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Microsoft Dynamics 365 2025 release wave 1 plan

The Dynamics 365 and Microsoft release plan for the 2025 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 2025 release wave 1 covers new features for Dynamics 365 releasing from **April 2025** through **September 2025**.

Download the 2025 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 2025 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

The role-based Copilot offerings features coming in the 2025 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

2025 release wave 1 overview

The 2025 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, Contact Center, 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 brings the power of AI to help sellers meet their targets while boosting seller productivity. Copilot and agents enhance performance and simplify tasks to help grow your pipeline, sharpen strategies, and accelerate deals. A reimagined user experience ensures sellers never miss the best move. Automated research, ongoing follow-ups and prioritized tasks provide continuous guidance, allowing you to focus on the right actions to drive success and grow your business.

Service

Dynamics 365 Customer Service will enable agentic capabilities for Case and Knowledge management, as well as AI-driven routing, while extending Copilot capabilities for Customer Service representative and supervisor experiences, with a focus on productivity improvements.

Dynamics 365 Contact Center will transform service experiences with new features to deliver effortless self-service, accelerate assisted service, and drive efficiency. The 2025 release wave 1 introduces Copilot and agent capabilities to automate intent determination for evergreen self-service and autonomous knowledge management. Additional key features include multimodal support in customer intent agent, enhanced unified routing features, and new workforce and quality management capabilities.

Dynamics 365 Field Service introduces Copilot-first experiences that enhance service operations and deliver exceptional customer experiences in 2025 release wave 1. Key features include automated inspection generation from templates, actionable insights for schedulers, quick access to vital information for frontline workers and managers, plus seamless integrations with Teams and Outlook.

Finance and supply chain

Dynamics 365 Finance capabilities are designed with a copilot-first experience, delivering enhanced automation and agentic capabilities. This release focuses on simplifying complex tax management and regulatory compliance, automating account reconciliations with agents, improving bank reconciliation processes, and adding intelligence to planning, along with extensibility and data refresh updates for business performance analytics.

Dynamics 365 Supply Chain Management advances autonomy by integrating intelligence, automation, and analytics to improve productivity and organizational adaptability. This update enhances operational efficiency by automating supplier communications, improving demand planning accuracy with cell-level explainability and generative insights, and leveraging AI in manufacturing to align production data with actual processes.

Dynamics 365 Project Operations is focused on enhancing usability, performance, and scalability in key areas such as project planning, contract management, invoicing, time and expense entry, and core transaction processing. The spotlight is on AI-assisted core functionality improvements in what-if analysis, proposal generation, time and expense, and approvals. This release will introduce a mobile application for time management and deliver scale improvements to support larger projects and handle higher invoice volumes.

Finance and operations cross-app capabilities will continue enabling AI and autonomous ERP with capabilities that support ERP suite in Dynamics 365, including Dynamics 365 Finance, Supply Chain Management, Commerce, Human Resources, and Project Operations. We are infusing agent experiences across applications, including chat, embedded AI, and intelligent

process automation, and enabling extensibility for agent scenarios along with enterprise-grade security and compliance at scale.

Dynamics 365 Human Resources enhances intelligence, automation, and analytics across the hire-to-separate process to boost productivity and enable business agility. We are advancing recruiting with AI-driven assessments and integrations with external job boards, including LinkedIn. Additionally, we are improving benefits and people management experiences for employees and HR business partners through AI-first solutions and automation.

Commerce

Dynamics 365 Commerce advances in-store experience by providing a mobile-first point-of-sale that reduces store hardware footprint and boosts sales conversion. The improvements to the payment connector allow modern payment methods, further reducing hardware requirements and offering more purchasing options for customers. Additionally, omnichannel unified pricing enables retailers to establish more intricate pricing structures, helping them remain competitive.

SMB

Dynamics 365 Business Central introduces intelligent AI agents to enhance efficiency and automation for SMBs. These agents seamlessly integrate to execute complex tasks, generate reports, automate processes, and optimize order creation using natural language processing. This release focuses on manufacturing, sustainability, and e-document capabilities, along with enhanced Shopify and Dynamics 365 Field Service integrations.

Customer Insights

Dynamics 365 Customer Insights - Data powers your copilot and agents with the latest customer insights, enabling your teams to leverage this data directly within their daily workflow. Enriched with the latest marketing behavioral interactions and streamlined data ingestion, your business can access up-to-date customer profiles without delays to build each experience upon the last.

Dynamics 365 Customer Insights - Journeys brings the power of AI to engage your customers on new channels so you can create new scenarios and business opportunities. Thanks to advanced journey capabilities, you can optimize every interaction with your customers, ensuring that each touchpoint is meaningful and impactful. The new forms and event management features not only streamline the lead generation process but also ensure that high-quality leads are captured and nurtured effectively.

Key dates for the 2025 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 2025 release wave 1.

Expand table

Milestone	Date	Description
Release plans available	January 23, 2025	Learn about the new capabilities coming in the 2025 release wave 1 (April 2025 - September 2025) across Dynamics 365, Microsoft Power Platform, role-based Copilot offerings, and Microsoft Cloud for Industry.
Early access available	February 3, 2025	Test and validate new features and capabilities that will be part of 2025 release wave 1, coming in April, before they are enabled automatically for your users. You can view the Dynamics 365 **2025 release wave 1 early access features now**.
Release plans available in additional languages	February 7, 2025	The Dynamics 365, Microsoft Power Platform, role-based Copilot offerings, 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	April 1, 2025	Production deployment for the 2025 release wave 1 begins. Regional deployments will start on April 1, 2025.

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 2025 release wave 1 plans.

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

Last updated on 12/04/2025

Get started with this release wave

10/23/2025

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

> **Note**
>
> Check out our release planner and share your feedback on this interactive experience.

2025 release wave 1

April 2025 – September 2025

Sales

See what's new and planned
Watch latest videos

Customer Service

See what's new and planned

Dynamics 365 Contact Center

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
Watch latest videos

Project Operations

See what's new and planned
Watch latest videos

Human Resources

See what's new and planned
Watch latest videos

Commerce

See what's new and planned
Watch latest videos

Business Central

See what's new and planned
Watch latest videos

Customer Insights - Data

See what's new and planned
Watch latest videos

Customer Insights - Journeys

See what's new and planned
Watch latest videos

Change history

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

Dynamics 365 Sales

Features added to release plan

Expand table

Feature	Date added
Connect AI agents to sales workflows using Model Context Protocol server	Apr 28, 2025
Accelerate data entry using form fill assist toolbar	Apr 18, 2025
Streamline data entry with smart paste	Aug 20, 2025
Deploy autonomous Sales Qualification Agent to qualify leads at scale	Apr 14, 2025
Visualize and work with hierarchical data	Mar 06, 2025
Transform decision-making with sales research agent	Mar 01, 2025
Turn marketing engagement into actionable insights for sellers	Feb 27, 2025
Improve sales efficiency with the Sales Qualification Agent's email validation	Feb 21, 2025

Release date changed

Expand table

Feature	Change	Date updated
Deploy autonomous Sales Qualification Agent to qualify leads at scale	Public preview date moved to Aug 2025	Jul 25, 2025
Enhance customer interactions with auto-linked CRM data	Public preview date moved to Aug 2025	Nov 04, 2025
Connect AI agents to sales workflows using Model Context Protocol server	Public preview date moved to Jun 2025	Sep 19, 2025
Improve sales efficiency with the Sales Qualification Agent's	Public preview date	Oct 29,

Feature	Change	Date updated
email validation	moved to May 2025	2025
Tailor Sales Qualification Agent to your industry and business needs	Public preview date moved to May 2025	May 22, 2025
Improve research relevance by adding custom web sources to the Sales Qualification Agent	Public preview date moved to Jul 2025	May 02, 2025
Turn marketing engagement into actionable insights for sellers	Public preview date moved to Jul 2025	May 01, 2025
Boost pipeline by autonomously researching and engaging leads with the Sales Qualification Agent	Public preview date moved to May 2025	Nov 07, 2025

Features removed from release plan

Expand table

Feature	Reason	Date removed
Find, filter, and sort using natural language with smart grid	Moved to the next release wave.	Jul 24, 2025
Let Sales Qualification Agent reply to emails based on knowledge sources	Deprioritized and will not be delivered.	Jul 18, 2025
Improve research relevance by adding custom web sources for the agent	Merged this feature with the Boost pipeline by autonomously researching and engaging leads with Sales Qualification Agent feature.	Apr 08, 2025
Let agents transform data quality by deduplicating records	Moved to a future release wave.	Apr 03, 2025
Boost sales success by focusing on the most relevant lead	Deprioritized and will not be delivered.	Mar 19, 2025
Stay updated with action items from customer conversations	Deprioritized and will not be delivered.	Mar 18, 2025
Improve lead conversion with a customer success story in outreach email	Deprioritized and will not be delivered.	Mar 18, 2025
Discover and unblock stalled deals using AI-powered suggestions	Moved to the next release wave.	Mar 03, 2025

Feature	Reason	Date removed
Discover and proactively respond to stakeholder changes in an opportunity	Moved to the next release wave.	Mar 03, 2025
Boost Engagement by Staying Informed with Conversation Insights	Moved to the next release wave.	Mar 03, 2025
Engage with a prioritized list of key opportunities to enhance your deal success	Moved to the next release wave.	Mar 03, 2025
Increase pipeline quality with intent-to-buy analysis	Moved to a future release wave.	Feb 06, 2025

Dynamics 365 Customer Service

Features added to release plan

Expand table

Feature	Date added
Use Copilot to generate contextual partial email content	Sep 09, 2025
Summarize base records and related records with Copilot	Apr 18, 2025
Increase user productivity with new modern rich text editor	Apr 09, 2025
Use one record creation and update rule for multiple queues	Apr 09, 2025
Use the new email editor for a streamlined, feature-rich experience	Apr 08, 2025
Enable customers to create multisession apps	Mar 24, 2025
Search for user experience profile assignments	Mar 24, 2025
Use Execute JavaScript macro to create your own custom macros	Mar 24, 2025
View the enhanced user experience for Copilot summaries	Mar 18, 2025
Monitor customer wait time through live conversation counter	Mar 18, 2025
Customize formatting and headers for case and custom record summaries	Mar 13, 2025
Use shift bookings to assign records to representatives	Mar 05, 2025

Feature	Date added
Maintain routing rules in bulk	Feb 04, 2025
Use the modernized and refreshed Copilot Service workspace app	Jan 24, 2025

Release date changed

Expand table

Feature	Change	Date updated
Use one record creation and update rule for multiple queues	General availability date moved to Jul 2025	Jun 11, 2025
Use shift bookings to assign records to representatives	General availability date moved to May 2025	May 02, 2025
Use Copilot to generate contextual partial email content	Public preview date moved to Jul 2025 General availability date moved to Jul 2025	Sep 09, 2025

Features removed from release plan

Expand table

Feature	Reason	Date removed
Connect AI agents using Model Context Protocol server	Moved to the next release wave.	Sep 24, 2025
Tag email templates with line of business	Moved to the next release wave.	Sep 09, 2025
Set Timer to Wrap Up Cases in Seconds	Merged this feature with the Set timer to wrap up conversations in seconds feature.	Jul 28, 2025
Optimize customer service with intent-based routing	Merged this feature with the Customer Intent Agent feature.	Jul 16, 2025
Use Copilot Studio agents for customer surveys	Merged this feature with the Use Copilot Studio agents to get customer feedback feature.	May 01, 2025

Dynamics 365 Contact Center

Features added to release plan

Expand table

Feature	Date added
Update knowledge base with Customer Knowledge Management Agent	Sep 03, 2025
Use Azure Communication Services-based SMS mobile numbers	Jul 24, 2025
Use optimized setting to update presence	Jul 01, 2025
Automate voice calls with Customer Intent Agent in voice	Jun 26, 2025
Set timer to wrap up conversations in seconds	Jun 10, 2025
Use custom NLU Plus models with AI agents	May 02, 2025
Upload phone numbers in bulk for direct routing	Apr 30, 2025
Use constrained grammars for speech recognition	Apr 14, 2025
Recognize one of multiple entities in a single utterance	Apr 14, 2025
Use enhanced disposition code capabilities	Apr 10, 2025
Search for phone numbers in Copilot Service admin center	Apr 10, 2025
Promote intents for self-service in semi- or fully automated manner	Apr 09, 2025
Resolve issues autonomously with Customer Intent Agent	Apr 09, 2025
Monitor work item, representative lifecycle in Application Insights	Sep 22, 2025
Use the optimized option to update presence	Mar 17, 2025
Use improved outbound dialing with reduced latency	Mar 17, 2025
Real-time adherence monitoring for service representatives	Mar 13, 2025
Shift bidding for customer service representatives	Mar 13, 2025
Shift swapping for customer service representatives	Mar 13, 2025
Manage time-off requests	Mar 13, 2025
View and manage shift schedules with My Schedule calendar	Mar 13, 2025
Use automated and manual scheduling to manage shift plans	Mar 13, 2025
Create and manage shift plans for effective staffing and service coverage	Mar 13, 2025
Use capacity planning to predict your staffing needs	Mar 13, 2025

Feature	Date added
Create and analyze forecast scenarios for case and conversation volumes	Mar 12, 2025
Use Desktop companion application	Mar 10, 2025
Use disposition codes in voice and chat conversations	Mar 10, 2025
Use API to pause and resume recording, transcription	Mar 06, 2025
Use shift bookings to assign conversations	Mar 05, 2025
Manage routing rules in bulk	Feb 04, 2025

Release date changed

Expand table

Feature	Change	Date updated
Place a consulting representative on hold in a call	Public preview date moved to Sep 2025	Nov 21, 2025
Use Microsoft Teams phone in Dynamics 365 Contact Center	General availability date moved to Sep 2025	Sep 01, 2025
Use API to pause and resume recording, transcription	General availability date moved to Jun 2025	Jul 28, 2025
Use custom NLU Plus models with AI agents	General availability date moved to Jul 2025	Jun 18, 2025
Recognize one of multiple entities in a single utterance	General availability date moved to Jun 2025	Jun 03, 2025
Use shift bookings to assign conversations	General availability date moved to May 2025	May 02, 2025
Use messaging APIs to manage customer chat conversations	Public preview date moved to Sep 2025	Nov 10, 2025
Support WhatsApp through Azure Communication Services	General availability date updated to Apr 2025	Feb 05, 2025

Features removed from release plan

Expand table

Feature	Reason	Date removed
Enable selective hold with music and exit prompts	Moved to the next release wave.	Oct 06, 2025
Monitor work item lifecycle in Application Insights	Merged this feature with the Monitor work item lifecycle through Application Insights feature.	Aug 25, 2025
Optimize customer service with intent-based routing	Merged this feature with the Customer Intent Agent feature.	Jul 16, 2025
Enable SIP X header support for context transfer	Moved to the next release wave.	Aug 14, 2025
Use intent to consult with a user	Moved to the next release wave.	Jul 01, 2025
Consult with workgroup, queue using intent	Moved to the next release wave.	Jul 01, 2025
Use intent to select representatives to transfer conversations	Moved to the next release wave.	Jun 26, 2025
Use callback insights to optimize contact center operations	Moved to a future release wave.	Jun 20, 2025
Mask sensitive data and prevent unauthorized access	Moved to the next release wave.	Mar 12, 2025
Mask sensitive data and prevent unauthorized access	Moved to the next release wave.	Mar 12, 2025

Dynamics 365 Field Service

Features added to release plan

Expand table

Feature	Date added
Tailor Copilot chat experience with Copilot Studio	May 23, 2025
Integrate bookings with Outlook and Teams	Feb 07, 2025

Release date changed

Expand table

Feature	Change	Date updated
Access online data with your offline-first application	General availability date moved to Jun 2025	Apr 30, 2025
Improve schedule assistant matching across locations	General availability date moved to Jun 2025	Apr 30, 2025
Use inspection builder to create inspections from existing files	Public preview date moved to Mar 2025	Jan 24, 2025

Dynamics 365 Finance

Features added to release plan

Expand table

Feature	Date added
Use updated Australian Payment Times Reporting Scheme	Apr 14, 2025
Process automation bank foreign currency reconciliation	Apr 09, 2025
Export Business performance planning cubes and dimensions	Apr 01, 2025

Release date changed

Expand table

Feature	Change	Date updated
Define rules for default financial tags	General availability date updated to Jun 2025	Aug 15, 2025
Update to OIOUBL format 3 for electronic invoicing in Denmark	General availability date moved to Aug 2025	Aug 12, 2025
Export Business performance planning cubes and dimensions	General availability date moved to Jun 2025	Jun 19, 2025
Use agents for recommended actions on Account reconciliation agent workspace	Public preview date moved to May 2025	May 05, 2025

Feature	Change	Date updated
Make payments in advance with prepayment sales invoices	General availability date updated to Jun 2025	Apr 16, 2025
Access electronic invoicing phased rollout in Belgium	General availability date moved to Apr 2025	Apr 01, 2025
Expand localization in LATAM countries for Venezuela	General availability date moved to Jul 2025	Feb 28, 2025

Features removed from release plan

Expand table

Feature	Reason	Date removed
Manage assets using the Acquire to Dispose data model	Moved to the next release wave.	Oct 09, 2025
Streamline Dynamics 365 finance and operations apps integration	Moved to the next release wave.	Oct 08, 2025
AI-Powered Outlier Detection	Merged this feature with the Improve Forecast Accuracy with AI-Driven Projections feature.	Oct 08, 2025
AI-Powered Outlier Detection	Moved to the next release wave.	Oct 08, 2025
Accelerate planning with quick-start templates	Moved to the next release wave.	Aug 27, 2025
Improve planning with next-gen data model builder	Moved to the next release wave.	Aug 20, 2025
Improve planning with next-gen data model builder	Moved to the next release wave.	Aug 20, 2025
Reconcile accounts faster using the enhanced Account reconciliation agent	Moved to the next release wave.	Jul 24, 2025
Use extensible universal connector for e-invoicing service	Moved to the next release wave.	May 23, 2025
Use electronic invoicing in Paraguay	Moved to the next release wave.	May 23, 2025

Feature	Reason	Date removed
Use electronic invoicing in Uruguay	Moved to the next release wave.	May 23, 2025
Generative help in business performance planning application	Deprioritized and will not be delivered.	Apr 30, 2025
Generate one journal for multiple vendor payment lines	Merged this feature with the Preview automatic bank reconciliation matching results feature.	Mar 28, 2025
Use electronic invoicing in Bolivia	Moved to a future release wave.	Jan 31, 2025
Search documents using natural language in document explorer	Deprioritized and will not be delivered.	Jan 25, 2025

Finance and operations cross-app capabilities

Features added to release plan

Expand table

Feature	Date added
Build agents for finance and operations with Model Context Protocol	Apr 24, 2025
Stay focused and simplify tasks with Immersive Home and adaptive experiences	Mar 18, 2025

Release date changed

Expand table

Feature	Change	Date updated
Extend Copilot in finance and operations apps with client actions	General availability date moved to Sep 2025	Apr 11, 2025

Features removed from release plan

Expand table

Feature	Reason	Date removed
Extend Copilot in finance and operations apps with client actions	Moved to the next release wave.	Oct 08, 2025
AI actions for finance and operations business logic	Moved to the next release wave.	Oct 08, 2025

Dynamics 365 Supply Chain Management

Features added to release plan

Expand table

Feature	Date added
Achieve regulatory compliance and quality excellence	Sep 30, 2025
Capture worker IDs for warehouse packing events	Sep 09, 2025
Improve operations with Warehouse Management mobile app V4	Jun 16, 2025
Enable quality control with acceptance sampling	Jun 02, 2025
Autodetect and analyze seasonality patterns in demand forecasts with generative insights	May 09, 2025
Gain cell-level explainability in demand forecasts	May 09, 2025
Allow net price in Unified pricing management	Apr 25, 2025
Enhance vendor rebate management	Oct 23, 2024

Release date changed

Expand table

Feature	Change	Date updated
Capture worker IDs for warehouse packing events	General availability date moved to Jul 2025	Nov 11, 2025
Enhance supply chain traceability with tracking attributes	Public preview date moved to Aug 2025	Jun 03, 2025

Features removed from release plan

Expand table

Feature	Reason	Date removed
Improve license accuracy with metadata validation	Deprioritized and will not be delivered.	Jul 21, 2025

Dynamics 365 Project Operations

Features added to release plan

Expand table

Feature	Date added
Use stocked products in resource-based deployments	Oct 15, 2025
Optimize processes with agent-led time, expense, and approvals	Aug 20, 2025
Support larger invoices in Project Operations	Jul 23, 2025
Enable contract line-based default financial dimensions for expenses	Jun 11, 2025
Use time zone independent accounting date in project invoicing	Apr 25, 2025
Customize the Billing hub view	Apr 10, 2025
Project cost for service items and procurement categories with item requirements	Mar 04, 2025
Post project cost for the procurement category upon product receipt	Jan 22, 2025
Use integration troubleshooting for modern projects	Dec 12, 2024
Use the new Time Entry mobile app	Dec 05, 2024

Release date changed

Expand table

Feature	Change	Date updated
Use the modern architecture for existing legal entities	Public preview date moved to Jun 2025	Oct 07, 2025
Project cost for service items and procurement categories with item requirements	Public preview date updated to Jun 2025	Jun 03, 2025
Use general journals against projects for resource nonstocked scenarios	Public preview date updated to Sep 2025	May 30, 2025
Post expenses on the expense report posting date	General availability date moved to Sep 2025	May 22, 2025
Simplify expense management using new enhancements	General availability date moved to Sep 2025	May 22, 2025
Enable number sequences in expense management	General availability date moved to Sep 2025	May 22, 2025
Increase work breakdown structure limits	Public preview date moved to Jun 2025 General availability date updated to Jun 2025	Jun 16, 2025
Import projects in MPP files into existing projects	Public preview date moved to Aug 2025	Aug 11, 2025
Enable milestone date to be time zone independent	General availability date moved to May 2025	May 02, 2025
Sync global address book with Project Operations	General availability date moved to Aug 2025	Aug 04, 2025
Use stocked products in resource-based deployments	Public preview date moved to Jun 2025	May 22, 2025
Use the enhanced quote experience	Public preview date moved to Feb 2025 General availability date moved to May 2025	Apr 21, 2025
Support for line discounts and fees in resource-based deployments	General availability date moved to Sep 2025	Mar 19, 2025

Features removed from release plan

Expand table

Feature	Reason	Date removed
Use time zone-agnostic fields in project planning	Merged this feature with the Add time zone-agnostic fields for projects and project tasks feature.	Sep 18, 2025
Use the improved project contract experience	Moved to a future release wave.	Mar 31, 2025
Use what-if analysis on estimates	Moved to the next release wave.	Mar 31, 2025
Use time zone-agnostic fields in resource planning	Moved to the next release wave.	Oct 09, 2025
Match credit card transactions and itemize expenses automatically	Moved to the next release wave.	Oct 08, 2025
Edit per diem transaction date, exchange rate in expense management	Moved to the next release wave.	Sep 30, 2025
Customize the Task details pane for tailored experiences	Moved to the next release wave.	Sep 18, 2025
Add support to import tasks from other projects	Moved to the next release wave.	Sep 18, 2025
Update key project fields using Copy project	Moved to the next release wave.	Sep 18, 2025
Copy externally scheduled projects	Moved to the next release wave.	Sep 18, 2025
Use the simplified Approvals page	Moved to the next release wave.	Sep 11, 2025
Enable time phasing of quote and contract lines	Moved to the next release wave.	Aug 28, 2025
Enable flexibility when determining financial dimension defaults	Moved to the next release wave.	Aug 01, 2025

Dynamics 365 Human Resources

Features added to release plan

Expand table

Feature	Date added
Streamline benefits eligibility processing	Jun 17, 2025
Ability to link variable pay to position	Jun 17, 2025

Release date changed

Expand table

Feature	Change	Date updated
Use recruiting for service-centric organizations	General availability date moved to Aug 2025	Nov 07, 2025

Features removed from release plan

Expand table

Feature	Reason	Date removed
Use recruiting with copilot	Merged this feature with the Simplify job posting by generating job ad description feature.	Feb 27, 2025

Dynamics 365 Commerce

Features added to release plan

Expand table

Feature	Date added
Enable business continuity with Store Commerce offline on iOS	Sep 19, 2025
Enable business continuity with Store Commerce offline on Android	Sep 19, 2025
Migrate to Azure Maps support in Commerce	Sep 16, 2025
Defer gift card activation until post customer payment	Jul 04, 2025
Enable custom price attributes for POS and e-commerce	May 23, 2025

Feature	Date added
Allow net price in Unified pricing management	Apr 25, 2025
Enable associates to monitor and detect offline health issues	Mar 31, 2025
Enable Klarna payments for customers in physical stores	Mar 24, 2025
Use Adyen risk management to minimize e-commerce fraud	Feb 11, 2025

Release date changed

Expand table

Feature	Change	Date updated
Modernize Commerce payments to enable new payment methods	Public preview date moved to May 2025	May 05, 2025
Enable Klarna payments for customers in physical stores	General availability date moved to May 2025	May 05, 2025

Features removed from release plan

Expand table

Feature	Reason	Date removed
Discover retail statement insights using Copilot summaries	Moved to the next release wave.	Oct 13, 2025
Drive sales and improve efficiency with Copilot for merchandising data	Moved to the next release wave.	Oct 13, 2025

Dynamics 365 Business Central

Features added to release plan

Expand table

Feature	Date added
Alternative posting groups for employees in Czechia	Aug 01, 2025
Use ZUGFeRD format for E-Documents in Germany	Jun 26, 2025
Capture more sales with enhanced Sales Order Agent	Jun 16, 2025
Use SecretText with control add-ins and in JSON objects	Jun 04, 2025
Use B2B Router as a service provider for e-documents	May 16, 2025
Use AI resources for your Copilot extensions	Dec 02, 2025
Experience user-friendly client activity descriptions in performance profiles	Apr 01, 2025
Use new AL project templates for creating Copilot features in Visual Studio Code	Mar 31, 2025
Use Continia as a service provider for e-documents	Mar 14, 2025
Manage external files more easily through unified API in External File Storage module	Mar 14, 2025
Use enhanced Excel reports for sustainability	Mar 01, 2025
Use enhanced analytics for projects	Mar 01, 2025
Use enhanced analytics for purchasing	Mar 01, 2025
Use enhanced analytics for sales	Mar 01, 2025
Use enhanced analytics for finance	Mar 01, 2025
Enhanced index troubleshooting	Mar 01, 2025
Add fields from related tables in analysis mode	Feb 26, 2025
Create lists and dictionaries of interfaces in AL	Feb 26, 2025
Enable overpicking for production orders	Feb 26, 2025
Link to Power Platform to use Copilot Studio messages	Feb 25, 2025
Self-service App Key Vault onboarding for AppSource apps	Feb 25, 2025
Import and export more data for Shopify B2B companies and company locations	Feb 24, 2025
Use new IncStr parameter to change integers by more than 1 in string variables	Feb 24, 2025
Use improved troubleshooting options for cost adjustments	Feb 24, 2025
Align Subscription Billing with standard user experience and terminology	Feb 24, 2025
Track and rebill quantity changes in subscriptions	Feb 24, 2025

Feature	Date added
Add unit cost in subscription lines	Feb 24, 2025
Create subscription contract lines manually	Feb 24, 2025
Work with multiline strings in AL	Feb 24, 2025
Create demo data for Subscription Billing with demo data tool	Feb 24, 2025
Search, navigate and use app symbols as context for GitHub Copilot	Feb 24, 2025
Omit warehouse pick for manual flushing methods	Feb 20, 2025
Validate certificates on external web service endpoints called from AL HttpClient	Feb 20, 2025
Validate report layouts for errors as an admin	Feb 19, 2025
Running objects in actions defaults to UI descriptors on target object	Feb 18, 2025
Reschedule production orders within a safety lead time	Feb 17, 2025
Combine service shipments on a single service invoice	Feb 14, 2025
Achieve greater accuracy in manufacturing costing	Feb 12, 2025
Use ExFlow by SignUp connector for e-documents	Feb 11, 2025
Convert simple type values to text using new ToText method	Feb 11, 2025
Read and write YAML in AL using JsonObject	Feb 11, 2025
Overloaded JsonObject data type GetValue method	Feb 11, 2025
Use the new continue keyword for AL loops	Feb 11, 2025
Extend CardPageId on list and listpart pages	Feb 11, 2025
Use enhanced analytics for inventory	Feb 10, 2025
Extend E-Documents features using a new interface	Feb 10, 2025
Select extensions to open in Visual Studio Code from the web client	Jan 31, 2025
Generate launch json file from the web client	Jan 31, 2025
Allow multiple people to post inventory at the same time	Jan 31, 2025
Adjust the FactBox pane width	Jan 30, 2025
Enhance reports with PDF post-processing capabilities	Jan 29, 2025
Require Intrastat classifications on documents	Jan 29, 2025

Feature	Date added
Showcase Business Central with Czech localization demos	Jan 28, 2025
Use VAT Return to report VAT in local and functional currencies in Czech Republic	Jan 28, 2025
Add more text in cash documents in Czech localization	Jan 28, 2025
Use modern search to access data in Czech localization	Jan 28, 2025
Hide lines with zero quantity in Czech document reports	Jan 28, 2025
Post cash documents to projects in Czech localization	Jan 28, 2025
Use user interface enhancements for better experience	Jan 27, 2025
Calculate values only for visible FlowFields	Jan 24, 2025
Check total purchase amounts on documents	Jan 21, 2025
Use enhanced analytics for Sustainability	Jan 20, 2025
Use the new Out of Scope emission category	Jan 20, 2025
Use Edit in Excel on output, consumption, and item journals	Jan 15, 2025

Release date changed

Expand table

Feature	Change	Date updated
Capture more sales with enhanced Sales Order Agent	Public preview date moved to Sep 2025	Nov 10, 2025
Get UI improvements for Unreliable Payer for Czechia	Public preview date updated to Sep 2025	Jul 24, 2025
Use enhanced Excel reports for sustainability	General availability date moved to Jun 2025	May 08, 2025
Use enhanced analytics for purchasing	General availability date moved to Jun 2025	May 08, 2025
Use enhanced analytics for projects	General availability date moved to Jun 2025	May 08, 2025
Use Continia as a service provider for e-documents	Public preview date moved to Jun 2025 General availability date moved to Jul 2025	Apr 29, 2025

Feature	Change	Date updated
Support IPv6 for enhanced security and scalability	General availability date moved to May 2025	Feb 26, 2025
Use enhanced analytics for manufacturing (updated Power BI app)	General availability date moved to Jun 2025	May 08, 2025
Analyze subscription billing data with Power BI reports	General availability date moved to Jun 2025	May 08, 2025
Optimize screen estate usage on the web	Public preview date updated to Apr 2025 General availability date moved to Apr 2025	Apr 22, 2025
Use e-documents to fix unposted purchase documents	General availability date moved to May 2025	Feb 14, 2025
Preview incoming e-invoices prior to processing	Public preview date moved to May 2025	Feb 11, 2025
Automate embedded attachments in PEPPOL	Public preview date updated to Apr 2025 General availability date moved to Jun 2025	Feb 11, 2025
Delete incorrect e-documents and avoid duplicates	General availability date moved to May 2025	Feb 11, 2025

Features removed from release plan

Expand table

Feature	Reason	Date removed
Use new templates for financial reporting	Deprioritized and will not be delivered.	May 08, 2025
Find pages and reports with advanced Tell Me search	Moved to the next release wave.	Sep 08, 2025
Create e-documents from posted sales invoices	Moved to the next release wave.	Sep 03, 2025
Generate a CSRD preparation report	Moved to the next release wave.	Sep 03, 2025
Use the ForNAV Peppol connector for e-documents	Moved to the next release wave.	Aug 26, 2025
Migrate record links and notes with cloud migration tooling	Moved to the next release wave.	Aug 05, 2025

Feature	Reason	Date removed
Comply with Australian Payment Times Reporting bill	Moved to the next release wave.	Jun 26, 2025

Dynamics 365 Customer Insights - Data

Features added to release plan

Expand table

Feature	Date added
Export your data to Azure Data Lake Storage	Jun 13, 2025

Features removed from release plan

Expand table

Feature	Reason	Date removed
Accelerate time to insights with data in Delta Lake format	Moved to a future release wave.	Sep 29, 2025
Export segment audiences and insights to ad and marketing tech platforms	Moved to the next release wave.	Jun 12, 2025
Target right audience based on signals from earlier campaigns	Merged this feature with the Target right audience based on signals from earlier campaign feature.	Jun 02, 2025
Target right audience based on signals from earlier campaigns	Moved to the next release wave.	Jun 02, 2025
Synchronize customer data and insights directly to Fabric OneLake	Merged this feature with the Access unified profiles and insights in Fabric OneLake feature.	May 28, 2025
Integrate insights faster by choosing tables and data format to sync	Merged this feature with the Access unified profiles and insights in Fabric OneLake feature.	May 22, 2025

Dynamics 365 Customer Insights - Journeys

Features added to release plan

Expand table

Feature	Date added
Automate scalable journey creation with the journey API	Sep 08, 2025
Prevent duplicate emails to shared email addresses	Sep 04, 2025
Simplify forms by filtering choices based on previous answers	May 22, 2025
Tailor follow-up strategies by reacting to multiple customer actions at once	Apr 16, 2025
Collect extra event attendee information without updating your data model	Feb 21, 2025

Release date changed

Expand table

Feature	Change	Date updated
Collect extra event attendee information without updating your data model	General availability date moved to Sep 2025	Sep 08, 2025
Pause and resume journeys to handle unplanned events	Public preview date moved to Jun 2025 General availability date moved to Jul 2025	Jun 11, 2025
Respect quiet times, engage based on location and time zones	Public preview date moved to May 2025 General availability date moved to Jul 2025	Apr 29, 2025
Streamline form filling and event registration with form prefill	General availability date moved to Apr 2025	Apr 29, 2025
Get insights on email engagement with heatmap analytics	General availability date moved to Jun 2025	Apr 03, 2025
Maximize event capacity with waitlist registrations	Public preview date moved to Mar 2025 General availability date moved to Jul 2025	Jul 21, 2025

Features removed from release plan

Expand table

Feature	Reason	Date removed
Set up and manage pre- and post-event communications	Deprioritized and will not be delivered.	Oct 02, 2025
Create an event portal on your website using the events API	Moved to the next release wave.	Aug 27, 2025
Prevent duplicate emails to shared email addresses	Moved to the next release wave.	Sep 04, 2025
Export your data to your own storage for custom reporting	Moved to the previous release wave.	Apr 15, 2025
Scale your business with confidence with 300M maximum monthly interactions	Moved to a future release wave.	Apr 07, 2025

Last updated on 12/02/2025

2025 release wave 1 features available for early access

This topic lists the features that can be enabled for testing in your environment beginning **February 3, 2025**.

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

- Dynamics 365 Sales
- Dynamics 365 Customer Service
- Dynamics 365 Field Service
- Dynamics 365 Finance
- Dynamics 365 Supply Chain Management
- Dynamics 365 Project Operations
- Dynamics 365 Human Resources
- Dynamics 365 Commerce
- 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 2025 release wave 1 updates.

> **Important**
>
> Other early access features may impact your users. To learn more about these features visit:
>
> - Power Platform 2025 release wave 1 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
Get embedded experience for Copilot	Users,	✔ Jul 28,	✔ Sep 26, 2025

Feature	Enabled for	Early access	General availability
summaries	automatically	2025	
Integrate with Exchange using server-side synchronization	Users, automatically	✔ Feb 3, 2025	✔ Apr 1, 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
Increase user productivity with new modern rich text editor	Users, automatically	-	✔ May 2, 2025
Use the modernized and refreshed Copilot Service workspace app	Users, automatically	-	✔ Apr 30, 2025

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
Integrate bookings with Outlook and Teams	Users, automatically	✔ Jul 28, 2025	✔ Oct 1, 2025
Improve keyboard and screen reader support	Users, automatically	✔ Jul 28, 2025	✔ Oct 1, 2025

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
Define rules for default financial tags	Users by admins, makers, or analysts	✔ Oct 25, 2024	✔ Jun 27, 2025
Optimize user security configurations and licensing costs	Users, automatically	✔ Jan 27, 2025	✔ Jun 6, 2025

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
Enhance vendor rebate management	Users by admins, makers, or analysts	✔ Jan 27, 2025	✔ Apr 4, 2025
Integrate contract lifecycle management in source to pay	Users by admins, makers, or analysts	✔ Oct 25, 2024	✔ Apr 4, 2025

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
Use one grid for material and expense estimates	Users by admins, makers, or analysts	✔ Mar 8, 2024	✔ Apr 30, 2025

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
Use recruiting for service-centric organizations	Users by admins, makers, or analysts	✔ Jul 17, 2024	✔ Aug 29, 2025

Dynamics 365 Commerce

For a complete list of the Dynamics 365 Commerce features, go to What's new and planned for Dynamics 365 Commerce.

Expand table

Feature	Enabled for	Early access	General availability
Use Adyen risk management to minimize e-commerce fraud	Users by admins, makers, or analysts	✔ Jan 27, 2025	✔ Jun 6, 2025
Roll out multifaceted pricing strategies	Users by admins, makers, or analysts	✔ Oct 25, 2024	✔ Apr 4, 2025
Monitor and manage Store Commerce offline readiness	Admins, makers, marketers, or analysts, automatically	✔ Feb 3, 2025	✔ Apr 1, 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
Manage environment updates more flexibly	Admins, makers, marketers, or analysts, automatically	✔ Oct 1, 2024	✔ Apr 30, 2025

Last updated on 11/13/2025

Plan and prepare for Dynamics 365 Sales in 2025 release wave 1

> **Important**
>
> The 2025 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2025 to September 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/2025W1/Sales

Dynamics 365 Sales is an AI-powered sales solution that helps every organization close more deals and increase seller productivity. It helps organizations understand customer needs and drives more relevant and authentic engagements, so sellers can sell more efficiently.

In today's fast-paced sales world, managing multiple opportunities, staying connected with customers, and navigating competitive pressures can be tough. That's why, with this release, we're excited to introduce a suite of agents designed to enhance your sales performance and simplify essential tasks.

From discovering new leads and prioritizing key tasks to automating follow-ups and focusing on the next best action, agents empower you to generate more pipeline and win more deals. The reimagined overview page gives you continuous guidance on the most important things to do, so you never miss the best move. With autonomous, intelligent support, you can focus on what truly matters—driving success and growing your business.

Updates to Dynamics 365 Sales 2025 release wave 1

Investment areas



Business research

Research agents in Dynamics 365 empower business leaders to solve complex business questions through a dialog with their data. The research canvas orchestrates a multitude of specialized agents to gather, analyze, and transform data into intelligent, context-aware research results. These results are surfaced to the user as rich visualizations and textural narratives.

The user can effortlessly zoom into any research finding to explore the output from different angles where AI-powered intelligence helps gain new business perspectives from recommended next actions surfaced by the underlying models and built-in business logic.

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.

Lead management

Lead management in Dynamics 365 Sales helps you determine if a lead or prospect is a good fit for your product or service. You can convert the lead into an opportunity that you progress into a won deal for your business. This process involves deeply understanding customer needs, challenges, and buying habits, and engaging with the prospect to provide an overview of solutions that best meet their specific requirements. Dynamics 365 Sales streamlines this process by offering AI-powered capabilities for research, outreach, prospecting, and qualifying leads, ensuring that sales efforts focus on activities with the highest impact.

Copilot Agents in Dynamics 365 Sales, tailored to your industry and business needs, help you generate a more qualified pipeline. Lead research across various sources gives the seller or AI agent all the context about the lead. When you augment research with custom insights and knowledge sources, you empower sales teams with relevant information and enhance their ability to connect meaningfully with prospects. Personalized outreach improves response rates,

and timely follow-up communications keep prospects engaged by ensuring no move is missed. The system judges lead readiness based on ideal customer fit and intent to buy. It automatically disqualifies low-intent leads to maintain a clean and focused lead pipeline. As you use the system, you improve data quality with capabilities that automatically validate and enrich your data. Additionally, discovering leads from service interactions ensures that you don't overlook any potential lead.

Together, these features provide a robust framework for effective sales qualification, driving better customer engagement and higher conversion rates.

Sales management and operations
Dynamics 365 Sales gives sales managers and sales operations leaders the tools they need to manage and support sales teams so they can reach their sales goals.

Sales managers need to monitor, coach, and lead sales teams. With Dynamics 365 Sales, managers can manage quotas, review forecasting in real time, and give feedback on how conversations with customers are going. This approach helps managers spot coaching opportunities while keeping track of the pulse of the business.

Sales operations leaders use data, analytics, and defined processes to make sellers successful. In Dynamics 365 Sales, they can create dashboards or embed Power BI reports to analyze business results. They guide seller activity through predefined sequences of actions to scale best practices. To meet their business's unique needs, they use Microsoft Power Platform to extend Dynamics 365 Sales and custom sales application capabilities.

Seller experiences
Seller experiences focus on features and tools that cater to the unique needs and challenges sellers face in their daily work. 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 speed up deal closures.

These offerings streamline and simplify the day-to-day tasks of sellers, so they can work more efficiently and effectively. By using these capabilities, sellers navigate their professional responsibilities more seamlessly and find ways to optimize their time and resources. This approach boosts productivity and leads to more 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
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Sales.
Product documentation	Find documentation for Sales.

Helpful links	Description
User community	Engage with Sales experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Sales.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 10/16/2025

What's new and planned for Dynamics 365 Sales

This topic lists features that are planned to release from April 2025 through September 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 2 plan.
- For a list of the next wave's release plans, go to 2025 release wave 2 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 research

Research agents in Dynamics 365 empower business leaders to build rich research journeys, helping them solve complex business questions through a dialog with their data.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Transform decision-making with sales research agent	Admins, makers, marketers, or analysts, automatically	✅ Apr 1, 2025	-	-

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
Get embedded experience for Copilot summaries	Users, automatically	-	✔ Jul 28, 2025	✔ Sep 26, 2025
Accelerate data entry using form fill assist toolbar	Users by admins, makers, or analysts	✔ Jul 28, 2025	-	Oct 2025
Connect AI agents to sales workflows using Model Context Protocol server	Admins, makers, marketers, or analysts, automatically	✔ Jun 30, 2025	-	Dec 2025
Boost decision making by using Visualize with Copilot	Users by admins, makers, or analysts	✔ Mar 21, 2025	-	✔ Apr 25, 2025
Streamline data entry with smart paste	Users by admins, makers, or analysts	✔ Jul 28, 2025	-	Oct 2025

Lead management

Enable sellers to effectively manage leads to generate a qualified pipeline.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Enhance customer interactions with auto-linked CRM data	Users by admins, makers, or analysts	✔ Aug 15, 2025	-	✔ Oct 31, 2025
Boost pipeline by autonomously researching and engaging leads with Sales Qualification Agent	Users by admins, makers, or analysts	✔ May 5, 2025	-	Oct 2025
Deploy autonomous Sales Qualification Agent to qualify leads at scale	Users by admins, makers, or analysts	✔ Aug 22, 2025	-	-
Improve sales efficiency with Sales Qualification Agent's email validation	Users by admins, makers, or analysts	✔ May 1, 2025	-	Oct 2025

Sales management and operations

Sales management and enablement capabilities to optimize sales operations.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Tailor Sales Qualification Agent to your industry and business needs	Users by admins, makers, or analysts	✔ May 5, 2025	-	-
Improve research relevance by adding custom web sources for the agent	Users by admins, makers, or analysts	✔ Jul 31, 2025	-	Oct 2025
Turn marketing engagement into actionable insights for sellers	Users by admins, makers, or analysts	✔ Jul 31, 2025	-	-
Integrate with Exchange using server-side synchronization	Users, automatically	-	✔ Feb 3, 2025	✔ Apr 1, 2025

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
Visualize and work with hierarchical data	Users by admins, makers, or analysts	✔ Aug 29, 2025	-	✔ Oct 29, 2025

* You are able to opt into some features as part of early access on February 3, 2025, 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 information on data residency in Dynamics 365 and Power Platform, visit the Microsoft Dynamics 365 and Power Platform data residency documentation. For more information about geo availability, visit the Dynamics 365 and Microsoft Power Platform availability page.

Last updated on 11/04/2025

Business research

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Research agents in Dynamics 365 empower business leaders to solve complex business questions through a dialog with their data. The research canvas orchestrates a multitude of specialized agents to gather, analyze, and transform data into intelligent, context-aware research results. These results are surfaced to the user as rich visualizations and textural narratives.

The user can effortlessly zoom into any research finding to explore the output from different angles where AI-powered intelligence helps gain new business perspectives from recommended next actions surfaced by the underlying models and built-in business logic.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Transform decision-making with sales research agent

09/30/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	-	-

Business value

As a sales leader, it can be hard to see the state of your business. You might find yourself chasing your team for updates and spending days gathering data without getting the full picture.

With the sales research agent in Dynamics 365 Sales, you can use natural language to start a dialog with your data or pick from AI-suggested topics. This dialog helps you gain a deep understanding of the sales performance of your team, territory, and product portfolio.

You can access the research workspace directly from within Dynamics 365 Sales, where you're already connected to your sales data. When you ask a research question, the agent creates a research plan. It then gathers, analyzes, and transforms data into meaningful research outputs. These outputs are tailored to your context, business domain knowledge, and deep understanding of the business data. You receive comprehensive, AI-generated research blueprints.

The sales research agent brings back not just answers but suggestions for where to go next. You can effortlessly build multibranch research journeys and zoom into any research finding to explore the output from different angles using the AI cursor, a new AI-powered, context-aware approach to engaging you in the research journey. You can even augment your research by uploading data files from external sources such as HR or e-commerce to provide additional context and richer outcomes by building a comprehensive understanding of your business.

Feature details

As a sales manager, you can:

- Create multibranch research journeys over your Dynamics 365 Sales data and augment it with any data from local files (Excel, PDF) for a comprehensive view of your business.
- Use AI-suggested, prebuilt topics that are optimized for your role to get started or ask your own questions using natural language to seek insights into complex business problems.
- Use the AI cursor to click anywhere on the canvas to start a conversation, zoom into any research finding, change a visualization, or add more data.
- Go behind the scenes to see the reasoning behind the research outcomes.
- Save your workspaces for later use, update with new data, and regenerate blueprints or new research findings.

The sales research agent is initially available as part of the AI Accelerator for Sales offer only.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Sales Research Agent overview (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Copilot and AI innovation

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). 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.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Accelerate data entry using form fill assist toolbar

> **Important**
>
> **Some of the functionality described in this release plan has 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 28, 2025	-	Oct 2025

Business value

Sales teams often deal with large volumes of lead and contact data from sources like business cards, web forms, and scanned documents. Manually entering this information into Dynamics 365 Sales is time-consuming, error-prone, and takes away from high-value selling activities like engaging with customers and closing deals.

As part of Copilot's form fill assistance initiatives, the form fill assist toolbar supports uploading of files, emails, and images, helping eliminate this manual data entry work. It uses AI to extract key details such as names, phone numbers, addresses, and company info from uploaded content, and intelligently maps them to the right fields in the sales form. This capability streamlines data entry, reduces errors, and helps you stay focused on selling.

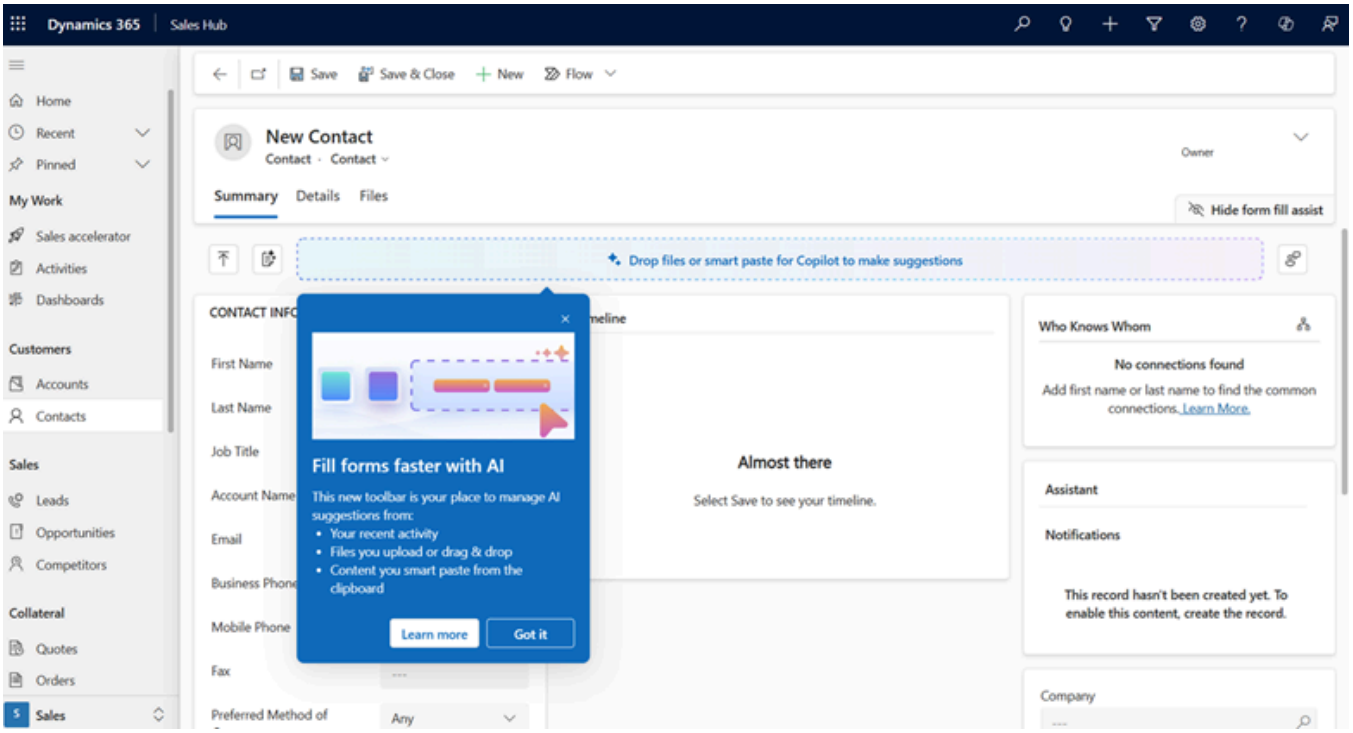
Feature details

As a seller, you can:

- Use **Files** to upload supported file types (.txt, .docx, .csv, .pdf, .png, .jpg, .jpeg, .bmp) and get inline suggestions to fill out fields based on the file's content.
- Drag and drop a file or use the file selector button in the form fill assist toolbar to start.
- Hover over the file's source tag to see which fields the file suggests.
- Accept all suggestions at once with the **Accept All** button or clear them with the **Clear** or **Clear All** options.

- Show or hide the form fill assist toolbar, access the Smart Paste button, and provide feedback with the more actions menu.

For more details and timelines, see the Power Apps release plan: Enhanced experience for form filling with Copilot



> **Note**
>
> The feature doesn't currently support files with sensitivity labels.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use form fill assistance (docs)

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 11/27/2025

Boost decision making by using Visualize with Copilot

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Mar 21, 2025	-	✔ Apr 25, 2025

Business value

Sales teams often rely on dashboards, static charts, or external tools like Power BI to make sense of their sales data in Dynamics 365 Sales. Switching between views or analyzing raw data manually can take extra time, disrupt daily workflows, and delay decision-making.

As part of Copilot's productivity capabilities, smart charts enable sellers to generate real-time visualizations directly within their workflow. Using AI, these charts help you uncover trends, patterns, and relationships in tabular data, making it easier to interpret data, act on insights faster, and stay focused on closing deals.

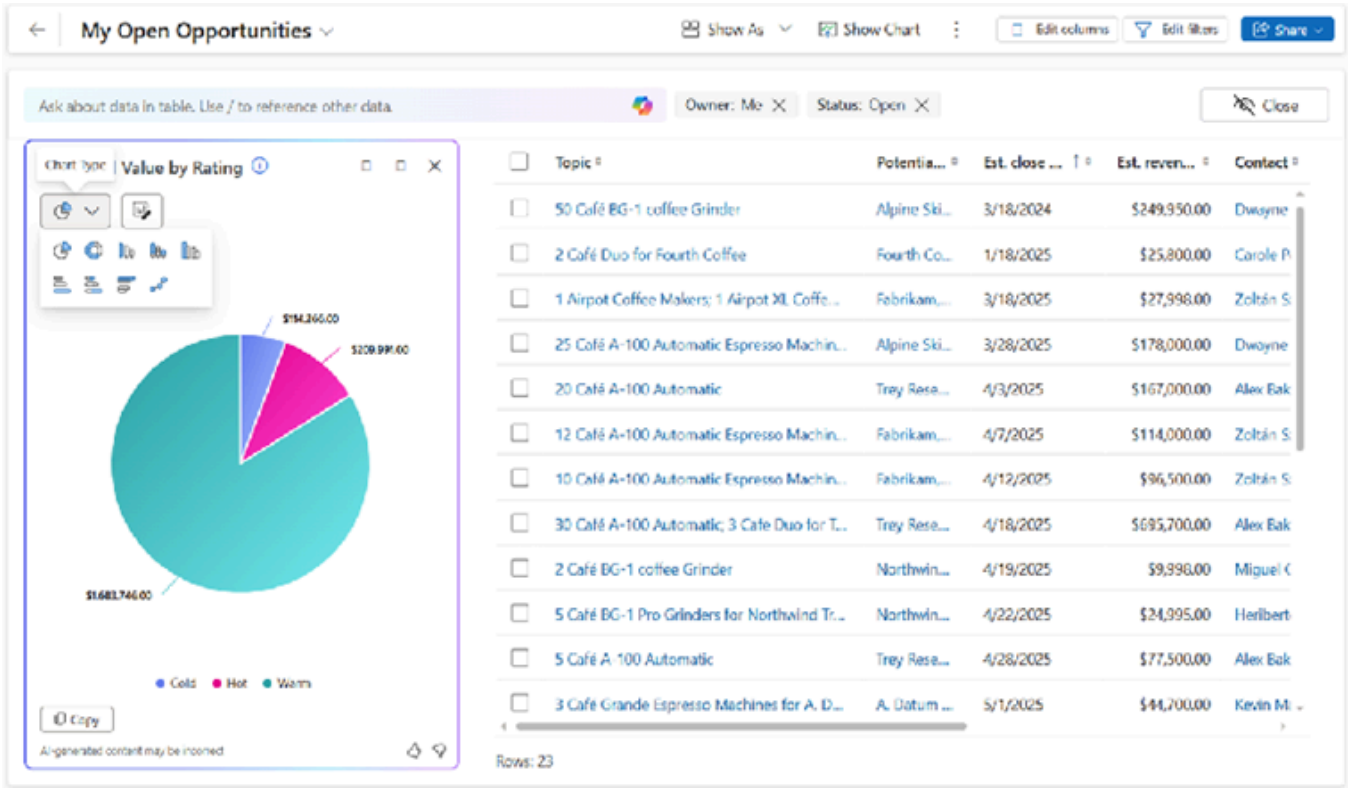
Feature details

As a seller, you can:

- Select the Visualize option on a grid page to generate a chart based on the visible columns and applied filters in the current view.
- View the chart side by side with the data grid, so you can more easily interpret key trends and patterns in your data.
- Select Explain to see an AI-generated summary that helps you understand why Copilot chose the specific visualization.
- Hover over data points or select chart elements to drill into details—filtered results will update automatically in the grid.
- Use the chart selector to personalize the visualization by choosing from nine chart types, including bar, pie, column, and line.
- Add or remove columns and filters in the view, and Copilot will automatically update the chart.
- Use additional controls to refresh the chart, expand it to full screen, close the chart pane, or copy it as a PNG.

- Share your feedback with the thumbs-up or thumbs-down icons to help improve the feature.

For more details and timelines, go to the Power Apps release plan: Visualize the data in your view easily with Copilot



> **Note**
>
> Your administrator must enable the **Allow AI to generate charts to visualize the data in a view** setting in the Power Platform admin center.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Visualize data in a view with Copilot (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Connect AI agents to sales workflows using Model Context Protocol server

> **Important**
>
> **Some of the functionality described in this release plan has 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 30, 2025	-	Dec 2025

Business value

Whether you're a developer building an AI agent to automate part of the sales workflow or a seller using AI assistants such as ChatGPT and Claude to get work done, you can now connect Dynamics 365 Sales to your agents and assistants with the new Model Context Protocol (MCP) server.

For developers, this capability means no more complex integrations. AI agents can retrieve, update, and act on CRM data, automate tasks like qualifying leads or sending emails, and handle business processes without custom code.

For end users and sellers, this capability means they can use their favorite AI assistant, such as Claude or, in the future, ChatGPT, to get their work done - prioritizing leads, engaging them with personalized emails, generating quotes, and closing deals. They connect their assistant to Dynamics 365 by installing the MCP server just as easily as installing a new mobile app.

Finally, agents and assistants can use Copilot in Dynamics 365 Sales in their workflow, starting with getting summaries and drafting emails. Additional operations are coming soon.

Feature details

The MCP Server exposes the following tools initially, with more tools coming soon:

- List leads

- Retrieve lead summary (using Copilot in Dynamics 365 Sales)
- Qualify lead to opportunity
- Get outreach email (using Copilot in Dynamics 365 Sales)
- Send outreach email

Use Microsoft Copilot Studio to build custom agents for sales teams that include the Dynamics 365 Sales MCP server or connect Dynamics 365 with any other agent platform that supports the MCP protocol. By using the Dynamics 365 Sales MCP server in combination with MCP servers from other business applications such as Customer Service and ERP, you can automate complex cross-functional business operations with ease. For example, a quote can be generated through the Dynamics 365 Business Central MCP server for each lead that confirms interest after being engaged with the Dynamics 365 Sales MCP server. Then, a support ticket on the order can be processed using the Dynamics 365 Customer Service MCP server.

Here are examples of agents you can build with these MCP tools:

- A post-service upsell agent that prospects for maintenance plans after a field tech visit, turning each engagement into a sales opportunity.
- An agent that targets prospects from existing accounts, so the account manager can schedule strategy meetings with key stakeholders.
- An agent that helps the sales team prioritize the best leads from B2B events and add others to a marketing nurture campaign.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Connect to Dynamics 365 Sales with Model Context Protocol (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 11/03/2025

Get embedded experience for Copilot summaries

10/09/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 28, 2025	✔ Sep 26, 2025

Business value

The Copilot summary for Opportunity, Lead, and Account gives sellers instant, AI-generated insights so they can quickly get up to speed, understand deal context faster, and spend less time searching through data.

The new in-form banner experience brings key information right to the top of the record, so sellers don't need to open the Copilot side pane. With this change, sellers stay in the flow of work, focus on what matters, and drive more productive customer engagements.

When you use Dynamics 365 Sales, this feature will be enabled by default for Opportunity, Lead, and Account summary from Copilot.

Feature details

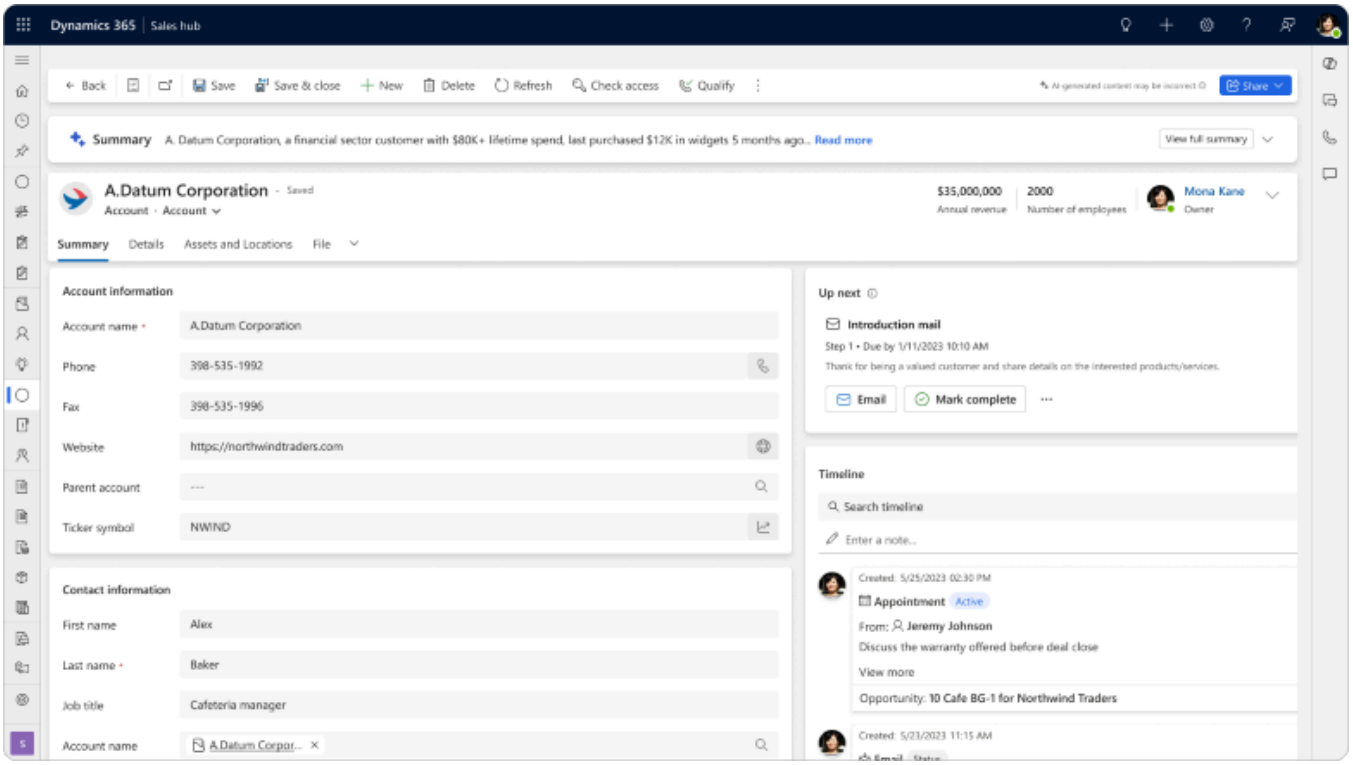
As a seller, you see an AI Summary banner at the top of your Lead, Opportunity, and Account forms. You can view a high-level summary and a detailed summary of your records. The summarization capabilities stay the same, with the following actions still supported:

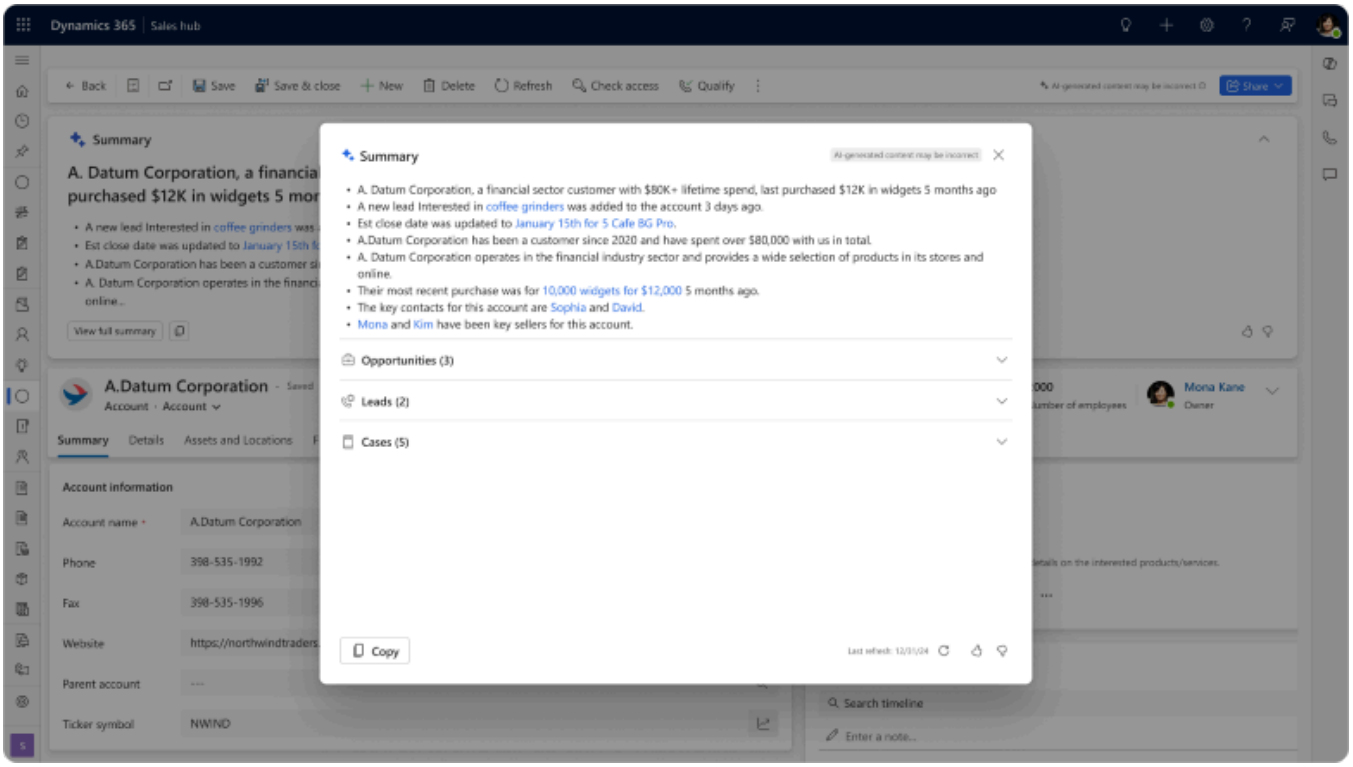
- Auto-generation of summaries when you open a form.
- Ability to copy the generated summary.
- Providing thumbs-up or thumbs-down feedback on summary quality.
- Using copilot chat to generate a summary for any specific record.

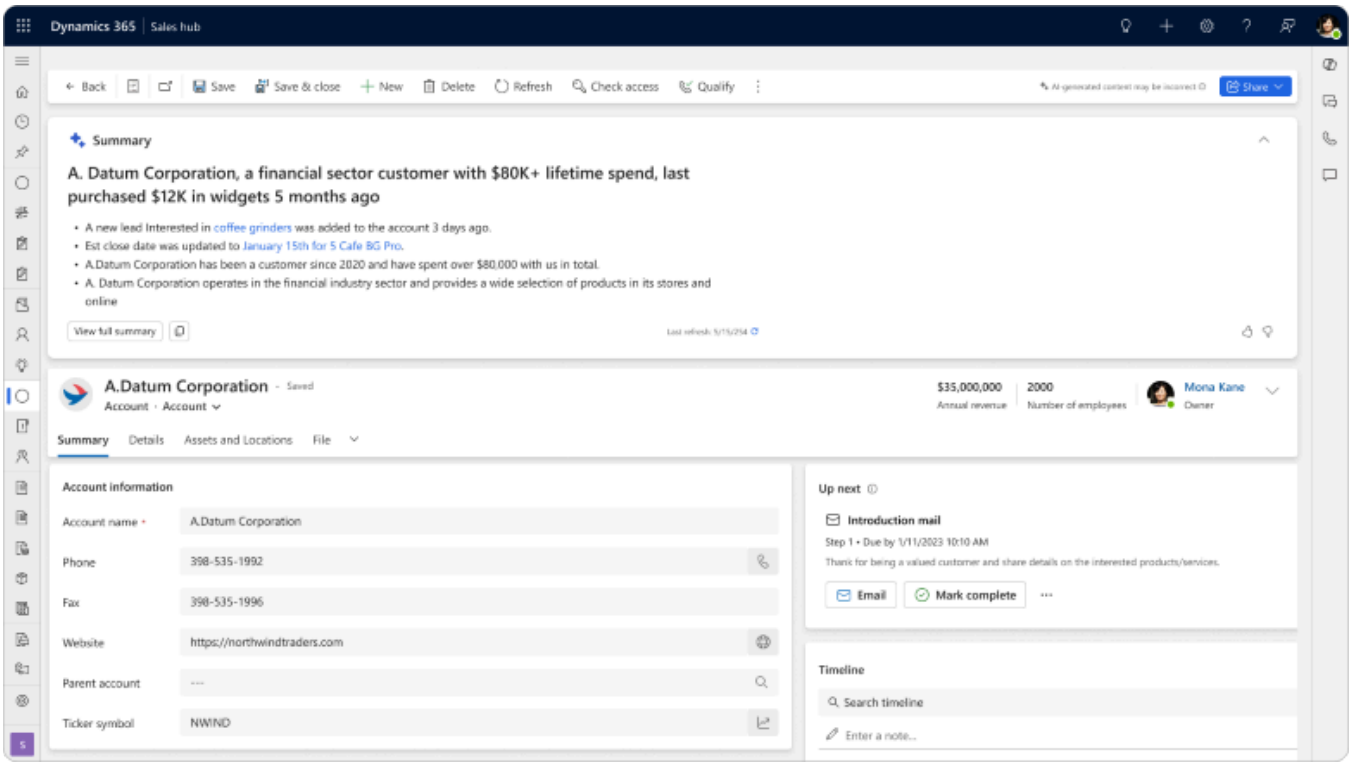
You'll get the new experience as part of the 2025 release wave 2 updates for Dynamics 365 Sales:

- Early access from July 2025. Opt in to early access updates.
- Default on for all Copilot-enabled organizations at general availability starting from September 2025.

Sellers will start seeing the new in-form banner without any extra clicks.







Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Introducing the new summary experience in Dynamics 365 Sales (blog)

Summarization of records with enhanced experience (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Streamline data entry with smart paste

> **Important**
>
> **Some of the functionality described in this release plan has 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 28, 2025	-	Oct 2025

Business value

As a sales team, you often spend a significant amount of time on manual data entry, like copying information from emails, business cards, or web forms into your CRM. This process not only reduces your available time but also takes time away from high-value selling activities, such as engaging with prospects and closing deals.

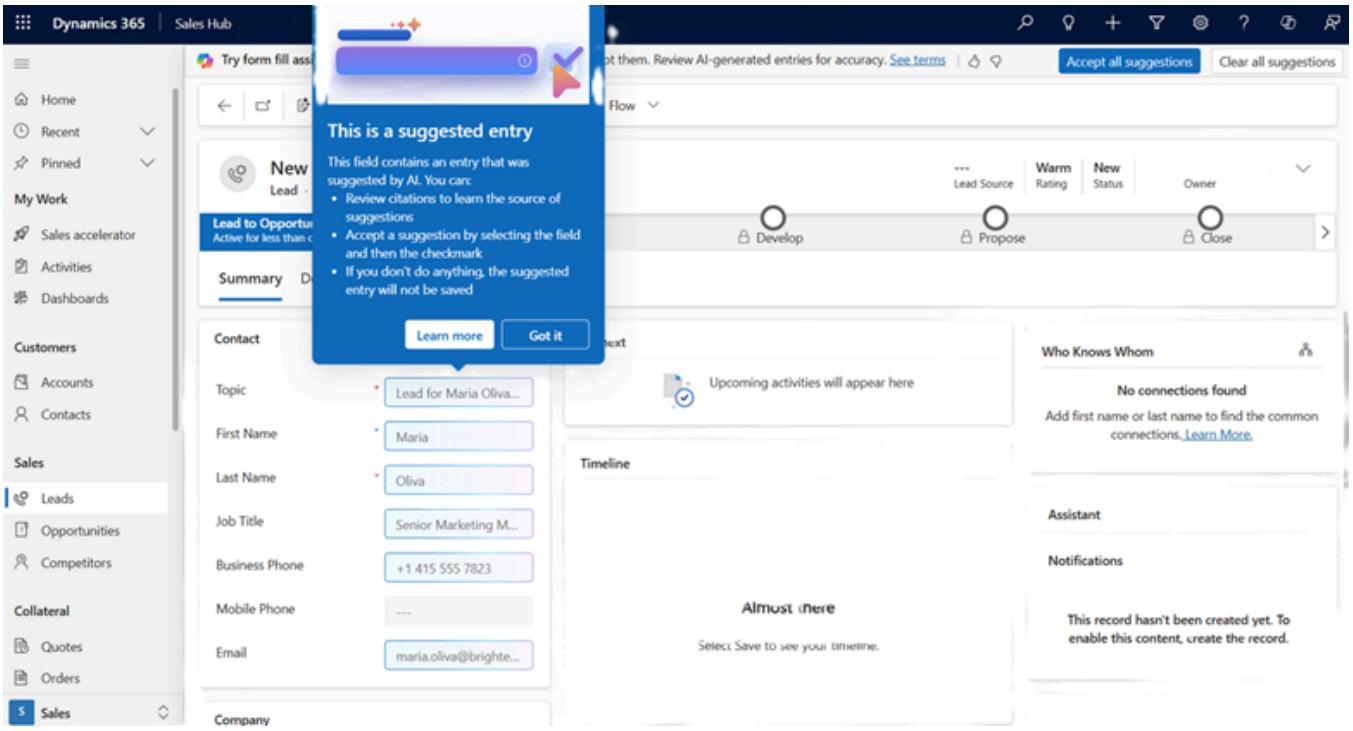
Smart paste helps you eliminate that busywork. It uses AI to analyze what you copy to your clipboard, identify key details, and automatically fill them into the right fields. Whether it's content from an email or a business card, smart paste updates the form for you, so all you need to do is review and save the lead or contact. It reduces manual effort, speeds up data entry, and keeps you focused on what matters most: selling.

Feature details

As a seller, you can:

- Use smart paste to automatically get inline field suggestions by copying relevant text or images to your clipboard.
- Paste using the smart paste icon or the keyboard shortcut (Ctrl+V or Cmd+V) when no field is selected and let AI reason over the form and clipboard content to suggest field values.
- Choose to accept or ignore suggestions, and continue editing the form as needed.
- Paste directly into specific fields as usual by selecting the field first.

For more details and timelines, see the Power Apps release plan: Fill forms faster with smart paste



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use smart paste (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 11/27/2025

Lead management

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Lead management in Dynamics 365 Sales helps you determine if a lead or prospect is a good fit for your product or service. You can convert the lead into an opportunity that you progress into a won deal for your business. This process involves deeply understanding customer needs, challenges, and buying habits, and engaging with the prospect to provide an overview of solutions that best meet their specific requirements. Dynamics 365 Sales streamlines this process by offering AI-powered capabilities for research, outreach, prospecting, and qualifying leads, ensuring that sales efforts focus on activities with the highest impact.

Copilot Agents in Dynamics 365 Sales, tailored to your industry and business needs, help you generate a more qualified pipeline. Lead research across various sources gives the seller or AI agent all the context about the lead. When you augment research with custom insights and knowledge sources, you empower sales teams with relevant information and enhance their ability to connect meaningfully with prospects. Personalized outreach improves response rates, and timely follow-up communications keep prospects engaged by ensuring no move is missed. The system judges lead readiness based on ideal customer fit and intent to buy. It automatically disqualifies low-intent leads to maintain a clean and focused lead pipeline. As you use the system, you improve data quality with capabilities that automatically validate and enrich your data. Additionally, discovering leads from service interactions ensures that you don't overlook any potential lead.

Together, these features provide a robust framework for effective sales qualification, driving better customer engagement and higher conversion rates.

Note: The author created this article with assistance from AI. Learn more

Boost pipeline by autonomously researching and engaging leads with the Sales Qualification Agent

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ May 5, 2025	-	✔ Oct 31, 2025

Business value

As a seller, you typically need to build a qualified pipeline that covers two to three times your target quota goal. However, building this pipeline requires manual work across fragmented tools. It's also inefficient to spend hours each week sending hundreds of prospecting emails just to book two to three meetings with prospects, of which perhaps one prospect converts to a qualified opportunity.

The Sales Qualification Agent in Dynamics 365 Sales eliminates this by autonomously researching information about every lead using data from CRM, public websites, and your company's internal knowledge sources. The agent then engages every lead autonomously, reminding them, following up, answering their questions, and understanding their need, ability, and intent to purchase. If the lead fits your ideal customer criteria and shows intent to purchase, it hands off the lead to a seller to take it forward, ensuring that your sales team builds a high-quality pipeline of high-intent leads, while spending more time building customer relationships and less time pursuing cold leads.

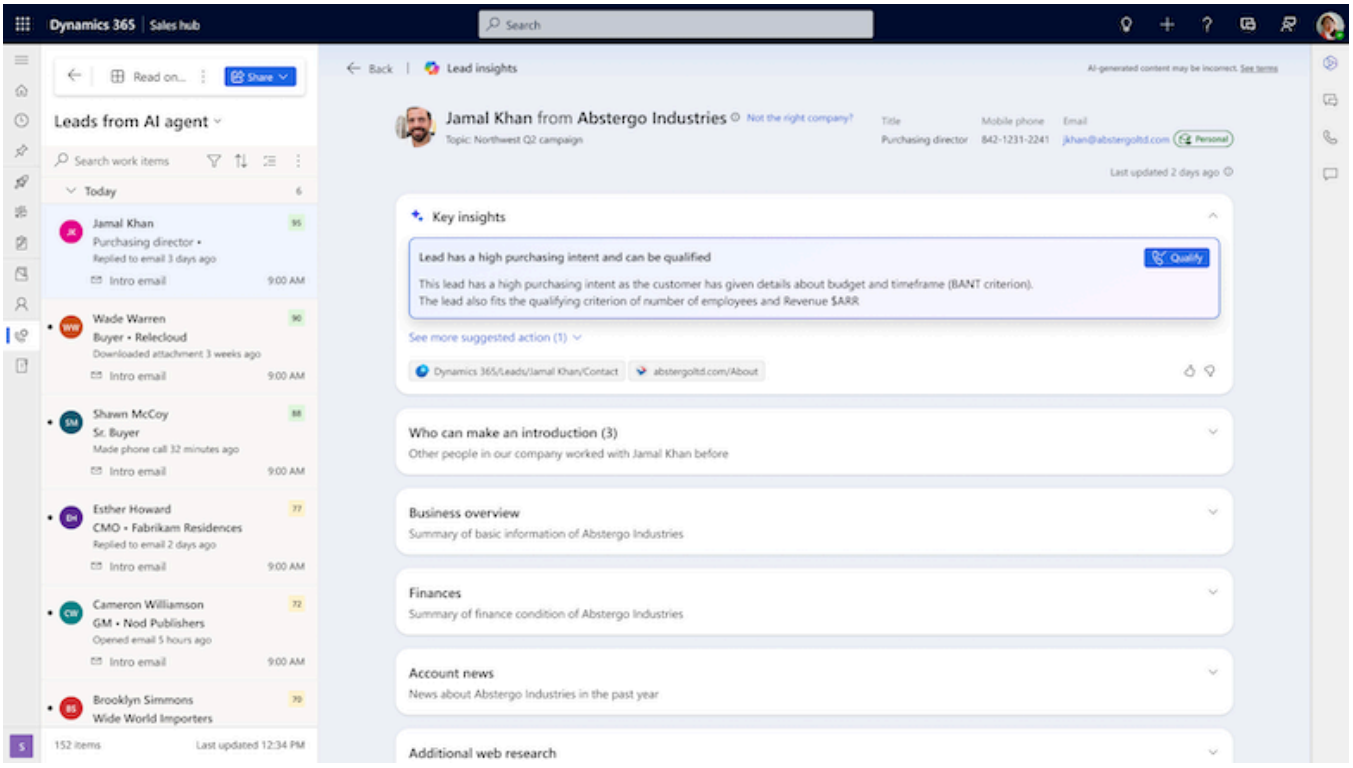
Feature details

The agent works on behalf of your team to autonomously prospect leads based on your defined selection criteria. Some features include:

- **AI-powered lead research**: The agent autonomously researches leads by combining your CRM data with public web sources as well as custom knowledge sources through Copilot Studio, creating rich lead and company profiles. It assesses a lead's importance based on target profile criteria you define, as well as signals from emails with the lead and recent marketing interactions.
- **Instant insights**: Get actionable recommendations, 360-degree lead and account summaries, recent company news, competitor insights, and clear prioritization—letting

sellers focus on the leads most likely to convert.

- **Personalized outreach**: The updated agent not only automatically drafts but also sends customized emails with key talking points. It also reminds leads that don't engage, increasing the response rates of your prospecting efforts.
- **Smart engagement with Q&A and intent detection**: With new automation, the agent can send personalized follow-up emails and analyze responses to detect purchase intent, ensuring high-touch engagement and boosting your pipeline's quality. It can answer the lead's questions using your configured knowledge sources, moving the lead further down the consideration journey.
- **Easy customization with configurable automation level**: Admins can tailor qualification rules, add industry-specific research sources, and fine-tune the agent's handover criteria to your unique sales strategy. You can control the level of automation you want—from research and prequalification all the way to full engagement



> ⓘ **Note**
>
> Currently, customers can't see this feature because of an active live site issue. We're working to resolve it.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Sales Qualification Agent overview (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 11/18/2025

Deploy autonomous Sales Qualification Agent to qualify leads at scale

09/11/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Aug 22, 2025	-	-

Business value

Sales teams get a wide variety of leads but often don't have the capacity to handle them all effectively. Scaling operations can be a daunting task. When you expand the team or streamline processes, you risk overlooking opportunities and losing revenue.

The autonomous Sales Qualification Agent in Dynamics 365 Sales works nonstop to build a qualified pipeline and boost revenue. After you configure it, the agent works on its own with minimal human oversight. It continuously handles every lead with precision. By leveraging data from your CRM and external sources, the agent automatically researches each lead, intelligently sends personalized outreach emails, follows up with timely reminders, gauges buying intent, and eventually hands over only the most qualified leads to human sellers.

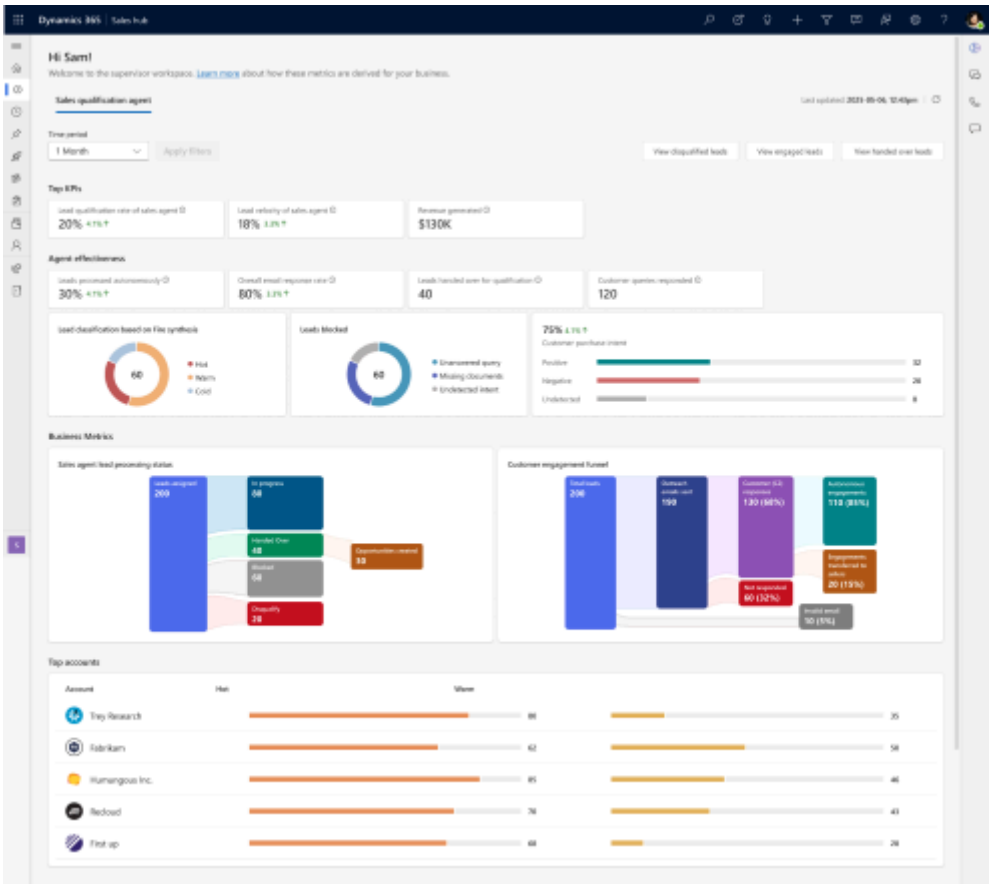
By freeing sellers to focus on closing deals, the agent boosts productivity, lowers operational costs, and maximizes overall team revenue.

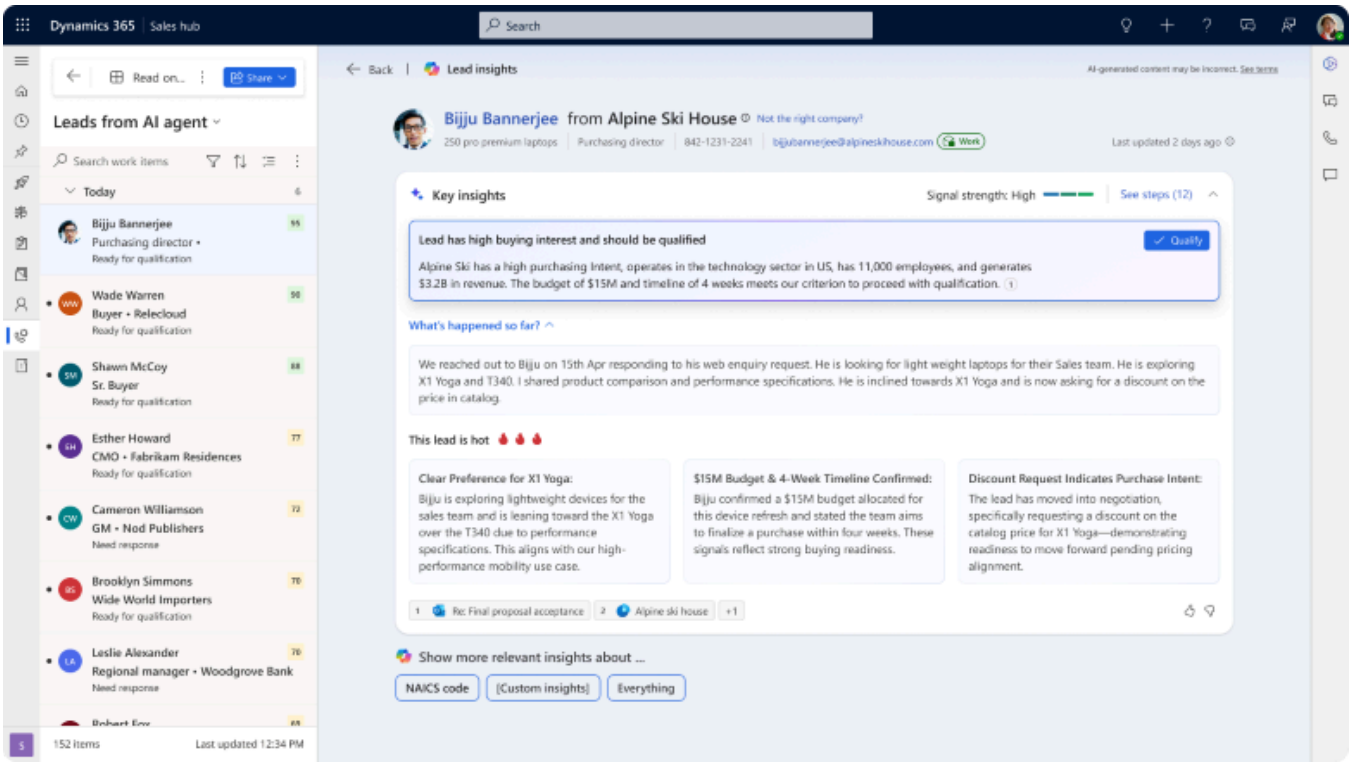
Feature details

You can customize the autonomous Sales Qualification Agent to align with your specific business processes and sales strategies.

- **Precise lead targeting**: Define specific filtering criteria to ensure the agent focuses exclusively on your desired leads. These criteria can include leads from a particular geography, related to a specific product, or leads that meet a certain lead value threshold.
- **Intelligent research and synthesis**: The agent automatically gathers and synthesizes key customer and account data from your CRM, public web sources, and existing copilot skills. It provides crucial context for qualification and enables sellers with deeper insights.
- **ICP-driven qualification**: Establish detailed Ideal Customer Profile (ICP) criteria for the agent to accurately assess lead fit and prioritize high-potential prospects.

- **Knowledge-infused outreach**: Configure the agent with access to your knowledge base, so it can automatically incorporate relevant testimonials, case studies, and other social proof into its outreach emails to enhance credibility.
- **Automated follow-ups**: Set up a follow-up strategy that includes time delay, frequency, and channels for the agent to use when following up with prospects.
- **Informed prospect engagement**: Provide the agent with knowledge sources so it can intelligently answer prospect questions about your product or service capabilities, features, maintenance, pricing, and more. This setup ensures accurate and timely responses.
- **Performance monitoring and analytics**: Track the agent's effectiveness with clear metrics. These metrics include the number of leads engaged, emails sent, positive interactions, leads qualified, and overall pipeline contribution.
- **Supervisor oversight**: Supervise the agent's activities. Review its interactions and easily intervene to provide guidance or resolve situations where it needs assistance. This approach ensures smooth operation and continuous improvement.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Sales Qualification Agent overview (preview) (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Enhance customer interactions with auto-linked CRM data

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Aug 15, 2025	-	✔ Oct 31, 2025

Business value

Although most companies generate a sizable amount of new business from existing customers, only a small fraction of new leads link to existing CRM data. This disconnect results in incomplete context, missed insights, and subpar customer experiences, as sellers and AI agents lack critical information for effective interactions.

Sales Qualification Agent in Dynamics 365 Sales now finds and auto-links a matching contact and account for each lead it researches, so it can process information not only from the lead but also from the linked records, which enhances research outcomes and improves customer interactions.

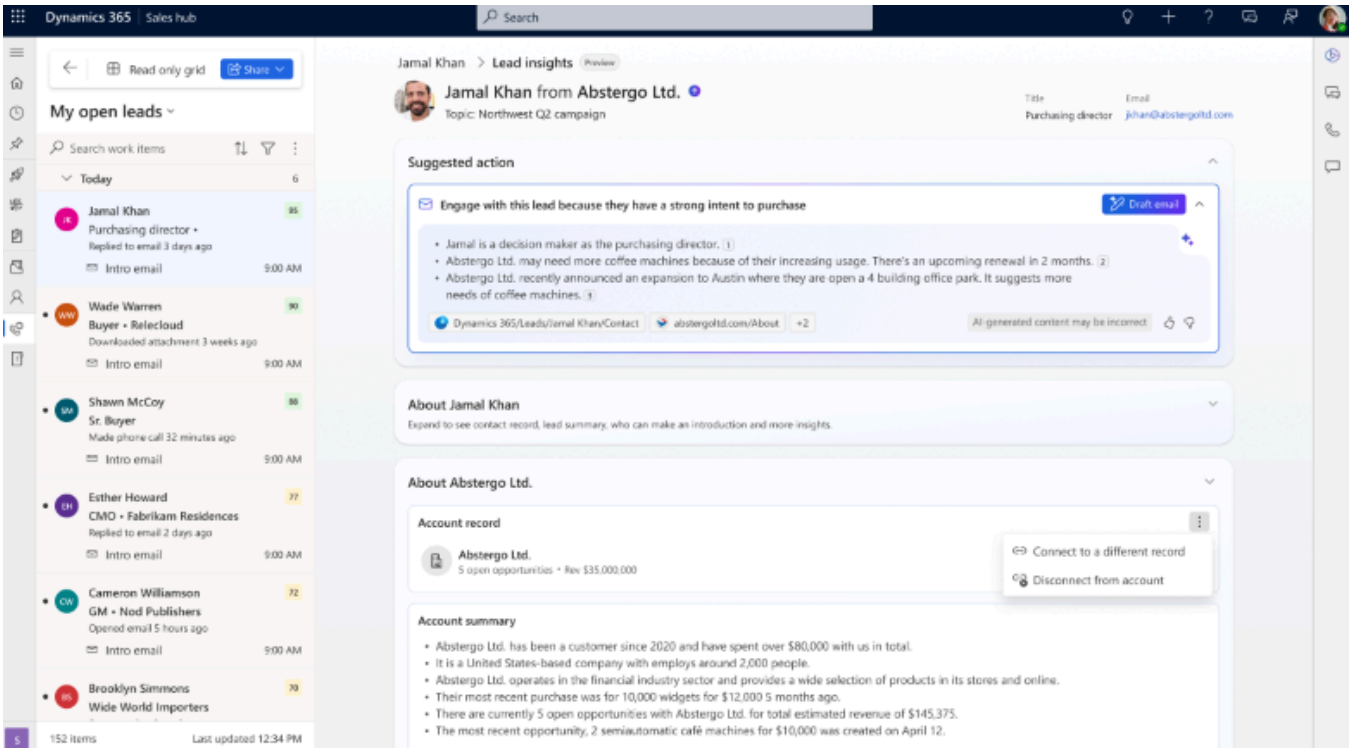
Feature details

This feature is automatically enabled when you turn on Sales Qualification Agent in Dynamics 365 Sales.

As a seller, you see the following information on the lead insights page:

- Automatically linked contact and account information.
- Enriched information from linked accounts and contacts.
- The ability to de-link an auto-linked record and manually link another record if needed.

Sales Qualification Agent analyzes information across linked accounts and contacts for high effectiveness.



Additional resources

Lead research page (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 11/05/2025

Improve sales efficiency with the Sales Qualification Agent's email validation

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ May 1, 2025	-	✔ Oct 31, 2025

Business value

Inaccurate email addresses in CRM systems can significantly hinder your productivity and engagement with prospects, leading to missed opportunities and decreased sales performance. Now, the Sales Qualification Agent in Dynamics 365 Sales verifies each email address and identifies if it's a work or personal email. Sales teams can save precious time by ignoring unreachable leads, increase the effectiveness of their sales outreach, and stay compliant by reaching out to only valid work emails.

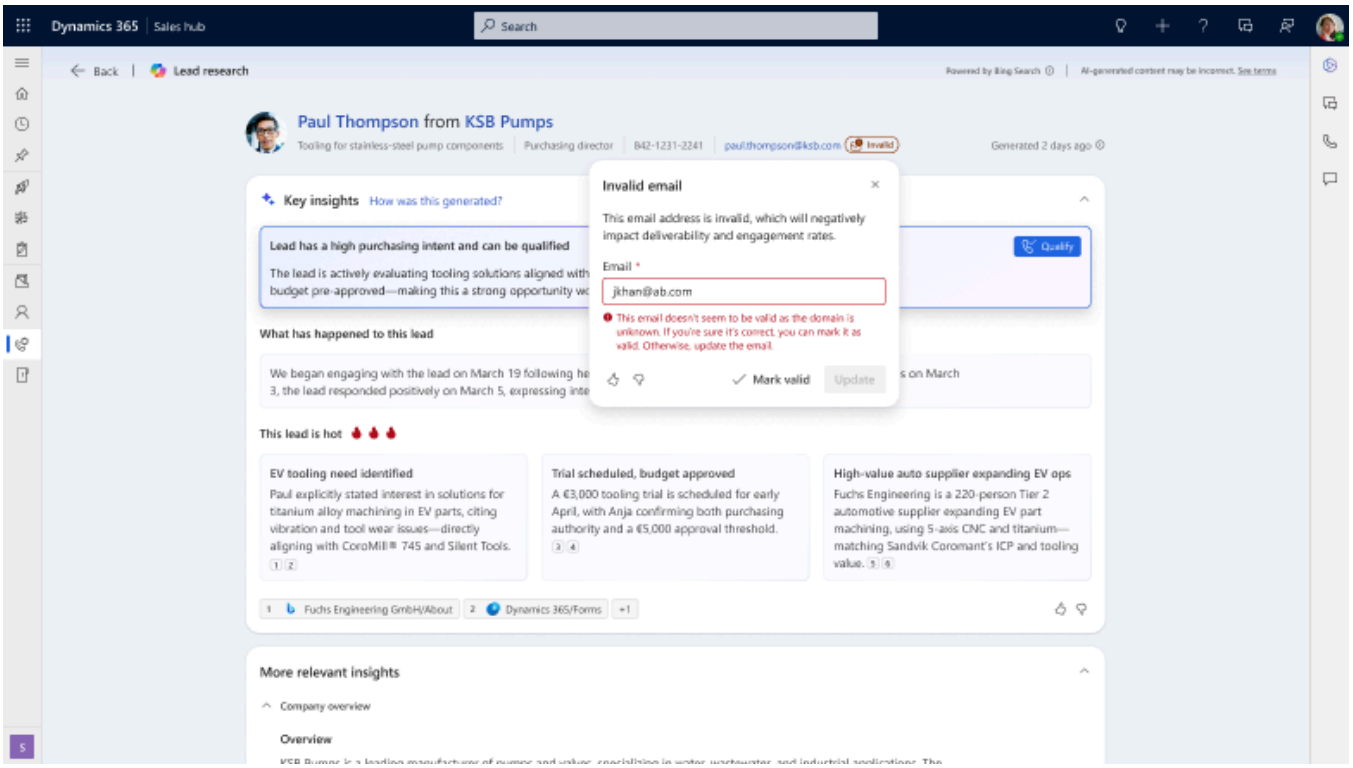
Feature details

The Sales Qualification Agent uses validated email addresses as it conducts lead research, outreach, and qualification.

As an admin, you can specify which email field on the lead form the agent validates. You set this field as part of the Sales Qualification Agent settings.

As a seller, you can:

- See whether the email address associated with the lead is valid.
- See the email address categorized as work or personal.
- Update the validity and categorization if you disagree with the assessment. For example, you can mark an email address as personal if the agent inadvertently marks it as a work email address.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Lead insights page (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 11/18/2025

Sales management and operations

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Dynamics 365 Sales gives sales managers and sales operations leaders the tools they need to manage and support sales teams so they can reach their sales goals.

Sales managers need to monitor, coach, and lead sales teams. With Dynamics 365 Sales, managers can manage quotas, review forecasting in real time, and give feedback on how conversations with customers are going. This approach helps managers spot coaching opportunities while keeping track of the pulse of the business.

Sales operations leaders use data, analytics, and defined processes to make sellers successful. In Dynamics 365 Sales, they can create dashboards or embed Power BI reports to analyze business results. They guide seller activity through predefined sequences of actions to scale best practices. To meet their business's unique needs, they use Microsoft Power Platform to extend Dynamics 365 Sales and custom sales application capabilities.

Note: The author created this article with assistance from AI. Learn more

Improve research relevance by adding custom web sources to the Sales Qualification Agent

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Jul 31, 2025	-	✔ Oct 31, 2025

Business value

As a sales team, you need research that's not only comprehensive but also tailored to your specific industry, customer segments, and business strategy. While a Sales Qualification Agent's out-of-the-box research provides broad insights, many organizations rely on industry-specific sources, regulatory databases, or niche publications to make informed decisions.

With this enhancement, the agent delivers more relevant, customized insights by incorporating data from public web sources that matter most to your business. You gain real-time access to industry-aligned insights and can engage leads with deeper context, using up-to-date information to ensure outreach is timely and impactful.

Feature details

Admins configure the Sales Qualification Agent to pull relevant insights from specific web sources, so they can tailor research to your industry's needs. Sellers see industry-specific insights from web sources that are relevant for your business.

For example, Contoso's sales ops team wants sellers to see industry details for incoming leads based on NAICS codes. By specifying sources that provide NAICS classifications, admins ensure that sellers receive industry insights directly in their workflow. This approach streamlines research and enables faster, more informed engagements.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Add knowledge sources for the agent (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 11/18/2025

Integrate with Exchange using server-side synchronization

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Feb 3, 2025	✔ Apr 1, 2025

Business value

Upgrading the Exchange infrastructure enhances support for Dynamics 365 Sales Premium features such as Relationship analytics and Who knows whom. With this release, Exchange data integration shifts to server-side synchronization (SSS), enabling more granular control over email sync settings. This upgrade boosts reliability and gives users greater flexibility in managing the timing and scope of their email synchronization.

Feature details

To use the new Exchange integration, configure server-side synchronization for Dynamics 365 Sales Premium features to work with your exchange activities.

For detailed setup instructions, see Set up server-side synchronization of email, appointments, contacts, and tasks.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Set up server-side synchronization of email, appointments, contacts, and tasks (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Tailor Sales Qualification Agent to your industry and business needs

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ May 5, 2025	-	-

Business value

Top sellers consistently build stronger pipelines by being disciplined in how they choose which leads to engage. What if every seller could follow that same high-performing approach? With the Sales Qualification Agent, now they can. You can now customize lead selection criteria by using your ideal customer profile (ICP), leveraging Dynamics 365 data like job title, and public web sources like market cap from Bloomberg.

Different businesses prioritize different signals: financial services might use assets under management, while tech companies focus on subscription usage. The Sales Qualification Agent lets sales operations replicate top sellers' intuition by fine-tuning the lead selection criteria with data from Dynamics 365, Dataverse, and public external sources. By encoding strong lead selection logic, the agent helps every seller focus only on the leads that are most likely to convert, driving higher productivity and better outcomes.

Feature details

As an admin, you configure the Sales Qualification Agent to assess leads using data from Dynamics 365, other Dataverse sources, and trusted public web sources. You can define your Ideal Customer Profile (ICP) with industry-specific precision.

For example, a logistics company like Contoso can set up the agent to evaluate a lead's USDOT status, incident history, and inspections from the past 24 months. This setup helps sellers focus on compliant, high-potential leads and drives more efficient, targeted engagement.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Set up the Sales Qualification Agent (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Turn marketing engagement into actionable insights for sellers

08/21/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Jul 31, 2025	-	-

Business value

Marketing interactions, such as attending a product demo or engaging with a targeted email campaign, are strong signals of buying intent. For Dynamics 365 Sales customers using Customer Insights - Journeys, the Sales Qualification Agent automatically brings key insights from recent marketing activities, including email opens, link clicks, event registrations and attendance, and form submissions.

This agent seamlessly connects marketing and sales without requiring customers to build and maintain a custom solution to extract, aggregate, and sync marketing engagement data into Dynamics 365 Sales. It saves significant time and costs. With this agent, sellers focus on the most valuable opportunities sooner and drive more personalized outreach and engagement.

Feature details

As a seller, you can see the marketing insights from within the lead insights page. With these insights, you gain deeper context for every lead, enabling more timely, relevant, and personalized engagement. For example, you can easily see if a lead recently attended a webinar and interacted with multiple product emails—all from within your sales workflow.

This feature is enabled by default for customers using both Dynamics 365 Sales and Customer Insights - Journeys.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Key insights from Sales Qualification Agent (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Seller experiences

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has 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 cater to the unique needs and challenges sellers face in their daily work. 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 speed up deal closures.

These offerings streamline and simplify the day-to-day tasks of sellers, so they can work more efficiently and effectively. By using these capabilities, sellers navigate their professional responsibilities more seamlessly and find ways to optimize their time and resources. This approach boosts productivity and leads to more successful deal closures.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Visualize and work with hierarchical data

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Aug 29, 2025	-	✔ Oct 29, 2025

Business value

When your large customers have multiple accounts, contacts, locations, and other related data, sellers can miss important customer opportunities and signals. A seller might not see the recent win in another region or notice an influential decision maker is unhappy with a related project. Presenting data hierarchically allows your organization to see, understand, and act on data in its relational context quickly and effectively.

The new Hierarchy control in Dynamics 365 Sales provides your organization with an intuitive visualization of your data. With this view, sellers can see important connections, such as common decision makers, and quickly take action with less effort. Define custom visualizations for your sellers and other teams that highlight the most important data and relationships for your customer's accounts, people, opportunities, and custom tables like householding and financial instruments. A hierarchical visualization lets your sellers and other team members see your customer's organization like never before. Because the hierarchy view provides full editability of the records you choose to display, your team can easily view, edit, and update customer information right in context without leaving the visualization.

Feature details

Visual hierarchies enable your sellers to view and work with data graphically.

Single table (self-referential) hierarchies are now GA

Unlock the ability to show a hierarchy of records from a single table, such as a hierarchy of accounts. Any standard or elastic table in Dataverse with a self-referential relationship can be displayed as a hierarchy.

Multitable hierarchies are now in Preview

These advanced capabilities allow you to create hierarchies that use:

- Multiple tables in a single hierarchy, such as an account with a child group of contacts that each have a child group of opportunities under each contact.

- Different views of the same table in a hierarchy, such as showing a group of open opportunities under an account and a separate group of closed opportunities under the account.
- Different types of table relationships, including 1:Many and Many:Many relationships.
- Row-level relationships using the Dataverse connection table, allowing you to filter relationships using Views or connection Roles.
- Your own custom connection tables, allowing you to display your own flexible custom relationship patterns.
- Hybrid hierarchies that mix self-referential relationships with cross-table relationships, creating complex hierarchies that visualize your data exactly the way you choose.

Configurable

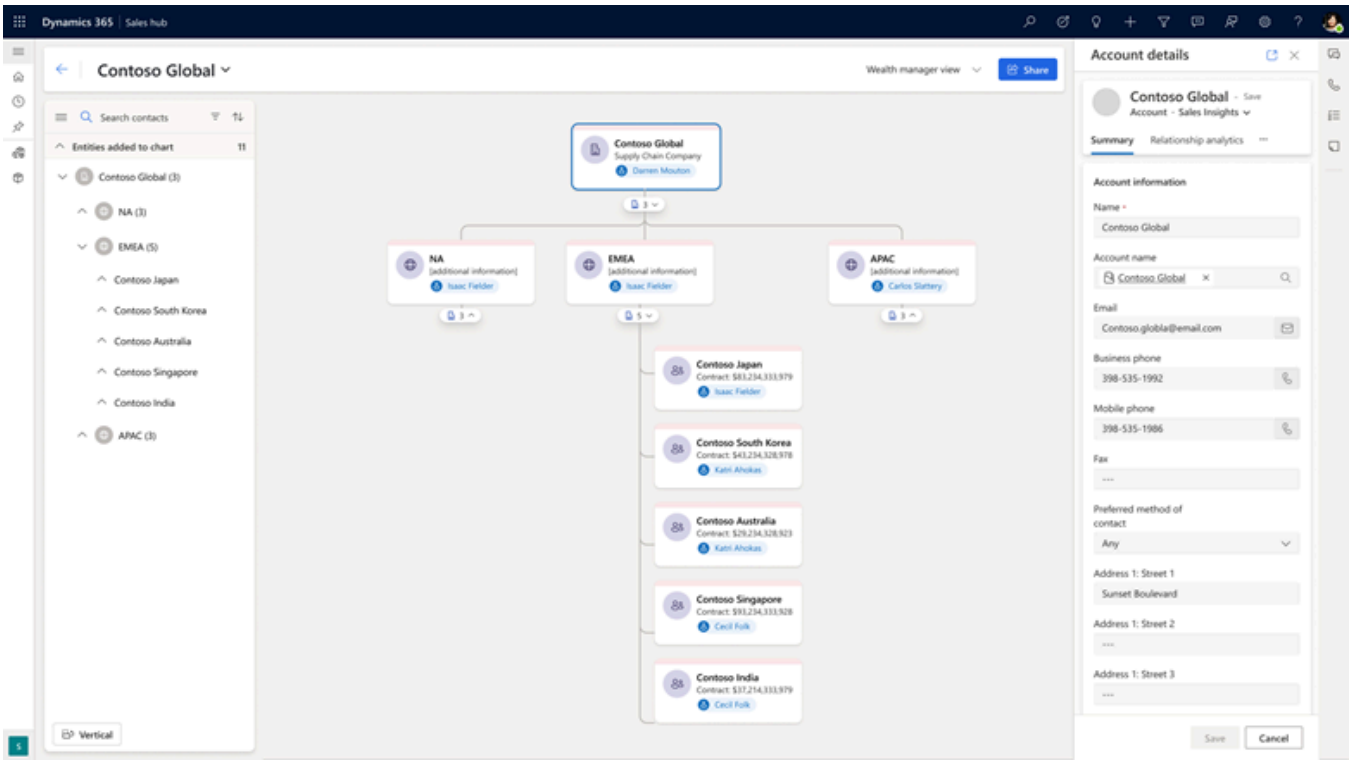
- Admins define hierarchy views for their teams. The feature currently supports single-table hierarchies, with support for multiple-table complex hierarchies coming later.
- Customize what data appears on each tile, along with the size, color, and picture or icon. You can show up to seven fields on each tile to create the perfect view for your sellers.
- Define hierarchies by using relationships in your data. You can use single-table (self-referencing) relationships, cross-table relationships, or the Dataverse Connections table for flexible relationships between any two records.

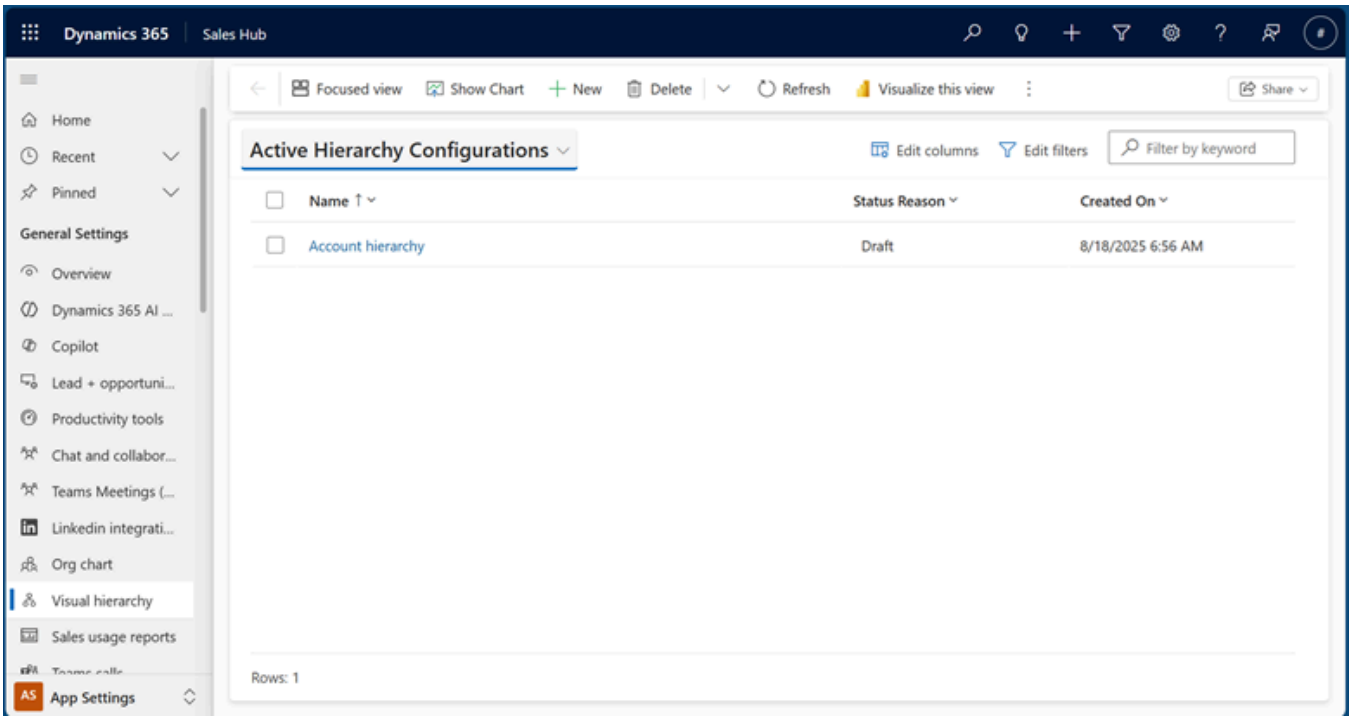
Intuitive

- Zoom in and out and expand and collapse branches so you can efficiently work with customers of all sizes.
- Switch between vertical and horizontal display modes to optimize the view based on the shape of the hierarchy.
- Select a tile to open the details form in a side pane, so you can make updates, add meeting notes, and make other edits without leaving the hierarchy view.

Getting started

When signed in to Sales Hub, an admin can select **Visual hierarchy** in the **App settings** menu to go to the hierarchy designer. The admin can design and publish a hierarchy to their organization. Once published, sales team members viewing a form or grid for the table with the hierarchy can select **View hierarchy** on the command bar to open the hierarchy view for that record. **View hierarchy** is added by default to the forms and grids for the Contact, Opportunity, Lead, and Account tables. For other tables, administrators must perform steps to add it. Updating the default security roles will allow you to grant additional people in your organization access to design, publish, and view hierarchies as needed.





Additional resources

Overview of hierarchy visualization (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Last updated on 11/05/2025

Plan and prepare for Dynamics 365 Customer Service in 2025 release wave 1

> **Important**
>
> The 2025 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2025 to September 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Service**.

Overview

Dynamics 365 Customer Service is a cloud-based solution that uses generative AI across the service journey. It helps 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.

For 2025 release wave 1, we focused on enhancing agentic capabilities and improving productivity with Copilot for the customer service representative and supervisor experiences.

Updates to Dynamics 365 Customer Service 2025 release wave 1

Investment areas



Administrator experiences

The modern administration experience gives you a consistent setup process that brings together the management of Dynamics 365 Customer Service, unified routing, and omnichannel activities. The Customer Service admin center app brings together all administrator experiences related to customer support into one app. It offers an intuitive, guided experience that helps you quickly set up the system for the first time or add to an

existing setup. It also includes proactive health checks to make sure the system is set up correctly and works as expected.

Copilot and AI innovation

Copilot transforms the customer service support experience with generative AI. Service representatives become more productive and deliver a better service experience when Copilot helps them find resources to resolve issues faster, handle cases more efficiently, and automate time-consuming tasks. Copilot gathers knowledge from internal and external sources to draft contextual answers to questions in email and chat conversations. As service representatives research a case, they can ask Copilot questions. They can use Copilot to generate case and conversation summaries in one step.

Service representative experiences

The service representative experience is at the heart of Dynamics 365 Customer Service. When you enhance service representative confidence, you improve customer satisfaction. Customer Service gives service representatives a powerful desktop with infused generative AI, seamless collaboration capabilities, and productivity tools in a customizable workspace. Its features boost service representative effectiveness and enable them to deliver personalized customer experiences across any channel.

Supervisor experiences

The supervisor experience is designed for customer service managers and analysts. When supervisors have access to key operational metrics, they can continuously monitor contact center operations and make course corrections. For example, supervisors can step in when customer sentiment turns negative. They can also improve service representative staffing to optimize productivity and keep service levels high.

Supervisors can use the extensibility feature to customize data models. By adding extra metrics and reporting on custom entities, they make the contact center more efficient.

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—case, record, chat, digital messaging, and voice—to the best-suited service representatives. The assignment rules take customer-specified criteria into account, such as priority and skills. The routing service uses AI to automatically classify, route, and assign work items. By eliminating the need for constant queue supervision and manual work distribution, the routing service offers operational efficiencies for organizations. Features like percent-based routing, overflow management, and routing to preferred service representatives help optimize the routing of work items to the best-suited service representatives.

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
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Customer Service.

Helpful links	Description
Product documentation	Find documentation for Customer Service.
User community	Engage with Customer Service experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Customer Service.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Last updated on 10/16/2025

What's new and planned for Dynamics 365 Customer Service

This topic lists features that are planned to release from April 2025 through September 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 2 plan.
- For a list of the next wave's release plans, go to 2025 release wave 2 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 Customer Service and using its features.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Use one record creation and update rule for multiple queues	Users by admins, makers, or analysts	-	-	✅ Jul 11, 2025

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
Customize formatting and headers for case and custom record summaries	Users by admins, makers, or analysts	-	-	✔ May 28, 2025
View the enhanced user experience for Copilot summaries	Users by admins, makers, or analysts	-	-	✔ May 9, 2025
Use Copilot-powered email template recommendations	Users by admins, makers, or analysts	✔ Apr 15, 2025	-	✔ Oct 31, 2025
Insert Copilot prompts in email templates	Users by admins, makers, or analysts	✔ Apr 15, 2025	-	✔ Oct 31, 2025
Use Copilot to generate contextual partial email content	Users by admins, makers, or analysts	✔ Jul 31, 2025	-	✔ Oct 31, 2025
Summarize base records and related records with Copilot	Users by admins, makers, or analysts	-	-	✔ May 2, 2025
Automate case lifecycle tasks with Case Management Agent	Users by admins, makers, or analysts	✔ Apr 10, 2025	-	✔ Oct 31, 2025

Service representative experiences

Enable service representatives 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
Increase user productivity with new modern rich text editor	Users, automatically	-	-	✔ May 2, 2025
Search for user experience profile assignments	Admins, makers, marketers, or analysts, automatically	-	-	✔ Apr 30, 2025
Use Execute JavaScript macro to create your own custom macros	Users by admins, makers, or analysts	✔ Apr 1, 2025	-	-
Use the modernized and refreshed Copilot Service workspace app	Users, automatically	-	-	✔ Apr 30, 2025

Feature	Enabled for	Public preview	Early access*	General availability
Create personalized case views in the inbox	Users by admins, makers, or analysts	-	-	✔ Apr 7, 2025
Monitor customer wait time through live conversation counter	Users by admins, makers, or analysts	-	-	✔ May 30, 2025
Enable customers to create multisession apps	Users by admins, makers, or analysts	✔ Apr 30, 2025	-	✔ Oct 31, 2025

Supervisor experiences

Enable supervisors to monitor and improve contact center operations.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Use the new email editor for a streamlined, feature-rich experience	Admins, makers, marketers, or analysts, automatically	-	-	✔ May 23, 2025

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
Maintain routing rules in bulk	Admins, makers, marketers, or analysts, automatically	-	-	✔ Apr 18, 2025
Use shift bookings to assign records to representatives	Users by admins, makers, or analysts	-	-	✔ May 30, 2025

* You are able to opt into some features as part of early access on February 3, 2025, 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 information on data residency in Dynamics 365 and Power Platform, visit the Microsoft Dynamics 365 and Power Platform data residency documentation. For more information about geo availability, visit the Dynamics 365 and Microsoft Power Platform availability page.

Last updated on 12/02/2025

Administrator experiences

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has 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 modern administration experience gives you a consistent setup process that brings together the management of Dynamics 365 Customer Service, unified routing, and omnichannel activities. The Customer Service admin center app brings together all administrator experiences related to customer support into one app. It offers an intuitive, guided experience that helps you quickly set up the system for the first time or add to an existing setup. It also includes proactive health checks to make sure the system is set up correctly and works as expected.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use one record creation and update rule for multiple queues

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Jul 11, 2025

Business value

When you configure one automatic record creation and update rule for multiple queues, you reduce the time it takes to set up and maintain rules.

Feature details

Previously, administrators could select only one queue for each rule. As an administrator, you can now add multiple queues to monitor for new automatic record creation and update rules in the Copilot Service admin center app.

You can go to **Case settings** > **Automatic record creation** and update rules. When you associate new automatic record creation and update rules with multiple queues, you can create records based on the rule conditions from queue items in any of the queues. For example, if you associate an email-to-case rule with two email queues, you can create a rule when an email arrives in either of the two queues. Previously, you needed separate rules for each queue.

With this update, you don't need to duplicate automatic record creation and update rules for each queue. You can use a common rule for multiple queues.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Configure rules to create or update records automatically (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Copilot and AI innovation

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 customer service support experience with generative AI. Service representatives become more productive and deliver a better service experience when Copilot helps them find resources to resolve issues faster, handle cases more efficiently, and automate time-consuming tasks. Copilot gathers knowledge from internal and external sources to draft contextual answers to questions in email and chat conversations. As service representatives research a case, they can ask Copilot questions. They can use Copilot to generate case and conversation summaries in one step.

Note: The author created this article with assistance from AI. Learn more

Automate case lifecycle tasks with Case Management Agent

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Apr 10, 2025	-	✔ Oct 31, 2025

Business value

Case Management Agent saves customer service representatives time by automating case details during live chats and from incoming emails. It reduces conversation wrap-up time. By sending follow-up emails and resolving cases automatically, the agent improves service representative efficiency and satisfaction by eliminating manual administrative tasks. The agent also identifies experts automatically and prompts customer service representatives to collaborate with them directly through Teams chat. It provides a seamless experience by automatically summarizing the case context. Collaboration summaries integrate into the application, enhancing the knowledge base and minimizing the need for future collaborations.

Feature details

When a customer service representative accepts a live chat, the Case Management Agent automatically creates a case and fills in the required information. As the conversation continues, representatives can use the agent to update case fields in real time. When the conversation ends, the agent automatically updates the case fields.

Similarly, when automatic record creation (ARC) rules convert an email into a case, the system automatically extracts the required information from the email. The case stays up to date as the customer sends new emails.

Email classification uses AI to categorize incoming emails into predefined categories. With this classification, you can automate support workflows. For example, you can skip case creation for "thank you" emails or marketing spam emails, and create cases only for relevant inquiries. This classification helps optimize support processes, improve productivity, and reduce operational costs.

The Case Management Agent gives you intelligent collaboration prompts with one click. It automatically finds the right experts and creates a concise case summary to help collaborators

get up to speed quickly. The case timeline captures collaboration insights, which streamlines future processes.

The agent also tracks cases that need attention. It sends follow-up emails based on SLA criteria. When a customer responds, the agent resolves the case or alerts the service representative. These capabilities boost the efficiency of case creation and closure. They reduce case handling time.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Set up Case Management Agent to create and update cases (docs)

Note: The author created this article with assistance from AI. Learn more

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Last updated on 12/04/2025

Customize formatting and headers for case and custom record summaries

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ May 28, 2025

Business value

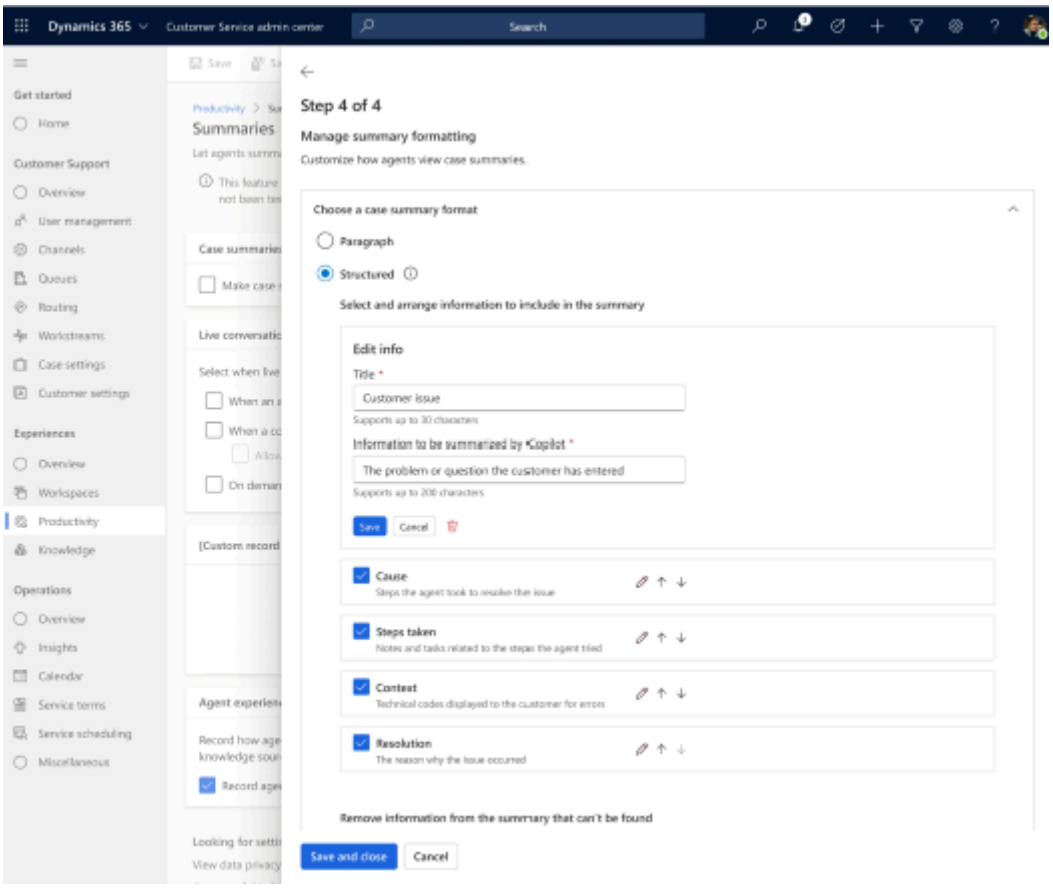
Case and custom record summaries help users catch up on lengthy, long-running cases and custom records. These summaries often include dense text. This feature helps structure the content so users can catch up quickly.

Feature details

When you customize the formatting for case and custom record summaries, you can organize your content. This customization makes it easier for service representatives to read records. It also helps representatives quickly bring up important information from their cases so they can provide customer service faster.

The feature includes the following capabilities:

- Two formatting modes for case summaries and custom record summaries: paragraph and structured.
- Paragraph formatting stays the same. For structured formatting, admins can specify up to five custom headers to organize the summary.
- Custom headers can include a short description to clarify what information from the record goes into the summary.
- Admins can deselect configured headers without deleting them.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Manage case and custom record summary (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Insert Copilot prompts in email templates

Expand table

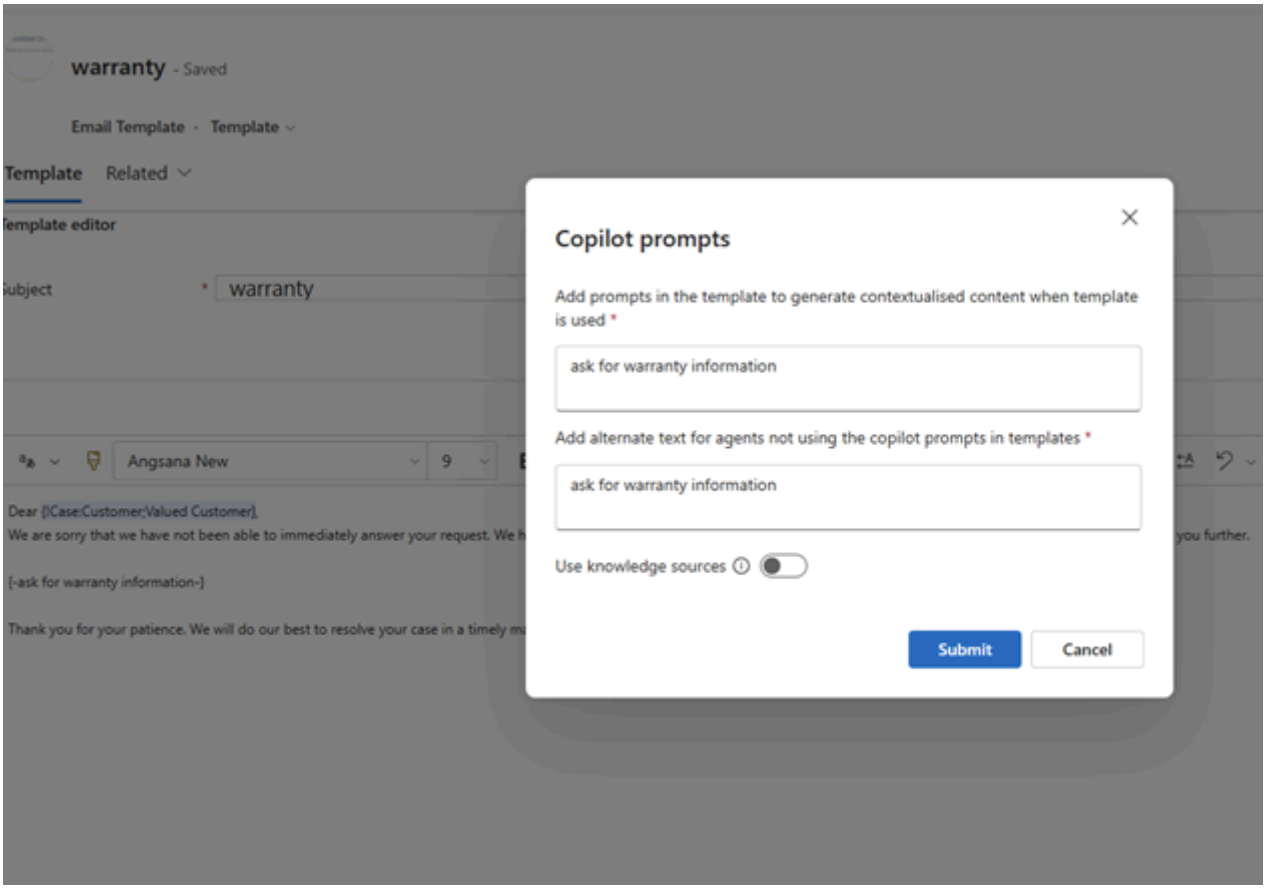
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Apr 15, 2025	-	✔ Oct 31, 2025

Business value

You can speed up email responses with intelligent template prompts. Copilot prompts in email templates automatically fill email templates with the prompt content. This feature reduces the service representative's workload and ensures consistent, accurate customer communication.

Feature details

With this feature, administrators can set up email prompts in email templates. When a customer service representative uses an email template, Copilot automatically fills in content from the prompts. This feature boosts agent productivity and cuts down on manual work.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Add Copilot prompts to email templates (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 11/18/2025

Summarize base records and related records with Copilot

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ May 2, 2025

Business value

Case and custom record summaries help admins quickly catch up on a case or relevant record. When you configure related records to show a summary in the same summarization control, support reps can quickly see if any related records to a case contain critical information and updates they need to review. They can also get a summary of those updates.

Feature details

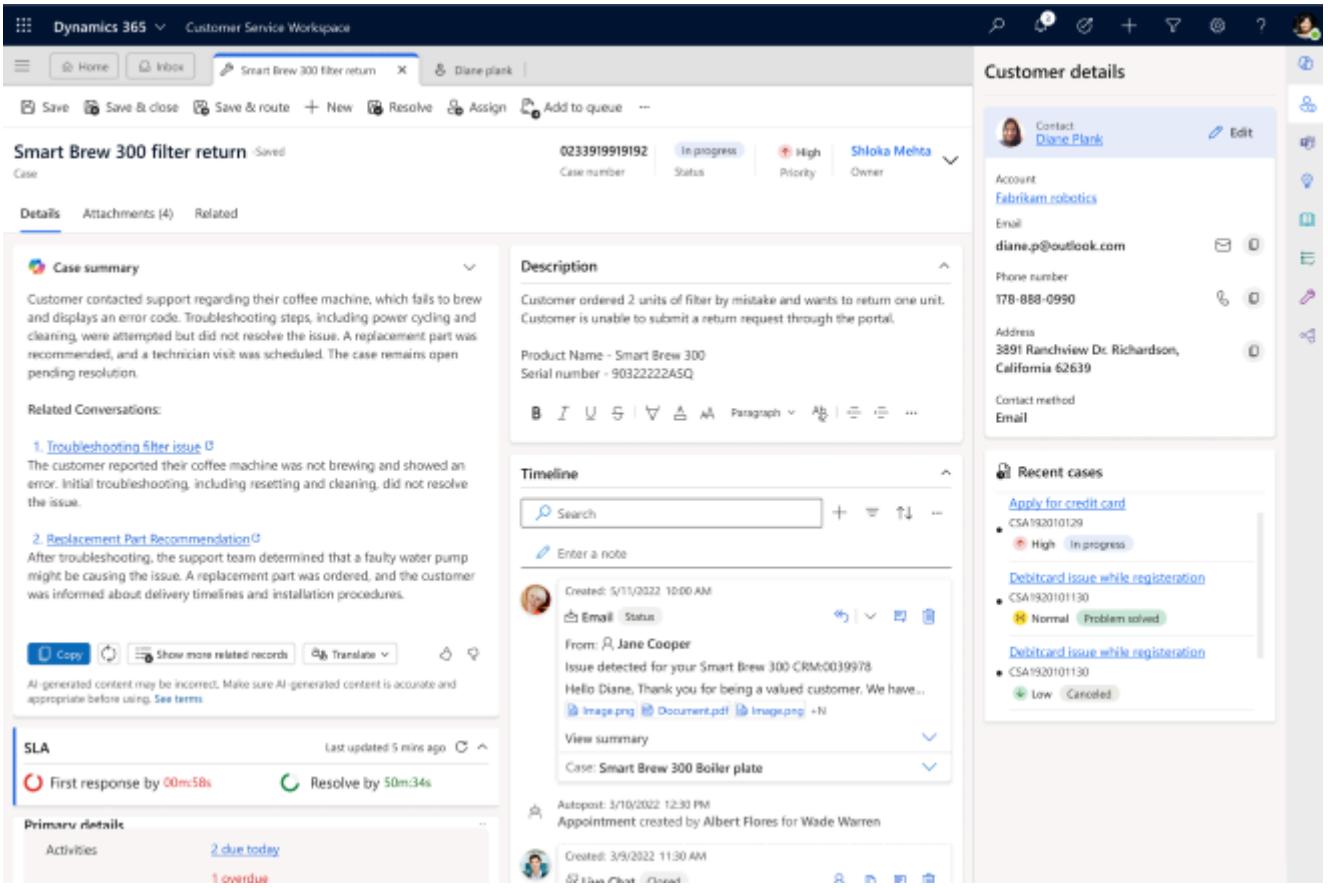
You can summarize related records within a case and custom record summary.

This feature helps support representatives:

- Understand if a related record to a case or any other entity where you configure summarization has key information and updates.
- View updates inline in the case or custom record summary control.
- Receive a summary of two related records by default.
- Generate two summaries at a time, for all the records that link to that base record.
- Select the record ID and view the related record.

Administrators can turn on this feature and set up the field that defines the relationship between the base entity and related entities in the Copilot Service admin center.

With this feature, support reps and admins can customize the summarization experience. For example, you can customize the experience for a custom entity, such as **Work Order**. You can configure case summaries to show linked work order summaries in descending order by the modification date. Service reps can select **Summarize more records** to generate extra work order summaries. This option lets them quickly review business details without opening each related record.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Include related record summary (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use Copilot to generate contextual partial email content

Expand table

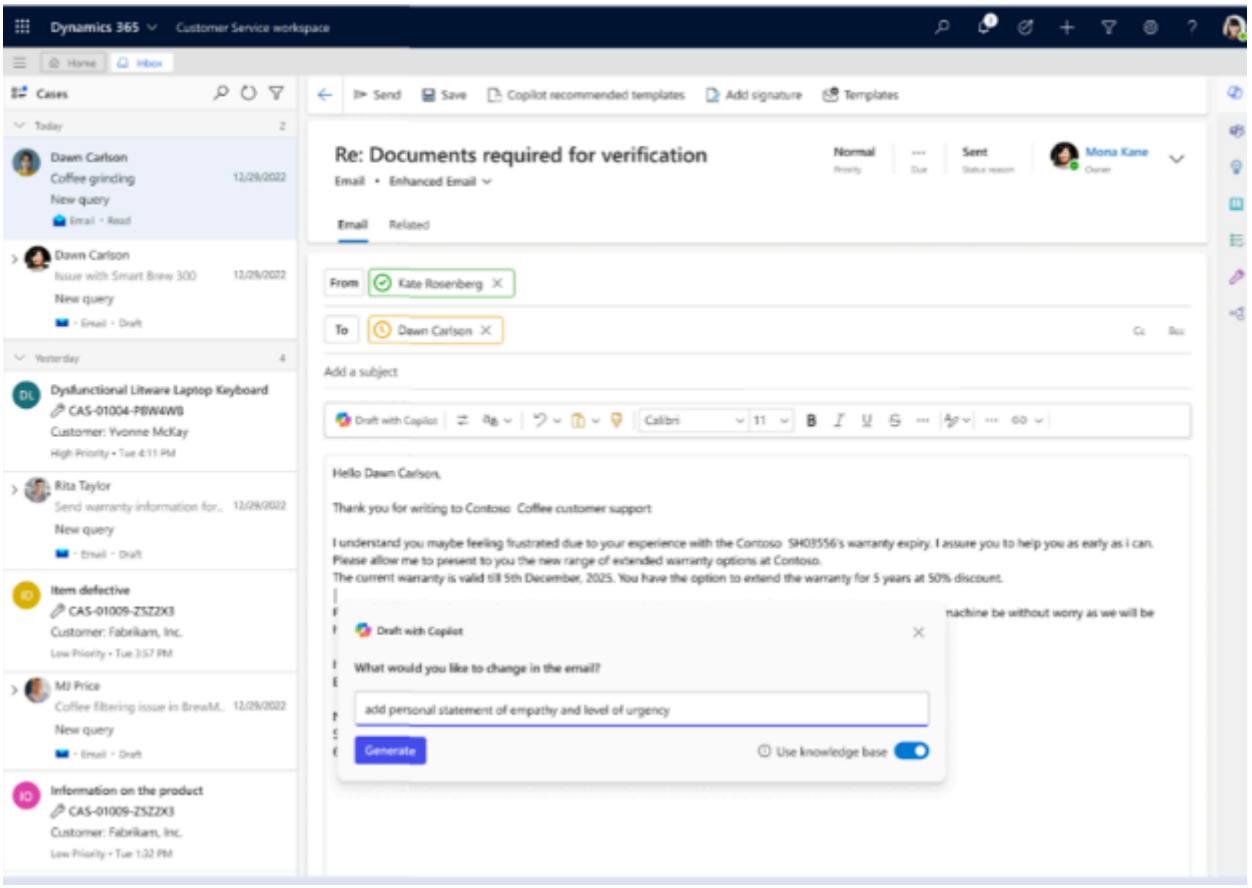
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Jul 31, 2025	-	✔ Oct 31, 2025

Business value

Inline Copilot boosts service representative productivity by reducing manual effort during email composition. When service representatives add extra content with Copilot's help, they improve the quality of the emails. This flexibility lets service representatives include relevant information, which enhances the accuracy and overall quality of the emails. By cutting down on back-and-forth interactions, this approach raises customer satisfaction (CSAT).

Feature details

Customer service representatives can now use the inline email Copilot feature while drafting an email. With this feature, they can get AI assistance at any point during email composition. This enhancement helps representatives generate relevant partial drafts by using the existing email assist functionality. It seamlessly integrates with the ongoing content-boosting efficiency and response quality.



You can use this functionality in the inline editor only. It's not available in the Copilot help pane.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use Copilot to draft an email (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 11/18/2025

Use Copilot-powered email template recommendations

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Apr 15, 2025	-	✔ Oct 31, 2025

Business value

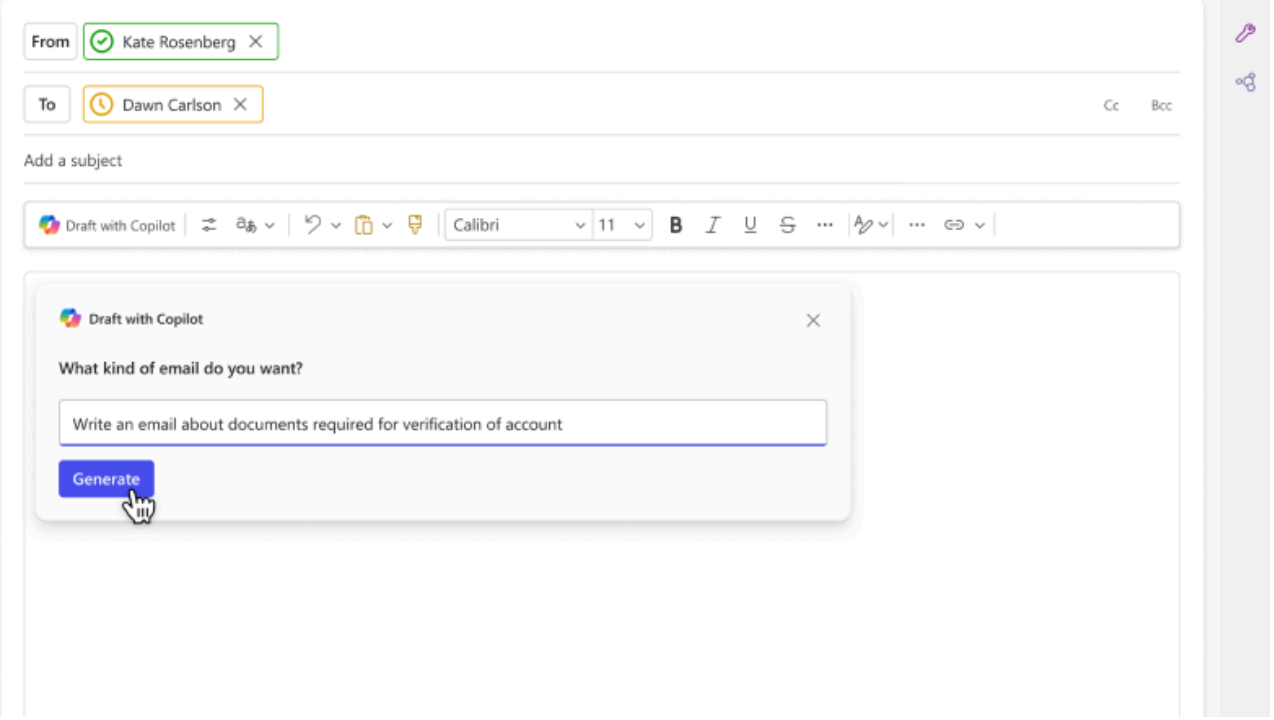
Transform customer support communication with intelligent template recommendations that reduce response times and remove administrative friction. By using AI to precisely match contextual templates, support teams can greatly reduce manual template searching time, speed up case resolution, and deliver more consistent, accurate customer communications.

Feature details

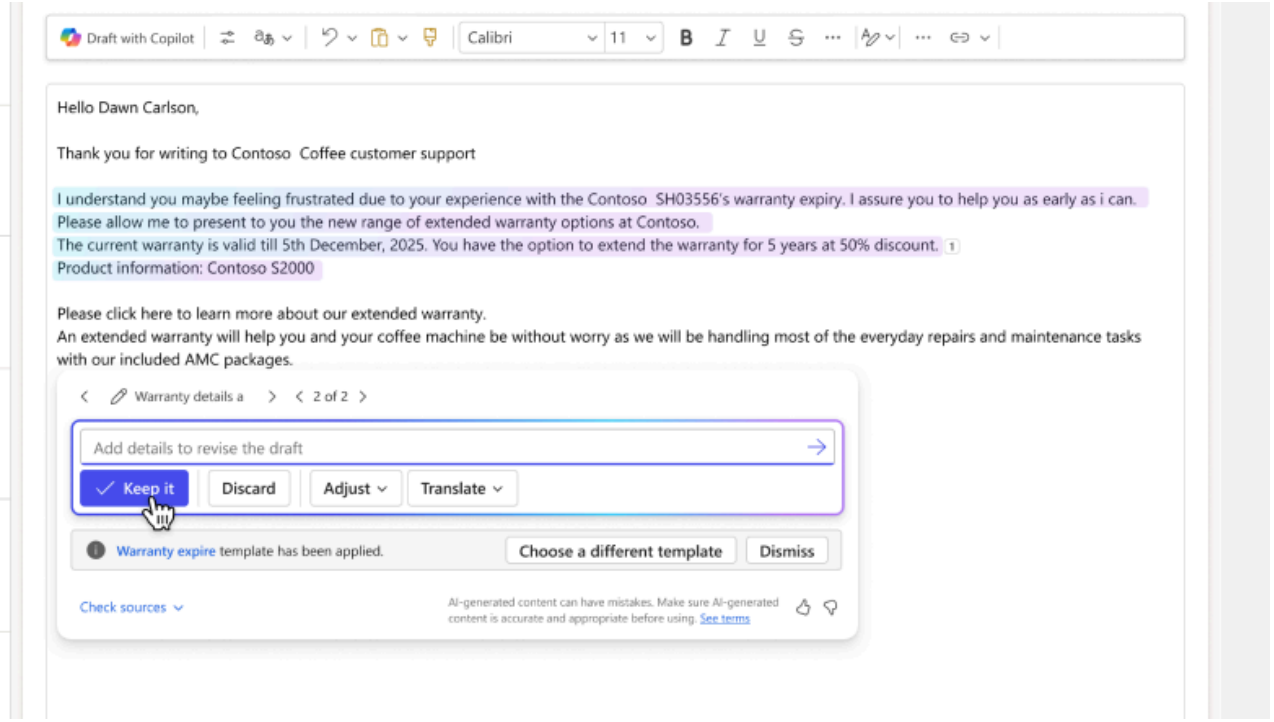
Copilot email assist now suggests relevant email templates so that service representatives don't need to manually search for templates. Copilot bases its suggestions on the email content, search context, and thread intent. Representatives can access these suggestions directly from the email editor.

This feature uses a pay-as-you-go pricing model if coupled with intent capabilities. For personal copilots, this feature is not charged. Learn more in Pay-as-you-go plan.

- Representatives can enter a custom prompt in the inline email assist card when they reply to a customer.
- Copilot matches the prompt with email templates stored in the application. It selects the most appropriate template in the inline email form.



- Representatives see the name of the selected email template. They can select a different email template if they want.



For representatives to use this feature, administrators must do the following:

1. Turn on the feature.
2. Create email templates in the application, because Copilot can recommend existing templates only.

Fallback behavior: If no email template is identified, then the email draft is created using existing inline email assist capabilties.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use Copilot to draft an email (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 11/18/2025

View the enhanced user experience for Copilot summaries

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ May 9, 2025

Business value

Case summaries and custom record summaries help users get up to speed with their cases or other records. This benefit drives efficiencies for customer service representatives across their workflows. By being available in a new user interface at the top of the form, all users can easily access these features. The functionality and behavior of the summaries stay the same. Users of any model-driven app that uses the incident entity, except for Copilot Service Workspace and Copilot Service Hub, get this feature by default.

Feature details

As part of this update, the Case Summary and Custom Record Summary features in Dynamics 365 Customer Service appear at the top of the form. You don't need to configure a custom control to enable the feature. Also, the case summary feature is enabled by default for any users of any model-driven app that uses the incident entity. This change applies to all forms except four out-of-the-box forms: **Case for Interactive experience**, **Enhanced full case form**, **Case**, and **Case for Multisession experience**.

This change doesn't affect the summarization feature. For example, the following actions are still available:

- Render the summary by selecting the generate button after you open the form.
- Copy the summary after it's generated.
- Give thumbs-up or thumbs-down feedback on the generated summary. Support representatives can also give verbatim feedback if they select thumbs-down.
- Store the usage data in Dataverse so customers can access it.
- Regenerate the summary.

Auto-enable Case Summarization guidelines

- If you enable a case summary on one of the four default forms, the summary doesn't change, and it stays in the same place on the form.
- If you don't enable a case summary on one of the four default forms, the feature auto-enables the case summary, and the summary shows up in the form.
- If you enable a case summary on a form other than the four default forms, you might see both the old and new experiences. To make sure the transition goes smoothly, admins disable the custom summarization UI control before this change happens.

The feature doesn't automatically turn on case summary for organizations that opt out of auto-enablement of Copilot features.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Understand auto-enabled Copilot summaries (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Service representative experiences

08/14/2025

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Create personalized case views in the inbox

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Apr 7, 2025

Business value

When service representatives personalize case views, they create case views that work best for them in the inbox. With these customized case views, service representatives can boost their productivity and organize their work more efficiently.

Feature details

When you use personalized case views, your service representatives can create inbox case views that help them organize their work in the way that works best for them.

Personalized case views include the following steps:

1. Admins create personal views on a grid page for the case entity.
2. Service representatives add the personal views to the inbox from the case grid.
3. Service representatives see the personal views in the inbox.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Configure custom views for the inbox (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Enable customers to create multisession apps

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Apr 30, 2025	-	✔ Oct 31, 2025

Business value

Customers work in many different lines of business, and each line of business needs its own application. With separate applications for each line of business, customers can create unique experiences for different business segments. When you enable the multisession functionality for representatives who use custom model-driven apps, you give organizations the ability to create multiple specialized workspace applications that fit their specific business requirements. By bringing this browser-like experience to custom apps, organizations keep their unique business processes while giving agents the efficiency benefits of concurrent session management.

Feature details

When you use the create multisession apps enhancement, administrators can turn on multisession capabilities for custom model-driven applications. With this feature, customer service representatives can manage multiple customer interactions at the same time within a single application. Representatives can handle several cases, conversations, and other activities without switching between apps. This capability greatly improves productivity.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Last updated on 11/05/2025

Increase user productivity with new modern rich text editor

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	-	✔ May 2, 2025

Business value

The new modern rich text editor gives you a fresh look and customization options to help your users work more efficiently and productively. With feature enhancements such as a modern design, dark mode, high-contrast themes, and Copilot capabilities, users can improve their text editing capabilities. The modern rich text editor aligns with the intuitive user interfaces that users know from Microsoft Office 365 products, including Outlook, Word, and OneNote. Additionally, users can customize the modern rich text editor to fit their needs.

Feature details

The new modern rich text editor provides improved functionality and customizations. It aligns with the familiar and intuitive interfaces of Microsoft applications such as Outlook, Word, and OneNote. This new text editor uses a modern design, dark mode, high contrast themes, and Copilot functionality to enhance your text editing capabilities. Users and organizations can customize the new modern experience to fit their specific needs.

You can add the modern rich text editor to a model-driven app or use it in Dynamics 365 apps. It's on by default and doesn't require admin configuration. However, to use the modern rich text editor, you must enable it in Power Apps if you're currently using the classic experience.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Add the rich text editor control to a model-driven app (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Monitor customer wait time through live conversation counter

10/02/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ May 30, 2025

Business value

Customer service representatives need to track the elapsed time since they last helped the customer to meet business service-level agreements (SLAs). Timely responses boost customer satisfaction. When customer satisfaction is high, businesses maintain or grow revenue through brand loyalty.

Feature details

Here are the key details of the feature.

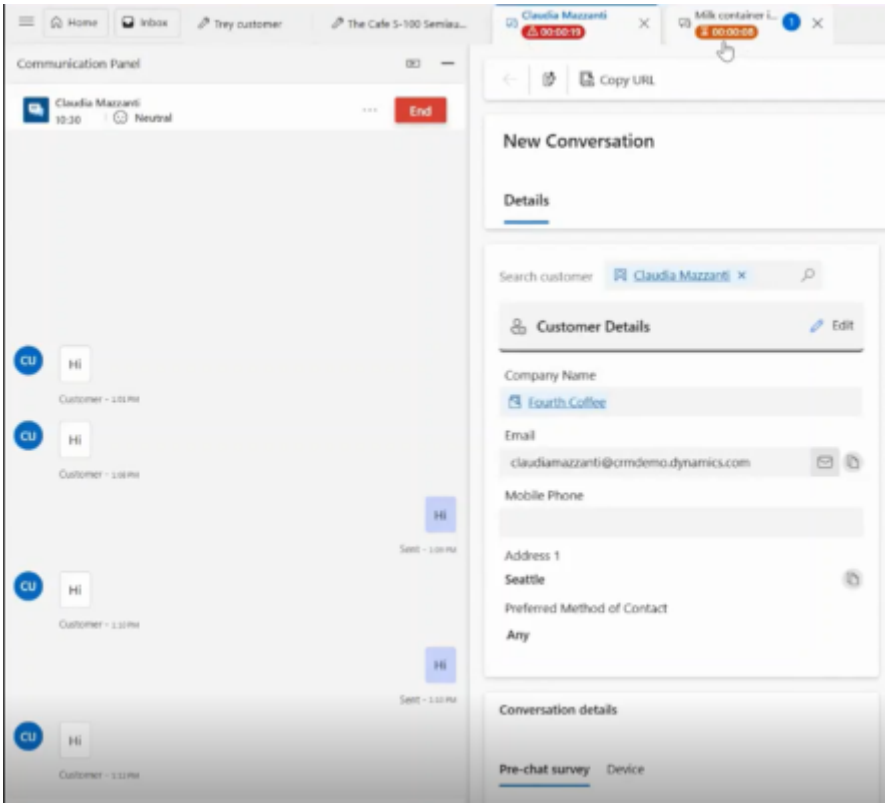
Customer service representatives:

- The SLAs that service representatives see come from response time standards that the business agrees on to address customer inquiries.
- Service representatives can see the SLA counter on the multisesion bar for live chat workstreams and channels.
- Service representatives can see a counter for each session or conversation.
- Each SLA counter increments based on the time that passes since the representative last responded, as long as the customer's message is the most recent message.
- If the representative responds, the counter resets itself and restarts only when the customer responds to the respective message.

Administrators:

- Administrators set the SLAs through the Urgent and Warning states.
- The Warning state shows that the SLA is getting close, and the Urgent state shows that the SLA passed.
- Configure these states in the Customer Service admin center by going to **Workstream** > **Specific workstream** > **Show advanced settings** > **Live conversation counter for**

customer wait time.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Configure live conversation counter to view customer wait time (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Search for user experience profile assignments

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Apr 30, 2025

Business value

With this enhancement, administrators can quickly find and verify user experience profile assignments in the Copilot Service admin center (CSAC) through a new search feature. By removing the need to manually search through multiple interfaces or records, this feature streamlines administrative workflows, reduces troubleshooting time, and enables more efficient user management. This search capability helps administrators quickly make sure that the right users have the correct profile assignments.

Feature details

Administrators can use new search functionality in the Copilot Service admin center to quickly find and verify user experience profile assignments. This capability shows how specific users get experience profiles in Dynamics 365 Customer Service and Dynamics 365 Contact Center. You see if the assignment is direct, default, rule-based, or rank-based. By removing the need to manually search through multiple interfaces or records, this feature streamlines administrative workflows, reduces troubleshooting time, and enables more efficient user management.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Search for users (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use Execute JavaScript macro to create your own custom macros

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2025	-	-

Business value

This feature addresses a critical extensibility gap for Unified Service Desk customers migrating to a Customer Service workspace by introducing custom macros with JavaScript execution capabilities. By enabling administrators to integrate third-party applications and create specialized actions through JavaScript files stored as Dataverse web resources, organizations can maintain their existing workflows and investments in external tools. This enhancement eliminates barriers to Customer Service workspace adoption. It reduces migration friction, preserves customized business processes, and lets customer service representatives work efficiently within a single interface.

Feature details

With this enhancement, administrators can extend the Customer Service workspace functionality through a new **Execute JavaScript** macro action type (Custom Macros). This enhancement addresses a critical gap for Unified Service Desk customers who rely on third-party integrations.

By uploading JavaScript files as Dataverse web resources, organizations can create specialized actions that go beyond the standard offerings. The addition of parameter customization provides extra flexibility for complex scenarios. With this enhancement, businesses can keep their existing workflows and investments in external tools while transitioning to a Customer Service workspace.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Execute JavaScript (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use the modernized and refreshed Copilot Service workspace app

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	-	✔ Apr 30, 2025

Business value

The new Fluent 2 design theme in Copilot Service enhances the user experience. This implementation ensures branding consistency. It also provides a modernized look and feel.

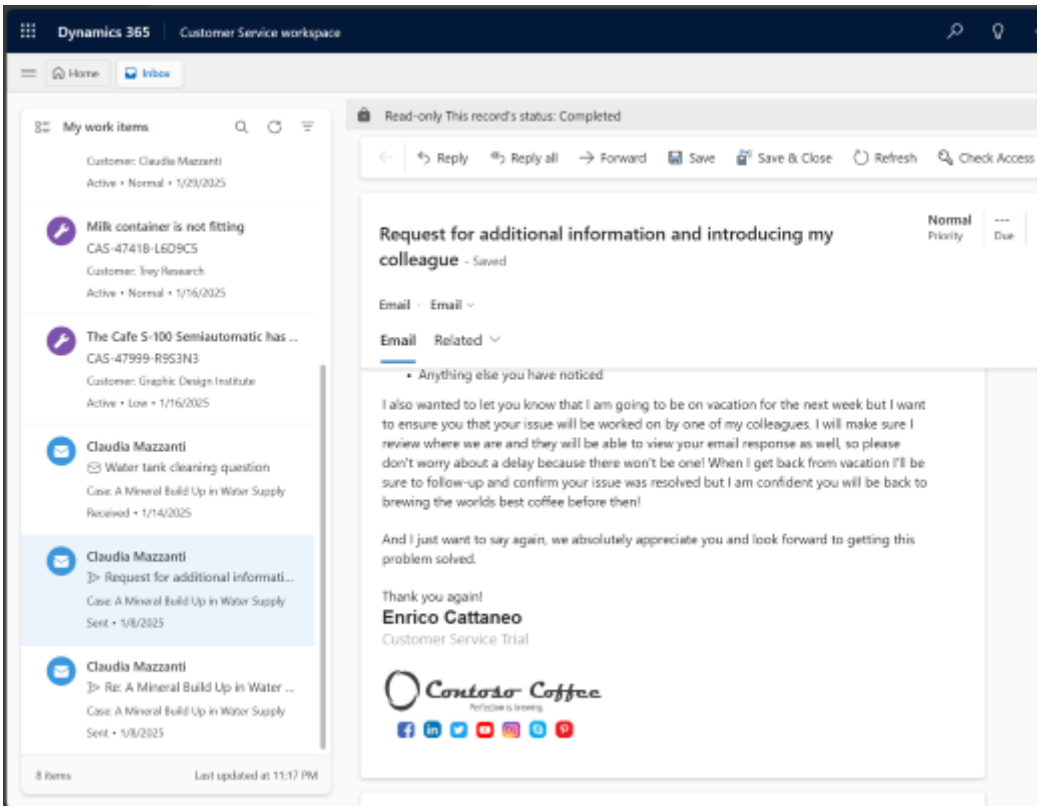
Feature details

The Copilot Service workspace application has a modern, more visually appealing user interface.

The new functionalities of the workspace enhance usability. They make the product easier to navigate and more intuitive for users.

Some changes from the modernization include the following features:

- Customer service representatives benefit from an improved look and feel of the Copilot **ask-a-question** feature in the Copilot Service workspace and Dynamics 365 Contact Center apps. Updates include a larger message input field and relocated icons.
- The inbox has a new island-type user interface with rounded edges to give it a modern look and feel.
- Service representative scripts in the productivity tools feature updated states, icons, and components to enhance the visual appeal and provide a more delightful user experience.
- The timeline is a pivotal control that needs a modernized look to meet the evolving needs of users. A modernized user interface in Dynamics 365 improves efficiency, visibility, and user satisfaction by providing a faster, cleaner, and more interactive experience.
- Voice controls have a refreshed look that makes it easier for service representatives to navigate controls with efficiency. The new, modern user interface is available for both inbound and outbound calls. It provides a better experience and makes the controls easier to use.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Get started with Copilot Service workspace (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Supervisor experiences

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 supervisor experience is designed for customer service managers and analysts. When supervisors have access to key operational metrics, they can continuously monitor contact center operations and make course corrections. For example, supervisors can step in when customer sentiment turns negative. They can also improve service representative staffing to optimize productivity and keep service levels high.

Supervisors can use the extensibility feature to customize data models. By adding extra metrics and reporting on custom entities, they make the contact center more efficient.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Use the new email editor for a streamlined, feature-rich experience

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ May 23, 2025

Business value

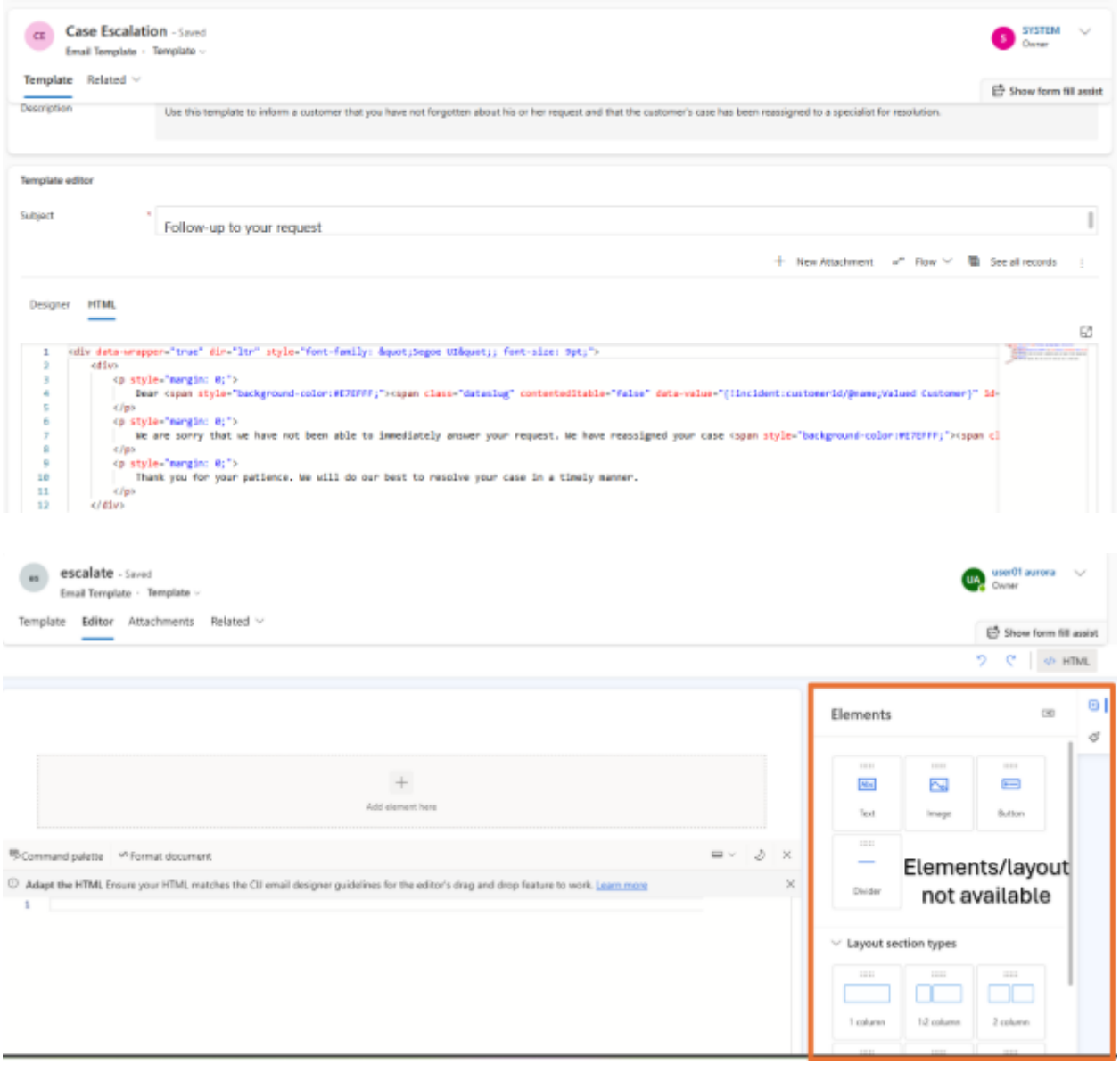
This update moves users to the new, modernized email template editor. Simplify the user experience by consolidating two editors into one. The modern email template editor delivers a more streamlined user experience with a feature-rich email template editing experience. It eliminates inconsistencies between versions.

Feature details

The enhanced email template rich text editor is now a modern rich text editor.

This automatic update brings the following benefits:

- **Unified editing experience**: You create and manage all templates with one modern rich text email template editor. You no longer need to switch between different editors.
- **HTML support for customization**: The new editor supports HTML editing. You have the flexibility to design custom layouts, apply consistent branding, and style your content exactly how you want.
- **Improved reliability**: This unified modern rich text editor removes formatting issues. It offers smoother previews and a more reliable experience during both creation and runtime.
- **HTML replaces drag-and-drop functionality**: The modern rich text editor replaces the drag-and-drop functionality with HTML support. This functionality ensures continuity.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Email editor template changes in Dynamics 365 Customer Service (blog)

Create email templates (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 11/18/2025

Unified routing

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has 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 intelligent routing service in Customer Service uses a combination of AI models and rules to assign incoming service requests from all channels—case, record, chat, digital messaging, and voice—to the best-suited service representatives. The assignment rules take customer-specified criteria into account, such as priority and skills. The routing service uses AI to automatically classify, route, and assign work items. By eliminating the need for constant queue supervision and manual work distribution, the routing service offers operational efficiencies for organizations. Features like percent-based routing, overflow management, and routing to preferred service representatives help optimize the routing of work items to the best-suited service representatives.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Maintain routing rules in bulk

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Apr 18, 2025

Business value

Often, businesses need common rules across different lines of business, queues, and workstreams. To set up these common rules, administrators go through each queue, manually creating a ruleset and adding rules. Repeating this step for each queue, which can include hundreds of queues, takes hours. Using a template for the ruleset simplifies this process. With a template, administrators create templates for common routing rulesets and apply them to queues and workstreams, so they save hours of work.

Feature details

Create templated rulesets for routing configurations, such as prioritization, assignment, and work classification rulesets. When you create prioritization, assignment, and work classification rulesets in a queue or workstream, apply these ruleset templates. Administrators can manage templated ruleset configurations globally from one location and publish updates to all queues and workstreams where the ruleset is applied.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Manage template rulesets (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use shift bookings to assign records to representatives

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ May 30, 2025

Business value

Unified routing uses dynamic bookings that change frequently, so it assigns tasks to service representatives only when they're available. With unified routing, the routing system follows the workforce management schedules. This system boosts productivity and satisfaction because representatives don't miss breaks or get interrupted during training. It also ensures that SLAs are honored, which leads to higher customer satisfaction.

Feature details

This feature offers the following capabilities:

- Administrators can turn on unified routing to support record assignment based on shift bookings that agents create in Dynamics 365 or import from non-Microsoft workforce management solutions.
- Service representatives get assigned tasks only for the time periods when they're scheduled for **working** type bookings. They don't receive assignments during breaks and training sessions. They don't need to manually reset their presence to avoid assignments.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Configure shift-based routing for work items (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Plan and prepare for Dynamics 365 Contact Center in 2025 release wave 1

09/11/2025

> **Important**
>
> The 2025 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2025 to September 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/2025W1/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 preferred channel, deliver effortless self-service to improve containment powered by generative AI, accelerate assisted service with embedded Copilot capabilities, and enable smoother operations for supervisors through a 360-degree view of each customer.

For 2025 release wave 1, we're focused on progressing our agentic, omnichannel, self-service, and extensibility capabilities.

Updates to Dynamics 365 Contact Center 2025 release wave 1

Investment areas



Copilot and AI innovation

Copilot transforms the service experience with generative AI. Service representatives 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 gathers knowledge from internal and external sources to draft contextual answers to questions in email and chat conversations. Service representatives can ask Copilot questions as they research a case and can use Copilot to generate case and conversation summaries in a single click.

Extensibility

To reach more customers, use extensibility to integrate the features in Dynamics 365 Contact Center with non-Microsoft CRM solutions through client-side and server-side integrations. Interoperability helps businesses adopt new offerings without disrupting their existing setups.

IVR capabilities

Conversational IVRs (interactive voice responses) enable enterprises to increase containment, improve customer satisfaction, and reduce costs by letting customers self-serve using their voice. Microsoft Copilot Studio powers Dynamics 365 Contact Center IVRs.

Omnichannel customer experiences

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

Service representative experiences

The service representative experience is at the heart of Dynamics 365 Contact Center. When service representatives feel confident, customer satisfaction improves. Dynamics 365 Contact Center gives service representatives a powerful desktop with infused generative AI, seamless collaboration capabilities, and productivity tools in a customizable workspace. Its features boost the effectiveness of service representatives, enabling them to deliver personalized customer experiences across any channel.

Teams integration

Use Dynamics 365 Contact Center and Microsoft Teams together to provide your service representatives and customers with a cohesive environment where they can seamlessly collaborate with each other.

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 service representatives. 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. It eliminates the need for constant queue supervision and manual work distribution, so organizations gain operational efficiencies. Features like percent-based routing, overflow management, and routing to preferred service representatives help optimize the routing of work items to the best-suited service representatives.

Workforce engagement management
Workforce engagement management (WEM) is a comprehensive approach to managing and optimizing employee performance, engagement, and productivity in customer service and contact center environments. WEM typically includes tools and practices that focus on:

- **Scheduling and forecasting**: Ensuring that the right number of service representatives are available at the right times to meet service demand, while avoiding overstaffing or understaffing.
- **Performance management**: Setting performance metrics, tracking service representative productivity, and providing feedback to improve service quality.
- **Quality management**: Monitoring and assessing interactions to maintain high service standards and compliance.
- **Employee engagement**: Encouraging service representative engagement through feedback, recognition, and tools that help service representatives understand their impact on business goals.
- **Training and development**: Providing targeted training resources to improve skills, address performance gaps, and support career development.

WEM enhances customer experiences, optimizes workforce efficiency, and increases service representative satisfaction. This approach improves overall service effectiveness.

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 Contact Center

Expand table

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

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

What's new and planned for Dynamics 365 Contact Center

This topic lists features that are planned to release from April 2025 through September 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 2 plan.
- For a list of the next wave's release plans, go to 2025 release wave 2 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

Copilot in Dynamics 365 Contact Center consists of generative AI capabilities that expedite resolutions of customer issues and increase customer satisfaction.

Expand table

Feature	Enabled for	Public preview	General availability
Promote intents for self-service in semi- or fully automated manner	Users by admins, makers, or analysts	✅ Jul 31, 2025	✅ Oct 31, 2025
Update knowledge base with Customer Knowledge Management Agent	Users by admins, makers, or analysts	✅ Jul 31, 2025	✅ Oct 31, 2025
Automate voice calls with Customer Intent Agent in voice	Users by admins, makers, or analysts	✅ Aug 8, 2025	✅ Nov 17, 2025
Resolve issues autonomously with Customer Intent Agent	Users by admins, makers, or analysts	✅ Jul 31, 2025	Nov 2025

Extensibility

Use extensibility to connect Dynamics 365 Contact Center with other CRM solutions.

Expand table

Feature	Enabled for	Public preview	General availability
Use messaging APIs to manage customer chat conversations	Users by admins, makers, or analysts	✔ Sep 15, 2025	Dec 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
Edit business rules for omnichannel AI agents	Users by admins, makers, or analysts	-	✔ Apr 30, 2025
Use constrained grammars for speech recognition	Users, automatically	-	✔ Sep 30, 2025
Recognize one of multiple entities in a single utterance	Users, automatically	-	✔ Jun 6, 2025

Omnichannel customer experiences

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

Expand table

Feature	Enabled for	Public preview	General availability
Support WhatsApp through Azure Communication Services	Users by admins, makers, or analysts	✔ Aug 30, 2024	✔ Apr 1, 2025
Monitor work item, representative lifecycle in Application Insights	Users by admins, makers, or analysts	✔ Feb 10, 2025	✔ Sep 19, 2025
Use AI summary for call quality management	Users, automatically	-	✔ Apr 17, 2025

Feature	Enabled for	Public preview	General availability
Add messaging to native mobile apps	Users by admins, makers, or analysts	-	✔ Jul 31, 2025
Use time-out rules for automated actions to meet SLAs	Users by admins, makers, or analysts	-	✔ Apr 30, 2025
Use Azure Communication Services-based SMS mobile numbers	Users by admins, makers, or analysts	-	✔ Aug 1, 2025
Upload phone numbers in bulk for direct routing	Admins, makers, marketers, or analysts, automatically	-	✔ May 30, 2025
Use custom NLU Plus models with AI agents	Users by admins, makers, or analysts	-	✔ Jul 8, 2025
Deploy chat widgets across portals using a single tag	Users by admins, makers, or analysts	-	✔ Apr 30, 2025
Use enhanced sessions and live conversation details	Users, automatically	-	✔ Apr 30, 2025
Use API to pause and resume recording, transcription	Users, automatically	-	✔ Jun 30, 2025

Service representative experiences

Enable service representatives 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
Place a consulting representative on hold in a call	Users, automatically	✔ Sep 26, 2025	Jan 2026
Use optimized setting to update presence	Users, automatically	✔ Aug 15, 2025	✔ Oct 31, 2025
Use Copilot Studio agents to get customer feedback	Users by admins, makers, or analysts	✔ Nov 18, 2024	✔ Apr 30, 2025
Use Desktop companion application	Users by admins, makers, or analysts	✔ Apr 1, 2025	✔ Jul 1, 2025

Feature	Enabled for	Public preview	General availability
Use disposition codes in voice and chat conversations	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Use improved outbound dialing with reduced latency	Users, automatically	-	✔ May 31, 2025
Use the optimized option to update presence	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Search for phone numbers in Copilot Service admin center	Admins, makers, marketers, or analysts, automatically	-	✔ Jul 31, 2025
Use enhanced disposition code capabilities	Users by admins, makers, or analysts	-	✔ Aug 8, 2025

Teams integration

Provide your service representatives with seamless integrations between Dynamics 365 and Microsoft Teams.

Expand table

Feature	Enabled for	Public preview	General availability
Use Microsoft Teams phone in Dynamics 365 Contact Center	Admins, makers, marketers, or analysts, automatically	✔ Apr 30, 2025	✔ Sep 2, 2025

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
Route to least active representatives in messaging channels	Users by admins, makers, or analysts	-	✔ Apr 30, 2025
Enable direct transfer of	Users by admins, makers, or	-	✔ Jul 31, 2025

Feature	Enabled for	Public preview	General availability
conversations	analysts		
Set timer to wrap up conversations in seconds	Users by admins, makers, or analysts	-	✔ Aug 30, 2025
Manage routing rules in bulk	Admins, makers, marketers, or analysts, automatically	-	✔ Apr 18, 2025
Use shift bookings to assign conversations	Users by admins, makers, or analysts	-	✔ May 30, 2025

Workforce engagement management

The Microsoft WEM solution optimizes employee scheduling, performance, and engagement in customer service to enhance efficiency, service quality, and service representative satisfaction.

Expand table

Feature	Enabled for	Public preview	General availability
Use capacity planning to predict your staffing needs	Users by admins, makers, or analysts	-	✔ May 2, 2025
Create and manage shift plans for effective staffing and service coverage	Users by admins, makers, or analysts	-	✔ May 2, 2025
Use automated and manual scheduling to manage shift plans	Users by admins, makers, or analysts	-	✔ May 2, 2025
View and manage shift schedules with My Schedule calendar	Users by admins, makers, or analysts	-	✔ May 2, 2025
Manage time-off requests	Users by admins, makers, or analysts	-	✔ May 2, 2025
Shift swapping for customer service representatives	Users by admins, makers, or analysts	-	✔ May 2, 2025
Shift bidding for customer service representatives	Users by admins, makers, or analysts	-	✔ May 2, 2025
Real-time adherence monitoring for service representatives	Users by admins, makers, or analysts	-	✔ May 2, 2025
Create and analyze forecast scenarios for case	Users by admins,	-	✔ May 2, 2025

Feature	Enabled for	Public preview	General availability
and conversation volumes	makers, or analysts		

* You are able to opt into some features as part of early access on February 3, 2025, 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 information on data residency in Dynamics 365 and Power Platform, visit the Microsoft Dynamics 365 and Power Platform data residency documentation. For more information about geo availability, visit the Dynamics 365 and Microsoft Power Platform availability page.

Last updated on 12/02/2025

Copilot and AI innovation

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 service experience with generative AI. Service representatives 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 gathers knowledge from internal and external sources to draft contextual answers to questions in email and chat conversations. Service representatives can ask Copilot questions as they research a case and can use Copilot to generate case and conversation summaries in a single click.

Note: The author created this article with assistance from AI. Learn more

Automate voice calls with Customer Intent Agent in voice

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 8, 2025	✔ Nov 17, 2025

Business value

Customer Intent Agent in voice provides a highly personalized engagement, leading to improved self-service and reduced operational costs. It's significantly easier to configure, enable, and maintain than traditional static flow IVRs, saving business costs and allowing more rapid deployment of new voice call experiences.

Feature details

Customer Intent Agent in voice transforms the contact center by using agentic AI to automate customer interactions on the voice channel with natural human-like conversation and accurate identification of caller intent. The notable capabilities of the AI agent are as follows:

- Can navigate call conversations naturally and escalate to a service representative as needed.
- Can converse to accurately identify the customer issue, gather the information needed from the customer, and offer suggestions and solutions.

Customer Intent Agent in voice is powered by knowledge of the business, customers, and their conversations through the Dynamics 365 intent core services. In the future, Contact Center admins can use the intent core settings to configure this AI agent's settings.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

How voice agent uses intent (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 12/04/2025

Promote intents for self-service in semi- or fully automated manner

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 31, 2025	✔ Oct 31, 2025

Business value

Currently, intent promotion is a manual process that requires human validation before an intent can move from assisted service to self-service mode. The enhanced approach introduces automation to reduce operational overhead and accelerate intent use in self-serve modes by allowing admins to define when intents can promote. This feature saves time and resources by increasing automation or assisting admins in making faster decisions, which increases the efficiency of intent promotion. With this approach, businesses can operate more smoothly and focus on higher-value tasks.

Feature details

Administrators can enable auto-promotion of intents at the line of business or intent group level by selecting semi-autonomous or fully autonomous promotion mode. Some of the key features are:

- **Increase automation**: Reduce the need for human intervention in intent promotion.
- **Improve accuracy and trust**: Make sure that only high-confidence, low-risk intents are promoted automatically by using robust validation mechanisms to prevent erroneous promotions.
- **Enhance administrator control and flexibility**: Allow administrators to configure self-promotion settings at various levels and provide override mechanisms.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Note: The author created this article with assistance from AI. Learn more

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Last updated on 11/18/2025

Resolve issues autonomously with Customer Intent Agent

10/09/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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, 2025	Nov 2025

Business value

By automating complex support interactions across voice, chat, and email, this feature reduces support staffing costs by increasing the number of interactions that resolve autonomously. It boosts customer satisfaction scores and reduces average handling time through faster, personalized resolutions without human interaction.

Feature details

Enablement and scope

- Available in Dynamics 365 Contact Center. Customer Intent Agent is part of the autonomous service agents suite and uses a consumption-based billing model on top of your base license for Dynamics 365 Contact Center.
- When the administrator turns on the feature in the Copilot Service admin center, Customer Intent Agent analyzes your existing support conversations and cases to automatically build an intent library.
- After the agent discovers intents, you can create a Customer Intent Agent in Copilot Studio. It uses your intent library to ask follow-up questions, provide knowledge articles, or take actions to resolve customer issues end to end.

Enhancements

- **Intent discovery customization**: Customize intent discovery by supplying sample utterances, specifying key entities, and defining inclusion criteria to make sure intents align with your business needs.
- **Hierarchical playbooks and orchestration**: Tailor agent behavior for each intent by using natural language playbooks with no coding required. These playbooks support nested sub-intents and conditional logic for complex workflows.
- **Expanded channel and escalation support**: Support both digital and voice channels through Azure Communication Services. The agent automatically escalates to the Case Management Agent for structured email follow-up when needed.
- **Action support via custom connectors**: Run support actions, such as triggering refunds, updating order statuses, querying inventory systems, and automating non-Microsoft workflows through configurable connectors.
- **Quality and monitoring enhancements**: Real-time dashboards highlight KPI deviations and provide intent-level metrics. These features enable targeted adjustments and continuous optimization of agent performance.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Automate intent discovery and resolution with Customer Intent Agent (blog)

Manage Customer Intent Agent (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Update knowledge base with Customer Knowledge Management Agent

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 31, 2025	✔ Oct 31, 2025

Business value

Customer Knowledge Management Agent automatically turns untapped case and case-related conversation data into knowledge that supports your contact center. It harvests knowledge from cases in real time as customer service representatives close them, helping you respond to emerging issues in minutes. No more waiting weeks and months for long knowledge lifecycles.

With historical article creation, you can quickly turn your historical case data including conversations, emails, case notes, and other details into ready-to-use knowledge articles.

Actionable knowledge insights let supervisors and content managers monitor Customer Knowledge Management Agent and track how Copilot uses knowledge. Tailored analytics help you improve the quality and relevance of knowledge articles, resulting in more accurate Copilot guidance. This boosts productivity and decision-making accuracy, leading to better user satisfaction and operational efficiency.

Feature details

With real-time creation, Customer Knowledge Management Agent analyzes cases and related notes, conversations, and emails the moment representatives close the case. It drafts knowledge articles that fill knowledge gaps and help your organization respond to emerging issues in minutes. The agent compares case content against your Dynamics 365 knowledge base to determine if a new article is needed while ensuring content isn't duplicated. It can even update existing knowledge articles. It ensures compliance by scrubbing sensitive data and can be extended with custom automated compliance checks from your organization.

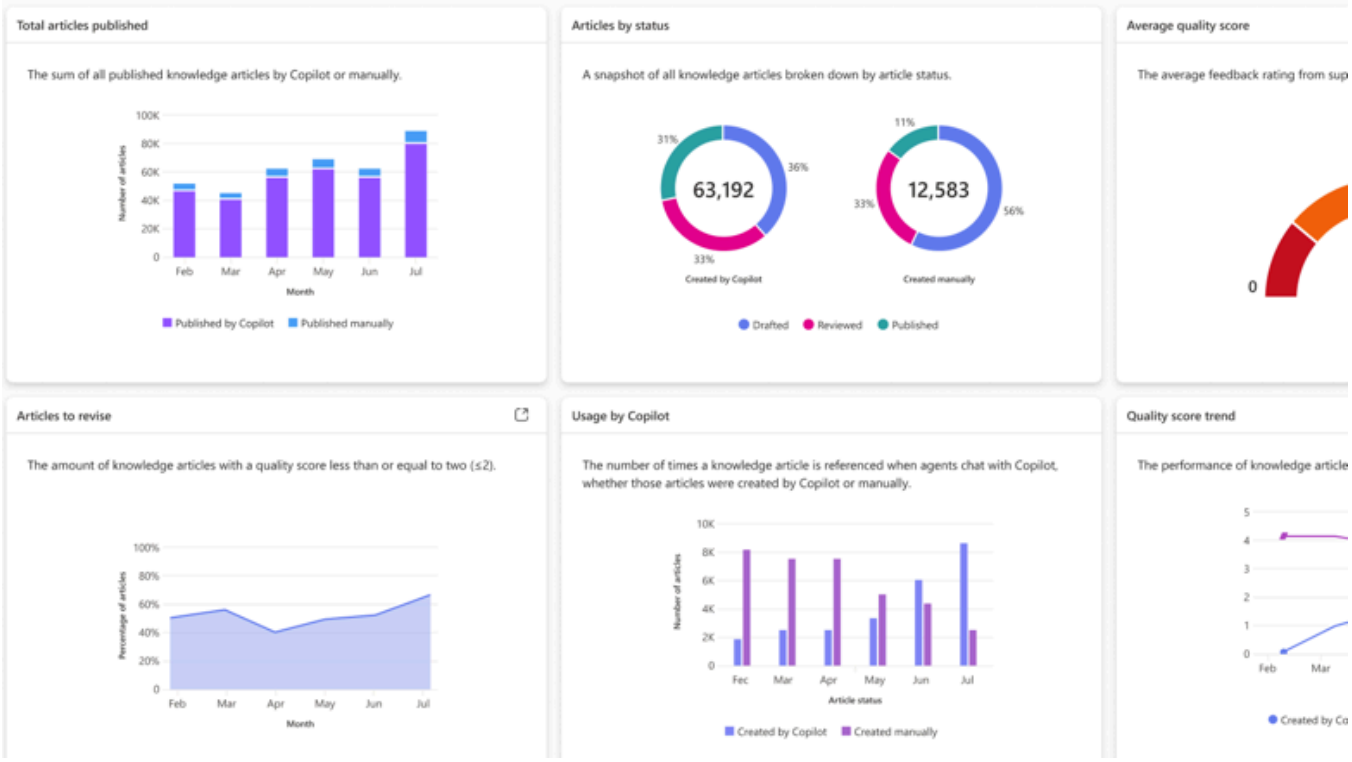
If configured to do so, the agent can automatically publish articles and make them accessible to representatives, Copilot, and self-service portals. Supervisors can review, edit, and monitor Customer Knowledge Management Agent's work.

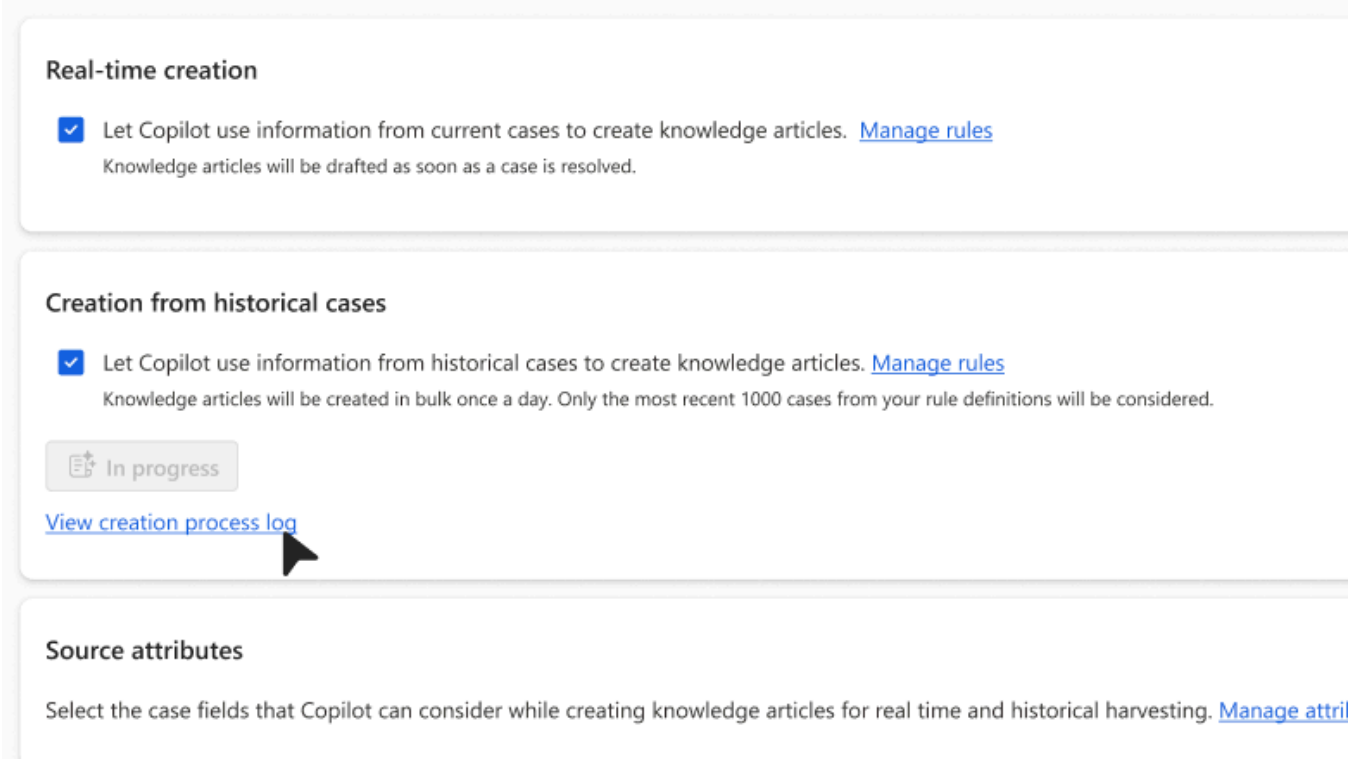
Historical creation helps you unlock knowledge from historical cases, turning raw case data into ready-to-publish knowledge articles while preventing duplication, ensuring compliance, and

giving supervisors tools to monitor Customer Knowledge Management Agent's work.

Knowledge insights help supervisors assess and confirm Customer Knowledge Management Agent's ability to create reliable content for internal and external use. Supervisors can take quick actions to drive measurable knowledge repository improvements that lead to optimal Copilot experiences.

This feature is automatically available to supervisors using Customer Knowledge Management Agent. Based on your autonomous-level preference (semi-autonomous or fully autonomous), supervisors see a dashboard highlighting performance from draft creation to publishing and articles' usage by Copilot. Supervisors are guided to articles that require review and are approaching expiration, so they can act on high-priority articles in a timely manner.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Manage Customer Knowledge Management Agent (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 11/18/2025

Extensibility

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 reach more customers, use extensibility to integrate the features in Dynamics 365 Contact Center with non-Microsoft CRM solutions through client-side and server-side integrations. Interoperability helps businesses adopt new offerings without disrupting their existing setups.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Use messaging APIs to manage customer chat conversations

> **Important**
>
> **Some of the functionality described in this release plan has 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 15, 2025	Dec 2025

Business value

Dynamics 365 Contact Center messaging APIs support service-to-service integrations, so you have full control over your customer experience. The APIs are especially useful for business scenarios that traditional integration methods can't solve. When you use messaging APIs, you don't need client-side libraries, SDKs, or connections from client-side devices. This approach works well when you want to bring your own managed communication channel.

Feature details

Messaging APIs provide a set of RESTful interfaces that you can use to control and manage customer conversations programmatically. With these APIs, you can start and end conversations and handle various customer interactions within a session.

A webhook subscription lets your services receive real-time updates about conversation events. For example, you can get notifications when an agent sends a message, when a system message is generated, or when an agent closes the conversation.

Key features of messaging APIs include:

- Starting a conversation with an authentication token and options for persistent conversations and context variables.
- Sending customer messages, including attachments and updates to context variables.
- Receiving agent or system messages through webhook subscriptions.

- Checking agent availability in a queue and retrieving queue position and estimated wait time.

Use messaging APIs when you need full control over the customer experience. They support extensive customization and work well in environments with strict network and data policies, such as closed network deployments.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Overview of messaging APIs (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 12/04/2025

IVR capabilities

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Conversational IVRs (interactive voice responses) enable enterprises to increase containment, improve customer satisfaction, and reduce costs by letting customers self-serve using their voice. Microsoft Copilot Studio powers Dynamics 365 Contact Center IVRs.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Edit business rules for omnichannel AI agents

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 30, 2025

Business value

When business administrators use Power Apps to build and configure rules for a voice agent (IVR), they can dynamically change the call flow without changing the Copilot logic. This approach saves a significant amount of time by removing the need for testing and deployment cycles within Microsoft Copilot Studio.

This feature is especially useful for enterprises that need to quickly respond to environmental factors like natural disasters or power outages, as well as financial shifts such as market fluctuations or policy changes. It gives administrators the power to make decisive actions in different situations, keeping business operations running smoothly and maintaining customer satisfaction.

Feature details

With Power Apps, enterprise customers can use Dataverse tables to set up dynamic key values for their Copilot applications. Examples of these key values include store locations, transfer numbers, broadcast messages, and lines of business. By managing these AI agent rules, business administrators can improve operational agility and quickly adjust the voice agents (IVR) flow to meet their business needs. Using Power Apps removes the need to directly change the agent's logic, saving time on standard testing and deployment procedures.

Customers can connect Power Apps 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.

When you set up the customer's application, business administrators can directly add, update, and delete key data values. They can also publish these changes to the live Copilot

environment without any hassle. The data associated with the Copilot is cached, so users experience no latency or disruptions.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Design a Copilot Studio voice agent rule manager for real-time changes to Dynamics 365 Contact Center IVR (learn)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Recognize one of multiple entities in a single utterance

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Jun 6, 2025

Business value

Voice agents today can only recognize one entity per question. Often, scenarios require flexibility in choice. For example, performing non-biometric validation using account details (such as an account number) or personal details (last four digits of a Social Security number) as inputs. This flexibility reduces customer frustration and abandonment while decreasing average handle time and agent escalations. The result is higher customer satisfaction, lower interaction costs, and improved operational efficiency through more adaptive, customer-centric self-service experiences.

Feature details

Multi Entity Identification allows agent designers to attach more than one entity for recognition onto a question node in Copilot Studio, providing additional flexibility for customer self-service and leading to higher containment rates. This capability improves customer self-service by recognizing one of several valid inputs provided by a user, such as an account number or partial social security number. It also enables AI agents to offer alternatives when users do not have specific information, avoiding immediate escalation and enabling fallback options like additional questions or logic branches.

During runtime, if multiple entities are attached to a question node, the agent attempts to match the user's input to one of them, whether by voice or text. If multiple entities are detected, the agent matches only the first entity in the list. Designers should ensure prompt wording and follow-up logic account for this behavior. If no match is found, the agent follows the configured re-prompt treatment in the question node.

On the Copilot Studio authoring canvas, designers must perform the following steps:

1. Define and create the entities to capture.
2. Create a question node and craft the prompt to the user.

3. On the question node:
    a. Under **Identify**, select **One of Multiple Entities**.
    b. Select **+ New Entity** and then select from the Entity picker.
    c. Repeat for all applicable entities.

All responses are saved in a variable of type "record" that can be renamed by the author.

This recognition method identifies only one entity per user utterance. If a user input contains more than one valid entity, only the first entity listed in the configuration is recognized.

For example, a question node uses Multi Entity Identification, where the entities are **Tracking Number** and **Delivery Address**. A user says, "My package to be delivered to One Microsoft Way with the tracking number 7658641290753147". The result is 7658641290753147, as the tracking number is the first entity in the list.

To access specific information from the record object, subvariables are automatically created based on the possible entities captured by the question node and displayed in dot notation, `{recordName}.{entityName}`. This is used to create conditional branches following the Multi Entity Identification step to route the information captured.

We recommend using the **Is (not) Blank** triage option in the conditional nodes to proceed logically based on what information is received by the user at question time.

The following is a list of known limitations for Multi Entity Identification:

- Dual-tone Multi Frequency (DTMF) input for entity identification is not supported in this modality. However, it may exist for the entity on non-Multi Entity Identification-based question nodes based on the type of entity created.
- Currently, a maximum of five entities can be within the recognition pool on any given question.
- No external entity support.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Accept one of multiple entities at a conversation turn (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use constrained grammars for speech recognition

10/16/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Sep 30, 2025

Business value

High containment within self-service channels is essential for organizations, with recognition accuracy being paramount for voice agents. You can achieve higher accuracy by constraining speech recognition through defined rules and parameters, especially when handling alphanumeric input, lists, and predefined option sets. Historically, voice agents have relied heavily on constrained speech. By providing this capability in Copilot Studio, you can preserve your investment in the authoring, tuning, and use of speech grammars while maintaining the high level of accuracy gained through their implementation.

Feature details

For voice agents (IVR) and voice applications, constrained grammar-based recognition delivers better accuracy, performance, and cost than traditional semantic-based speech-to-text (STT) AI engines. The engine processes grammars that follow the Speech Recognition Grammar Specification (SRGS) standard, which are usually written in an XML-based format called GrXML. The engine converts spoken audio (utterances) into text that follows the grammar's rules.

Constrained speech recognition works best for:

- Recognizing constrained lists such as addresses, stock tickers, zip codes, and department names.
- Recognizing alphanumeric strings like tracking numbers, account numbers, and confirmation codes that have positional constraints. For example, the first two characters of a member ID start with "AN", "FD", or "NT". Another example of positional constraints is vehicle identification number.
- Alphanumeric or digit recognition with checksums or similar constraints. For example, credit card numbers with Luhn checksums.
- Directed dialog applications requiring specific words or phrases.

Voice Agent Makers must perform the following steps:

1. Author GrXML grammar files within a rich text editor of choice that adhere to the Speech Recognition Grammar Specification standard.
2. After development, upload the grammar into an Azure Storage account.
3. In Microsoft Copilot Studio, create an external entity and use the URL of the grammar as the entity title.

During runtime, the voice agent loads the grammar, performs the recognition, and returns the required result.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Understand your customers better with constrained speech recognition (blog)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Omnichannel customer experiences

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 omnichannel capabilities in Dynamics 365 Contact Center enable organizations to connect and engage with their customers through channels like live chat, SMS, voice, Microsoft Teams, and social channels. By providing a seamless service representative experience and valuable conversation insights across channels, the omnichannel features enable organizations to deliver a true, all-in-one contact center.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Add messaging to native mobile apps

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Jul 31, 2025

Business value

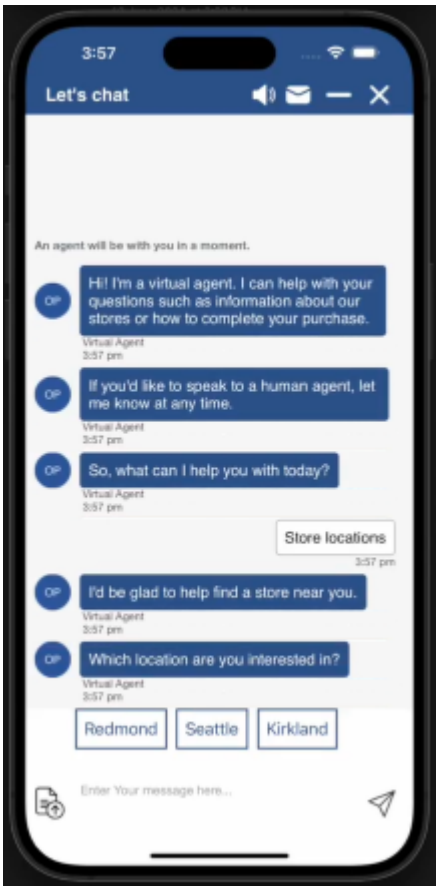
Reach your customers through your branded mobile application with an easy-to-integrate mobile messaging experience.

Feature details

The Native SDKs are native iOS and Android SDKs that enable applications to start, manage, and retrieve customer communications for Dynamics 365 Contact Center. Both SDKs contain two main components:

- A ready-to-brand, fully featured messaging user interface that developers can integrate into their existing application. The included interface is based on the live chat widget so brands can use the same features and customizations as their web program.
- An optional communication layer, containing all the messaging functions necessary to host a conversation that developers can use directly to support a new or existing fully custom messaging interface. Brands that choose to use the included interface don't need to interact with this layer.

You can get the SDKs from public repositories, just like the existing Chat SDK for web. To enable communications through the mobile SDK, an admin creates a new chat workstream in the admin center and references the workstream's ID in the code for the mobile application. We recommend push notifications, for which the admin can also configure Google Firebase and Apple Push Notification accounts in the admin center.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Customize live chat widgets for mobile apps (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Deploy chat widgets across portals using a single tag

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 30, 2025

Business value

The basic method for deploying the live chat widget uses unique script tags for each workstream, supported by customizations defined in JavaScript. While this method gives your site full control over your web engagements, it can be difficult to update and deploy at scale across multiple lines of business, as modification to the program requires web development effort.

Web engagement orchestration addresses this need. It enables a business to deploy a single script tag to all of its pages and then control when and how to engage its customers through business rules configured in the admin center. For a large organization, this solution can potentially save millions in development costs and allows you to expand your messaging program faster and with confidence.

Feature details

The web engagement orchestration has two main components:

- **Single script tag for live chat widget**: Use the new script tag that isn't tied to any workstream but is instead tied to your organization and line of business. You can use this tag on any portal where you want to support messaging.
- **Web engagement rules**: Use the new page in the admin center to configure the chat widget according to your organization's business rules.
  - **Take actions**:
    - Engage customers by displaying a chat button or proactively opening the widget.
    - Set the look and features for the widget.
    - Add custom context to the conversation.
  - **Run rules conditionally**:
    - According to where the customer is in your website.

    - Based on your operating hours.
    - Based on the customer attributes that you provide.
- **Publish with confidence**: Rules that support versioning and publishing.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Deploy chat widgets using a single tag (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Monitor work item, representative lifecycle in Application Insights

09/25/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 10, 2025	✔ Sep 19, 2025

Business value

Today, businesses struggle to swiftly identify and resolve issues that come up during a conversation's lifecycle. Instead, they often must escalate the issue to Microsoft Support, which increases customer pain time. With this feature, businesses can understand where, when, and why issues arise, so they can address them.

Feature details

Organizations can now access diagnostic telemetry for the full lifecycle of a conversation through Application Insights, so they can troubleshoot runtime issues more effectively. This end-to-end data empowers teams to quickly identify problems, apply mitigations, and maintain seamless contact center operations.

Telemetry spans voice, messaging, and record routing channels. The key conversation stages covered are initialization, self-service, routing, representative engagement, and conversation end.

To get started, export Power Platform data to Application Insights. After enabling the feature, telemetry from conversations begins flowing in. Administrators and supervisors can use built-in queries—or craft custom ones—to analyze each conversation stage by filtering with a conversation or correlation ID found in the conversation URL. For every telemetry item, you can pinpoint where failures occurred and understand the reasons why.

If you prefer not to build queries, the out-of-the-box dashboards offer an intuitive path to insights.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Additional resources

Configure conversation diagnostics (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Support WhatsApp through Azure Communication Services

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 30, 2024	✔ Apr 1, 2025

Business value

By offering WhatsApp through Azure Communication Services as a support channel, businesses can give customers more ways to reach them. This option works well for customers who prefer to communicate using WhatsApp.

Feature details

Messaging platforms such as WhatsApp give businesses an opportunity to engage with customers in their own context to provide them with a seamless and personalized customer service experience. The following capabilities are available:

- Administrators can configure the WhatsApp channel powered by Azure Communication Services.
- Customers can reach out to the business through WhatsApp and seek support in an asynchronous manner.
- Agents can use one unified, contextual, and productive interface to engage with customers and resolve their issues.
- Supervisors and managers can access rich reports to run the support center efficiently and effectively.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Configure a WhatsApp channel through Azure Communication Services (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Upload phone numbers in bulk for direct routing

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ May 30, 2025

Business value

By importing your numbers in bulk, you can streamline the onboarding process, reduce administrative onboarding time, and minimize the risk of human errors. You can avoid manually entering one phone number at a time.

Feature details

When you integrate your existing telephony infrastructure with Dynamics 365 Contact Center through Azure Communication Services direct routing, you can bulk import your existing phone numbers. The Copilot Service admin center generates a template based on the data you enter, such as carrier, country, and number type. You can then enter your numbers in the template and upload them in bulk.

After the upload completes, you can view the status of your updated file. When the file processes successfully, the numbers are ready to use and appear on the **Phone Number** page.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use AI summary for call quality management

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 17, 2025

Business value

Service representatives can use AI summaries of closed voice conversations and voicemails to make conversation reviews more efficient.

Feature details

Key capabilities of this feature include:

- Administrators can enable the application to generate a summary of closed conversations and voicemails.
- On the enhanced Closed conversation page, customer service representatives see an AI-powered conversation summary and insights for closed voice conversations and voicemails.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

View call recordings and transcripts (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use API to pause and resume recording, transcription

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Jun 30, 2025

Business value

This solution enhances compliance by preventing the inadvertent recording of sensitive customer information. It addresses regulatory concerns for industries that handle payments and Protected Health Information (PHI). By providing an intuitive mechanism for pausing and resuming recordings, it minimizes operational risks and improves customer trust. The web link integration ensures ease of adoption with minimal workflow disruption. It empowers agents to securely process transactions while maintaining compliance. Ultimately, this feature strengthens customer relationships and mitigates legal and regulatory risks.

Feature details

Many industries, including healthcare and finance, require strict compliance with regulations that protect sensitive customer information, such as payment details and protected health information. Contact centers and customer service operations must ensure that they don't record or transcribe this data while still maintaining seamless customer interactions.

The Pause and Resume Recording and Transcription API enables businesses to temporarily stop and restart call recordings and transcriptions. It provides a compliant and secure way to manage sensitive interactions. This API ensures adherence to industry regulations while preserving customer trust and operational efficiency.

The Pause and Resume Recording and Transcription API provides the following key capabilities:

- **API-based controls**: Programmatically pause and resume call recordings and transcriptions.
- **Web link integration**: Allow agents to manage recording and transcription settings directly within their workflows.
- **Visual notifications**: Provide real-time visual alerts to agents when recording or transcription is paused or resumed.

- **Regulatory compliance**: Support legal and industry requirements for handling sensitive data.
- **Operational efficiency**: Minimize compliance risks without disrupting customer service operations.

By leveraging this API, businesses can ensure secure and compliant interactions, enhance customer trust, and streamline agent workflows, all while mitigating legal and regulatory risks.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use Azure Communication Services-based SMS mobile numbers

09/11/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Aug 1, 2025

Business value

With the support for mobile numbers in SMS in Dynamics 365 Contact Center, businesses can now engage with their customers in the regions or countries of Australia, Belgium, Denmark, Finland, Ireland, Latvia, Netherlands, Poland, Sweden, and United Kingdom. The provisioning and management of the mobile numbers is simplified for organizations because it can be handled within the Azure ecosystem.

Feature details

Administrators can configure the following settings:

- Provision SMS mobile numbers through Azure Communication Services.
- Synchronize the SMS mobile numbers from Azure Communication Services on the **Phone numbers** page in Copilot Service admin center.
- Configure the Azure Communication Services-based SMS mobile numbers in workstreams to send to and receive messages from customers reliably.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Expanding SMS capabilities in Dynamics 365 Contact Center (blog)

Configure Azure Communication Services-based mobile numbers, short code for SMS (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use custom NLU Plus models with AI agents

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Jul 8, 2025

Business value

Enhance containment with accurate intent prediction and information extraction. Use customized Natural Language Understanding (NLU) models tailored to your organization's language, and enjoy faster deployment with minimal training time. Get cost savings by receiving NLU customs support at no extra cost for Dynamics 365 customers. Plus, with seamless integration with Dynamics 365 Contact Center and Copilot Studio, businesses can easily train Copilot agents with custom data, improving customer interactions for a conversational experience.

Feature details

With Copilot Studio, administrators can create custom Natural Language Understanding models to predict the intent for incoming calls and extract critical information. This integration enables developers to upload complex, organization-specific NLU models to ensure the caller's intent is interpreted accurately, reflecting the unique jargon and vocabulary of the business.

The solution enables developers to design a tailored ontology for their domain by defining intents, entities, and the relationships between them through annotated data. Developers can build training sets with annotated samples based on this ontology and use them to train and test their language models.

The solution streamlines the import of large volumes of training data to minimize training time and accelerate the development process. Customers with a Dynamics 365 license get custom NLU support at no extra cost.

After you link your Copilot agent with Dynamics 365 Contact Center, select Microsoft Custom NLU Plus from the **Language Understanding** tab under **Settings** in Copilot Studio. Then, train your Copilot agent using the data you provide to the custom NLU.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Set up IVR agents in the voice channel using Copilot Studio (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use enhanced sessions and live conversation details

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 30, 2025

Business value

Customer service representatives can use the enhanced sessions management and live conversation details in Dynamics 365 Contact Center, an embedded experience, to view their conversations more comprehensively and pick the conversations they want to work on. It also helps service representatives stay fully informed with live details that are attached to the conversation, enabling them to provide better customer assistance.

Feature details

The embedded contact center experience now includes conversation details, sign-out, sessions management, pick mode, and voicemail capabilities. Service representatives can take the following actions in the embedded experience:

- Assign conversations to themselves using the pick mode, adding more work items to their workload, along with sessions management.
- See customer and conversation details when conversing with customers, enabling them to view the holistic picture in real time.
- See voicemail and other async channels.
- Sign out of the embedded app.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use time-out rules for automated actions to meet SLAs

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 30, 2025

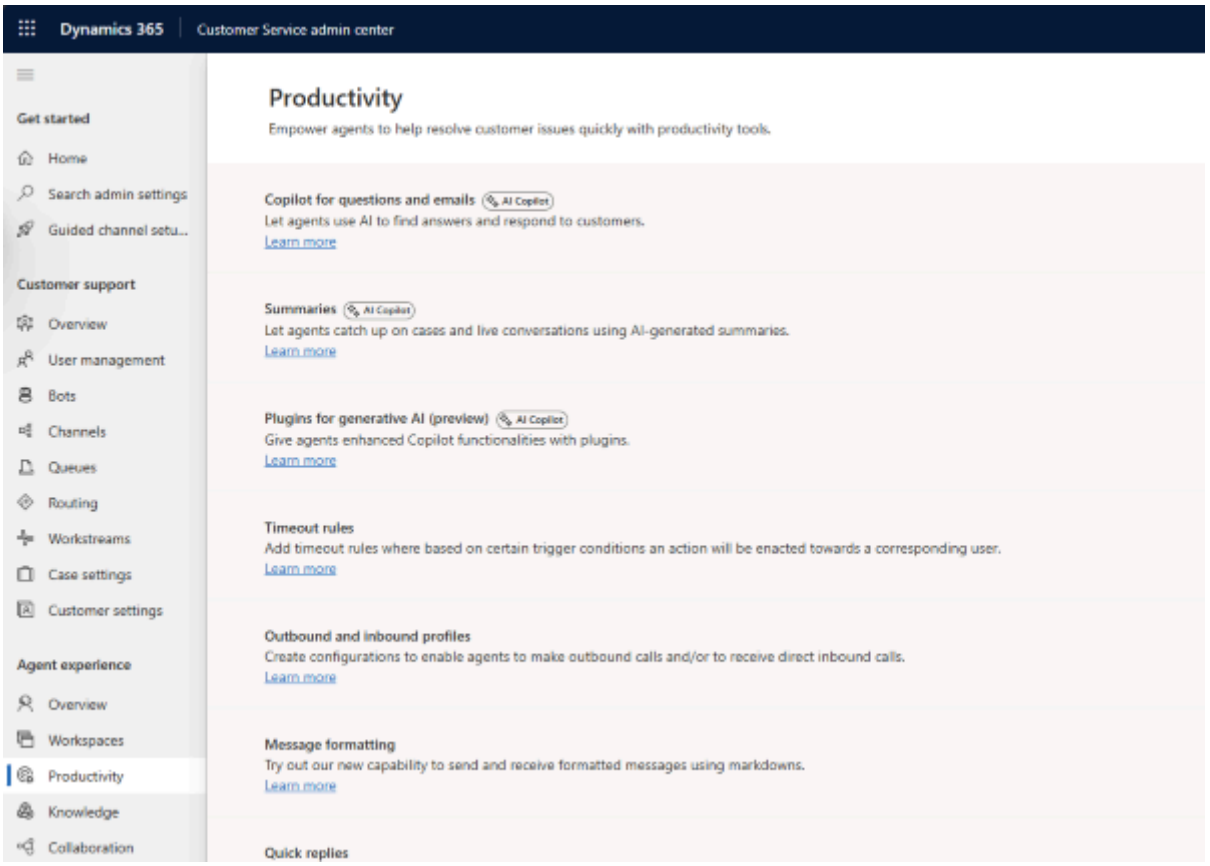
Business value

Businesses can set up automatic actions on messaging conversations with time-based SLAs to improve customer satisfaction and boost representatives' productivity.

Feature details

To boost agent productivity, administrators can configure the following capabilities for conversations that come through the asynchronous messaging channels. In the Dynamics 365 Contact Center admin center, under **Productivity**, use the **Timeout rules** option to enable the following actions based on business service-level agreements:

- Send an automatic reply to a customer to engage them again if they're unresponsive after a certain period.
- Close conversations automatically after the configured idle time that's indicated by no customer responses, so the representative's capacity is released to help other customers in the queue.
- Send follow-up messages to customers to remind them to connect back to make progress on their support conversations.
- Reduce average handling time for service representatives.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Configure time-out rules (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Service representative experiences

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 service representative experience is at the heart of Dynamics 365 Contact Center. When service representatives feel confident, customer satisfaction improves. Dynamics 365 Contact Center gives service representatives a powerful desktop with infused generative AI, seamless collaboration capabilities, and productivity tools in a customizable workspace. Its features boost the effectiveness of service representatives, enabling them to deliver personalized customer experiences across any channel.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Place a consulting representative on hold in a call

> **Important**
>
> **Some of the functionality described in this release plan has 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 26, 2025	Jan 2026

Business value

Customer service representatives can now put a consulting representative on hold if they wish to speak with only the customer. This feature makes it easy to communicate with just the customer even while on an active call consult. It eliminates the need to terminate and restart consult sessions for private conversations, reducing call handling times.

Feature details

During an ongoing call, customer service representatives can now place other representatives who are consulting on the call on hold so they can talk to the customer while the consult session is ongoing. Before this enhancement, customer service representatives could only place the customer on hold.

Key benefits include:

- Enables confidential customer conversations while preserving access to consulting expertise.
- Eliminates the need to terminate and restart consult sessions for private discussions.
- Maintains seamless workflow continuity for representatives handling escalated cases.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use consult to collaborate with other representatives or supervisors (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 11/21/2025

Search for phone numbers in Copilot Service admin center

08/14/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Jul 31, 2025

Business value

With the new search capability, admins don't need to scroll through thousands of numbers in an organization.

Feature details

The search functionality is available at the upper right of the phone number configuration page. Administrators don't need to use the **Ctrl+F** combination of shortcut keys that previously allowed them to search on the displayed numbers only. Now, with the search functionality, administrators can search through the entire database of phone numbers enabled for their organization.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use Copilot Studio agents to get customer feedback

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 18, 2024	✔ Apr 30, 2025

Business value

Traditional customer feedback management can take a long time, sometimes 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, you have an opportunity to enable real-time feedback, with automated and personalized feedback loops to help unlock immense business values. This feature unifies the process of configuring the surveys across channels while using the generative AI capabilities of Copilot Studio agents.

Feature details

In the Copilot Service admin center, administrators can configure feedback surveys by using Copilot agents with the following capabilities:

- Use Copilot agents to gather customer feedback and set up contextual actions based on the feedback.
- Unify and centralize the process of configuring surveys across voice, messaging, email, and custom channels.
- Use predefined templates like Customer Satisfaction (CSAT) Survey and Net Promoter Score (NPS) Survey to create surveys.
- Allow supervisors to view and review feedback summarized into actionable insights.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Configure feedback surveys using Copilot Studio (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use Desktop companion application

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2025	✔ Jul 1, 2025

Business value

The Desktop companion application for Dynamics 365 Contact Center gives you more reliable voice conversations by keeping call connections active even if the browser app refreshes or crashes. This standalone solution reduces connection latency and offers useful insights into resource use and device troubleshooting options.

By keeping communication between customers and service representatives uninterrupted despite browser performance issues, organizations see better call completion rates, higher customer satisfaction, and increased agent productivity. The application removes the frustration of dropped calls during important service interactions, guards against audio loss during technical disruptions, and helps contact centers keep consistent service quality even when facing tough technical challenges.

Feature details

Administrators can download and install the Desktop companion application on a customer service representative's desktop.

Customer service representatives can use this application to do the following tasks:

- Provide increased latency and reliability to connect and maintain voice conversations respectively.
- Keep a call ongoing even when the browser app refreshes or crashes, ensuring that customers and representatives are always connected and engaged.
- Mute and end calls, switch speaker settings.
- The conversation continues to be recorded and transcribed (if the feature is turned on for the web version) to ensure continuity.

Representatives can minimize the client application on their screen to ensure there are no distractions.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Try Desktop companion application for Dynamics 365 Contact Center (blog)

Install and manage Desktop companion application for voice channel (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use disposition codes in voice and chat conversations

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

Disposition codes help service representatives quickly jot down the outcome of calls and live chats. They also help in reporting and tracking interactions. Administrators can customize these codes to suit the business needs.

Feature details

Disposition codes allow customer service representatives to assign codes to conversations to indicate the outcome of calls or chats. Administrators can turn on the feature and enter disposition codes that representatives can quickly search. The service representative can add disposition codes to an active conversation or a conversation they're wrapping up. After the conversations end, you can view the disposition codes for the closed conversation through the Inbox.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Set disposition codes (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use enhanced disposition code capabilities

08/25/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Aug 8, 2025

Business value

The enhancements to disposition codes help service representatives save time and resources when they indicate how the call ended. Service representatives don't need to take their own notes to indicate the outcome of the call but can choose from a predetermined list. Supervisors can view these codes in the closed conversation summary form to aggregate data on how calls are going for their representatives.

Feature details

Administrators enable disposition code enhancements at both global and workstream levels. The global level settings:

- Enable disposition codes for the entire organization.
- Add, edit, and delete disposition codes. Associate disposition codes with categories and workstreams.
- Require disposition codes before closing the conversation.
- Set the maximum number of disposition codes allowed per conversation.

At a workstream level, admins can add workstream-specific codes and configure the need for a disposition code to close the conversation.

Service representatives can choose a category to filter the available disposition codes. If the administrator enables a maximum number of disposition codes allowed, service representatives see the number displayed in the disposition code area.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Configure disposition codes (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use improved outbound dialing with reduced latency

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ May 31, 2025

Business value

The enhancements in outbound dialing significantly reduce latency. Representatives can now place and connect an outbound call more quickly than before. By adhering to the latest UI standards, our product offers a smooth and intuitive user flow. Customer service representatives can focus their energy on helping customers.

Feature details

This feature release significantly reduces latency because service representatives no longer need to wait for a session to be created before they can place an outbound call. You see marked improvements in how quickly your service representatives get connected to a customer. The latest UI updates make sure that representatives have all the information about the customer in one easy-to-find place that lends itself to an intuitive user flow.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Make a call using the outbound dialer (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use optimized setting to update presence

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Aug 15, 2025	✔ Oct 31, 2025

Business value

With this feature release, we expect an increase in performance and time saved when service representatives change their presence status with a less cumbersome process.

Feature details

Service representatives can now update their presence in fewer steps. Service representatives will spend less time doing a basic task, thereby allowing them to help customers more easily and efficiently. Furthermore, the presence icon loads faster after the update, allowing for a faster rendition of an accurate representation of the service representative's presence status.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 11/18/2025

Use the optimized option to update presence

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

With this feature release, service representatives can change their presence status more easily, leading to better performance and saved time.

Feature details

Service representatives can now update their presence with one click instead of going through a process that takes more than four clicks. Service representatives spend less time doing a basic task, so they can help customers more easily and efficiently. The presence icon also loads faster when updated, so it quickly shows an accurate representation of the service representative's presence status.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Manage presence status (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Teams integration

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Use Dynamics 365 Contact Center and Microsoft Teams together to provide your service representatives and customers with a cohesive environment where they can seamlessly collaborate with each other.

Note: The author created this article with assistance from AI. Learn more

Use Microsoft Teams phone in Dynamics 365 Contact Center

09/11/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 30, 2025	✔ Sep 2, 2025

Business value

By connecting the Teams Phone numbers with Dynamics 365 Contact Center, businesses integrate their existing Teams Phone system without the need to configure a separate telephone setup. Customers can use the broad geographic reach of Teams calling capabilities through calling plans available in 36 countries, Operator Connect in 96 countries, and Direct Routing globally. Also, it eliminates the need for customers to bring their own Azure Communication Services resource.

Feature details

With this feature, organizations can use their Teams Phone system with the voice channel configuration:

- Enable the voice channel in Copilot Service admin center.

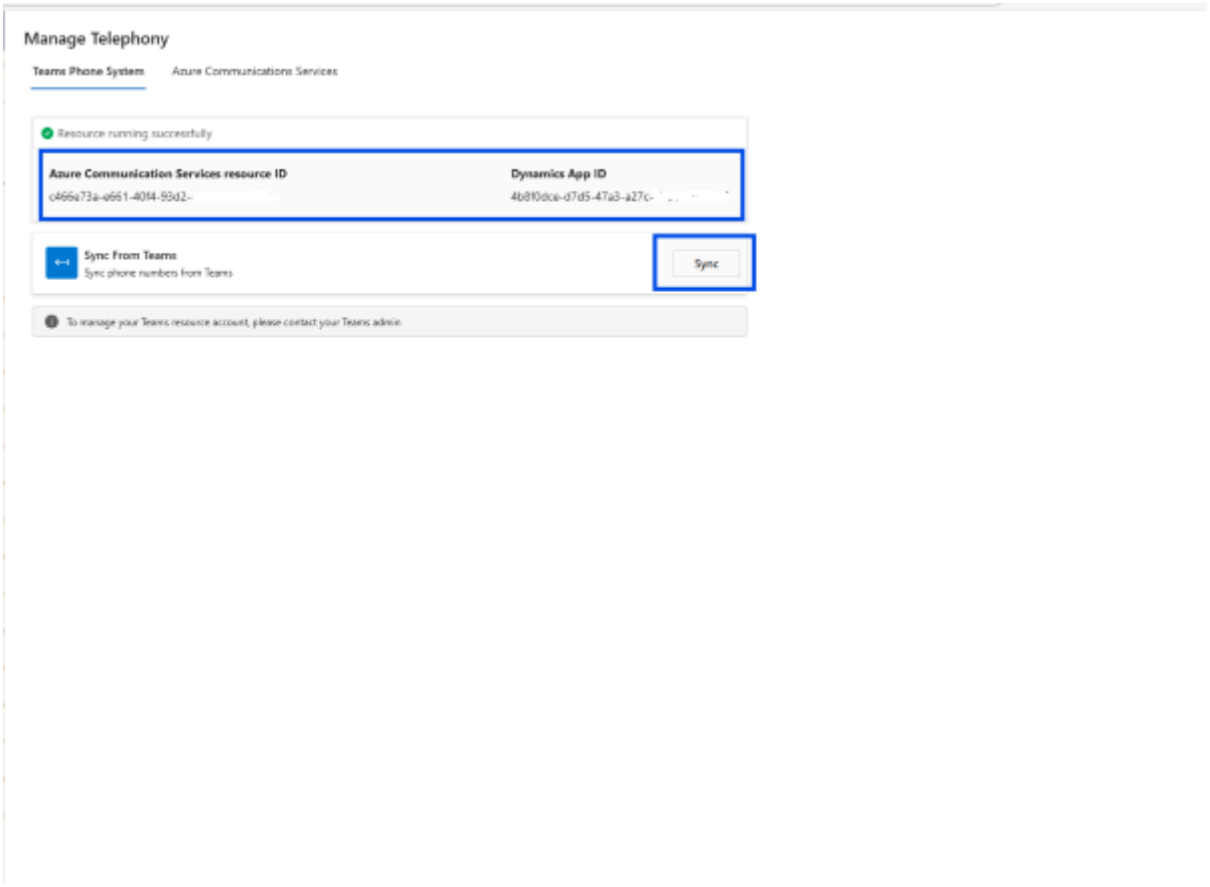
The key steps in the Teams admin center (via PowerShell) include:

- Get phone numbers and configure them in Teams admin center
- Link phone numbers to individual Teams Resource Accounts
- Connect the Teams Resource Accounts to the Dynamics 365 app

In Copilot Service admin center, you can synchronize phone numbers from Teams with Dynamics 365 by using the sync option on the **Teams phone system** tab of the **Manage telephony** pane.

Some of the key features include:

- Teams emergency calling (E911).
- Early media support for customer service representative initiated outbound call.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Teams Phone extensibility for Dynamics 365 Contact Center generally available (blog)

Configure Teams Phone in voice channel (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Unified routing

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has 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 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 service representatives. 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. It eliminates the need for constant queue supervision and manual work distribution, so organizations gain operational efficiencies. Features like percent-based routing, overflow management, and routing to preferred service representatives help optimize the routing of work items to the best-suited service representatives.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Enable direct transfer of conversations

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Jul 31, 2025

Business value

By enabling direct transfer to service representatives, businesses can streamline conversation handling processes and improve overall efficiency. This feature allows service representatives to directly transfer conversations to the appropriate representative when they know the right person to handle the conversation. This capability leads to faster resolution times, reduced wait times for customers, and enhanced customer satisfaction. Also, resource allocation is optimized by directing conversations to the most suitable representative without delays.

Feature details

The key capabilities of direct transfer of conversations are as follows:

- Administrators can turn on direct transfer of conversations.
- Service representatives can transfer conversations to other representatives in their queue or in other queues without needing to consult first.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Enable transfer of conversations to representatives (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Manage routing rules in bulk

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Apr 18, 2025

Business value

Often, businesses require common rules across various lines of business queues and workstreams. To configure these common rules, administrators must go through each queue and manually create a ruleset and add rules. Repeating this step for each queue, which can be in the hundreds, takes long hours to complete. A template for the ruleset simplifies the process by allowing administrators to create templates for common routing rulesets and apply them in queues and workstreams, thus saving hours of work.

Feature details

Create templated rulesets for routing configurations like prioritization, assignment, and work classification rulesets. Apply these ruleset templates when you create prioritization, assignment, and work classification rulesets in a queue or workstream. Administrators can manage templated ruleset configurations globally from one place and publish updates to all queues and workstreams where the ruleset is applied.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Manage template rulesets (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Route to least active representatives in messaging channels

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 30, 2025

Business value

Organizations can route messaging conversations by first prioritizing agents with the fewest active conversations. Among agents with the same conversation count, routing prioritizes those who are least active for the longest duration. This two-level ordering ensures better utilization of representatives, improved customer satisfaction, and higher agent engagement by allowing a sufficient gap between conversations.

Feature details

With this feature, administrators can:

- Set up their messaging queues to use the 'least active' assignment method. This method assigns work items to the customer support representative who is least active and has been inactive for the longest time.
- Set up their custom assignment methods to sort the matching customer support representatives by their 'least active' times on the messaging channel.

For representatives working on both voice and messaging queues, the "least active" time calculation includes both voice and messaging conversations.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use least active routing on messaging channels (blog)

Least active (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Set timer to wrap up conversations in seconds

09/11/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Aug 30, 2025

Business value

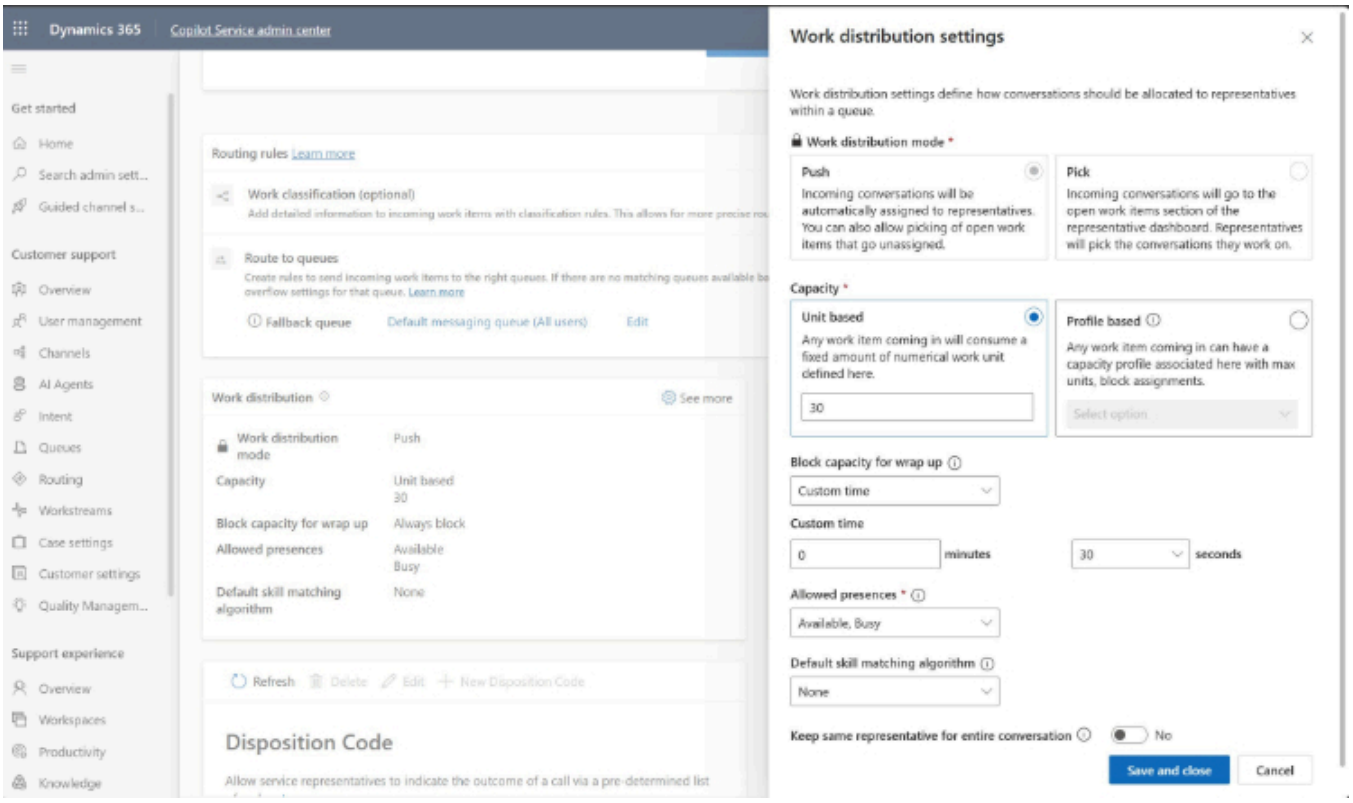
Customizable conversation wrap-up timers give customer service representatives the flexibility to set post-call durations that match business needs. This flexibility helps speed up agent availability and improves cost efficiency.

Feature details

You can now set the wrap-up timer in seconds, so contact centers have precise control over post-conversation workflows. Previously, you could only set this timer in minutes.

Key benefits include:

- Customize wrap-up times to fit your business needs.
- Boost agent efficiency and cut down on idle time.
- Help manage capacity in a cost-effective way.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Boost productivity with precision wrap-up timers in Dynamics 365 (blog)

Configure work distribution (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use shift bookings to assign conversations

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ May 30, 2025

Business value

By using dynamic bookings that change frequently, unified routing ensures that it assigns tasks such as calls and chats to service representatives only when they're available. With this system, the routing system makes sure that it follows the workforce management schedules. This approach boosts productivity and satisfaction because representatives don't miss breaks or get interrupted during training. SLAs are honored, which leads to higher customer satisfaction.

Feature details

This feature offers the following capabilities:

- Administrators can enable unified routing to support assignment of conversations based on shift bookings created in Dynamics 365 or imported from non-Microsoft workforce management solutions.
- Service representatives receive conversation assignments only for the time periods when they're scheduled for "working" type bookings. They don't get assignments during breaks and training sessions, and they don't need to manually reset their presence to avoid assignments.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Configure shift-based routing for work items (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Workforce engagement management

10/02/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Workforce engagement management (WEM) is a comprehensive approach to managing and optimizing employee performance, engagement, and productivity in customer service and contact center environments. WEM typically includes tools and practices that focus on:

- **Scheduling and forecasting**: Ensuring that the right number of service representatives are available at the right times to meet service demand, while avoiding overstaffing or understaffing.
- **Performance management**: Setting performance metrics, tracking service representative productivity, and providing feedback to improve service quality.
- **Quality management**: Monitoring and assessing interactions to maintain high service standards and compliance.
- **Employee engagement**: Encouraging service representative engagement through feedback, recognition, and tools that help service representatives understand their impact on business goals.
- **Training and development**: Providing targeted training resources to improve skills, address performance gaps, and support career development.

WEM enhances customer experiences, optimizes workforce efficiency, and increases service representative satisfaction. This approach improves overall service effectiveness.

Note: The author created this article with assistance from AI. Learn more

Create and analyze forecast scenarios for case and conversation volumes

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ May 2, 2025

Business value

Accurate forecasting helps your business keep the right staffing levels and optimize service operations. With forecast scenarios, you can explore different possibilities based on historical data and trends. Whether you're planning weeks or months ahead, this feature helps you make data-driven decisions, reduce staffing inefficiencies, and maintain service level targets.

Feature details

Accurate forecasting is essential for efficient workforce planning. With this feature, you can predict case and conversation volumes and service representative demand based on historical trends.

- **Long term forecast**: Predict conversation and case volumes at a daily level for up to six months.
- **Short term forecast**: Generate 15-minute interval forecasts for up to six weeks to manage real-time demand fluctuations.
- **Scenario forecasting**: Model different business scenarios to assess their impact on workload and staffing.
- **Data slicing**: Break down forecasted data by channels and queues for more granular insights.
- **Import external data**: Incorporate historical data from external systems through file import to enhance forecast accuracy.
- **Export forecasts**: Download forecast data into spreadsheets for further analysis.
- **Visualize trends**: View daily, weekly, and monthly forecast trends using interactive charts.

To turn on this feature, your administrator needs to install the Workforce Management for Customer Service package in the Power Platform admin center app. Then, you can create forecast scenarios that fit your operational needs.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Create and manage forecast scenarios (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Create and manage shift plans for effective staffing and service coverage

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ May 2, 2025

Business value

Effective shift planning is key to maintaining efficient support operations. With a structured shift plan, you can ensure that the service representatives with the necessary skills are available at the right time to meet forecasted demand. By defining activities like work, breaks, and training, businesses can improve workforce productivity while maintaining operational efficiency.

Feature details

A shift plan helps businesses define shift hours, required activities, and staffing needs. With a shift plan, you can make sure the right service representatives are available at the right times. When you use a structured shift plan, you can match workforce availability with forecasted demand. This alignment helps improve operational efficiency and service quality.

Key features include:

- **Required staff**: Align shift staffing with the capacity plan to make sure the right number of service representatives are scheduled based on forecasted demand.
- **Assign skills**: Make sure the right service representatives with the necessary skills are scheduled for each shift.
- **Queue coverage**: Define the queues that the shift plan supports to maintain service consistency.
- **Shift activities**: Specify activities such as work, training, breaks, and lunch to structure shifts effectively.
- **Calendar**: Set operational parameters, including shift days, times, and time zones, for better organization.

To activate this feature, your administrator must first install the Workforce Management for Customer Service package in the Power Platform admin center app. Then, you can set up shift

plans that fit your operational needs.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Create and schedule a shift plan (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Manage time-off requests

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ May 2, 2025

Business value

The Time-Off Request feature helps streamline the leave management process for service representatives and supervisors. Representatives can submit their leave requests directly from the **My Schedule** view or **Request Management**, providing an easy and intuitive experience. Managers and schedulers benefit from efficient workflows, as they're notified when new requests are submitted and when requests are approved. This process ensures proper staffing while accommodating representatives' time-off needs. It helps improve operational efficiency and representative satisfaction.

Feature details

The Time-Off Request feature helps service representatives, supervisors, and schedulers handle leave requests more efficiently and in a more organized way.

Key features include:

For service representatives:

- Submit time-off requests directly from the **My Schedule** view or **Request Management**.
- View approved time-off visually on the **My Schedule** calendar.

For supervisors:

- Receive notifications of new time-off requests via email or in-app alerts.
- Review and manage time-off requests in the **Request Management** view.

For schedulers:

- Stay informed with notifications when time-off is approved.
- View agents' time-off within the schedule view, allowing for informed scheduling decisions.

To activate this feature, your administrator must first install the Workforce Management for Customer Service package in the Power Platform admin center app.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

View and take action on time-off requests (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Real-time adherence monitoring for service representatives

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ May 2, 2025

Business value

The real-time adherence tracker enables supervisors to continuously monitor service representatives' adherence to their schedules. It helps supervisors ensure that representatives stay on track to meet performance targets. By providing immediate visibility into deviations from scheduled activities, the tracker helps supervisors take timely corrective actions. This visibility results in enhanced productivity, better resource management, and improved compliance.

Feature details

The Real-Time Adherence Tracker offers comprehensive monitoring and tracking of service representatives' adherence to their scheduled activities.

Key features include:

- **Metrics**: Track adherence percentage, total scheduled time, time in current state, and time out of adherence.
- **Visual Charts**: Display adherence trends, compare scheduled versus actual activity, and show time spent in different channels.

To enable this feature, your administrator must first install the Workforce Management for Customer Service package in the Power Platform admin center app.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use the Adherence Tracker (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Shift bidding for customer service representatives

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ May 2, 2025

Business value

Shift bidding empowers service representatives to choose shifts that align with their preferences and availability, which leads to improved satisfaction and retention. When service representatives participate in bidding, they get more flexibility and control over their work schedules. Schedulers can easily manage and release shifts for bidding, which helps streamline the process while ensuring adequate coverage based on your business needs.

Feature details

Shift bidding lets your service representatives join a bidding process to select their shifts.

Key features include:

- **Bid for shifts**: Service representatives can see available shifts and send bids right from the **My Schedule** view or **Request Management**.
- **Select preferred shifts**: Representatives can bid on their preferred working hours by choosing shifts that fit their personal schedules.
- **Shift release for bidding**: Schedulers can release shift plans for bidding, so service representatives can select the shifts they want.
- **Bidding management**: Schedulers can review and manage shift bidding requests within the shift plan or **Request Management** view to keep coverage steady.

To turn on this feature, your administrator must first install the Workforce Management for Customer Service package in the Power Platform admin center app.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Enable shift bids (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Shift swapping for customer service representatives

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ May 2, 2025

Business value

Shift swapping gives service representatives the flexibility to manage their schedules while keeping staffing levels steady. It enhances flexibility by enabling representatives to trade shifts directly with colleagues or open the request to the broader team. Supervisors retain oversight, ensuring smooth operations with minimal disruption to team schedules.

Feature details

Shift swapping simplifies shift adjustments by allowing service representatives to exchange shifts directly within the system.

Key features include the following capabilities:

- **Submit swap requests**: Service representatives can submit shift swap requests from the **My Schedule** view or via **Request Management**.
- **1:1 swap or public request**: Representatives can swap shifts with a colleague on a 1:1 basis or post their swap request publicly for any team member to pick up.
- **Notifications**: Both service representatives and supervisors receive email or in-app alerts when a swap request is accepted or rejected.
- **Supervisor oversight**: Supervisors receive notifications when swap requests are made and can review, approve, or decline them to ensure appropriate coverage and scheduling alignment.

To activate this feature, your administrator must first install the Workforce Management for Customer Service package in the Power Platform admin center app.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use shift swapping (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use automated and manual scheduling to manage shift plans

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ May 2, 2025

Business value

Scheduling helps ensure that service representatives efficiently assigned to shifts based on demand and availability. With both manual and automatic scheduling options, you can easily manage staffing for different shifts and ensure that your contact center is always properly staffed. This flexibility helps you meet the forecasted demand, reduce gaps in coverage, and enhance the overall operational efficiency. You can also ensure continuous service by strategically distributing breaks and avoiding staffing shortages during peak times.

Feature details

Scheduling helps businesses assign service representatives to shift plans efficiently. It helps ensure proper coverage to meet operational requirements. With both manual and automated options, you can streamline scheduling while maintaining flexibility.

Key features include:

- **Manual scheduling**: Assign service representatives to shifts individually based on operational needs.
- **Automatic scheduling**: Generate schedules automatically with a single click, based on scheduling constraints.
- **Break distribution**: Schedule breaks across service representatives to help ensure continuous coverage during shifts.

To activate this feature, your administrator must first install the Workforce Management for Customer Service package in the Power Platform admin center app. Then, you can configure scheduling based on your workforce requirements.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Create and schedule a shift plan (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use capacity planning to predict your staffing needs

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ May 2, 2025

Business value

Ensuring you have the right number of representatives available at the right time is critical for delivering exceptional customer service while optimizing costs. With capacity planning, you can forecast staffing requirements based on historical and expected demand. This feature helps you maintain service levels without overstaffing or understaffing.

You can model different demand scenarios based on forecasted volumes and break down staffing needs by channel and queue. Whether you're planning for the next few weeks or months ahead, capacity planning provides the visibility and flexibility you need to make informed staffing decisions.

Feature details

Capacity planning helps you forecast staffing needs at different levels of detail. With capacity planning, you can align your workforce capacity with service demand.

Short-term planning: Forecast staffing needs in 15-minute intervals for up to six weeks, so you can make real-time adjustments. **Long-term planning**: Plan daily staffing requirements for up to six months to support strategic workforce decisions. **Scenario analysis**: Model different workload scenarios to see how changes in demand affect your staffing needs. **Data slicing**: View staffing projections by specific channels and queues for deeper insights.

To activate this feature, your administrator must first install the Workforce Management for Customer Service package in the Power Platform admin center app, and then enable the feature in the Customer Service admin center. Then, your business can create capacity plans based on your operational needs.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Create and manage capacity planning (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

View and manage shift schedules with My Schedule calendar

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ May 2, 2025

Business value

The **My Schedule** calendar gives customer service representatives a clear and accessible view of their shifts, time off, and other schedule-related details. The tool empowers service representatives to manage their time efficiently, whether they're reviewing upcoming shifts, requesting time off, or viewing their schedule in different formats. The flexibility of day, week, month, and agenda views ensures that representatives can access their schedules in the format that works best for them. Having a calendar view can help reduce scheduling conflicts.

Feature details

The **My Schedule** calendar gives service representatives several views to help them manage their shifts and time off.

Key features include:

- **Day view**: Service representatives see their shifts and activities scheduled for the current day.
- **Week view**: Displays the entire week's shifts, which helps representatives plan and manage their time effectively.
- **Month view**: Provides a high-level overview of the month's schedule, including shifts and time-off requests.
- **Agenda view**: Displays a list of scheduled shifts and activities for easy viewing of upcoming tasks.

To turn on this feature, your administrator must install the Workforce Management for Customer Service package in the Power Platform admin center app.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use the Schedule Calendar (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Plan and prepare for Dynamics 365 Field Service in 2025 release wave 1

> **Important**
>
> The 2025 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2025 to September 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/2025W1/FieldService

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

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

In the 2025 release wave 1, get the next generation of Copilot-first, modern, task-oriented experiences across all Field Service personas and app areas.

Updates to Dynamics 365 Field Service 2025 release wave 1

Investment areas



Boost technician productivity

Service technicians and frontline workers are the heart of any field service organization. They provide excellent customer service by resolving customers' issues. It's essential that frontline workers have the best digital tools to engage with their peers, the back office, and customers while staying on top of their field duties. Empowering technicians and frontline workers to deliver better service and achieve high first-time fix rates is a core objective of Field Service.

Technicians primarily experience this empowerment through the Field Service Mobile app. With its rich set of features that work in offline conditions, the Field Service Mobile app is a reliable companion for frontline workers.

Copilot and AI innovation

Copilot transforms the Field Service experience for both managers and frontline workers. With Copilot, managers are more productive and deliver a better service experience as they manage and schedule work across their workforce. Frontline workers spend more time fixing issues because Copilot helps them find and update critical information. By keeping users in the flow of work across interfaces on the web, mobile, and Microsoft 365, Copilot enables 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 central to field service management. With resource scheduling, service organizations can efficiently triage unscheduled work orders and schedule the nearest matching technicians to deliver service to customers. The schedule board gives dispatchers, project managers, and resource managers scheduling capabilities through different views. Partners can extend these capabilities to tailor functionality to their needs. The Scheduling Optimization Agent that lets you schedule frontline workers is now easier to use than ever.

Streamline work order management

Streamlined workflows and Copilot's assistance help service managers efficiently allocate resources, coordinate schedules, and monitor progress, so they keep operations running smoothly. Dynamics 365 Field Service encourages collaboration with field technicians and customers, so service managers maintain a high level of customer satisfaction. Advanced analytics gives service managers the power to analyze feedback and metrics, so they can find areas for improvement and enhance service quality and the customer experience.

In this wave, we continue investing in enhancements to existing Copilot experiences, bug fixes, performance improvements, and addressing top customer-identified product gaps.

Discover how Dynamics 365 Field Service can transform your service processes and elevate your operations.

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
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Field Service.
Product documentation	Find documentation for Field Service.
User community	Engage with Field Service experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Field Service.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Last updated on 10/16/2025

What's new and planned for Dynamics 365 Field Service

10/14/2025

This topic lists features that are planned to release from April 2025 through September 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 2 plan.
- For a list of the next wave's release plans, go to 2025 release wave 2 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
Access online data with your offline-first application	Users by admins, makers, or analysts	✔ Sep 13, 2024	-	✔ Jun 30, 2025
Select table columns to include in mobile offline sync	Admins, makers, marketers, or analysts, automatically	✔ Jun 18, 2024	-	✔ May 23, 2025
Integrate bookings with Outlook and Teams	Users, automatically	-	✔ Jul 28, 2025	✔ Oct 1, 2025
Improve usability for the Field Service mobile app	Users by admins, makers, or analysts	-	-	✔ Sep 1, 2025

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
Configure Copilot summaries in Field Service	Users by admins, makers, or analysts	✔ Apr 17, 2024	-	✔ Apr 9, 2025
Summarize work orders with Copilot in the mobile app	Users by admins, makers, or analysts	✔ Dec 15, 2023	-	✔ Apr 9, 2025
Use inspection builder to create inspections from existing files	Admins, makers, marketers, or analysts, automatically	✔ Apr 9, 2025	-	-
Get assistance with AI-powered work order recaps	Users by admins, makers, or analysts	✔ Aug 9, 2023	-	✔ Apr 9, 2025

Optimize resource scheduling

Dynamics 365 Field Service resource scheduling features include key enhancements with agentic, manual, and automated scheduling.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Improve schedule board usability and performance	Users by admins, makers, or analysts	-	-	✔ Apr 7, 2025
Improve schedule assistant matching across locations	Users by admins, makers, or analysts	-	-	✔ Jun 2, 2025

Streamline work order management

Simplified workflows in Dynamics 365 Field Service streamline tasks for admins and service managers, ensuring quick and efficient operations.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Improve keyboard and screen reader support	Users, automatically	-	✔ Jul 28, 2025	✔ Oct 1, 2025
Tailor Copilot chat experience with Copilot Studio	Users by admins, makers, or analysts	✔ Aug 1, 2025	-	-

* You are able to opt into some features as part of early access on February 3, 2025, 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 information on data residency in Dynamics 365 and Power Platform, visit the Microsoft Dynamics 365 and Power Platform data residency documentation. For more information about geo availability, visit the Dynamics 365 and Microsoft Power Platform availability page.

Boost technician productivity

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Service technicians and frontline workers are the heart of any field service organization. They provide excellent customer service by resolving customers' issues. It's essential that frontline workers have the best digital tools to engage with their peers, the back office, and customers while staying on top of their field duties. Empowering technicians and frontline workers to deliver better service and achieve high first-time fix rates is a core objective of Field Service.

Technicians primarily experience this empowerment through the Field Service Mobile app. With its rich set of features that work in offline conditions, the Field Service Mobile app is a reliable companion for frontline workers.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Access online data with your offline-first application

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Sep 13, 2024	-	✔ Jun 30, 2025

Business value

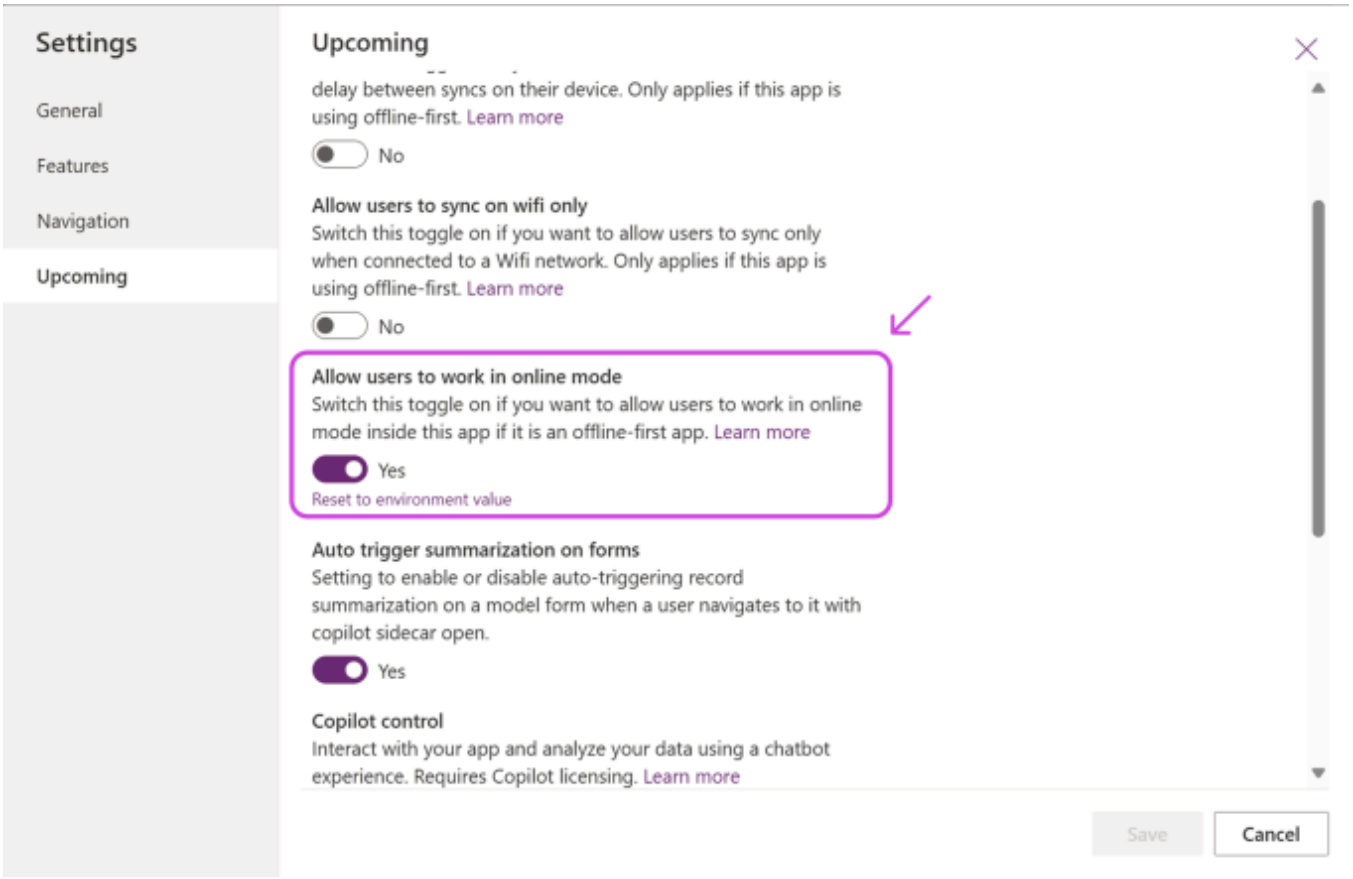
Frontline workers face variable network conditions while working on remote job sites. They need a reliable offline-enabled application that works seamlessly with or without network connectivity. By using the offline-enabled Field Service mobile application, the mobile offline profile configured for their environment limits the data technicians can access.

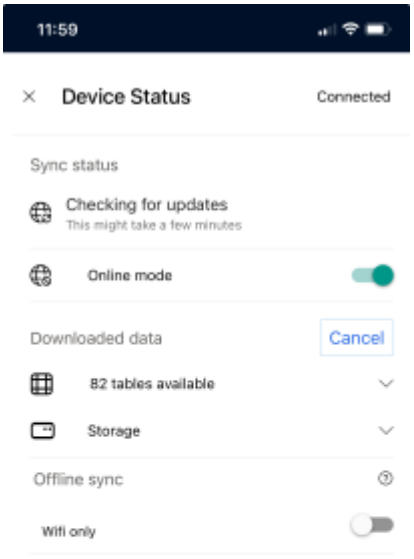
However, the unpredictable nature of frontline workers' day-to-day activities often requires broader data access than what their mobile offline profile defines. With this feature, frontline workers access online data when the network is available, giving them full access to the data stored in Dataverse.

Feature details

When frontline workers have network access on their mobile device, they can switch the application to online mode. With online mode, they get access to Dataverse data in the cloud.

- Users can switch between online and offline-first modes.
- Field Service Mobile application keeps syncing in online mode. It stays up to date and ready to switch back to offline mode if network connectivity is lost.
- A sync icon shows the application mode for users at a glance.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Configure offline data synchronization (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Improve usability for the Field Service mobile app

10/16/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Sep 1, 2025

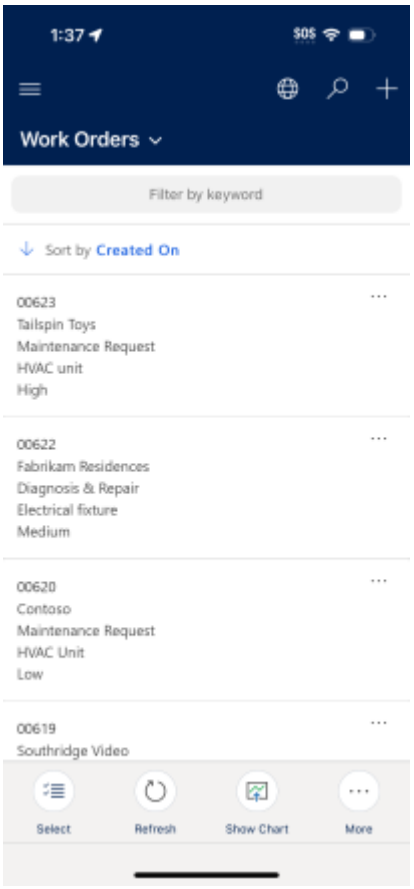
Business value

Frontline workers' productivity can increase by having access to more data directly on the mobile grid. By expanding the grid control to support additional fields, users can view comprehensive information at a glance, reducing the need for time-consuming navigation. Additionally, removing the unnecessary icons eliminates distractions, allowing workers to focus solely on the critical data they need. These enhancements streamline workflows, improve data visibility, and ultimately lead to more efficient and effective decision-making in the field.

Feature details

Frontline workers get the following usability enhancements for the Field Service mobile app:

- Mobile grids support additional columns for improved data visibility.
- Mobile grids are streamlined by removing unnecessary icons.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Show more data and hide the row icon in the mobile app (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Integrate bookings with Outlook and Teams

10/09/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 28, 2025	✔ Oct 1, 2025

Business value

Frontline workers can access their assigned bookings directly within Outlook and Teams, the platforms they already use daily. This integration eliminates the need for switching between multiple tools, allowing employees to manage their work and personal schedules all in one place.

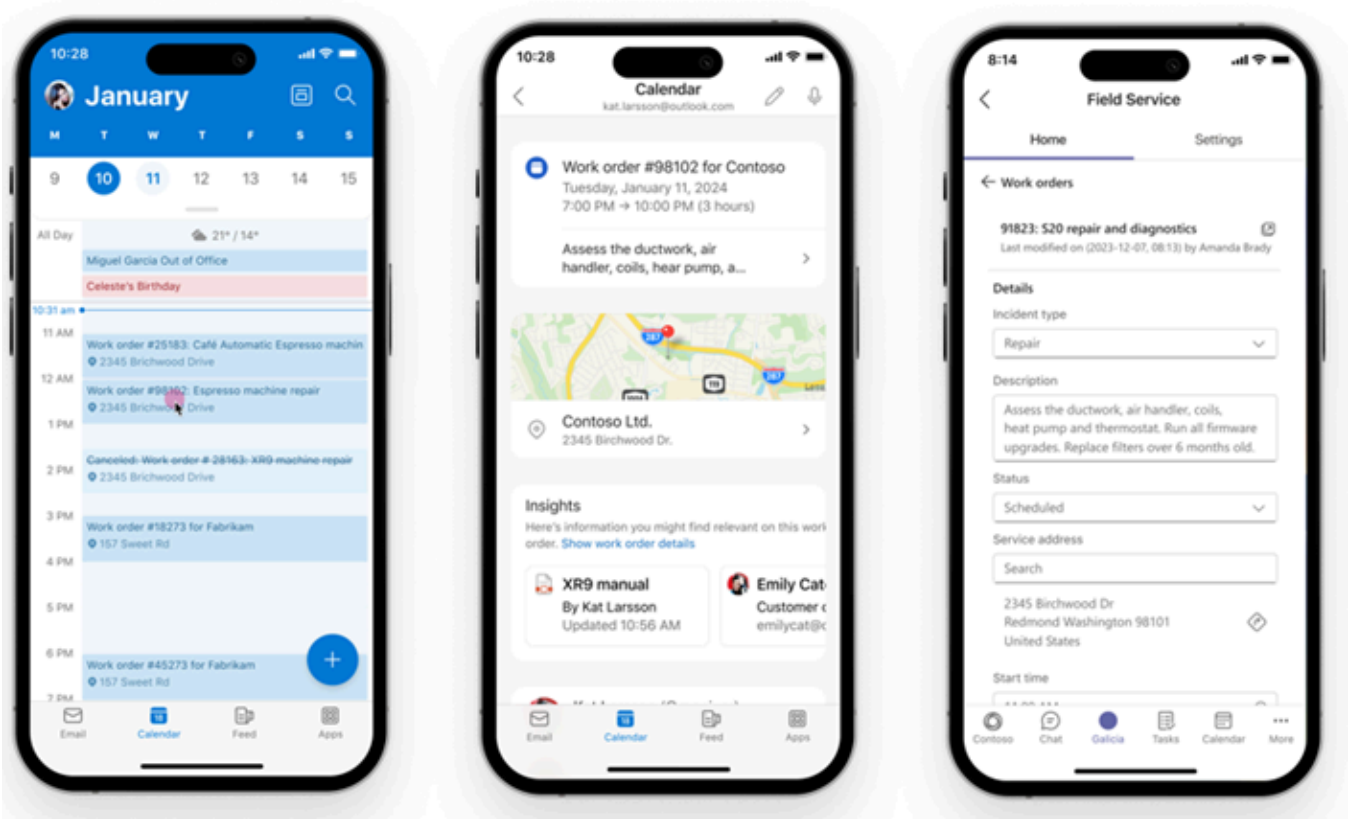
Feature details

Field Service bookings for work orders create an appointment in the frontline workers' calendars and provide extra details, including a deep link to the Field Service application.

This feature offers several valuable improvements:

- **Seamless integration**: Frontline workers can view their assigned bookings directly within Outlook and Teams, so they don't need to switch between multiple applications.
- **Real-time updates**: Any changes to bookings automatically appear in their calendars within minutes, so employees always have the most current information.
- **User-friendly experience**: Since Outlook and Teams are familiar tools for frontline workers, the transition is smooth and requires minimal training time.

This feature is in production-ready preview. Sign up to get started with the preview.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Thank you for your idea

Thank you for submitting this idea:

- Sync Bookable Resource Bookings with Outlook Calendar

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Additional resources

Integrate bookings with Outlook calendars (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Select table columns to include in mobile offline sync

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jun 18, 2024	-	✔ May 23, 2025

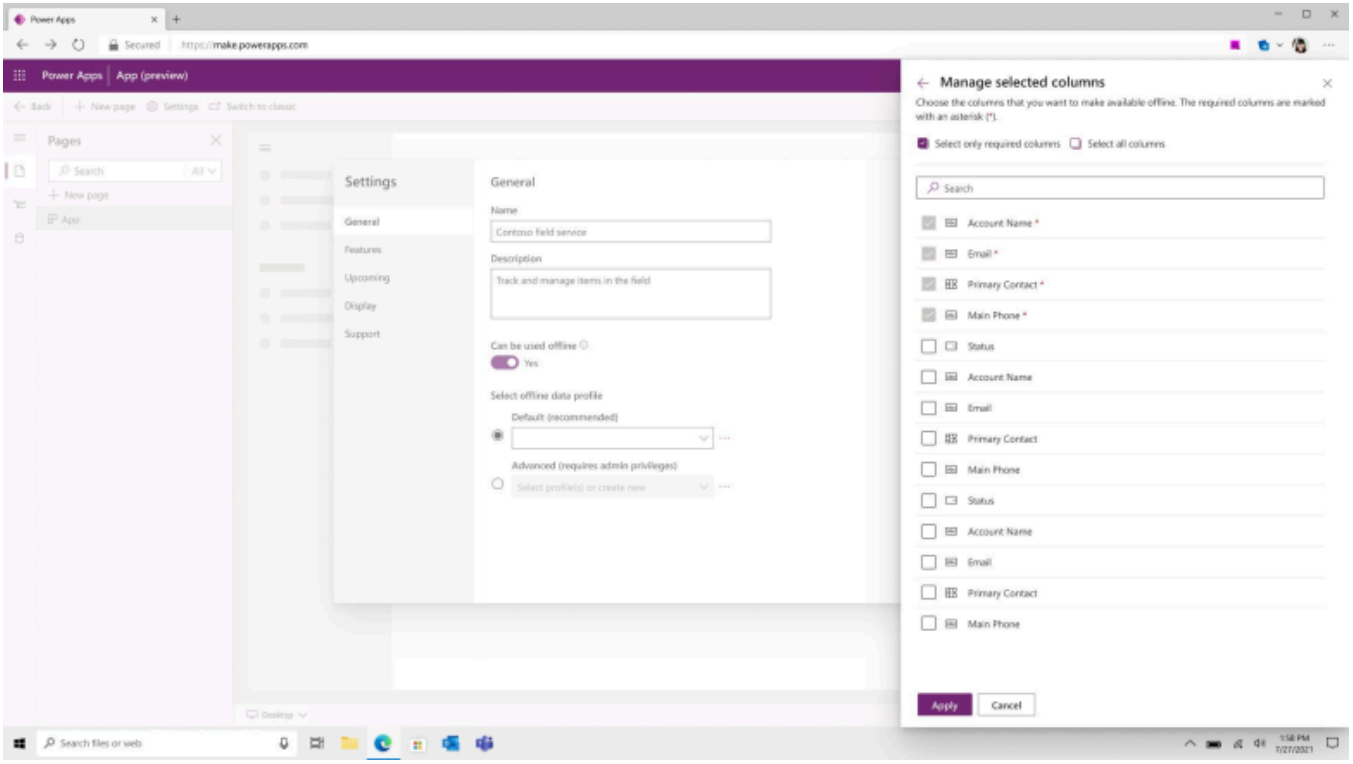
Business value

Makers can select the columns of tables that the app downloads on mobile devices for offline use. When you select fewer columns, the app downloads data faster on the device for usage without connectivity.

Feature details

When you configure your mobile offline profile, you can now choose which columns to download for each offline-enabled Dataverse table.

- The updated mobile offline profile configuration interface shows how many columns you select and lets you select individual columns for each table.
- The system shows which columns the application requires.
- Users can select columns for unique business scenarios or customizations.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Optimize columns included within the offline profile (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Copilot and AI innovation

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has 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. With Copilot, managers are more productive and deliver a better service experience as they manage and schedule work across their workforce. Frontline workers spend more time fixing issues because Copilot helps them find and update critical information. By keeping users in the flow of work across interfaces on the web, mobile, and Microsoft 365, Copilot enables managers and frontline workers to ask questions, update information, and streamline their process across Microsoft 365 apps and Field Service.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Configure Copilot summaries in Field Service

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Apr 17, 2024	-	✔ Apr 9, 2025

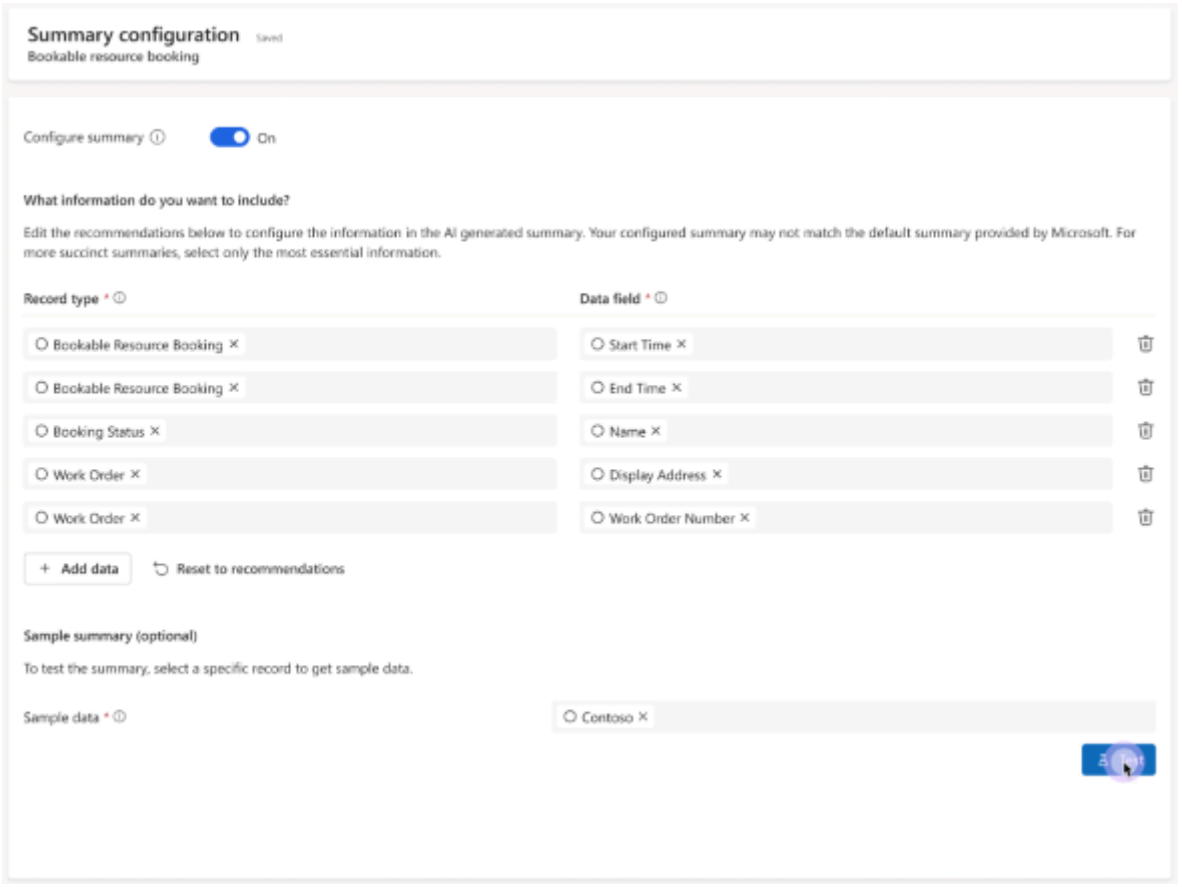
Business value

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 leads to more useful and actionable summaries.

Feature details

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

- Makers can select the tables and columns that Copilot uses to create the summary in natural language.
- After setting up the summary, you can generate a preview summary from an existing record with real data before saving the configuration.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Summary configuration (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Get assistance with AI-powered work order recaps

08/07/2025

Expand table

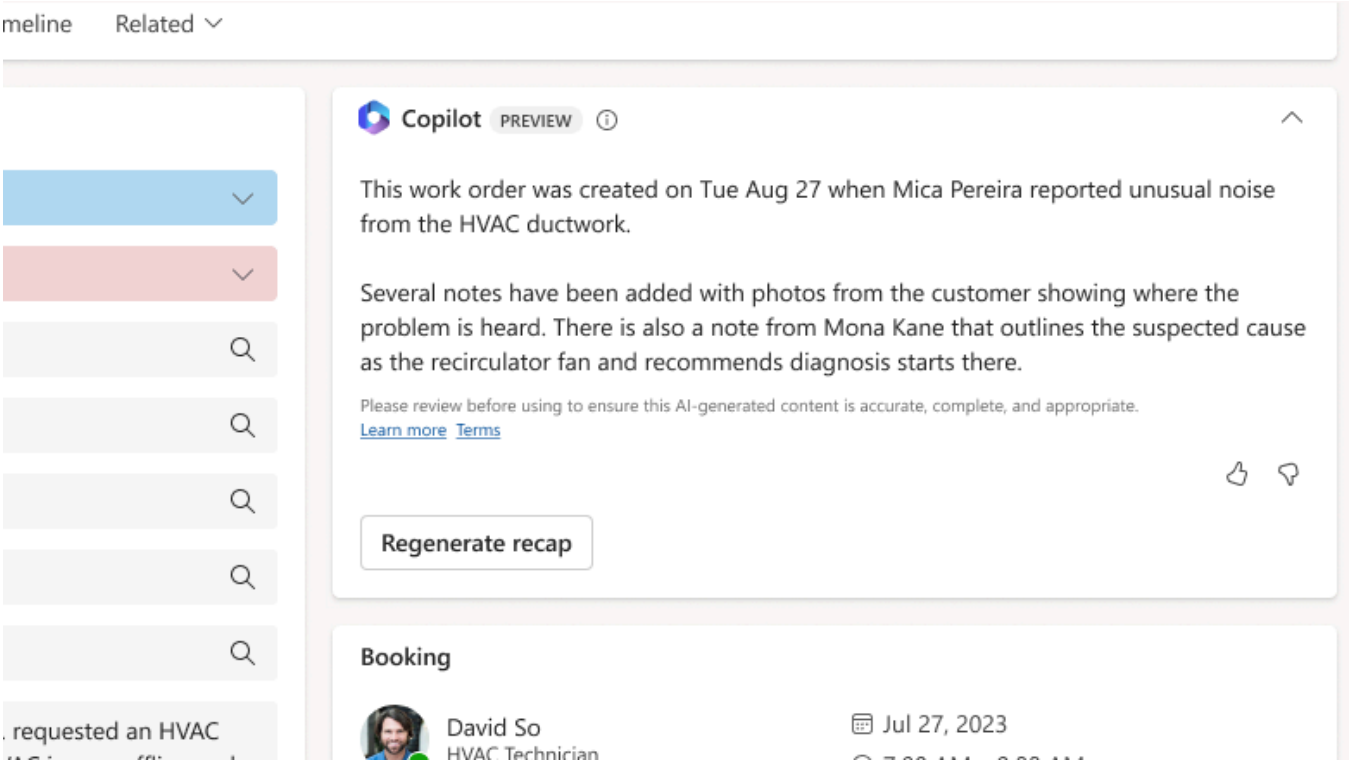
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Aug 9, 2023	-	✔ Apr 9, 2025

Business value

AI-powered work order recaps help service managers quickly access a summary of the work order and its related data. They boost efficiency and improve customer satisfaction.

Feature details

Work order recaps highlight important information about a work order, such as notes, products, services, tasks, and activities. Recaps help users catch up without digging 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.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Summarize records with Copilot in Field Service (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Summarize work orders with Copilot in the mobile app

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Dec 15, 2023	-	✔ Apr 9, 2025

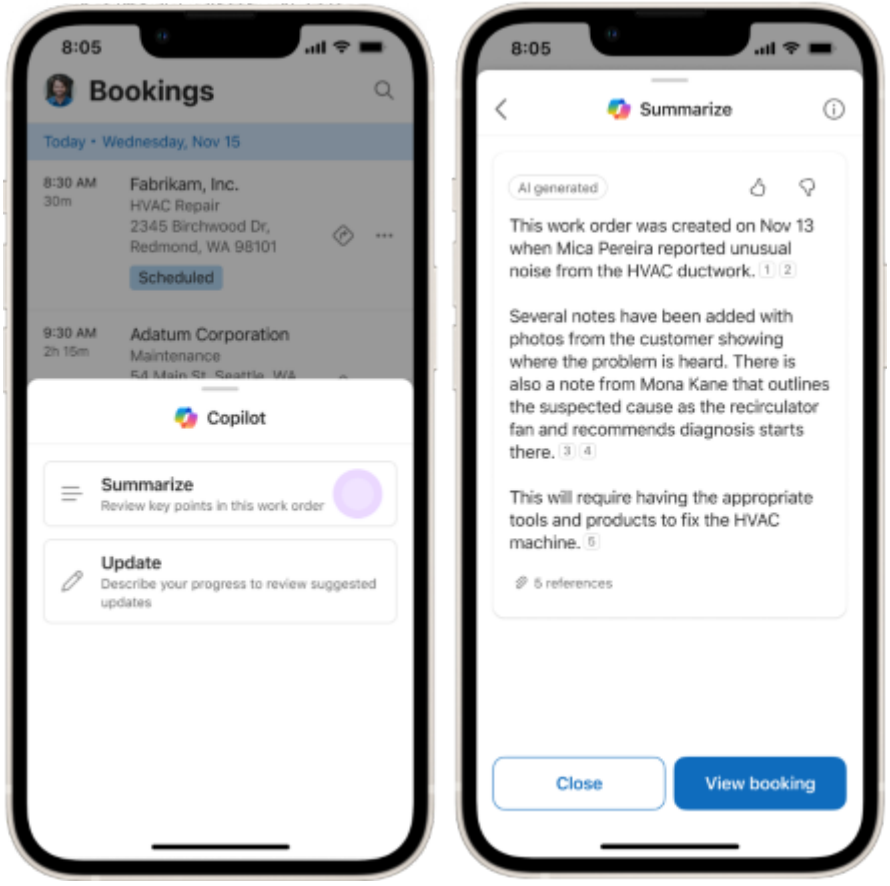
Business value

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

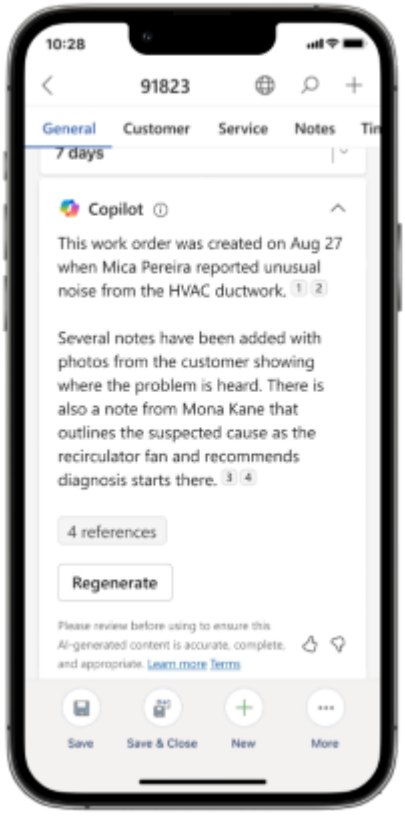
Feature details

Technicians can use Copilot to summarize their work orders within the Field Service mobile application. The summary gives them meaningful context for the work they're about to perform. It can include notes, diagnostic information, key events in the work order lifecycle, and recommendations.

New mobile user experience:



Unified Client user experience:



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Summarize records with Copilot in Field Service (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use inspection builder to create inspections from existing files

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 9, 2025	-	-

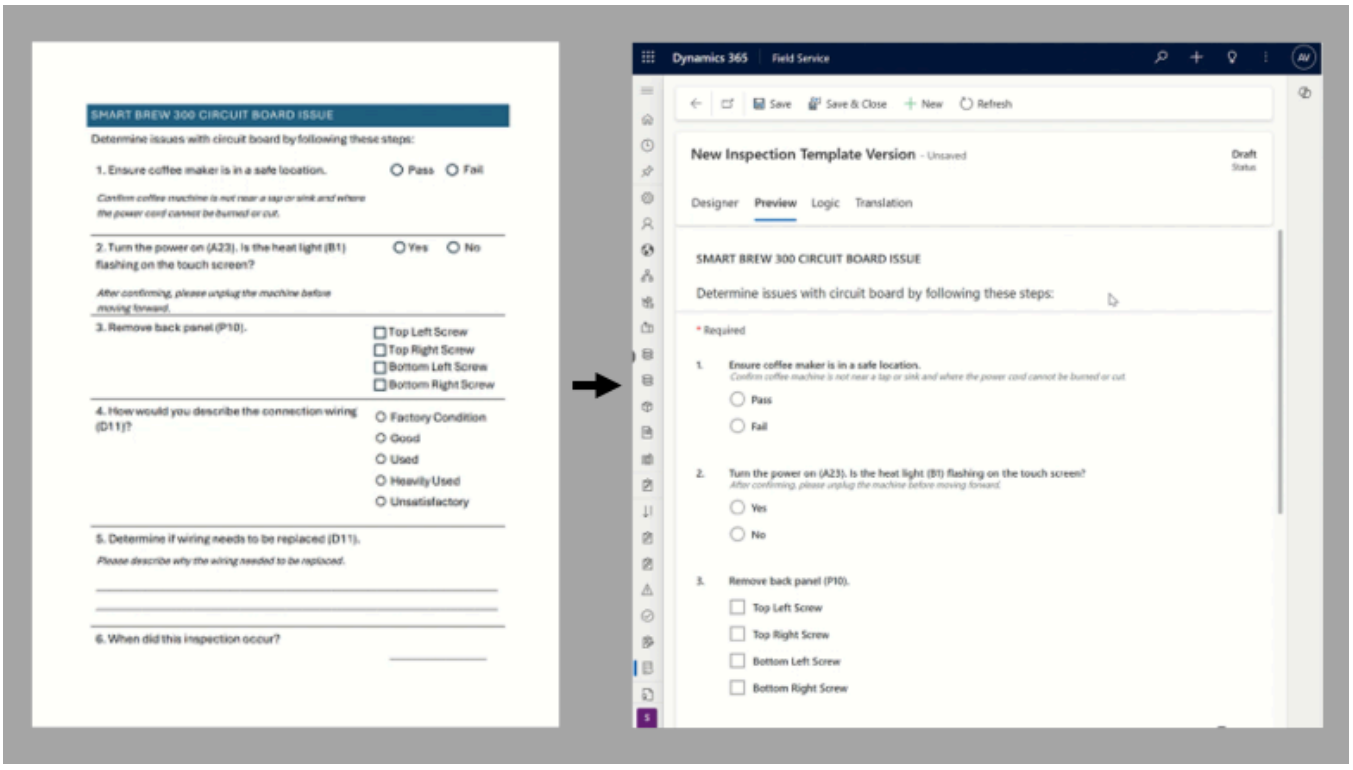
Business value

Empower your workforce to follow protocols, collect data efficiently, and use checklists to enhance first-time fix rates. The collected data helps boost operational visibility, enabling organizations to optimize processes and elevate customer satisfaction.

Feature details

Service organizations often use numerous procedures, forms, and checklists stored in various formats like paper or PDF files. With Copilot in Field Service, makers can quickly digitize these documents and integrate them into Field Service work orders.

Copilot converts the uploaded documents into draft inspection templates that makers can edit and publish. Technicians fill in these templates when completing work order tasks in the Field Services mobile app.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Create inspections with Copilot (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Optimize resource scheduling

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Resource management and scheduling optimization are central to field service management. With resource scheduling, service organizations can efficiently triage unscheduled work orders and schedule the nearest matching technicians to deliver service to customers. The schedule board gives dispatchers, project managers, and resource managers scheduling capabilities through different views. Partners can extend these capabilities to tailor functionality to their needs. The Scheduling Optimization Agent that lets you schedule frontline workers is now easier to use than ever.

Note: The author created this article with assistance from AI. Learn more

Improve schedule assistant matching across locations

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Jun 2, 2025

Business value

With this feature, businesses can efficiently match resources and requirements from different time zones on a calendar day basis, without needing precise time slot matches as schedule assistant typically requires. Companies can ensure that projects across different locations are staffed with the best available resources worldwide, so delivery times and customer satisfaction improve.

Feature details

The schedule assistant feature efficiently matches resources with requirements. However, finding matches between resources and requirements across different time zones and locations can be challenging. This feature solves the challenge with **Time zone-agnostic matching**. The feature matches resources and requirements based on relative availability, regardless of their respective time zones. For example, if a resource works from 9 a.m. to 5 p.m. in their local time, the feature matches them with a requirement that spans 9 a.m. to 5 p.m. in local time, even if the resource and requirement are in different geolocations with different time zones.

With this feature, organizations can overcome the challenges of managing resources across different geolocations, ensuring that projects are staffed efficiently and effectively.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Schedule resources across time zones (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Improve schedule board usability and performance

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Apr 7, 2025

Business value

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

Feature details

We encountered issues with the updated schedule board. To fix these issues, we're temporarily disabling the updated schedule board. We're committed to delivering this update and will share our plans to roll it out once we resolve the issues. In the meantime, the schedule board reverts to its prior functionality. If you manually installed Universal Resource Scheduling solution version 3.12.144.84, we remotely disable the update with no action required on your part. If you're on any other prior version of the Universal Resource Scheduling solution, there's no change to your schedule board.

- **Enhanced user experience**: The improved schedule board architecture brings a shift from extJS to React. This change provides a more responsive user interface and creates a more intuitive and satisfying user experience for technicians and dispatchers.
- **Improved performance**: An efficient diffing algorithm and a virtual Document Object Model (DOM) give you better update and load times. The schedule board loads faster and reacts instantly to user interactions, even under heavy load.
- **Future-proof**: The new architecture uses the latest advancements in web technology, so maintenance and upgrades are easier.
- **Usability and modernization improvements**: The updated schedule board brings highly requested features like a working-days-of-the-week selector, week numbers, the ability to reorder tabs per user, day line visibility, and accessibility improvements.

> ⓘ Note

Updating from extJS to React breaks unsupported customizations, such as DOM manipulations.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Streamline work order management

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Streamlined workflows and Copilot's assistance help service managers efficiently allocate resources, coordinate schedules, and monitor progress, so they keep operations running smoothly. Dynamics 365 Field Service encourages collaboration with field technicians and customers, so service managers maintain a high level of customer satisfaction. Advanced analytics gives service managers the power to analyze feedback and metrics, so they can find areas for improvement and enhance service quality and the customer experience.

In this wave, we continue investing in enhancements to existing Copilot experiences, bug fixes, performance improvements, and addressing top customer-identified product gaps.

Discover how Dynamics 365 Field Service can transform your service processes and elevate your operations.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Improve keyboard and screen reader support

10/16/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 28, 2025	✔ Oct 1, 2025

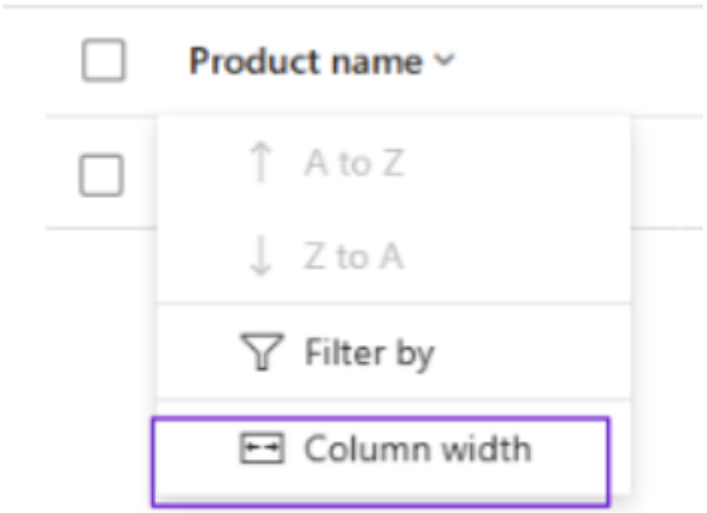
Business value

Field Service becomes more accessible and efficient for users who rely on keyboards or screen readers. With improved keyboard navigation in subgrids and enhanced screen reader support for date fields, users can move through forms without a mouse and clearly understand key information using assistive technology. This improvement leads to faster workflows, fewer accessibility barriers, and a more inclusive experience for all users.

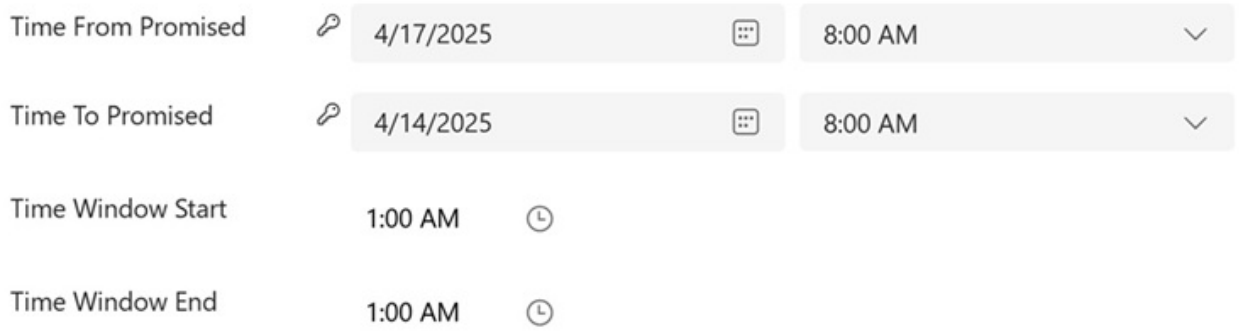
Feature details

We're rolling out accessibility enhancements to Field Service:

- Subgrids on the **Opportunities**, **Actuals**, **Invoices**, and **Quotes** forms now use the fully keyboard-friendly OneGrid component, replacing the legacy Power Apps Wijmo Grid. With this update, the column menu in Field Service grids supports complete keyboard navigation, so users can sort data, apply filters, and adjust column widths without relying on a mouse. This enhancement significantly improves accessibility for users who depend on keyboard navigation or assistive technologies, such as screen readers, by ensuring all menu options are reachable and properly announced.



- The new work order form refactors the date and time promised fields to make screen reader interpretation clearer. This update simplifies navigation and ensures that promised times are accurate.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Tailor Copilot chat experience with Copilot Studio

08/14/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Aug 1, 2025	-	-

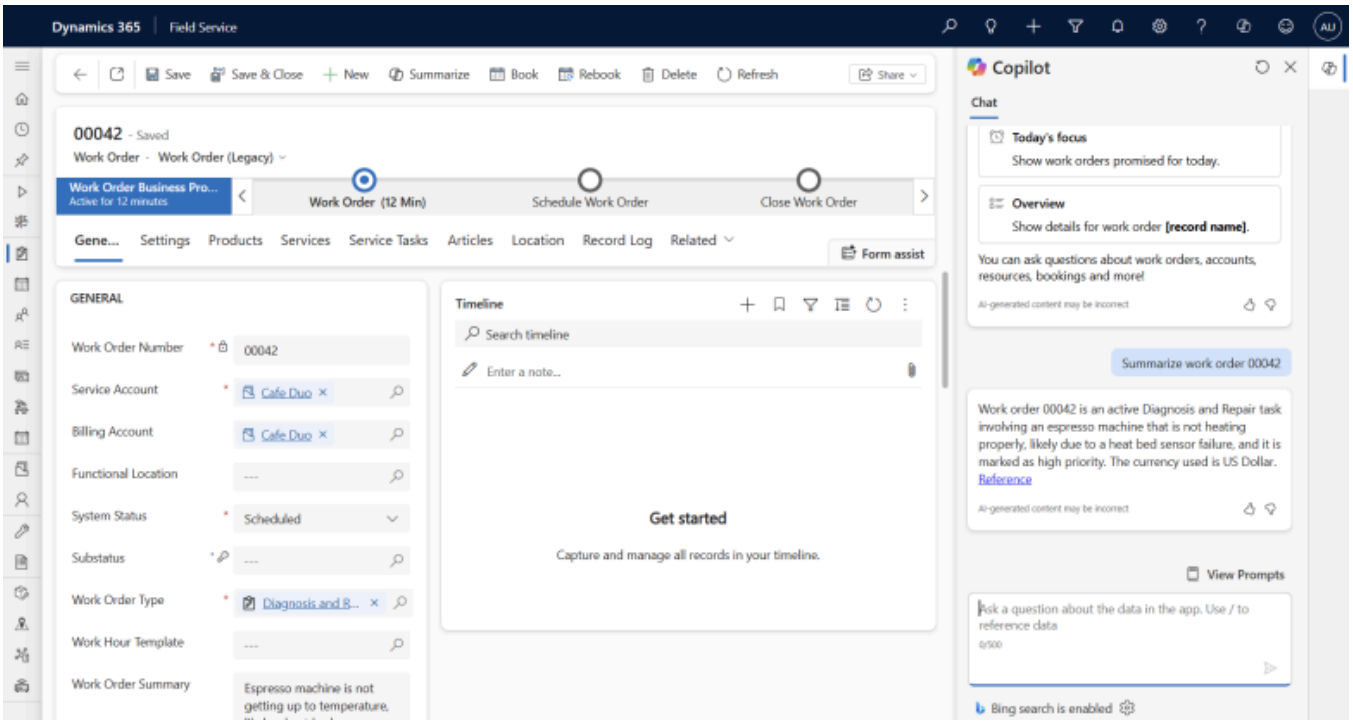
Business value

With Copilot Studio components, makers can create tailored workflows within Microsoft Copilot Studio. These custom workflows empower end users with capabilities that meet organizational needs. Makers can also integrate existing components from Power Platform or Field Service to enrich the user experience continually.

Feature details

Customize your Copilot in Field Service side pane experience with Copilot Studio.

- Makers can customize Copilot chat with existing Copilot Studio component collections (Preview) or create their own components to enable custom workflows.
- Field Service work order and scheduling topics are now available as Copilot Studio component collections, allowing makers to enable them for Field Service or custom model-driven applications.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Customize Copilot chat (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Plan and prepare for Dynamics 365 Finance in 2025 release wave 1

> **Important**
>
> The 2025 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2025 to September 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/2025W1/Finance

Finance continues to be a strategic leader in an organization's growth plan. A key aspect of this role is gaining a competitive advantage by using AI to transform not only the productivity of an organization but also the ability to view deep insights on data for faster decision-making. We continue to strengthen our autonomous financial application goals by bringing additional copilot and agentic capabilities to customers while strengthening the core offering and setting the foundation for end-to-end automation and copilot experiences.

In this release, we continue the preview of the account reconciliation agent, moving this process from end-of-period to a systematic, real-time experience. We also introduce a new journal framework that brings extra control, hyper-scale, and multicompany capabilities to both the entry and import experiences. We enhance modern bank reconciliation and automation to reach deeper capabilities based on user feedback. In globalization, we expand our out-of-the-box localizations with releases for Türkiye and Argentina. We keep the system up to date with evolving electronic invoicing, tax reporting, and other legislations, while also enhancing tax automation capabilities.

Business performance analytics introduces increased data freshness and extensibility capabilities. Business performance planning provides intelligent actions and templates for quickly starting the continuous planning process.

Features and user experience enhancements are designed with the copilot-first experience, using copilot to gain deep insights across documents in the application, gain insights into the fixed assets book, help with increasing automation in bank reconciliation, and reduce the manual work involved in managing taxes and applying regulatory updates.

Updates to Dynamics 365 Finance 2025 release wave 1

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. Features in business performance showcase the enhancements around business performance planning and business performance analytics.

Copilot

Copilot gives users AI-powered assistance and helps resolve tasks more efficiently with fewer steps by guiding users through these tasks. It empowers users with data, ensures the best decisions, and takes actions. With these time savings, users can execute financial tasks faster and focus on more value-added activities.

Core financials

Our core financials investments focus on bringing extra enhancements to core financial capabilities. They enhance end-to-end business processes across ERP, increase automation, reporting, and analytics, and reduce financial close time.

Globalization Studio

To meet various tax compliance and local requirements (localizations), customers in over 210 countries and regions use our solution. We offer out-of-the-box localizations and continuous regulatory updates for multiple countries and regions, available in multiple languages. Our no-code/low-code Globalization Studio services automate complex tax scenarios, so partners and customers can easily extend localizations.

We're investing in expanding out-of-the-box country coverage, automating continuous regulatory updates, and reducing the manual efforts involved in managing taxes.

To follow our planned and released regulatory updates, see Search for country/region-specific regulatory updates.

For more information on Globalization Studio, see 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
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Finance.
Product documentation	Find documentation for Finance.
User community	Engage with Finance experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Finance.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 10/16/2025

What's new and planned for Dynamics 365 Finance

This topic lists features that are planned to release from April 2025 through September 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 2 plan.
- For a list of the next wave's release plans, go to 2025 release wave 2 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
Track change management in business performance planning	Users, automatically	-	✅ Apr 30, 2025
Export Business performance planning cubes and dimensions	Users, automatically	-	✅ Jun 30, 2025

Copilot

AI-powered assistance to resolve financial tasks more efficiently in the location where the user works.

Expand table

Feature	Enabled for	Public preview	General availability
Reconcile with subledger to general ledger reconciliation agent	Users by admins, makers, or analysts	✔ Apr 25, 2025	-

Core financials

Automation, AI, and enhancements to core financials.

Expand table

Feature	Enabled for	Public preview	General availability
Define rules for default financial tags	Users by admins, makers, or analysts	✔ Oct 25, 2024	✔ Jun 27, 2025
Make payments in advance with prepayment sales invoices	Users by admins, makers, or analysts	✔ Feb 28, 2025	✔ Jun 6, 2025
Process automation bank foreign currency reconciliation	Users by admins, makers, or analysts	-	✔ Jun 6, 2025
Expand the use of financial tags	Users, automatically	-	Sep 2025
Enable financial tags for purchase order invoicing	Users by admins, makers, or analysts	-	✔ Jun 18, 2025
Use agents for recommended actions on Account reconciliation agent workspace	Users by admins, makers, or analysts	✔ May 12, 2025	-
Implement workflow for lease impairment	Admins, makers, marketers, or analysts, automatically	✔ Jul 28, 2025	✔ Sep 12, 2025
Optimize user security configurations and licensing costs	Users, automatically	✔ Jan 27, 2025	✔ Jun 6, 2025
View cross-company transactional data using accounting source explorer	Users by admins, makers, or analysts	-	✔ Sep 26, 2025

Globalization Studio

Globalization Studio automates complex tax scenarios and provides out-of-the-box localizations for multiple countries and regions and in multiple languages. Extended by

partners and customers, it allows our customers to run Dynamics 365 finance and operations apps in over 210 countries and regions.

Expand table

Feature	Enabled for	Public preview	General availability
Use electronic invoicing in Colombia	Users by admins, makers, or analysts	-	✔ Sep 17, 2025
Use electronic invoicing in Uruguay	Users by admins, makers, or analysts	-	✔ Sep 1, 2025
Expand localization in LATAM countries for Dominican Republic	Users by admins, makers, or analysts	-	✔ Jul 4, 2025
Expand localization in LATAM countries for Peru	Users by admins, makers, or analysts	-	✔ Jul 4, 2025
Expand localization in LATAM countries for Venezuela	Users by admins, makers, or analysts	-	✔ Jul 4, 2025
Update to OIOUBL format 3 for electronic invoicing in Denmark	Users by admins, makers, or analysts	-	✔ Aug 12, 2025
Convert Excel documents to PDF format	Users by admins, makers, or analysts	✔ Apr 1, 2025	✔ Oct 1, 2025
Expand country coverage to Turkiye	Users by admins, makers, or analysts	✔ Apr 25, 2025	✔ Oct 3, 2025
Use electronic invoicing in Paraguay	Users by admins, makers, or analysts	-	✔ Sep 17, 2025
Access electronic invoicing phased rollout in Belgium	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Use the enhanced Poland JPK KR PD annual regulatory report	Users, automatically	✔ Apr 1, 2025	✔ Oct 1, 2025
Extend support for multiple tax registration numbers in tax reporting	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Use security enhancements in UK MTD VAT integration	Users by admins, makers, or analysts	✔ Apr 1, 2025	✔ Apr 1, 2025
Use updated Australian Payment Times Reporting Scheme	Users, automatically	✔ May 30, 2025	✔ Jun 30, 2025

* You are able to opt into some features as part of early access on February 3, 2025, 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 information on data residency in Dynamics 365 and Power Platform, visit the Microsoft Dynamics 365 and Power Platform data residency documentation. For more information about geo availability, visit the Dynamics 365 and Microsoft Power Platform availability page.

Last updated on 12/02/2025

Business performance

08/14/2025

> **Important**
>
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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. Features in business performance showcase the enhancements around business performance planning and business performance analytics.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Export Business performance planning cubes and dimensions

08/28/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Jun 30, 2025

Business value

This feature streamlines the deployment of planning models by enabling seamless packaging and transfer of Business performance planning cubes, dimensions, and frameworks across environments. It eliminates the need to rebuild models from scratch, so you significantly reduce implementation time and effort. By providing a flexible and extensible foundation, businesses can accelerate decision-making, optimize planning processes, and adapt frameworks to industry-specific needs. Partners can create reusable baseline models to enhance collaboration and ensure rapid, tailored deployments. This solution increases efficiency, reduces costs, and delivers faster time-to-value for planning and budgeting solutions.

Feature details

The Business performance planning cube and dimension export and import feature enables users to transfer planning structures across environments. Users select a cube and its associated dimensions, and generate a JSON file that contains the data schema. To import the file into another Business performance planning environment, users can:

- Select **Import cube** on the home page.

  -- or --

- Select **Create cube** in the cube section, then select **Import cube**.

A guided wizard helps users select the previously exported JSON file. If a dimension with the same name exists in the target environment, users get a prompt that lets them choose to stop the process or continue without duplicating the existing dimension. If a cube with the same name exists, users get a notification that blocks the import. Users must rename the cube in the source or target environment before they can proceed.

This feature exports only the data schema, not the actual data. After importing the schema, users must populate the new tables with data by using existing functionalities. For dimensions, users can enter data manually through the grid or use Dataflow. For cubes, users can use Dataflow or Excel upload.

When users update the Business performance planning application to the latest version, licensed users get this feature enabled by default. No manual activation is required. The feature has no compatibility restrictions and doesn't affect existing functionalities.

By streamlining the deployment of planning models, this feature reduces implementation time and enables customers to deploy solutions in less than two weeks. It empowers partners to create and distribute industry-specific planning templates to address the need for reusable frameworks. Research and customer feedback show that businesses want a standardized yet adaptable approach that balances best practices with customization. This feature helps organizations rapidly scale and optimize their planning processes.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Track change management in business performance planning

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 30, 2025

Business value

This feature improves transparency and accountability for changes to cube data in business performance planning. Users get a comprehensive view of the data's history, which helps facilitate better decision-making.

Feature details

The change management tracking for cubes in business performance planning enhances tracking and transparency for changes to cube data. With this feature, you can track who made changes, what changes they made, and when they made them. The UI experience clearly shows the changed values before and after the change. You can filter the audit trail data for reporting purposes.

The feature also includes a contextualized audit trail experience within Power BI visuals. With this feature, you can access the audit trail directly within the visuals.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Copilot

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has 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 gives users AI-powered assistance and helps resolve tasks more efficiently with fewer steps by guiding users through these tasks. It empowers users with data, ensures the best decisions, and takes actions. With these time savings, users can execute financial tasks faster and focus on more value-added activities.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Reconcile with subledger to general ledger reconciliation agent

08/21/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 25, 2025	-

Business value

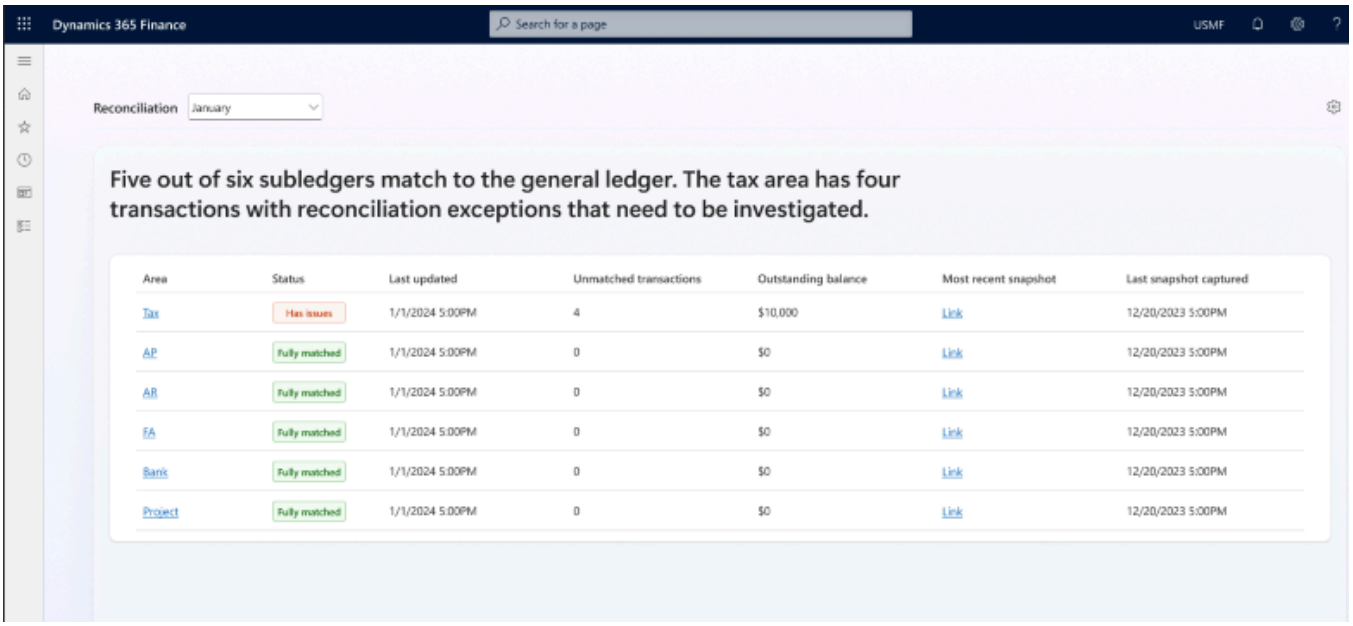
Reconciliation of data is a time-consuming process that you often defer until the end of a period. This deferral adds time and headaches to the completion of period end tasks. The subledger to general ledger reconciliation feature changes this process to be proactive rather than reactive when it identifies a difference. Use Copilot to notify you of a difference between the subledger and the general ledger, provide options for how to resolve the issue, and eventually resolve the issue on your behalf. Reconciliation is no longer a bottleneck but is always in a continuous state of readiness.

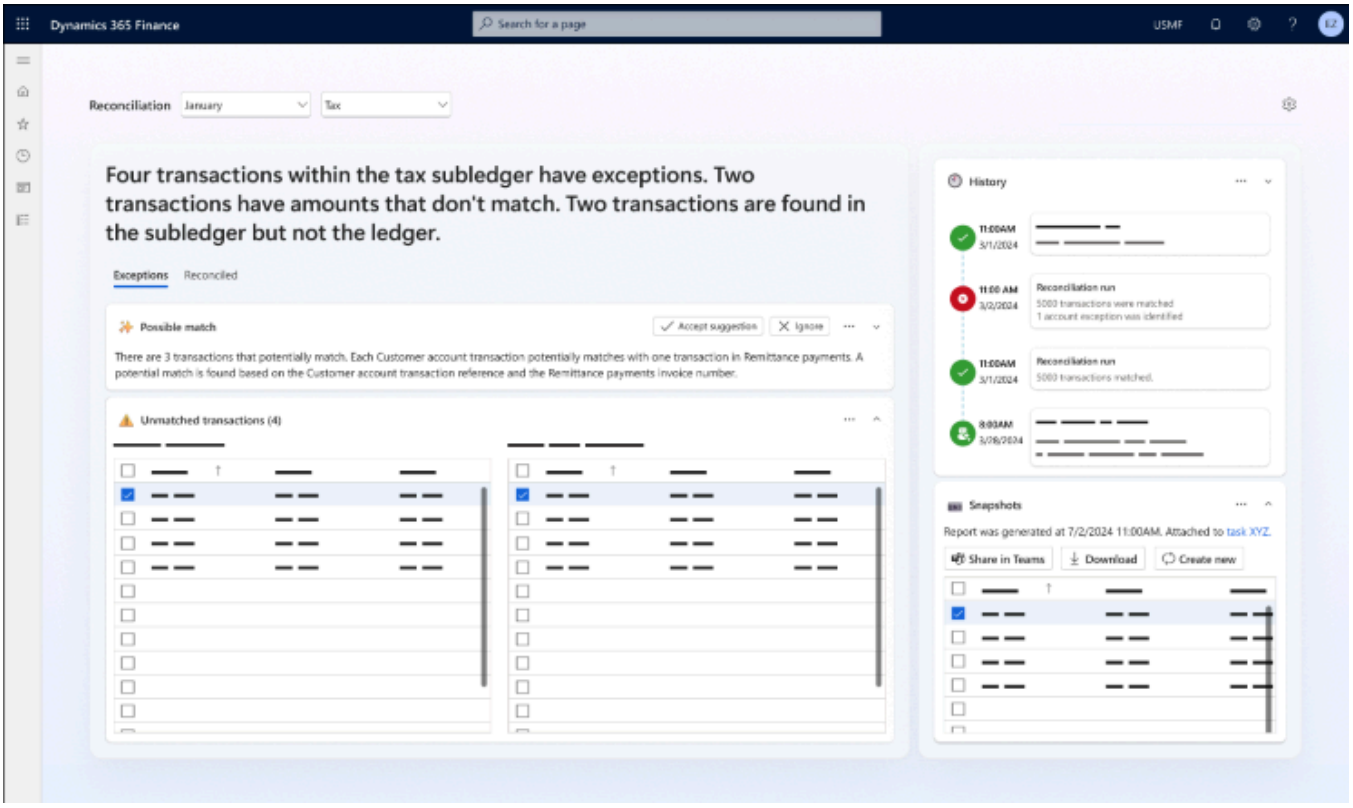
Feature details

The first reconciliation copilot automations focus on reconciling subledgers to the general ledger balances. SQL Server Reporting Services (SSRS) reports are replaced with a near-real-time process that proactively notifies the finance team of any reconciliation issues. Upon recognition of an issue, Copilot identifies the mismatched transactions and provides a solution. That solution might be changing a setting on the main account (such as don't allow manual entry) or recognizing when a posting profile change causes a different balance sheet account to be used for reconciliation.

An audit trail is maintained when you identify issues, along with the solution. Copilot learns from the solutions of the past and moves toward automatic resolution to any reconciliation issues (longer-term vision). Again, the audit trail tracks actions taken by Copilot.

The first releases focus on a subset of subledgers: accounts payable, accounts receivable, tax, and bank. Future releases add subledgers such as fixed assets and inventory.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Ledger and subledger accounting overview (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Core financials

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

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ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Define rules for default financial tags

08/21/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 25, 2024	✔ Jun 27, 2025

Business value

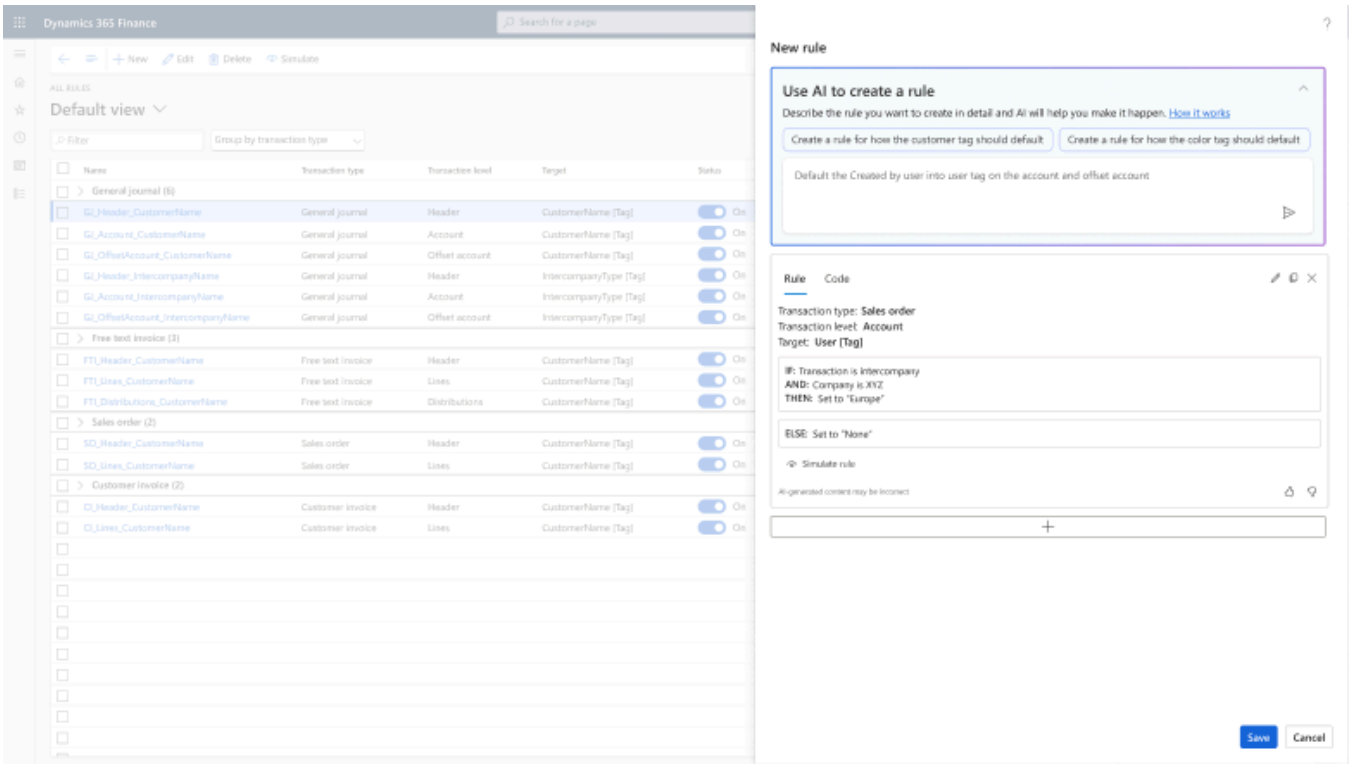
Financial tags help you track up to 20 user-defined fields on accounting entries. The initial releases limit the defaulting capabilities for financial tags. With this feature, accounting managers and system administrators can capture important transactional data in Tags with Copilot-assisted rules creation. By defaulting financial tags, you reduce the manual effort and mistakes of team members entering transactions.

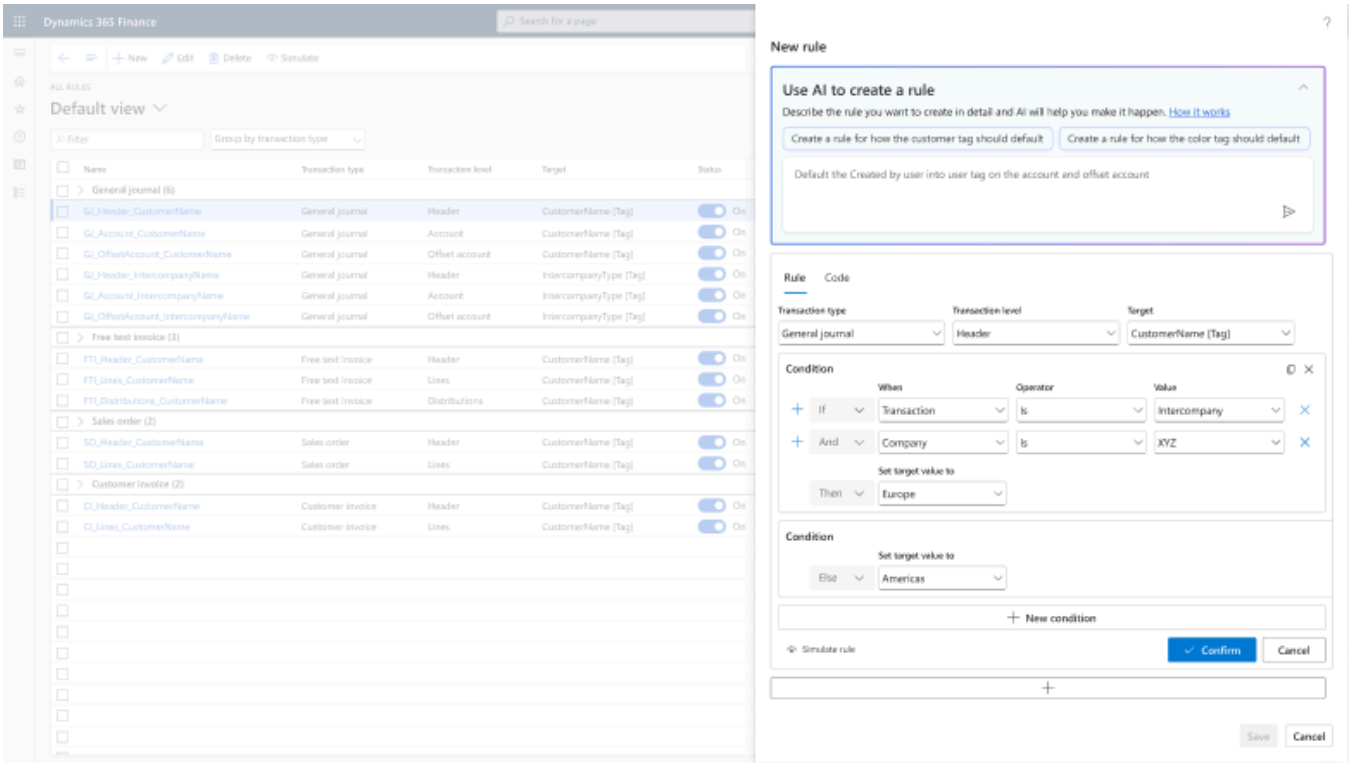
Feature details

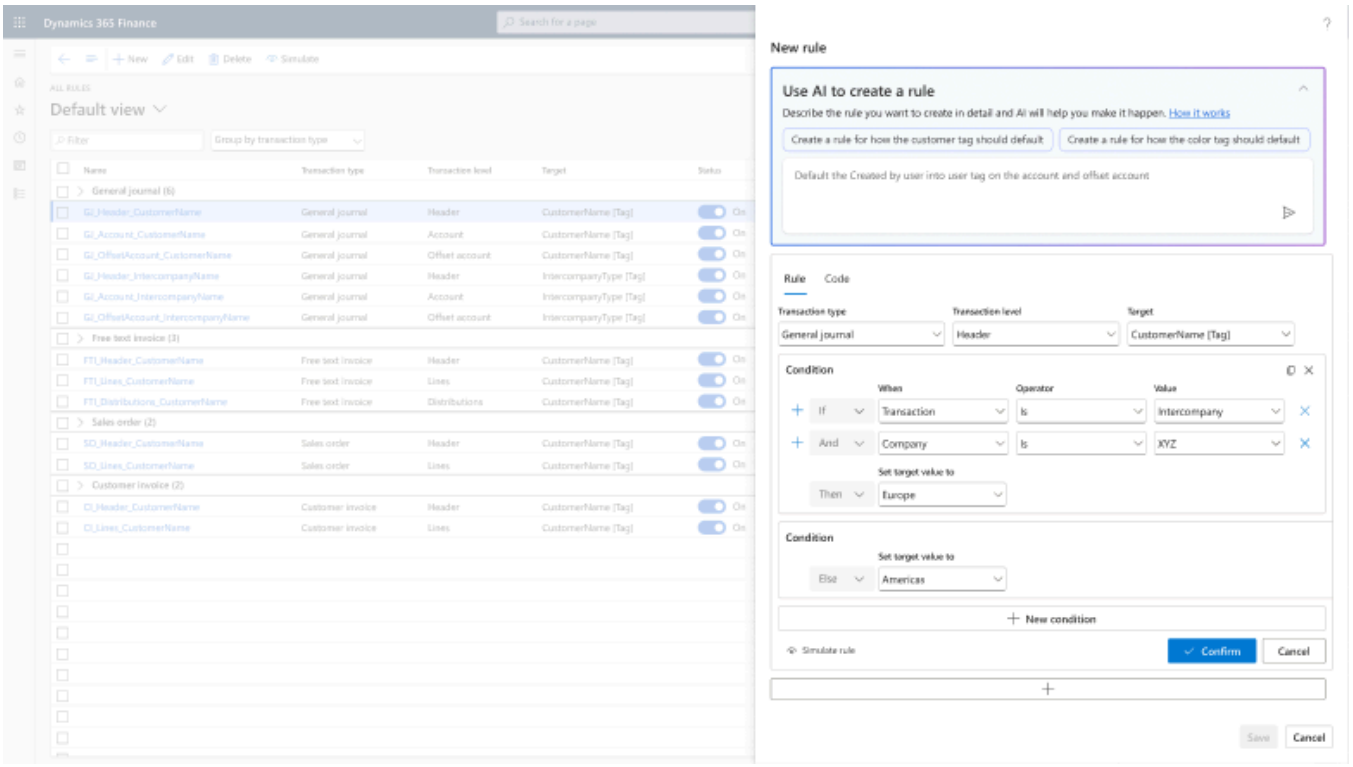
The default engine for tags enables an organization to set its own rules for default financial tags. You can define rules for each transaction entry point, such as general journal, free text invoice, purchase order, vendor invoice journal, and more. You can also set rules for each financial tag and transaction level, including header, lines, account, offset account, and distributions. The rules can use three different options. You can enter natural language into Copilot, which converts it into a technical rule. You can define the rule with an expression builder or enter the technical rule directly.

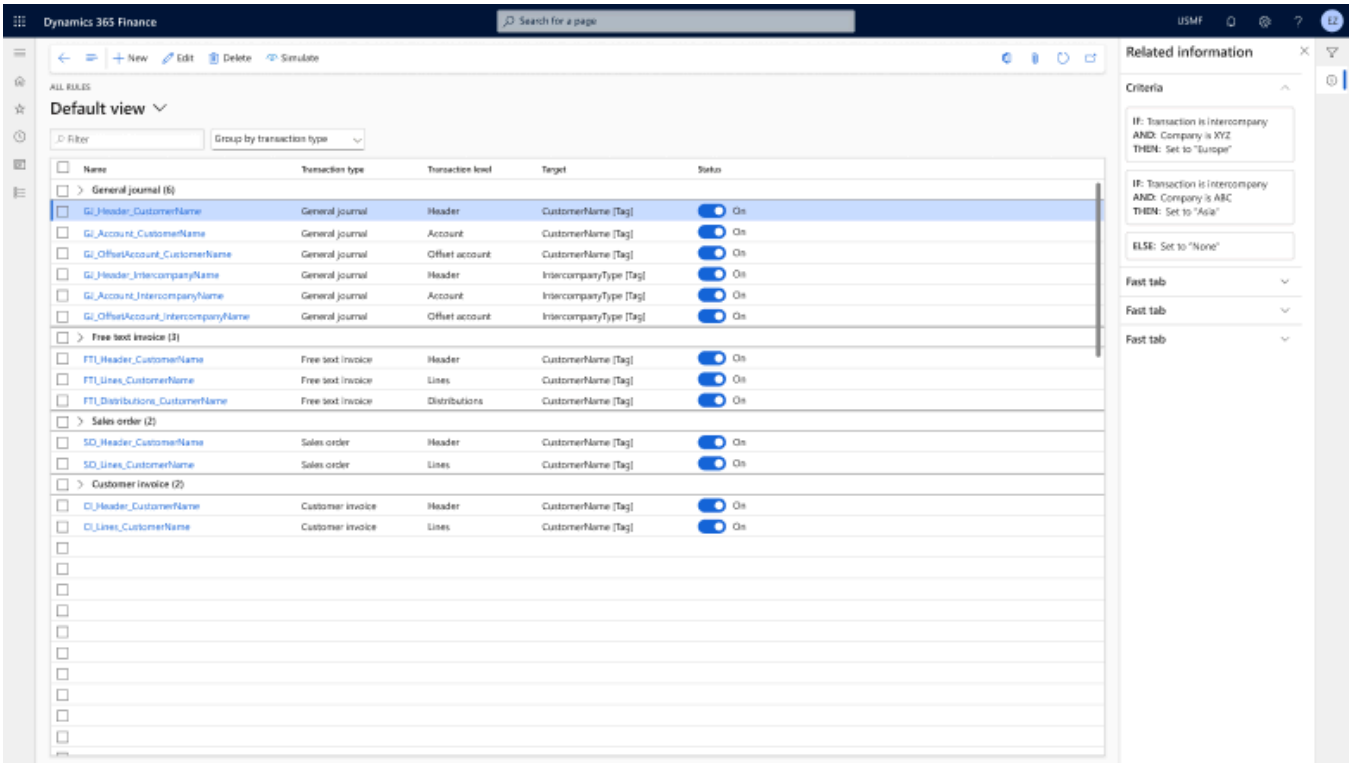
You can simulate a rule against posted transactions to preview the results before you activate it. The simulation doesn't update the posted transaction. It just uses the transaction to validate the rule.

In the first release, you can create defaulting rules for a subset of transaction entry points, such as the general journal. We'll add support for more journals and documents in future releases.


Dynamics 365 Finance
Search for a page
New
Edit
Delete
Simulate
Default view
Filter
Group by transaction type
Name
Transaction type
Transaction level
Target
Status
General journal (6)
GJ_Header_CustomerName
GJ_Account_CustomerName
GJ_OffsetAccount_CustomerName
GJ_Header_IntercompanyName
GJ_Account_IntercompanyName
GJ_OffsetAccount_IntercompanyName
Free text invoice (3)
FTI_Header_CustomerName
FTI_Lines_CustomerName
FTI_Distributions_CustomerName
Sales order (2)
SO_Header_CustomerName
SO_Lines_CustomerName
Customer invoice (2)
CI_Header_CustomerName
CI_Lines_CustomerName
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


Dynamics 365 Finance
Search for a page
New
Edit
Delete
Simulate
Default view
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
Transaction level
Target
General journal
Header
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





Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Financial tag rules (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Enable financial tags for purchase order invoicing

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Jun 18, 2025

Business value

When you enable the financial tags for purchase order invoicing feature, use the financial tag to track subledger data with purchase order numbers and vendor names instead of using financial dimensions. This change helps reduce performance issues 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. These fields store on accounting entries. When you enable the feature, 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

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Financial tags (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Implement workflow for lease impairment

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jul 28, 2025	✔ Sep 12, 2025

Business value

Integrating workflow functionality into the lease impairment process not only streamlines custom approval sequences but also delivers significant business value. This enhancement minimizes errors, ensuring greater control and compliance throughout the process. By standardizing approvals, organizations can boost operational efficiency, improve transparency, and accelerate decision-making.

Feature details

This feature introduces a new workflow for managing lease impairment using the standard workflow framework. It adds a **Submit** option to the Right-of-use asset impairment dialogue that initiated from the **Lease book** page, allowing users to send impairment records for approval before posting. A new lease impairment form supports continuing the process after approval.

The workflow ensures a consistent and controlled impairment process by guiding each record through predefined workflow approval steps and assigning tasks to designated users. Once approved, the impairment is finalized on the Lease impairment list page. Approvals are managed directly from the **Lease impairment** page.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Last updated on 12/04/2025

Make payments in advance with prepayment sales invoices

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 28, 2025	✔ Jun 6, 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 success of the business.

Feature details

The prepayment invoice feature gives you the option to issue an invoice for prepayment sales order lines. You collect payment with a prepayment invoice before delivering the goods or services. You reconcile and settle the prepayment invoice with the final invoice. This process ensures that all payments are posted against an invoice.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Prepayment invoices vs. prepayments (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Optimize user security configurations and licensing costs

08/14/2025

Expand table

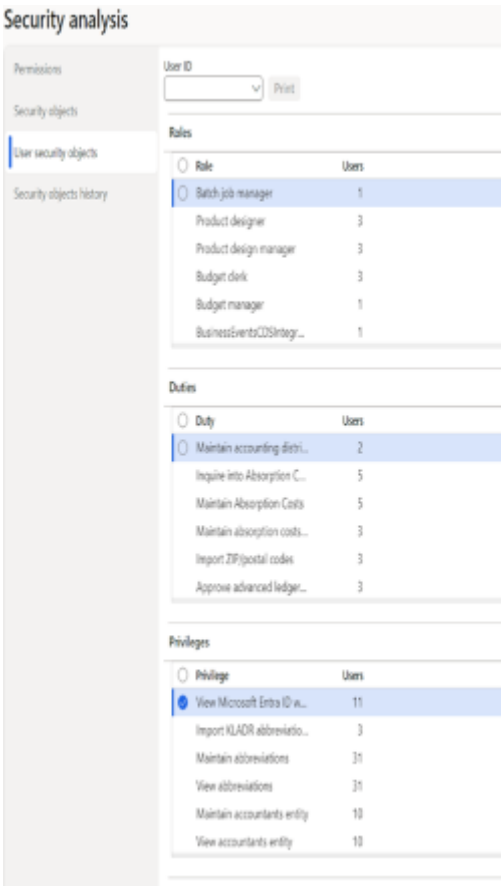
Enabled for	Public preview	General availability
Users, automatically	✔ Jan 27, 2025	✔ Jun 6, 2025

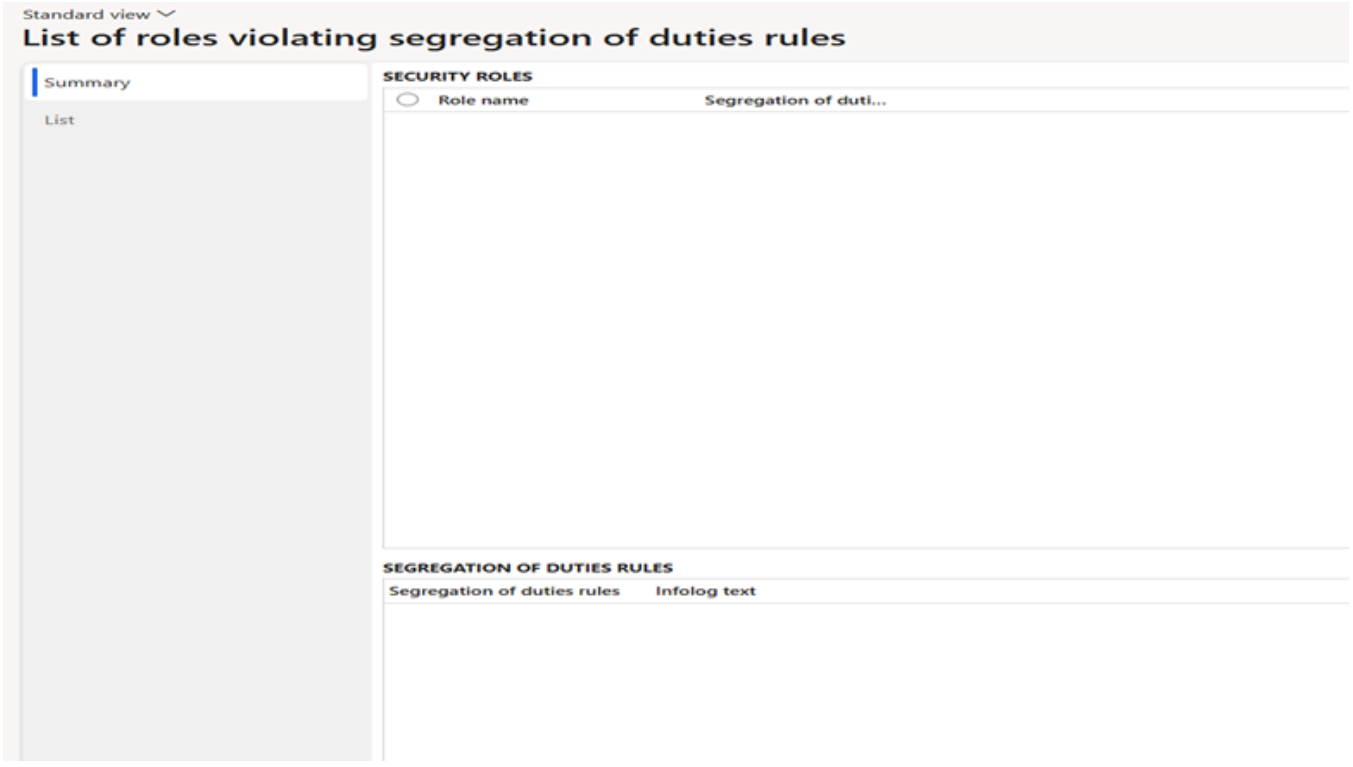
Business value

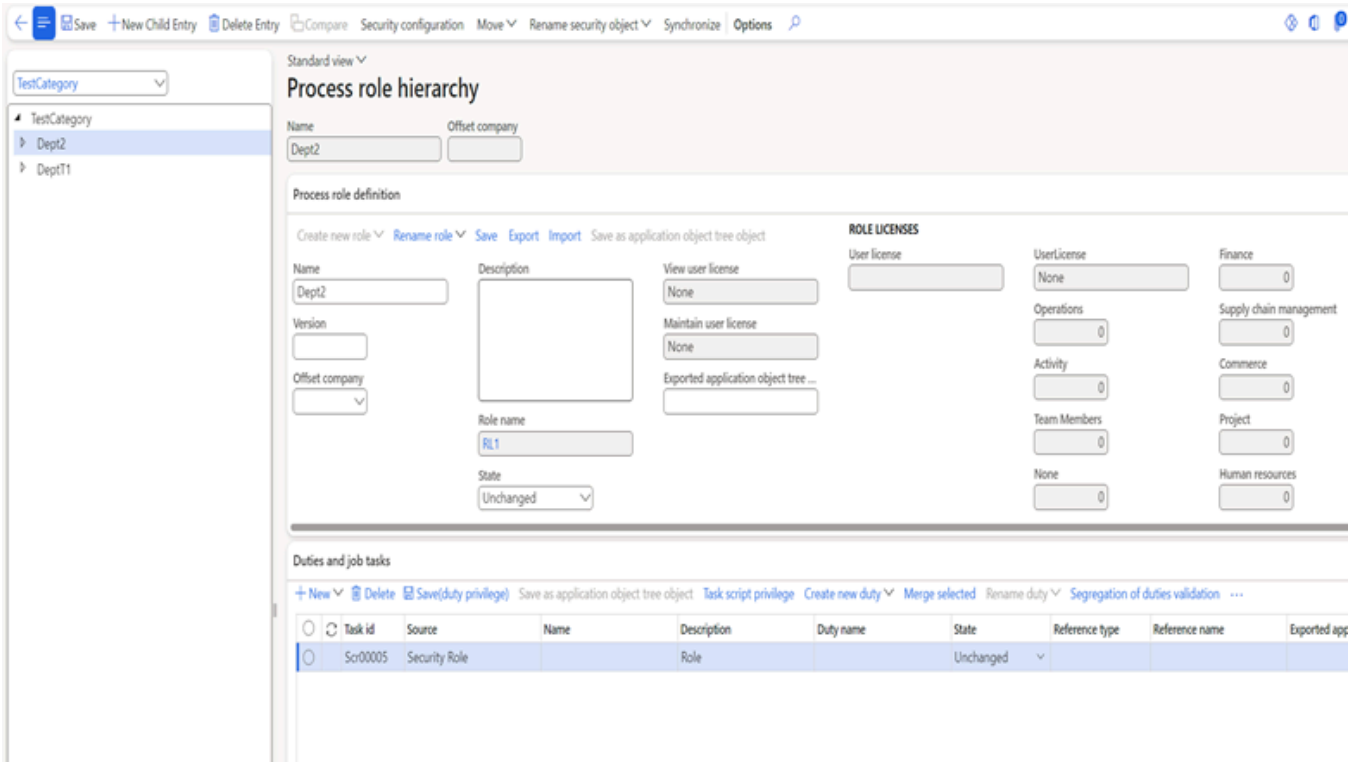
These features designed for system administrators streamline role management, audit licenses, and enhance audit trails and versioning. They provide valuable reports on license usage and separation of duties violations. With these features, organizations can optimize software investments, ensure compliance, and maintain robust security and internal controls.

Feature details

User security governance is a set of advanced features that provides system administrators with tools for role management, license auditing, enhanced audit trails, and versioning. The features include reports on license usage and separation of duties violations.


Security analysis
Permissions
Security objects
User security objects
Security objects history
User ID
Print
Roles
Role
Users
Batch job manager 1
Product designer 3
Product design manager 3
Budget clerk 3
Budget manager 1
BusinessEventsCDSIntegr... 1
Duties
Duty
Users
Maintain accounting distri... 2
Inquire into Absorption C... 5
Maintain Absorption Costs 5
Maintain absorption costs... 3
Import ZIP/postal codes 3
Approve advanced ledger... 3
Privileges
Privilege
Users
View Microsoft Entra ID a... 11
Import KLADR abbreviatio... 3
Maintain abbreviations 31
View abbreviations 31
Maintain accountants entity 10
View accountants entity 10


Standard view
List of roles violating segregation of duties rules
Summary
List
SECURITY ROLES
Role name
Segregation of duti...
SEGREGATION OF DUTIES RULES
Segregation of duties rules
Infolog text



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Set up security governance parameters (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Process automation bank foreign currency reconciliation

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Jun 6, 2025

Business value

Scheduling bank foreign currency revaluation through process automation in Dynamics 365 Finance ensures accuracy and saves time.

Feature details

Dynamics 365 Finance now supports automating Bank Foreign Currency Revaluation (FCR), so the system consistently updates foreign currency balances. This enhancement greatly reduces the risk of errors and discrepancies in financial reporting.

You can schedule revaluation processes to run on specific dates and use defined parameters. These processes run in the background, so you can focus on other tasks and review the results when needed.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Bank foreign currency revaluation (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use agents for recommended actions on Account reconciliation agent workspace

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ May 12, 2025	-

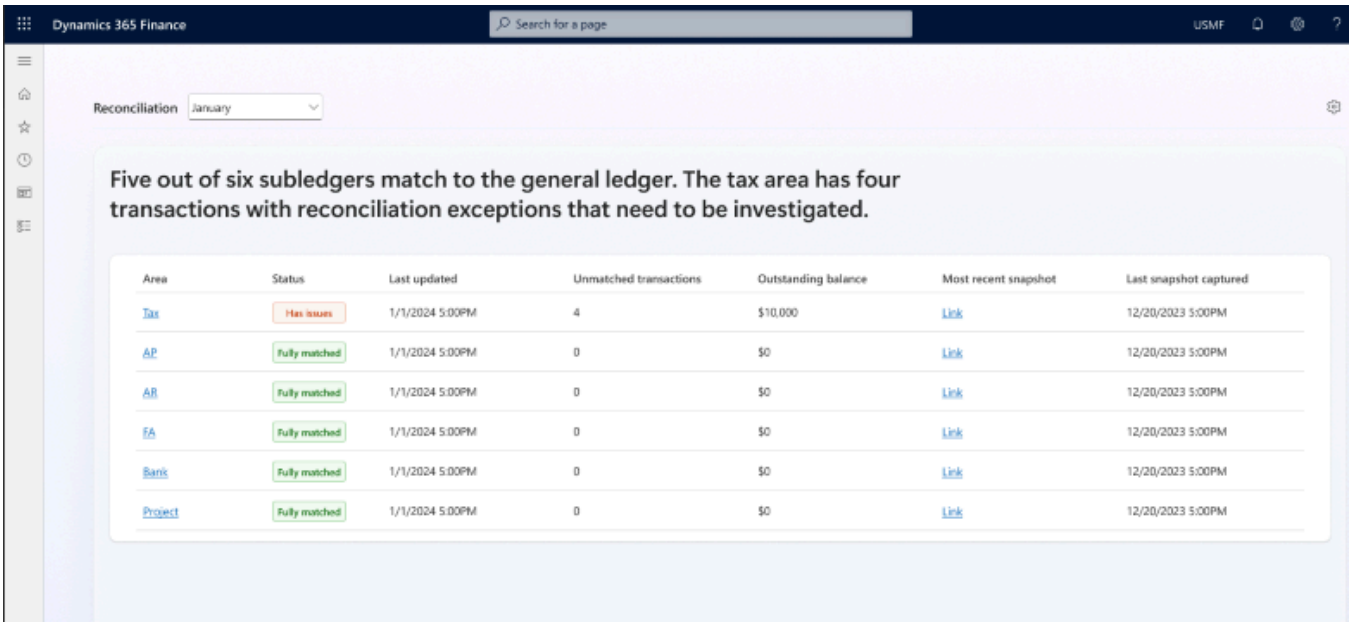
Business value

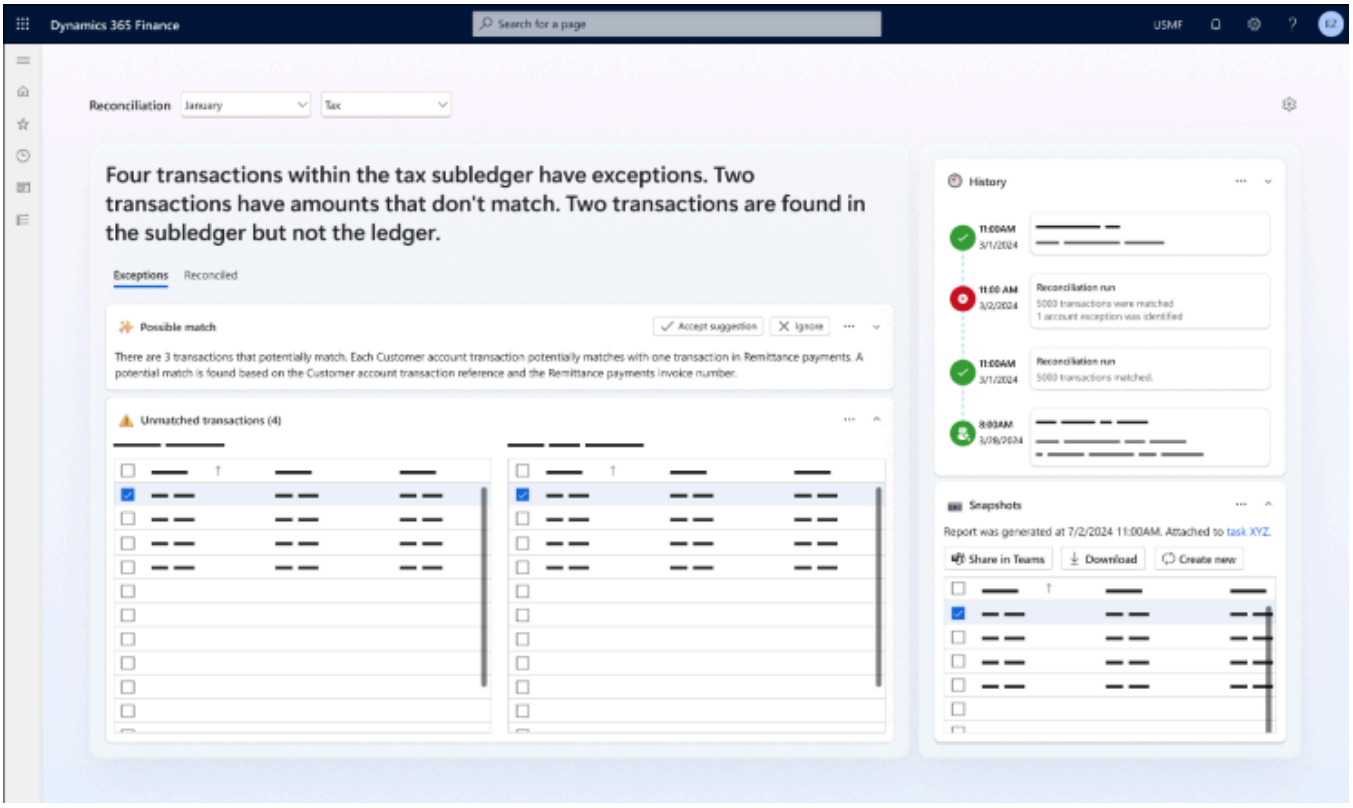
Reconciliation of data is a time-consuming process that you often defer until the end of a period. This deferral adds time and headaches to completing the period end tasks. The subledger to general ledger reconciliation feature changes this process to be proactive rather than reactive when it identifies a difference. Use Copilot to notify you of a difference between the subledger and the general ledger, provide options for how to resolve the issue, and eventually resolve the issue on your behalf. Reconciliation is no longer a bottleneck. Instead, it's always in a continuous state of readiness.

Feature details

The first reconciliation automations focus on reconciling subledgers to the general ledger balances. SSRS reports are replaced with a near-real-time process that proactively notifies the finance team of any reconciliation issues. Upon recognition of an issue, each transaction provides many options for possible solutions. The solution might be changing a setting on the main account, such as don't allow manual entry. The solution might be recognizing when a posting profile changed, causing a different balance sheet account to be used for reconciliation. The system maintains an audit trail when you identify issues, along with the solution.

The first public preview includes the subledger-to-ledger reconciliation automation but doesn't include recommendations from the Account reconciliation agent for how to address exceptions. The second public preview introduces the agent functionality for recommending the action to take to address the exception for individual transactions. Copilot learns from the solutions of the past and moves toward automatic resolution to any reconciliation issues (longer-term vision). All actions taken by Copilot are tracked with an audit trail.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Account reconciliation (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

View cross-company transactional data using accounting source explorer

10/30/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Sep 26, 2025

Business value

Accountants using Dynamics 365 Finance to view detailed transactional data often view data across multiple companies that are related to the overall parent business. It's important for them to quickly and easily view data across related companies. With this feature, users can view or export data to Excel to see deep financial analysis across those companies.

Feature details

The accounting source explorer page in Dynamics 365 Finance is a key tool for accounting personnel to view financial transactions. Currently, you can view data from only one company or legal entity at a time. To view data from multiple companies, you must switch between companies and reload the data in the accounting source explorer page.

With this update to the accounting source explorer, you can quickly and easily export transactional data for selected companies. By exporting data from multiple companies to Excel, the accounting team can perform deeper analysis across companies.

The key change for this feature is an improved export option. You can select the companies you want to export data from, along with other existing filter options in the accounting source explorer.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Accounting source explorer (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Globalization Studio

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 meet various tax compliance and local requirements (localizations), customers in over 210 countries and regions use our solution. We offer out-of-the-box localizations and continuous regulatory updates for multiple countries and regions, available in multiple languages. Our no-code/low-code Globalization Studio services automate complex tax scenarios, so partners and customers can easily extend localizations.

We're investing in expanding out-of-the-box country coverage, automating continuous regulatory updates, and reducing the manual efforts involved in managing taxes.

To follow our planned and released regulatory updates, see Search for country/region-specific regulatory updates.

For more information on Globalization Studio, see Globalization Studio documentation.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Access electronic invoicing phased rollout in Belgium

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

Global and local customers who deploy Microsoft Dynamics 365 Finance in Belgium can access electronic invoicing functionality that meets Belgium requirements.

Feature details

This feature complies with the Belgium-specific requirements for enforcing electronic invoicing for business-to-business communications starting January 1, 2026.

You can send invoices and credit notes created from sales orders, free text invoices, project invoices, or imported vendor pending invoices to or from the PEPPOL Delivery Network in the PEPPOL-based XML format that complies with the Belgian electronic invoicing standards.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Electronic invoicing for Belgium (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Convert Excel documents to PDF format

10/16/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2025	✔ Oct 1, 2025

Business value

This feature makes it easy to convert configurable business documents from Word or Excel formats to PDF format, and it removes the need for external conversion services. To use this feature in Dynamics 365 Finance version 10.0.43 and later, enable the (Preview) In-App PDF conversion for the Configurable Business Documents (CBD) feature in Feature management.

Feature details

This feature uses Application Object Server (AOS) resources to eliminate the need for external conversion services. Using these in-app capabilities ensures efficient and secure document processing to reduce dependency on tools outside of Finance while maintaining high performance and reliability. This enhancement supports a wide range of business scenarios that provide users with the flexibility to generate and distribute professional-grade PDF documents directly within the application.

When you enable the **(Preview) In-App PDF conversion for Configurable Business Documents (CBD)** feature, you get the following advantages of in-app PDF conversion:

- The produced PDF document isn't limited to 300 pages.
- The converted Word document can contain a large number of content controls.
- On-premises deployments don't require internet connectivity.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Output conversion to PDF (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Expand country coverage to Turkiye

10/23/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 25, 2025	✔ Oct 3, 2025

Business value

Tax compliance requirements are complex and frequently changing. Companies want more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for more countries gives customers more consistent out-of-the-box regulatory compliance coverage in multiple areas, including tax reporting and electronic invoicing.

Feature details

To meet the needs of global and local customers, we continue to extend the scope of supported countries. The solution includes out-of-the-box localization for the Republic of Türkiye. The following localization features are provisional and might change before general availability. Additionally, some of the following capabilities might not be available for preview.

- Exchange rate import from CBRT.
- Continuous serial numbers for invoices and packing slips.
- Currency conversion in purchase and sales orders.
- Exchange rate difference invoices.
- Electronic invoice generation.
- Cheque and promissory note enhancements.
- Pro-rata depreciation of fixed assets and depreciation rounding per year.
- E-Ledger generation.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Türkiye overview (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Expand localization in LATAM countries for Dominican Republic

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Jul 4, 2025

Business value

Tax compliance requirements are complex and frequently changing. Companies want 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 the current support. It 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. The solution includes out-of-the-box localization for Dominican Republic. While the country localization provides the following capabilities, the features might not all 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

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Dominican Republic overview (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Expand localization in LATAM countries for Peru

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Jul 4, 2025

Business value

Tax compliance requirements are complex and frequently changing. Companies want 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 the current support. It 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 supported countries in LATAM to address the needs of multiple global and local customers. The solution includes out-of-the-box localization for Peru. While the country localization provides the following capabilities, the features might not all 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

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Perú overview (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Expand localization in LATAM countries for Venezuela

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Jul 4, 2025

Business value

Tax compliance requirements are complex and frequently changing. Companies want 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 the current support. It 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 supported countries in LATAM to address the needs of multiple global and local customers. The solution includes out-of-the-box localization for Venezuela. While the country localization provides the following capabilities, the features might not all 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 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

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Venezuela overview (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Extend support for multiple tax registration numbers in tax reporting

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

A multinational corporation that operates across geographic locations can configure one legal entity in Dynamics 365 Finance with addresses and related tax registration numbers in different countries or regions. They can provide some tax regulatory reports (VAT Declaration, EU Sales List, Intrastat) directly from this legal entity based on tax transactions posted for a specific tax registration number.

Feature details

In a legal entity with the Support multiple VAT registration numbers feature enabled, you can generate VAT Declaration, EU Sales List, and Intrastat reports. A list of supported countries and tax regulatory reports is available at Reporting for multiple VAT registrations.

For this release, we're extending the list of supported countries and tax regulatory reports. We're releasing:

- EU Sales List correction for Poland (`VAT_UEK`) with the support of multiple VAT registration numbers.
- Belgium Annual VAT listing of domestic sales report with the support of multiple VAT registration numbers.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Multiple VAT registration numbers (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Update to OIOUBL format 3 for electronic invoicing in Denmark

08/21/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Aug 12, 2025

Business value

Global and local customers who deploy Dynamics 365 ERP apps in Denmark can access a configurable electronic invoice in an updated OIOUBL format, which meets local Danish requirements.

Feature details

This feature meets the Denmark-specific requirements for OIOUBL format version 3.0. You can export invoices and credit notes that you create from sales orders, free text invoices, or project invoice proposals into XML format that complies with the updated Danish electronic invoicing standards.

OIOUBL 3 Invoice Package Postponed - Revised Schedule:

The Danish Business Authority expects to upgrade the OIOUBL 3 invoice package from Release Candidate to Final Release in **mid-May 2025**.

After that, it's expected to be voluntarily implemented until **mid-November 2025**, when Nemhandel makes support for OIOUBL 3 mandatory.

End-of-life for OIOUBL 2.1 is expected in **mid-May 2026**.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use electronic invoicing for Denmark (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use electronic invoicing in Colombia

10/16/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Sep 17, 2025

Business value

This update includes the Colombian electronic invoicing feature for last-mile integration with the Colombian tax authorities via the Certification Authorization Provider Edicom. It covers the required end-to-end process for the outbound flow of e-invoice submissions.

Feature details

Microsoft released the Colombian electronic invoicing feature for last-mile integration with the Colombian tax authorities via the Certification Authorization Provider Edicom. For the electronic invoicing globalization feature for Colombia (outbound flow), you must use Dynamics 365 Finance version 10.0.40 or later.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Electronic invoicing coverage for supported and planned countries and regions (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use electronic invoicing in Paraguay

10/16/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Sep 17, 2025

Business value

This update includes the Paraguayan electronic invoicing feature of the last-mile integration with the Paraguayan tax authorities via the Certification Authorization Provider Edicom. It covers the required end-to-end process of the outbound flow of e-invoice submissions.

Feature details

In addition to the globalization feature update, this functionality contains code changes in Microsoft Dynamics 365 Finance. The electronic invoicing globalization feature for Paraguay (outbound flow) requires that you use Dynamics 365 Finance version 10.0.40, build number 10.0.1935.60 or later.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Electronic invoicing coverage for supported and planned countries and regions (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use electronic invoicing in Uruguay

09/11/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Sep 1, 2025

Business value

This update includes the Uruguayan electronic invoicing feature of the last-mile integration with the Uruguayan tax authorities through the Certification Authorization Provider Edicom. It covers the required end-to-end process of the outbound flow of e-invoices submission.

Feature details

Microsoft has released the Uruguayan electronic invoicing feature of the last-mile integration with the Uruguayan tax authorities (DGI) through the Certification Authorization Provider (PAC) Edicom.

Generation of electronic fiscal receipts (CFE) based on the XML standard, with a syntax defined and maintained by the DGI. Submission to the Uruguayan tax authorities via a third-party "last mile" connection to Edicom.

For more information, go to Get started with Electronic invoicing for Uruguay.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Electronic invoicing coverage for supported and planned countries and regions (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use security enhancements in UK MTD VAT integration

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

This feature strengthens the security of direct VAT return submissions for companies registered for UK VAT under Making Tax Digital (MTD). By upgrading key submission processes to more secure executable classes, businesses reduce the risk of data breaches and unauthorized access during VAT filings, and ensure safer compliance with UK tax regulations.

Feature details

When you enable the **Security enhancements in UK MTD VAT integration** feature, **UK MTD VAT TEST** and **UK MTD VAT** electronic message processing update automatically to enhance the security of your Dynamics 365 Finance integration for direct VAT return submissions for your UK VAT registration.

The following **Web service** actions change to **Executable class**:

- Retrieve VAT obligations
- Test retrieve VAT obligations
- Submit VAT return
- Test submit VAT return
- Request VAT liabilities
- Request VAT payments

> ⓘ Note
>
> Once you enable the **Security Enhancements in UK MTD VAT Integration** feature, you can't disable it.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Security enhancements in UK MTD VAT integration (cloud-based deployments only) (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use the enhanced Poland JPK KR PD annual regulatory report

10/16/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Apr 1, 2025	✔ Oct 1, 2025

Business value

Building on the preview released in the previous wave, this extension enhances support for the JPK_KR_PD reporting structure for companies in Poland. Effective January 1, 2025, this mandatory tax reporting format ensures compliance with Polish tax authorities. The current wave introduces additional capabilities to further streamline reporting and reinforce regulatory adherence.

Feature details

The following capabilities are planned for JPK_KR_PD reporting:

- Adding an option to define main accounts markers (`S_12`) by using Financial Dimensions and report the trial balance (ZOiS) section based on a dedicated dimension set that includes the main account and the markers.
- Adding an option to report the journal entry number (`D_1`) by using Journalizing journals.
- Adding an option to report the date of the economic transaction (`D_6`) for vendor invoices by using the **Date of Vendor VAT Register** field.
- Adding the report **Settlement of income tax** section (`RPD`).
- Adding Microsoft Excel format to preview the data.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

SAF Accounting Books Income Tax - JPK_KR_PD (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use updated Australian Payment Times Reporting Scheme

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ May 30, 2025	✔ Jun 30, 2025

Business value

Stay ahead of regulatory changes with our update of the Payment Times Reporting Scheme (PTRS) in Australia to the new rules. For reporting periods starting on or after July 1, 2024, this update ensures compliance with the latest Payment Times Reporting Scheme (PTRS) requirements.

Feature details

This feature update enables reporting companies in Australia to comply with the revised Payment Times Reporting Scheme rules for reporting periods starting on or after July 1, 2024.

- Refined logic to prepare datasets: capture, filter, and classify payment data in accordance with the latest PTRS rules.
- Standardized reporting format aligned with the revised PTRS reporting requirements.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Payment times reporting schema (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Plan and prepare for Dynamics 365 Supply Chain Management in 2025 release wave 1

> **Important**
>
> The 2025 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2025 to September 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/2025W1/SupplyChainManagement

Dynamics 365 Supply Chain Management offers comprehensive capabilities for end-to-end processes that manufacturers, distributors, consumer product groups, and retailers need to meet their supply chain requirements. Its functionality spans product information management, forecasting, planning, inventory, sales, and procurement, as well as complex manufacturing, asset maintenance, warehousing, transportation management, and costing.

The 2025 release wave 1 introduces several key enhancements:

- **Demand Planning**: Copilot, generative insights, and cell-level explainability features improve forecasting accuracy.
- **Manufacturing**: New features include optimized testing strategies and digitized records for quality management. Copilot-assisted updates to manufacturing planning data enhancements lead to more accurate production processes.
- **Planning Optimization**: Integrates lean manufacturing principles, catch weight, and step consumption features for better management of material use.
- **Contract Lifecycle Management**: Supports integration with external systems for efficient management of supplier contracts.
- **Vendor Rebate Management**: Updates reconciliation and resubmission workflows, so vendor transactions are more flexible.

Updates to Dynamics 365 Supply Chain Management 2025 release wave 1

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 quickly unlock the full potential of supply chain management.

Inventory and logistics

By using the inventory and logistics capabilities in Dynamics 365 Supply Chain Management, you can efficiently manage your sales and fulfillment processes while keeping inventory available to meet your service level goals. These capabilities give you greater visibility, efficiency, and resiliency in your supply chain operations.

Manufacturing and asset management

The manufacturing and asset management features in Dynamics 365 Supply Chain Management help companies gain agility, efficiency, and visibility in their manufacturing and maintenance operations while maximizing asset uptime and productivity. These investments focus on increasing flexibility and agility. Manufacturers who need to comply with multiple inventory accounting practices across multiple currencies benefit from enhancements to the Global Inventory Accounting add-in. Improvements in material picking and handling last-minute manufacturing changes increase agility on the shop floor.

Planning

Demand planning uses best-in-class, ready-to-use forecast models, immersive user experiences, intelligent reports, and analytics. With demand planning, your organization can build an agile, resilient, and sustainable demand planning practice that's fueled by intelligence and collaboration. In-memory supply planning gives you the performance and scalability to get near real-time insights into requirement changes with material requirements planning and production scheduling.

Procurement

Procurement and sourcing cover all steps from identifying a need for products and services, through procurement, receipt, invoicing, and processing payments to vendors. You can configure procurement processes for your specific business needs by defining purchasing policies and workflows.

Sales and marketing

Dynamics 365 Supply Chain Management provides robust tools to manage the entire sales and marketing lifecycle—from lead generation to invoicing.

- **Marketing**
  - **Campaign management**: Create and manage campaigns (telemarketing, mailing, email) targeting prospects, leads, and customers.
  - **Lead nurturing**: Track and develop relationships from initial contact (such as trade shows and mass mailings) to customer conversion.
  - **Entity flow**: Understand and manage the transition of a party from prospect to customer.

- **Sales**
  - **Sales quotations**: Generate offers for goods and services. Convert approved quotes into sales orders.
  - **Up-sell and cross-sell**: Suggest alternative or additional products during order entry using predefined rules.
  - **Sales orders**: Choose from among five types—journal, subscription, sales order, return order, and item requirements—based on the sales scenario.
  - **Sales agreements**: Commit customers to purchase quantities or values over time with special pricing and discounts.

- **Backorders**
  - **Tracking**: Monitor undelivered purchase or sales orders by item, customer, or vendor.
  - **Prioritization**: Adjust delivery schedules and inform customers of delays. Split inventory across orders as needed.

- **Invoicing**
  - **Customer invoice**: Final billing based on sales orders or packing slips.
  - **Free-text invoice**: For non-sales order billing with custom descriptions and ledger accounts.
  - **Pro-forma invoice**: Estimate invoice amounts before posting for customer preview or internal review.

Warehouse management

The warehouse management solution in Dynamics 365 Supply Chain Management provides a rich and flexible set of capabilities that you can combine and configure to support many warehouse layouts and operational scenarios. You get the same capabilities in warehouse-only mode. With this mode, a dedicated legal entity uses Supply Chain Management's warehouse management features and integrates with other legal entities or external systems.

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
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Supply Chain Management.

Helpful links	Description
Product documentation	Find documentation for Supply Chain Management.
User community	Engage with Supply Chain Management experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Supply Chain Management.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Last updated on 10/16/2025

What's new and planned for Dynamics 365 Supply Chain Management

This topic lists features that are planned to release from April 2025 through September 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 2 plan.
- For a list of the next wave's release plans, go to 2025 release wave 2 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
Automate procure-to-pay tasks with supplier communications agent	Users by admins, makers, or analysts	✅ Apr 25, 2025	Mar 2026
Gain cell-level explainability in demand forecasts	Users, automatically	✅ Mar 31, 2025	✅ Aug 31, 2025
Autodetect and analyze seasonality patterns in demand forecasts with generative insights	Users, automatically	✅ Apr 30, 2025	✅ Aug 31, 2025

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
Enhance vendor rebate management	Users by admins, makers, or analysts	✔ Jan 27, 2025	✔ Apr 4, 2025
Allow net price in Unified pricing management	Users by admins, makers, or analysts	✔ Apr 24, 2025	✔ Jul 4, 2025
Enhance supply chain traceability with tracking attributes	Users by admins, makers, or analysts	✔ Sep 30, 2025	-

Manufacturing and asset management

Manufacturing and asset management features help companies gain agility and visibility in their operations while maximizing asset productivity.

Expand table

Feature	Enabled for	Public preview	General availability
Enable quality control with acceptance sampling	Users by admins, makers, or analysts	✔ Jul 28, 2025	✔ Sep 12, 2025
Achieve regulatory compliance and quality excellence	Users by admins, makers, or analysts	✔ Apr 25, 2025	✔ Sep 30, 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
Implement lean manufacturing, catch weight, and step consumption	Users by admins, makers, or analysts	✔ Jul 28, 2025	Dec 2025
Enhance your demand forecasting and planning	Users by admins, makers, or analysts	-	✔ Apr 30, 2025

Procurement

Procurement and sourcing capabilities help organizations increase resiliency in their supply chain.

Expand table

Feature	Enabled for	Public preview	General availability
Integrate contract lifecycle management in source to pay	Users by admins, makers, or analysts	✔ Oct 25, 2024	✔ Apr 4, 2025

Sales and marketing

Sales and marketing in Dynamics 365 Supply Chain Management enables organizations to manage campaigns, build customer relationships, and streamline the sales process from quotations to invoicing and backorder handling.

Expand table

Feature	Enabled for	Public preview	General availability
Find products using external identifiers when creating orders	Users by admins, makers, or analysts	✔ Jul 28, 2025	✔ Sep 12, 2025

Warehouse management

Warehouse management provides a rich and flexible set of capabilities that can be combined to support many warehouse layouts and operational scenarios.

Expand table

Feature	Enabled for	Public preview	General availability
Improve operations with Warehouse Management mobile app V4	Users by admins, makers, or analysts	✔ Aug 1, 2025	-
Capture worker IDs for warehouse packing events	Users by admins, makers, or analysts	✔ Jul 1, 2025	✔ Jul 1, 2025

* You are able to opt into some features as part of early access on February 3, 2025, 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 information on data residency in Dynamics 365 and Power Platform, visit the Microsoft Dynamics 365 and Power Platform data residency documentation. For more information about geo availability, visit the Dynamics 365 and Microsoft Power Platform availability page.

Last updated on 11/13/2025

Copilot and AI innovation

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). 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 quickly unlock the full potential of supply chain management.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Autodetect and analyze seasonality patterns in demand forecasts with generative insights

10/16/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Apr 30, 2025	✔ Aug 31, 2025

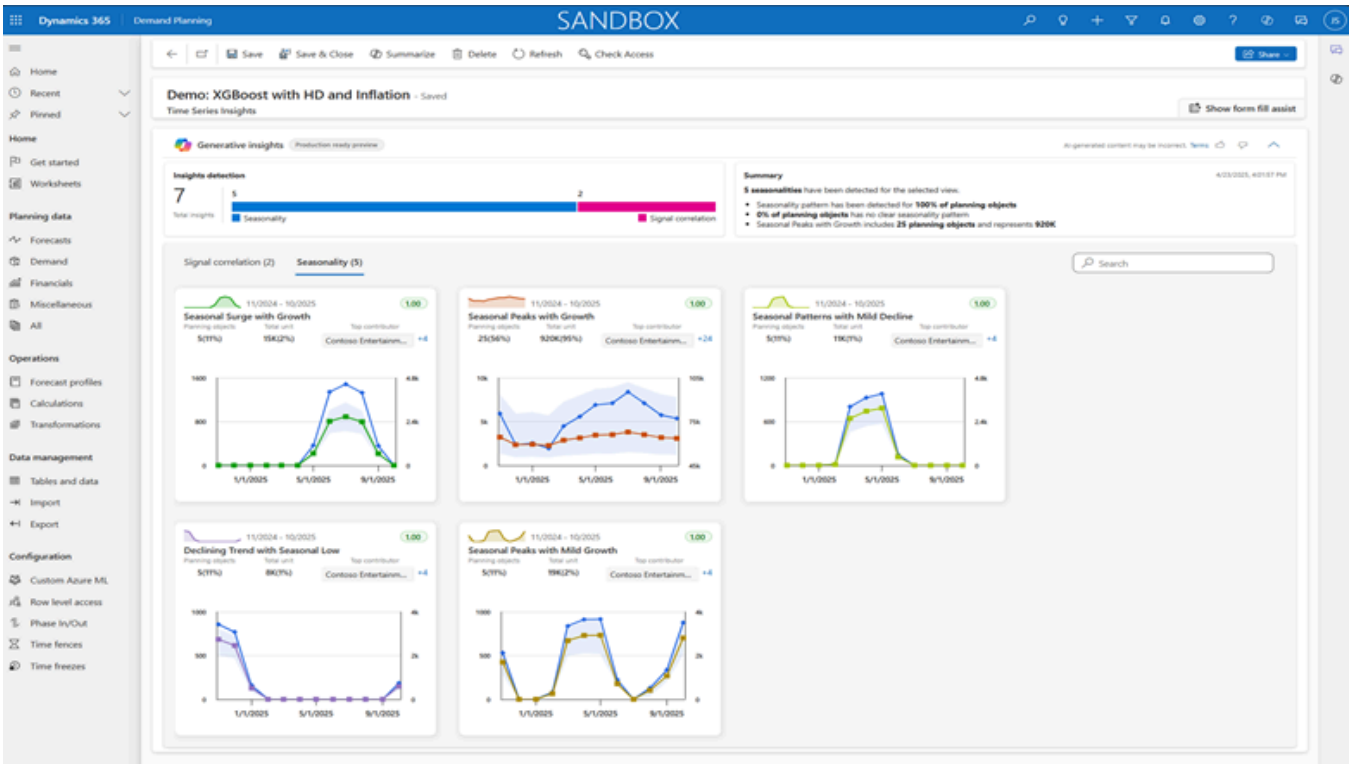
Business value

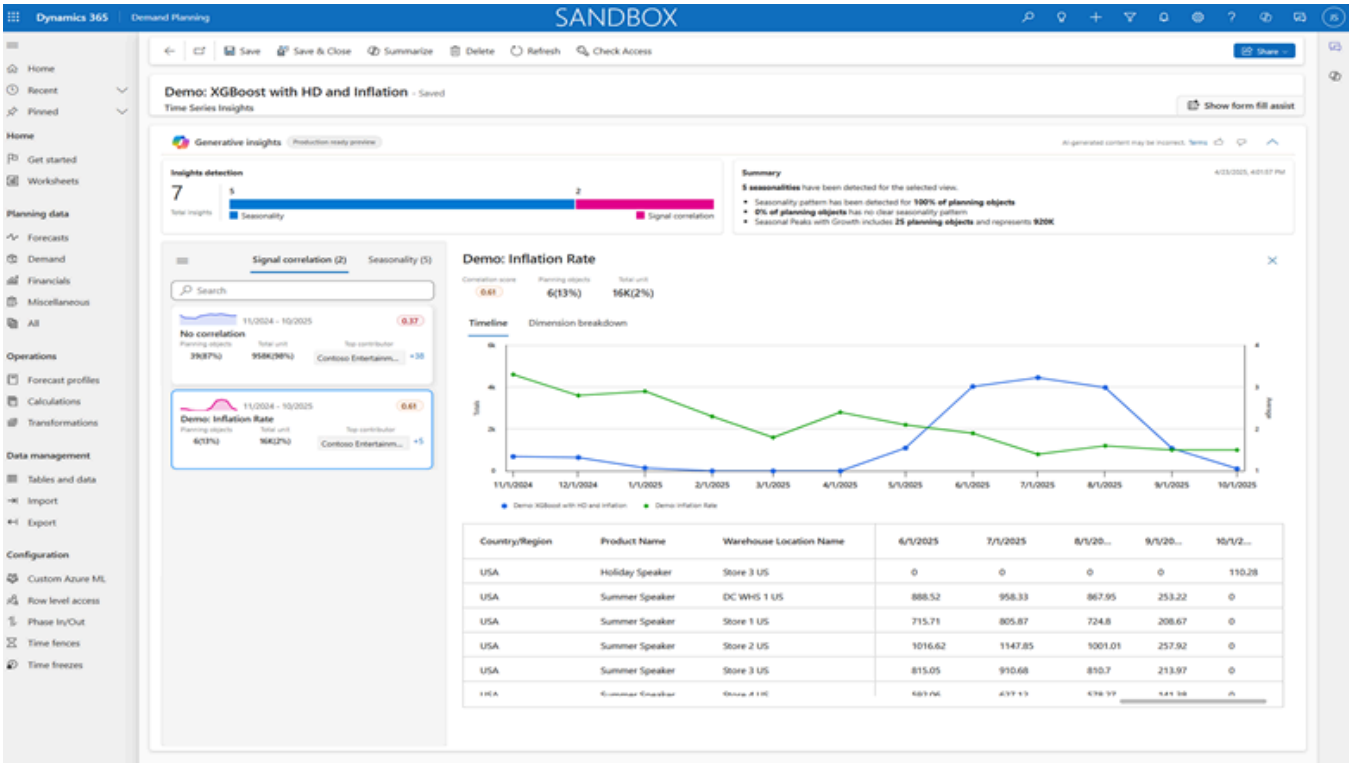
Generative insights in demand planning enhance forecasting accuracy by clustering data according to automatically detected seasonal patterns. This accuracy leads to more informed decision making, optimized inventory management, and reduced costs related to overstocking or stockouts. When you use generative insights, you can better meet customer demand, improve service levels, and gain a competitive edge in the market.

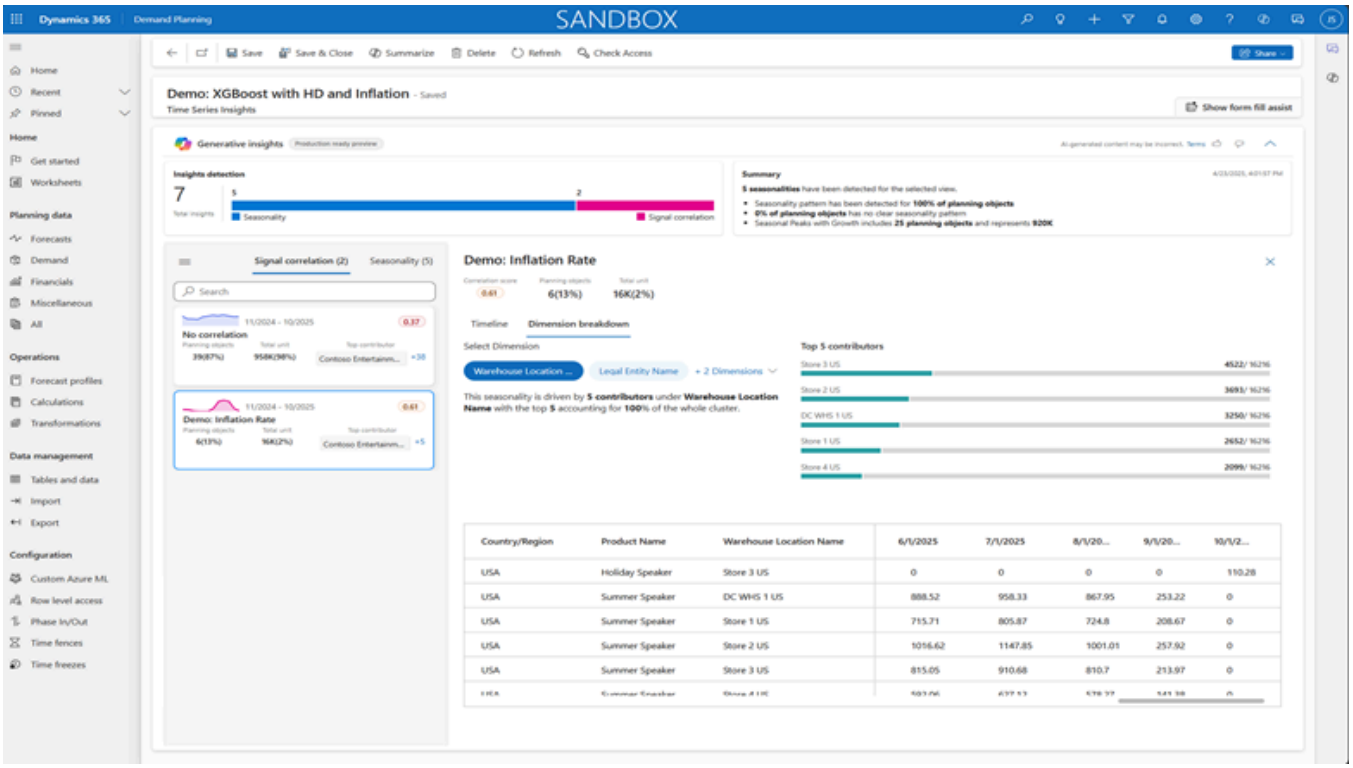
Feature details

Demand planning in Supply Chain Management now includes *generative insights*, which provides two metrics: seasonality and signal correlation. We plan to add more metrics in future releases. Generative insights evaluates forecast data using both metrics. It clusters data based on the seasonality patterns it detects.

For each seasonality cluster, generative insights gives a meaningful name and a confidence score. Each cluster shows its relative size compared to the full data set by the number of planning objects and the planned volume. Select a dimension to see a dynamic breakdown of the top five contributors within each cluster for that dimension.


Dynamics 365
Demand Planning
SANDBOX
Save
Save & Close
Summarize
Delete
Refresh
Check Access
Share
Demo: XGBoost with HD and Inflation - Saved
Time Series Insights
Show form fill assist
Generative insights
Production ready preview
Insights detection
7
Total insights
Seasonality
Signal correlation
Summary
5 seasonalities have been detected for the selected view.
Seasonality pattern has been detected for 100% of planning objects
0% of planning objects has no clear seasonality pattern
Seasonal Peaks with Growth includes 25 planning objects and represents 920K
Signal correlation (2)
Seasonality (5)
Search
Seasonal Surge with Growth
Seasonal Peaks with Growth
Seasonal Patterns with Mild Decline
Declining Trend with Seasonal Low
Seasonal Peaks with Mild Growth
Home
Recent
Pinned
Get started
Worksheets
Forecasts
Demand
Financials
Miscellaneous
All
Forecast profiles
Calculations
Transformations
Tables and data
Import
Export
Custom Azure ML
Row level access
Phase In/Out
Time fences
Time freezes


Dynamics 365
Demand Planning
SANDBOX
Save
Save & Close
Summarize
Delete
Refresh
Check Access
Share
Demo: XGBoost with HD and Inflation - Saved
Time Series Insights
Show form fill assist
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Seasonal Peaks with Growth includes 25 planning objects and represents 920K
Signal correlation (2)
Seasonality (5)
Search
No correlation
Demo: Inflation Rate
Demo: Inflation Rate
Correlation score
0.61
Planning objects
6(13%)
Total unit
16K(2%)
Timeline
Dimension breakdown
Demo: XGBoost with HD and Inflation
Demo: Inflation Rate
Country/Region
Product Name
Warehouse Location Name
6/1/2025
7/1/2025
8/1/20...
9/1/20...
10/1/2...
USA
Holiday Speaker
Store 3 US
0
0
0
0
110.28
USA
Summer Speaker
DC WHS 1 US
888.52
958.33
867.95
253.22
0
USA
Summer Speaker
Store 1 US
715.71
805.87
724.8
208.67
0
USA
Summer Speaker
Store 2 US
1016.62
1147.85
1001.01
257.92
0
USA
Summer Speaker
Store 3 US
815.05
910.68
810.7
213.97
0
Home
Recent
Pinned
Get started
Worksheets
Forecasts
Demand
Financials
Miscellaneous
All
Forecast profiles
Calculations
Transformations
Tables and data
Import
Export
Custom Azure ML
Row level access
Phase In/Out
Time fences
Time freezes



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Generative insights for Demand planning (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Automate procure-to-pay tasks with supplier communications agent

08/07/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 25, 2025	Mar 2026

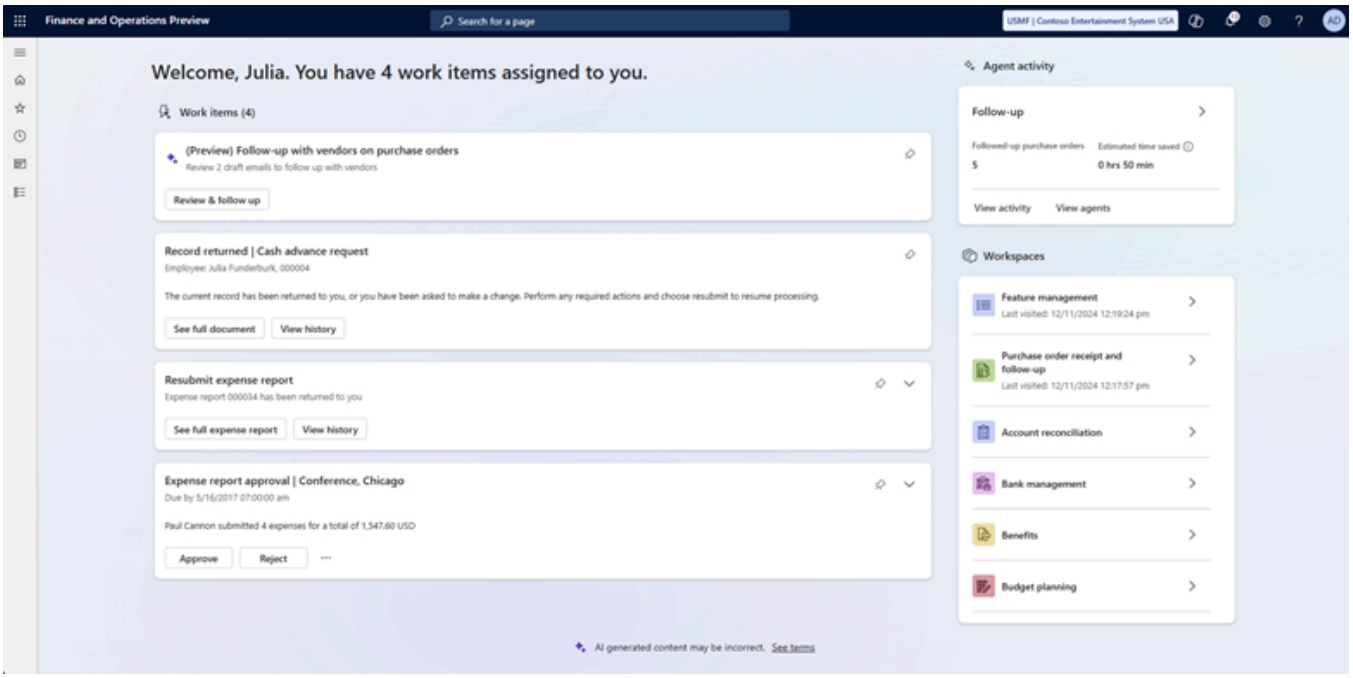
Business value

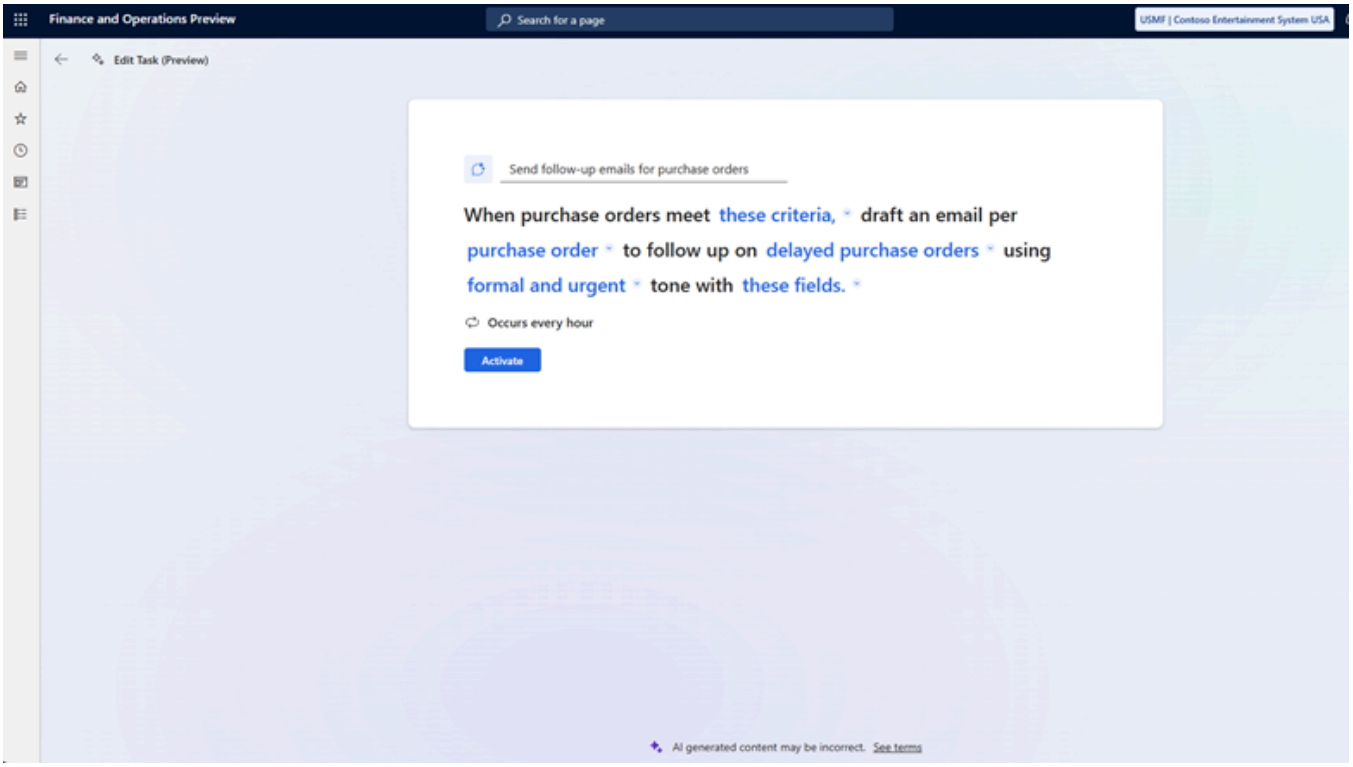
For many businesses, a large part of the procurement process is still manual. This process includes collaborating and following up with vendors, manually updating purchase orders, and managing change requests. The supplier communications agent helps purchasers save time by automating manual and repetitive tasks based on user-defined rules. The agent helps you achieve a resilient and efficient supply chain and increase procurement productivity.

Feature details

Purchasers spend a lot of time manually checking incoming emails, assessing the status of each purchase order, replying to suppliers, following up with suppliers, and updating systems. The supplier communications agent helps purchasers by providing the following features:

- **Follow up with vendors on purchase orders**: The agent can automatically draft ready-to-send emails that ask a vendor about the status of a delayed order or remind a vendor to confirm a purchase order.
- **Speed up purchase order updates based on incoming vendor emails**: The agent automatically reads your email inbox to analyze communications from your vendors. It finds messages related to purchase orders. It analyzes these messages with organizational data to identify both purchase order confirmations and change requests. The agent runs automated tasks based on your user-defined rules.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Supplier Communications Agent overview (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Gain cell-level explainability in demand forecasts

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 31, 2025	✔ Aug 31, 2025

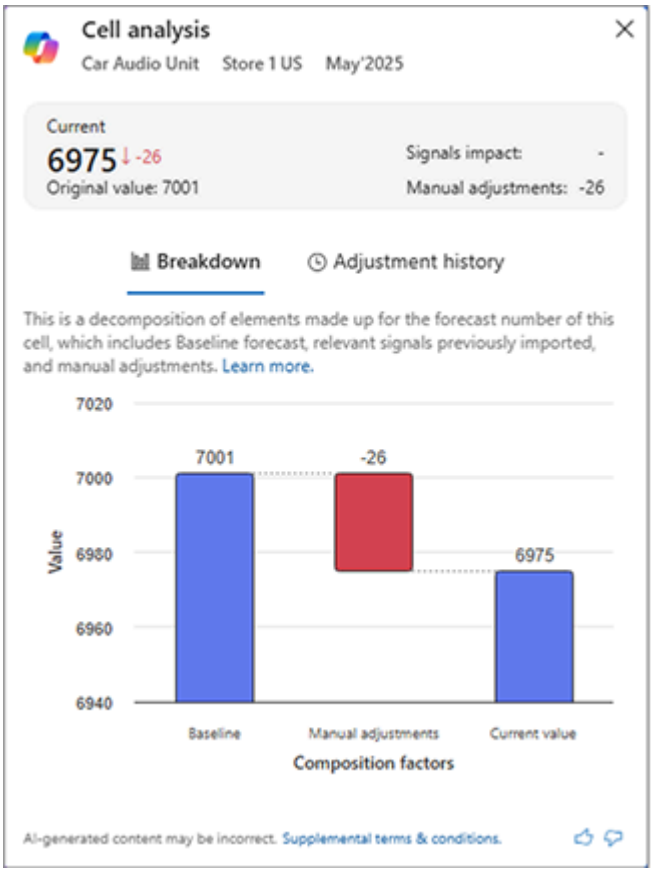
Business value

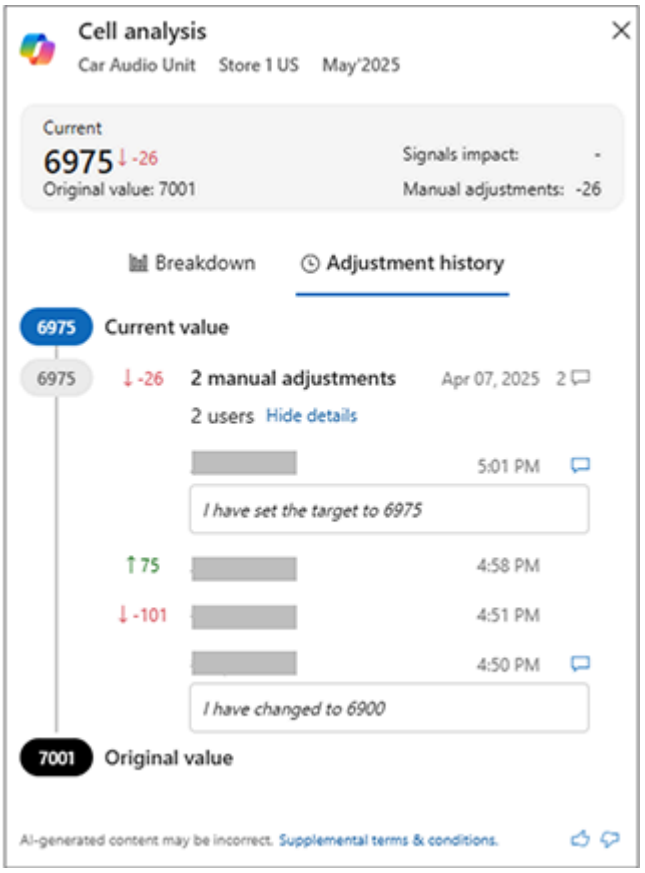
Gain a clear understanding of your demand forecasts with detailed insights into forecasted values, including historical sales, external signals, and manual adjustments. Make confident, data-driven decisions to optimize your strategies.

Feature details

Demand planning in Microsoft Dynamics 365 Supply Chain Management now includes a grid cursor Copilot that provides insights into the value shown in any cell of a forecast. This capability is available for all users. By selecting the Copilot icon when hovering over a cell in the forecast grid, you get a decomposed visual view of the forecasted value, which shows both the baseline forecast and all manual adjustments. You see adjustments and comments in a chronological timeline, so you can easily understand how the cell evolved from its initial forecast to the current final value.

The following screenshots show how the grid cursor Copilot provides insights into a selected forecast cell.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Copilot grid cursor (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Last updated on 11/18/2025

Inventory and logistics

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

By using the inventory and logistics capabilities in Dynamics 365 Supply Chain Management, you can efficiently manage your sales and fulfillment processes while keeping inventory available to meet your service level goals. These capabilities give you greater visibility, efficiency, and resiliency in your supply chain operations.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Allow net price in Unified pricing management

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 24, 2025	✔ Jul 4, 2025

Business value

This feature enhances the Unified pricing management module by adding support for negotiated final prices in trade agreements. With this feature, you can define sales prices directly, with or without price adjustments, and explicitly prevent the application of extra discounts. This functionality ensures accurate discount-exempt pricing that aligns with your contractual or wholesale pricing needs. In some situations, you negotiate a trade agreement price with customers and treat that price as an exclusive final price without discounts. Unified pricing management lets you set sales prices as negotiated net prices without considering discounts.

Feature details

This feature enhances the Unified pricing management module sales trade agreement pricing experience by allowing pricing administrators to define:

- A final exclusive net price that reflects the outcome of negotiation.
- Inclusion of price adjustments, such as percentage increases or decreases.
- Prevention of promotional or system-applied discounts from further affecting the transaction price.

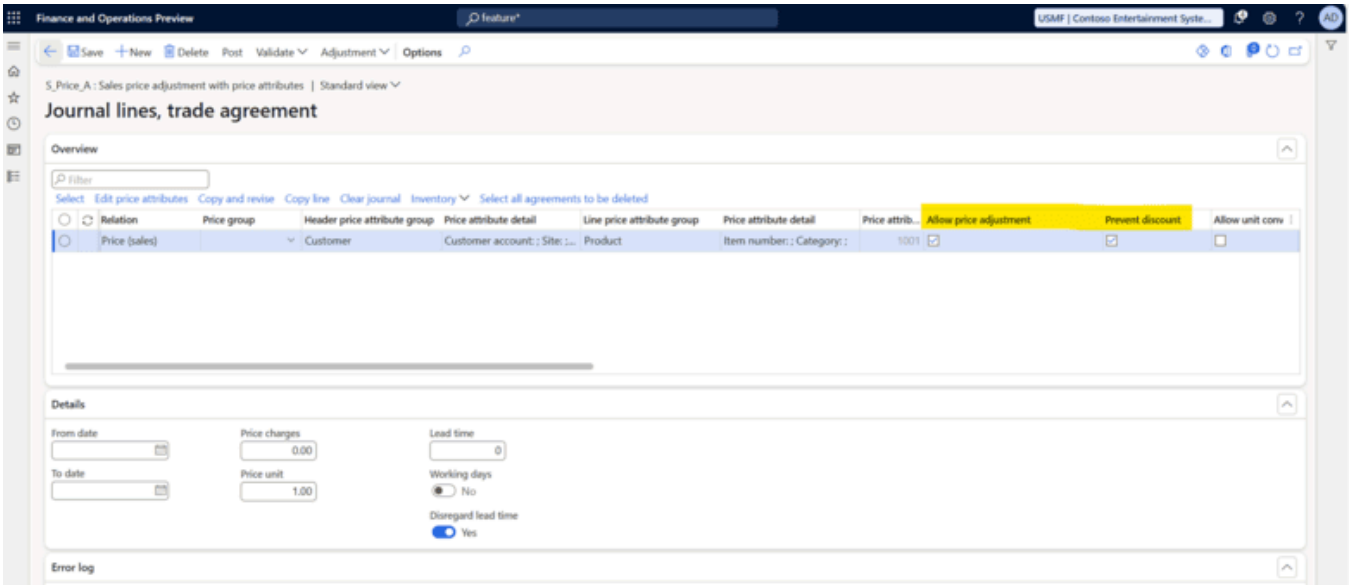
The feature supports the following key use cases:

- B2B or wholesale pricing where negotiated prices honor without promotional interference.
- Long-term contracts that require strict adherence to fixed pricing, which excludes further discounts.

This functionality is especially relevant in B2B, channel sales, and regulated pricing models, where discount logic doesn't alter the agreed price.

This feature provides the following key capability:

- **Prevent discount** – Choose to prevent any extra discount.
- **Allow price adjustment** – Choose whether to apply adjustments, such as a markup or markdown, to the sales price.
- **Net price definition** – Set **Allow price adjustment** to *No* and **Prevent discount** to *Yes* to define the trade agreement sales price as a net (final, exclusive) price that doesn't allow further discounting.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Net pricing (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 11/13/2025

Enhance supply chain traceability with tracking attributes

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 30, 2025	-

Business value

Tracking attributes enhance supply chain traceability. They help stakeholders, such as quality managers, sales managers, and production managers, analyze deviations by using captured data. Stakeholders can now get lists of product serial numbers or batch numbers based on business activities and tracking attribute data.

Feature details

You can configure data collection and assign it to specific activity types and codes to store measurements and attributes for tracking and tracing. With this configuration, you can monitor and manage various activities within the supply chain.

The system also enables you to retrieve all measurements and attributes related to each serial number, batch number, asset number, or lot number. This retrieval process ensures that you can access all relevant data for analysis and decision-making.

You can perform a where-used search to retrieve impacted products based on specific measurements and attributes. For example, you can retrieve all impacted VIN numbers for Model Y vehicles that you produced between August 23, 2024, and September 25, 2024, where the painting temperature was below 80 degrees. This capability helps you identify and address potential issues in the production process.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Configure data collection fields that are traced in Traceability (docs)

Note: The author created this article with assistance from AI. Learn more

Last updated on 11/18/2025

Enhance vendor rebate management

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jan 27, 2025	✔ Apr 4, 2025

Business value

Vendor rebate management clerks can resubmit and edit vendor rebate deals. Source transaction vendors can reconcile their company output, such as accounts payable invoices, which adds flexibility.

Feature details

The key capabilities that provide approval and reconciliation flexibility include:

- A new rebate management workflow that enables a resubmission process for vendors.
- Enhanced posting profiles that allow you to reconcile transactions according to the purchased-from vendor instead of using fixed, predefined vendors.
- Improved rebate output for vendor invoices that consolidates multiple ledger lines for the same vendor into a single vendor line with several ledger lines.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

What's new or changed in Dynamics 365 Supply Chain Management 10.0.43 (March 2025) (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Manufacturing and asset management

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 manufacturing and asset management features in Dynamics 365 Supply Chain Management help companies gain agility, efficiency, and visibility in their manufacturing and maintenance operations while maximizing asset uptime and productivity. These investments focus on increasing flexibility and agility. Manufacturers who need to comply with multiple inventory accounting practices across multiple currencies benefit from enhancements to the Global Inventory Accounting add-in. Improvements in material picking and handling last-minute manufacturing changes increase agility on the shop floor.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Achieve regulatory compliance and quality excellence

10/02/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 25, 2025	✔ Sep 30, 2025

Business value

Integrate advanced quality management capabilities across the supply chain. This integration fosters continuous improvement, customer satisfaction, regulatory compliance, and quality excellence. Advanced quality management minimizes reliance on third-party quality management solutions. It ensures adherence to regulations, enhances product quality, and boosts customer satisfaction. This solution also fosters continuous improvement and risk mitigation through a feedback-driven strategy.

Feature details

Advanced quality management integrates throughout the Supply Chain Management solution. Key features include:

- **Optimized testing strategies**: Flexible sampling plans, skip-lot testing, quality order creation triggers, sample management, instrument calibration, and acceptable quality limits (AQL) testing.
- **Regulatory compliance**: Approved customer lists, customer-specific certificates of analysis (COA), and enhancements to electronic signatures.
- **Digitized manufacturing for precision and compliance**: Electronic batch records and production dispensing.
- **Continuous improvement and risk mitigation**: Corrective and preventive actions (CAPA) management and enhancements to nonconformance.
- **Enhanced user experience**: Simplified entry of quality test results and new workspaces for quality management.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Advanced quality management overview (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Enable quality control with acceptance sampling

09/18/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 28, 2025	✔ Sep 12, 2025

Business value

Improve quality and reduce inspection time and costs by applying acceptance sampling, a statistical method based on industry standards, to determine optimal sample sizes and pass or fail criteria. This method enables efficient, risk-based quality control while minimizing manual effort.

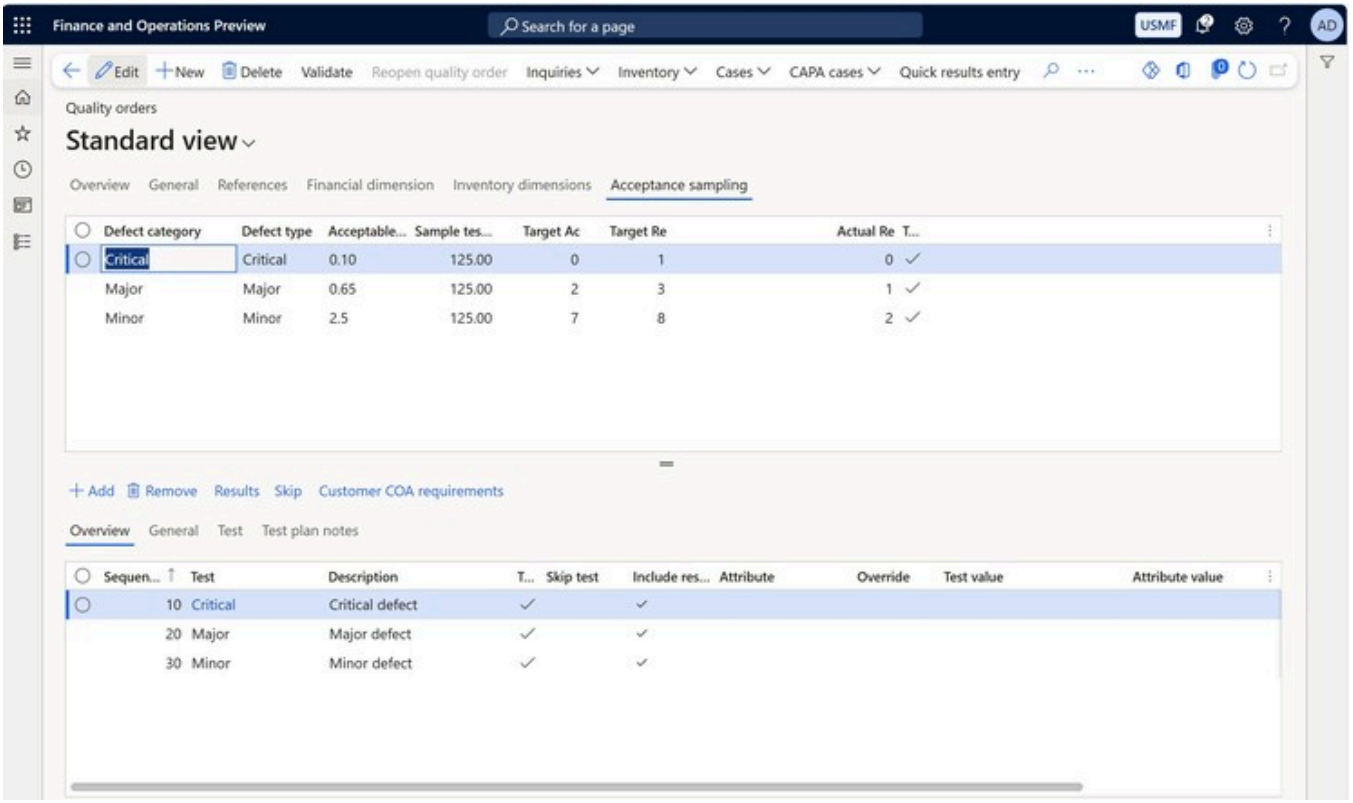
Feature details

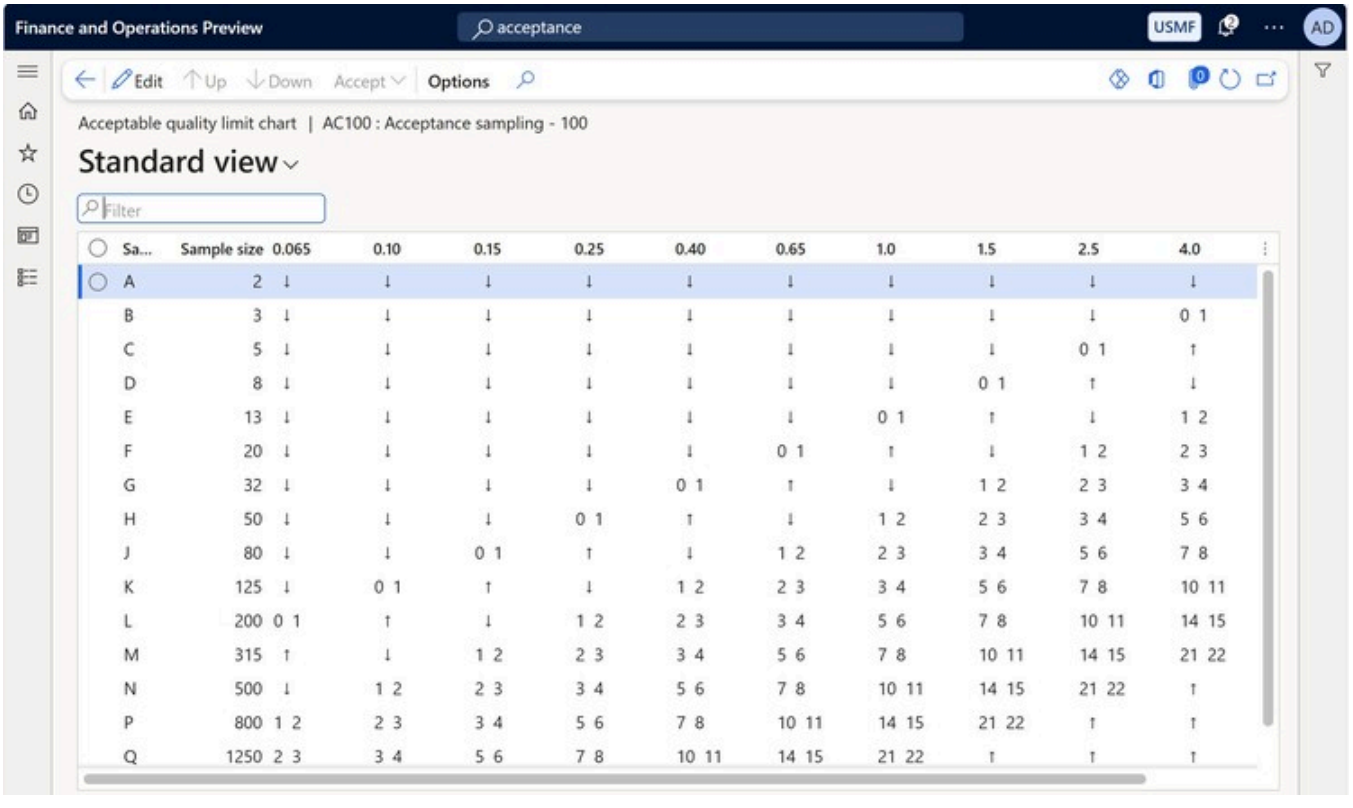
This feature uses quality orders to perform acceptance sampling.

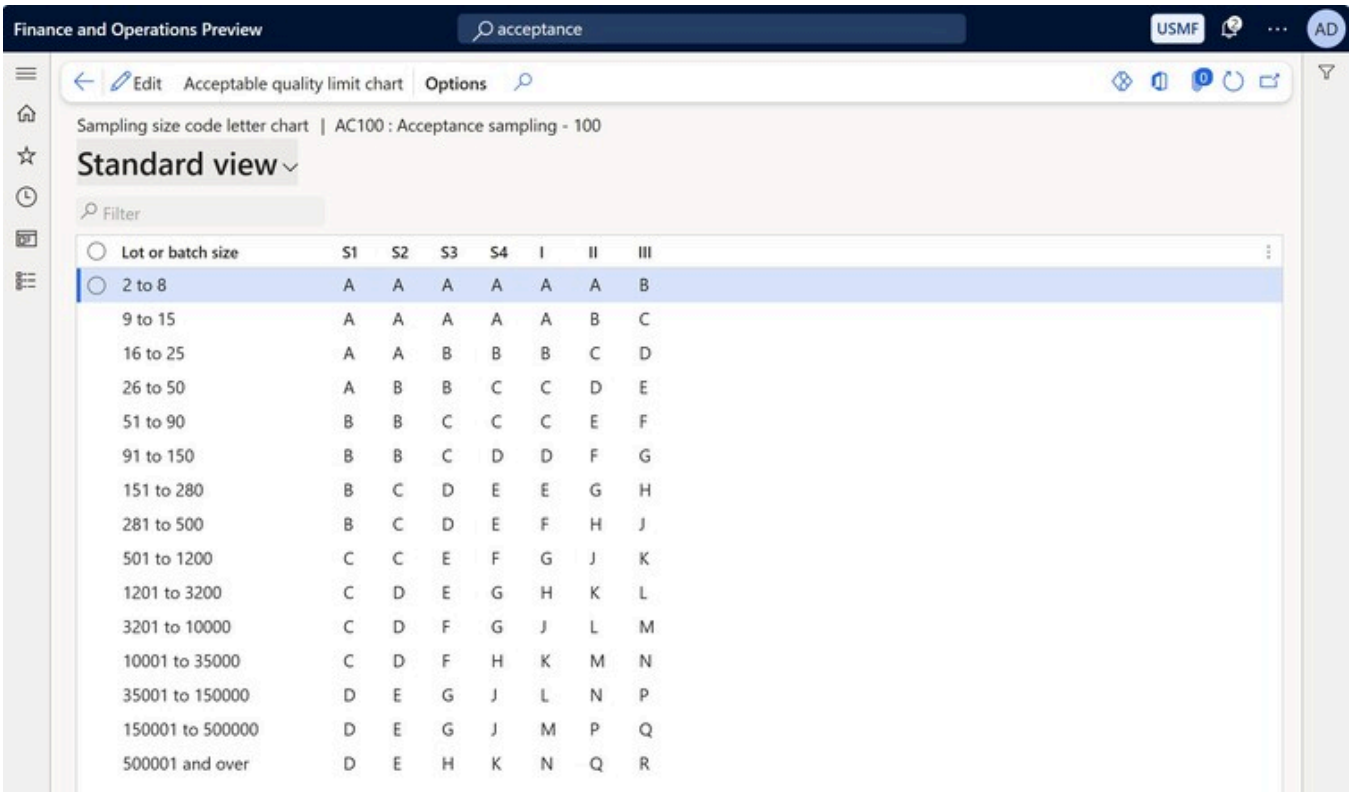
With acceptance sampling, workers inspect a statistically determined sample size of products to identify defects. Workers categorize each defect as critical, major, or minor. A code letter and a master sampling chart based on ISO and ANSI industry standards define the sample size and allowable defect counts for each category.

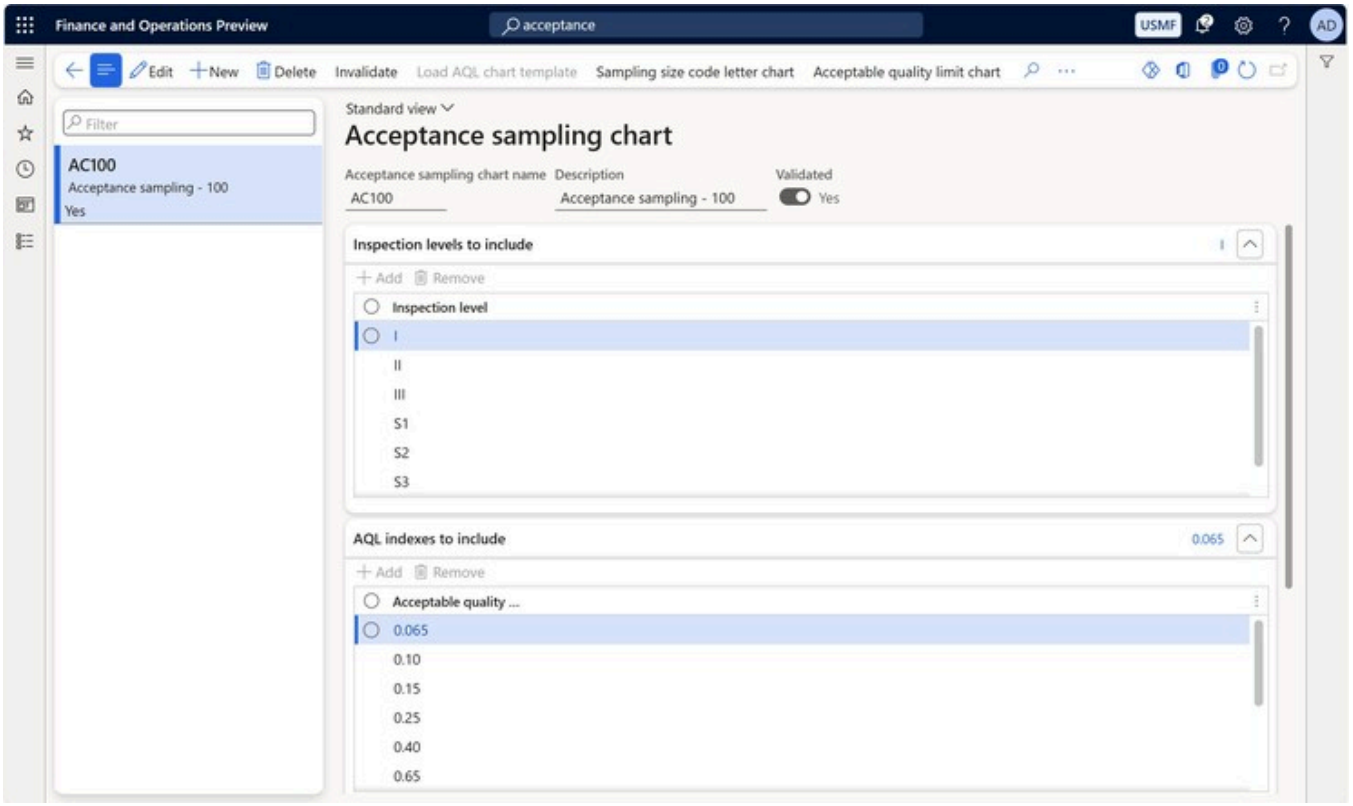
With this feature, you can:

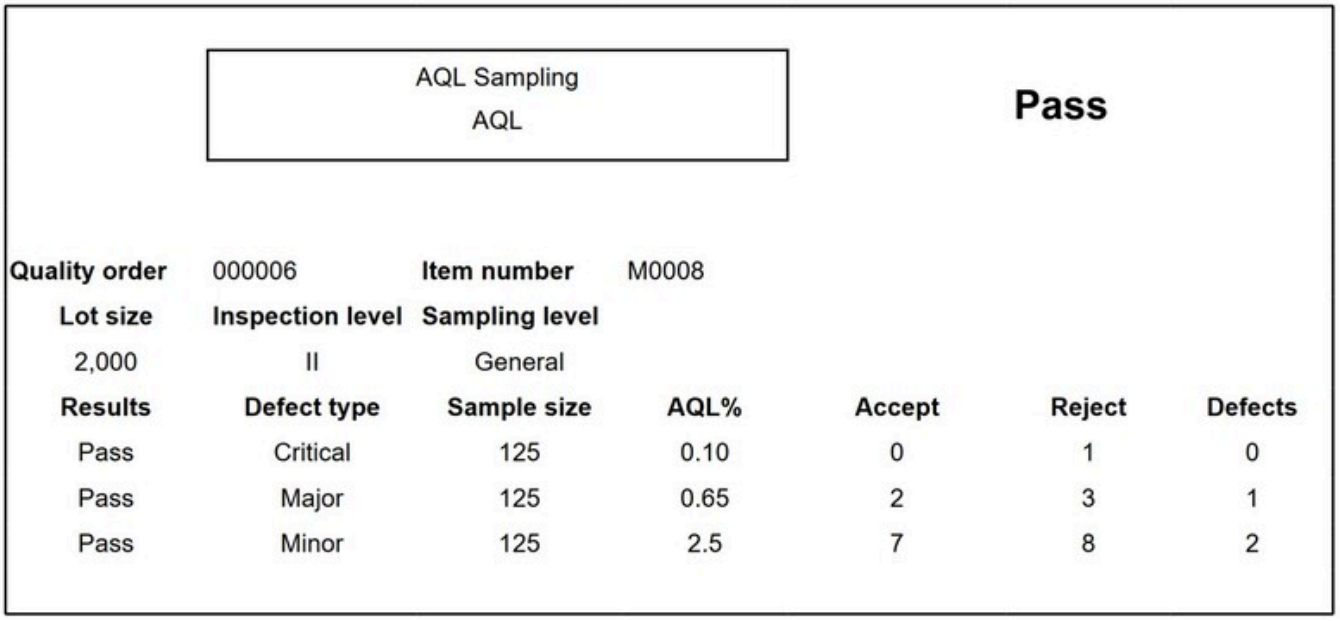
- Generate an acceptance sampling chart (image 1), which consists of a code letter chart (image 2) and an acceptable quality limit chart (image 3). The acceptable quality limit chart provides supporting data from a predefined template. Administrators can edit these templates.
- Create a quality association that includes item sampling and test groups, with tests classified by defect type (critical, major, or minor). This configuration enables automatic generation of quality orders for acceptance sampling (image 4).
- Print a test report that includes defect thresholds by category, test results, and a clear indication of whether the lot passes or fails inspection (image 5).


Finance and Operations Preview
Search for a page
USMF
AD
Edit
New
Delete
Validate
Reopen quality order
Inquiries
Inventory
Cases
CAPA cases
Quick results entry
Quality orders
Standard view
Overview
General
References
Financial dimension
Inventory dimensions
Acceptance sampling
Defect category
Defect type
Acceptable...
Sample tes...
Target Ac
Target Re
Actual Re
T...
Critical
Critical
0.10
125.00
0
1
0
Major
Major
0.65
125.00
2
3
1
Minor
Minor
2.5
125.00
7
8
2
Add
Remove
Results
Skip
Customer COA requirements
Overview
General
Test
Test plan notes
Sequen...
Test
Description
T...
Skip test
Include res...
Attribute
Override
Test value
Attribute value
10
Critical
Critical defect
20
Major
Major defect
30
Minor
Minor defect


Finance and Operations Preview
acceptance
USMF
AD
Edit
Up
Down
Accept
Options
Acceptable quality limit chart | AC100 : Acceptance sampling - 100
Standard view
Filter
Sa...
Sample size
0.065
0.10
0.15
0.25
0.40
0.65
1.0
1.5
2.5
4.0
A 2 ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓
B 3 ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ 0 1
C 5 ↓ ↓ ↓ ↓ ↓ ↓ ↓ 0 1 ↑
D 8 ↓ ↓ ↓ ↓ ↓ ↓ ↓ 0 1 ↑ ↓
E 13 ↓ ↓ ↓ ↓ ↓ ↓ 0 1 ↑ ↓ 1 2
F 20 ↓ ↓ ↓ ↓ ↓ 0 1 ↑ ↓ 1 2 2 3
G 32 ↓ ↓ ↓ ↓ 0 1 ↑ ↓ 1 2 2 3 3 4
H 50 ↓ ↓ ↓ 0 1 ↑ ↓ 1 2 2 3 3 4 5 6
J 80 ↓ ↓ 0 1 ↑ ↓ 1 2 2 3 3 4 5 6 7 8
K 125 ↓ 0 1 ↑ ↓ 1 2 2 3 3 4 5 6 7 8 10 11
L 200 0 1 ↑ ↓ 1 2 2 3 3 4 5 6 7 8 10 11 14 15
M 315 ↑ ↓ 1 2 2 3 3 4 5 6 7 8 10 11 14 15 21 22
N 500 ↓ 1 2 2 3 3 4 5 6 7 8 10 11 14 15 21 22 ↑
P 800 1 2 2 3 3 4 5 6 7 8 10 11 14 15 21 22 ↑ ↑
Q 1250 2 3 3 4 5 6 7 8 10 11 14 15 21 22 ↑ ↑ ↑


Finance and Operations Preview
acceptance
USMF
AD
Edit
Acceptable quality limit chart
Options
Sampling size code letter chart | AC100 : Acceptance sampling - 100
Standard view
Filter
Lot or batch size S1 S2 S3 S4 I II III
2 to 8 A A A A A A B
9 to 15 A A A A A B C
16 to 25 A A B B B C D
26 to 50 A B B C C D E
51 to 90 B B C C C E F
91 to 150 B B C D D F G
151 to 280 B C D E E G H
281 to 500 B C D E F H J
501 to 1200 C C E F G J K
1201 to 3200 C D E G H K L
3201 to 10000 C D F G J L M
10001 to 35000 C D F H K M N
35001 to 150000 D E G J L N P
150001 to 500000 D E G J M P Q
500001 and over D E H K N Q R


Finance and Operations Preview
acceptance
USMF
AD
Edit
New
Delete
Invalidate
Load AQL chart template
Sampling size code letter chart
Acceptable quality limit chart
Filter
AC100
Acceptance sampling - 100
Yes
Standard view
Acceptance sampling chart
Acceptance sampling chart name
AC100
Description
Acceptance sampling - 100
Validated
Yes
Inspection levels to include
Add
Remove
Inspection level
I
II
III
S1
S2
S3
AQL indexes to include
0.065
Add
Remove
Acceptable quality ...
0.065
0.10
0.15
0.25
0.40
0.65



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

- Acceptance sampling (video)
- Acceptance sampling (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Planning

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Demand planning uses best-in-class, ready-to-use forecast models, immersive user experiences, intelligent reports, and analytics. With demand planning, your organization can build an agile, resilient, and sustainable demand planning practice that's fueled by intelligence and collaboration. In-memory supply planning gives you the performance and scalability to get near real-time insights into requirement changes with material requirements planning and production scheduling.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Enhance your demand forecasting and planning

10/16/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 30, 2025

Business value

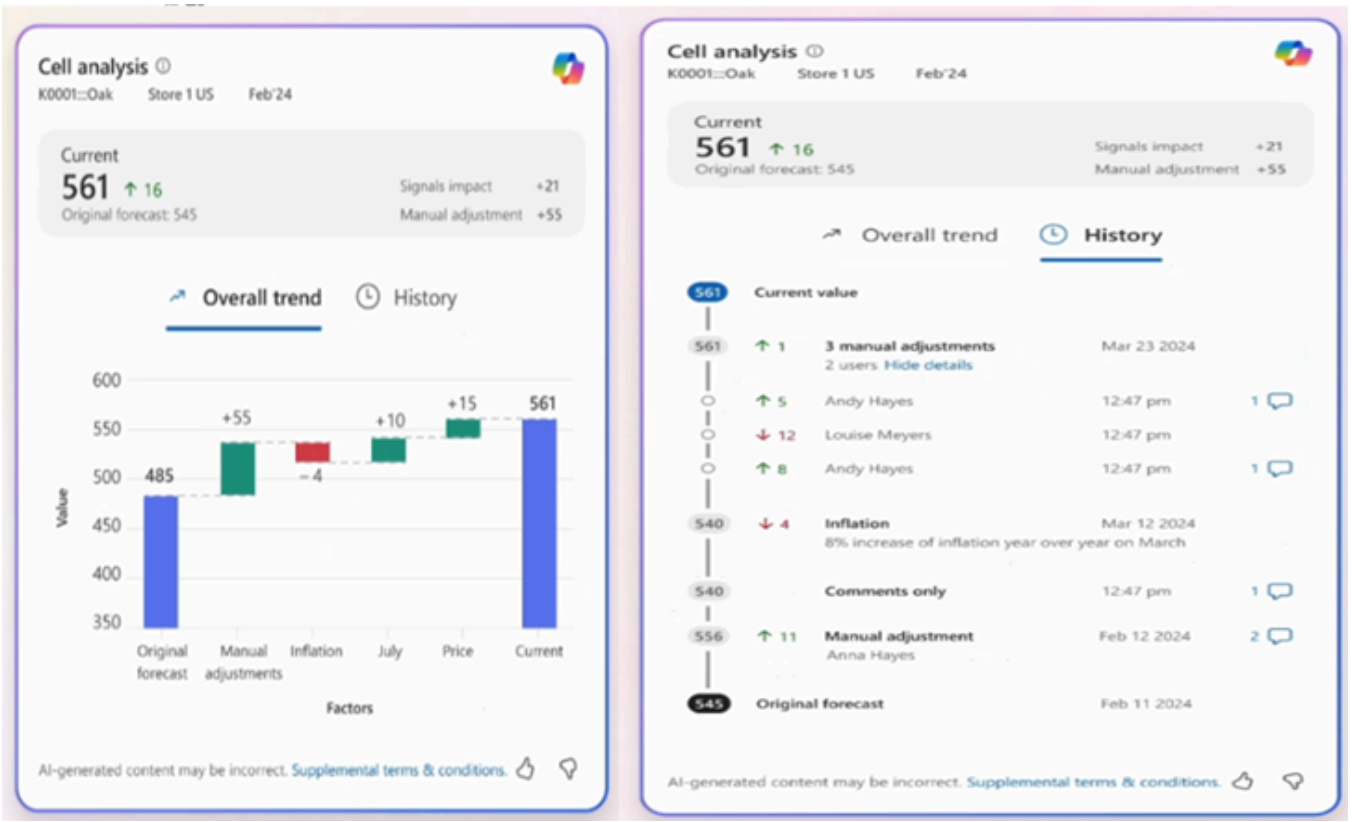
The latest enhancements for demand planning in Dynamics 365 Supply Chain Management provide new insights into your supply chain planning. Use these insights to help optimize your supply chain and improve your financial outcomes.

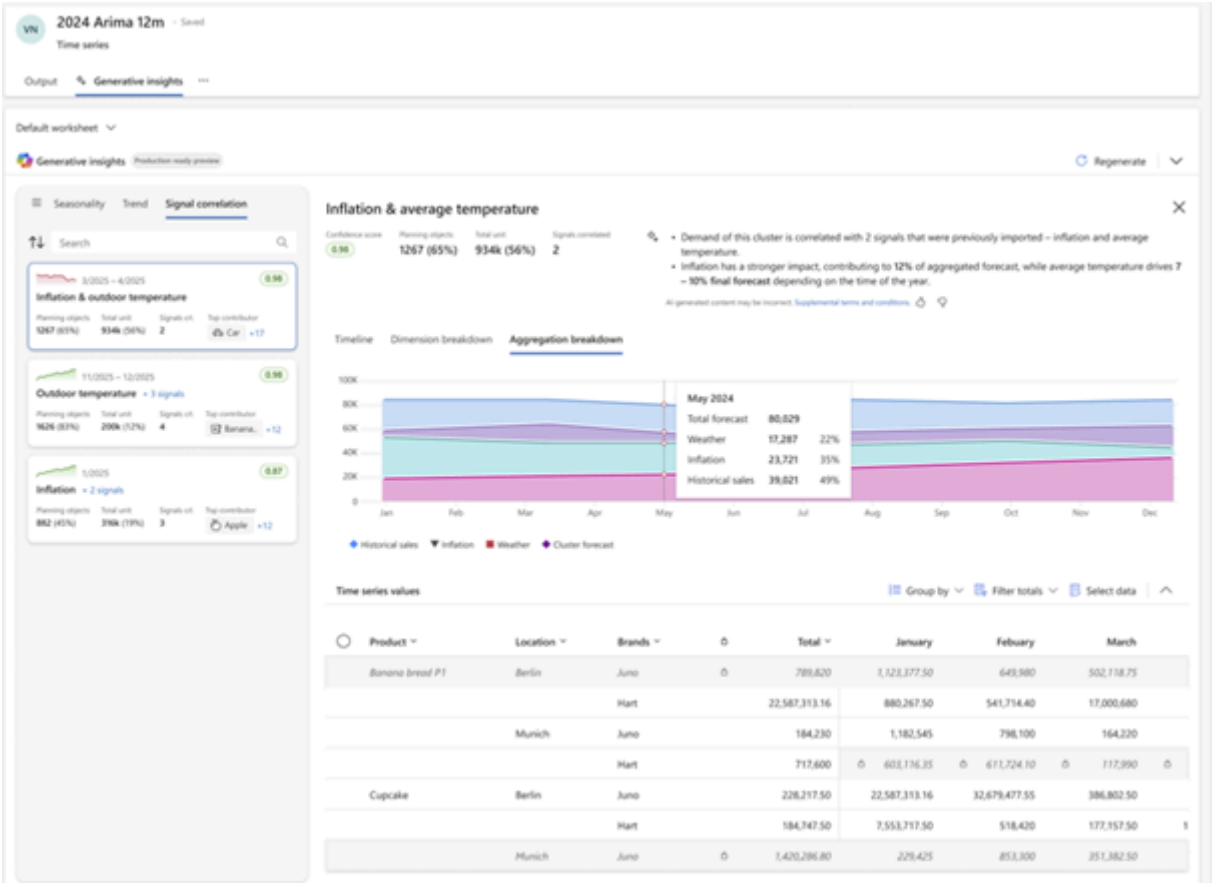
Feature details

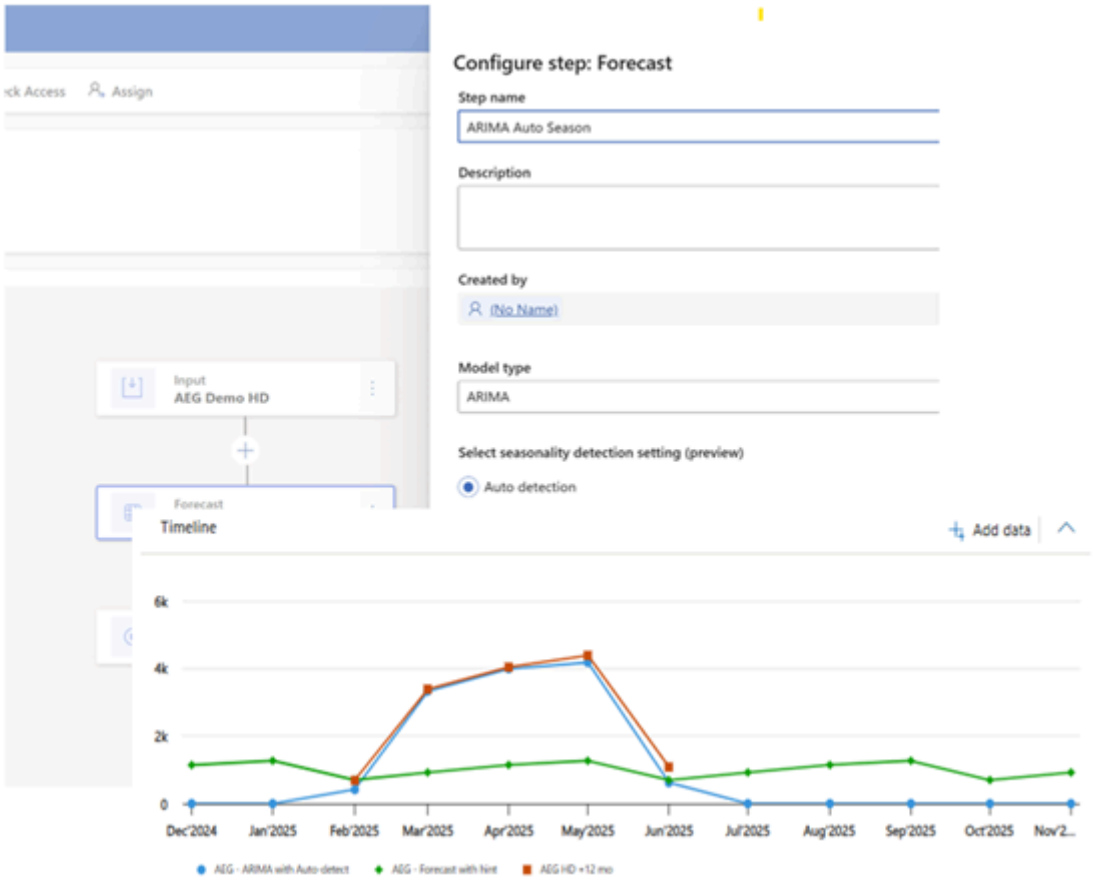
Demand planning in Supply Chain Management helps you plan and forecast demand based on various data sources and signals. The app now provides capabilities that enhance the accuracy of the demand forecast so you can better optimize your supply chain and boost your financial outcomes.

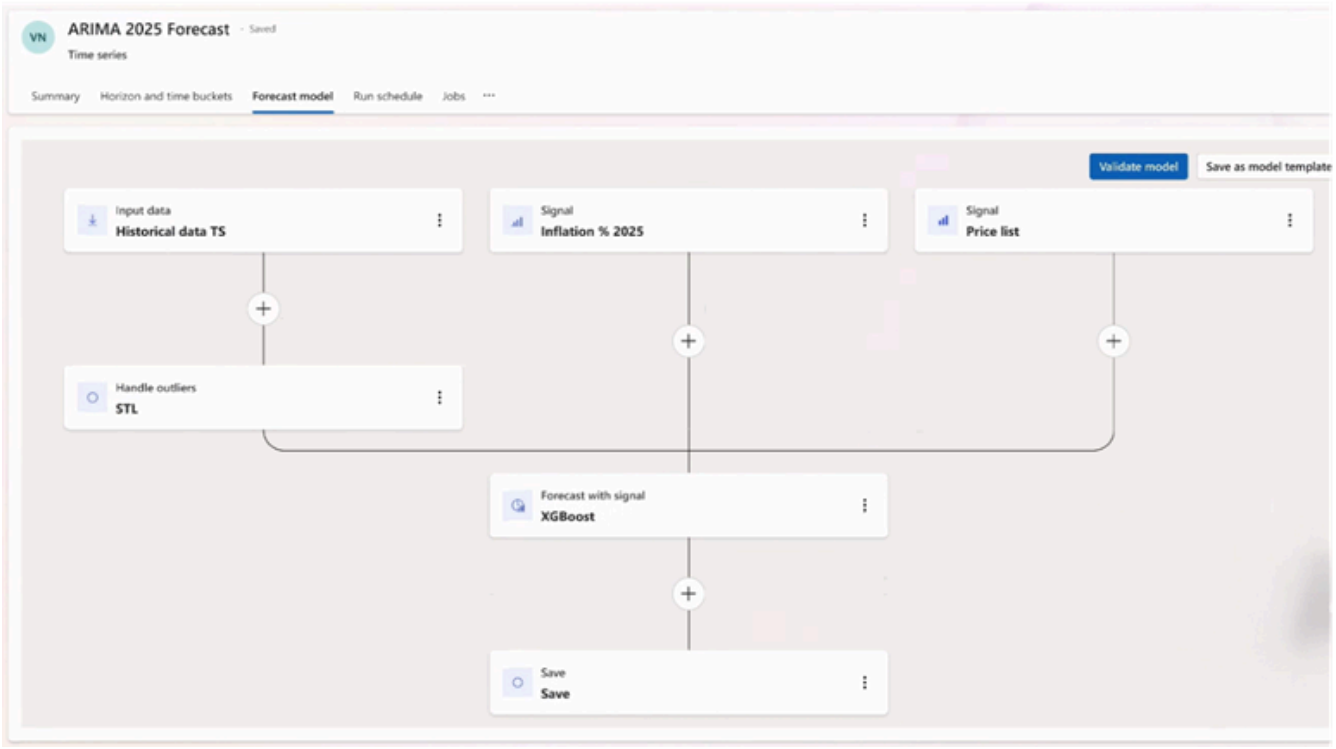
All the new capabilities are available by default. Use each capability as needed with your new and existing forecasts to help improve accuracy. The new capabilities include:

- **Time freeze**: Set up periods when forecast calculations that run continuously don't update their baseline forecasts.
- **Forecast with signals**: Forecast based on multiple input signals by using calculations based on the Prophet forecast algorithm, XGBoost forecast algorithm, or best-fit forecast model. The best-fit forecast model automatically calculates both XGBoost and Prophet results for each combination of dimensions and chooses the best one for the final forecast.
- **Auto detect seasonality**: Automatically detect seasonality patterns for all forecast algorithms. The system runs an algorithm to detect distinct seasonality patterns across different dimensions, such as products and locations.


Cell analysis
K0001:::Oak
Store 1 US
Feb'24
Current
561 ↑ 16
Original forecast: 545
Signals impact +21
Manual adjustment +55
Overall trend
History
600
550
500
450
400
350
Value
485
+55
-4
+10
+15
561
Original forecast
Manual adjustments
Inflation
July
Price
Current
Factors
AI-generated content may be incorrect. Supplemental terms & conditions.
Cell analysis
K0001:::Oak
Store 1 US
Feb'24
Current
561 ↑ 16
Original forecast: 545
Signals impact +21
Manual adjustment +55
Overall trend
History
561 Current value
561 ↑ 1 3 manual adjustments Mar 23 2024
2 users Hide details
↑ 5 Andy Hayes 12:47 pm 1
↓ 12 Louise Meyers 12:47 pm
↑ 8 Andy Hayes 12:47 pm 1
540 ↓ 4 Inflation Mar 12 2024
8% increase of inflation year over year on March
540 Comments only 12:47 pm 1
556 ↑ 11 Manual adjustment Feb 12 2024 2
Anna Hayes
545 Original forecast Feb 11 2024
AI-generated content may be incorrect. Supplemental terms & conditions.


2024 Arima 12m
Time series
Output
Generative insights
Default worksheet
Generative insights
Regenerate
Seasonality
Trend
Signal correlation
Search
Inflation & outdoor temperature
Outdoor temperature
Inflation
Inflation & average temperature
Demand of this cluster is correlated with 2 signals that were previously imported – inflation and average temperature.
Inflation has a stronger impact, contributing to 12% of aggregated forecast, while average temperature drives 7 – 10% final forecast depending on the time of the year.
Timeline
Dimension breakdown
Aggregation breakdown
May 2024
Total forecast 80,029
Weather 17,287 22%
Inflation 23,721 35%
Historical sales 39,021 49%
Historical sales
Inflation
Weather
Cluster forecast
Time series values
Group by
Filter totals
Select data
Product
Location
Brands
Total
January
Febuary
March
Banana bread P1 Berlin Juno 789,820 1,123,377.50 649,980 502,118.75
Hart 22,587,313.16 880,267.50 541,714.40 17,000,680
Munich Juno 184,230 1,182,545 798,100 164,220
Hart 717,600 603,116.35 611,724.10 117,990
Cupcake Berlin Juno 228,217.50 22,587,313.16 32,679,477.55 386,802.50
Hart 184,747.50 7,553,717.50 518,420 177,157.50
Munich Juno 1,420,286.80 229,425 853,300 351,382.50





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Limit automatic time series updates with time freezes (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Implement lean manufacturing, catch weight, and step consumption

09/25/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 28, 2025	Dec 2025

Business value

The Planning Optimization planning engine helps businesses streamline their planning processes, lower costs, and improve service levels by creating fast and accurate supply plans. This planning engine makes the supply chain more agile and responsive. Planning Optimization now includes features that let companies using lean manufacturing, catch weight pricing and measurement systems, and step consumption with process manufacturing benefit from this planning engine.

Feature details

Planning Optimization provides the features that support the following business processes:

- **Lean manufacturing**: A production philosophy that maximizes value for customers while minimizing waste. It comes from the Toyota production system and focuses on continuous improvement and operational efficiency.
- **Catch weight**: A pricing and measurement system used mainly in the food industry. Products are sold based on their actual weight instead of a predetermined fixed weight. This system is important for items that naturally vary in size and weight, such as meat, seafood, and fresh produce.

- **Step consumption**: Manages material consumption to accommodate non-linear consumption rates that are based on production quantities.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Lean manufacturing for Planning Optimization (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Procurement

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Procurement and sourcing cover all steps from identifying a need for products and services, through procurement, receipt, invoicing, and processing payments to vendors. You can configure procurement processes for your specific business needs by defining purchasing policies and workflows.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Integrate contract lifecycle management in source to pay

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 25, 2024	✔ Apr 4, 2025

Business value

With flexible integration to external contract lifecycle management systems, businesses can efficiently manage the creation and management of contract lifecycles with suppliers in their source-to-pay process. Purchase agreements stipulated in the contracts integrate seamlessly with operations such as applying the correct terms and pricing.

Feature details

Contract lifecycle management (CLM) is a key element of the source-to-pay process. Dynamics 365 Supply Chain Management now provides a platform that makes it easy to integrate with an external CLM system. The feature supports out-of-the-box rules and integration points for interacting with CLM. The integration supports purchase agreements and non-disclosure agreements. It uses master data from Supply Chain Management.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Contract lifecycle management integration overview (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Sales and marketing

08/21/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Dynamics 365 Supply Chain Management provides robust tools to manage the entire sales and marketing lifecycle—from lead generation to invoicing.

Marketing

- **Campaign management**: Create and manage campaigns (telemarketing, mailing, email) targeting prospects, leads, and customers.
- **Lead nurturing**: Track and develop relationships from initial contact (such as trade shows and mass mailings) to customer conversion.
- **Entity flow**: Understand and manage the transition of a party from prospect to customer.

Sales

- **Sales quotations**: Generate offers for goods and services. Convert approved quotes into sales orders.
- **Up-sell and cross-sell**: Suggest alternative or additional products during order entry using predefined rules.
- **Sales orders**: Choose from among five types—journal, subscription, sales order, return order, and item requirements—based on the sales scenario.
- **Sales agreements**: Commit customers to purchase quantities or values over time with special pricing and discounts.

Backorders

- **Tracking**: Monitor undelivered purchase or sales orders by item, customer, or vendor.
- **Prioritization**: Adjust delivery schedules and inform customers of delays. Split inventory across orders as needed.

Invoicing

- **Customer invoice**: Final billing based on sales orders or packing slips.
- **Free-text invoice**: For non-sales order billing with custom descriptions and ledger accounts.
- **Pro-forma invoice**: Estimate invoice amounts before posting for customer preview or internal review.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Find products using external identifiers when creating orders

10/23/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 28, 2025	✔ Sep 12, 2025

Business value

You can now improve order accuracy and speed up fulfillment by letting your order processors search for products using familiar external identifiers. Whether you're working with globally recognized codes like GTIN, UPC, or EAN, or customer-specific product IDs, your team can find products faster and reduce entry errors. This streamlines your operations and supports seamless integration with marketplaces and supplier systems.

Feature details

Enhance product discoverability and streamline integrations by letting order processors find products based on external item identifiers. External identifiers are product names or IDs that differ from those used internally at your company.

External identifiers could be globally recognized codes (such as GTIN, UPC, EAN, ISBN or MPN) that uniquely identify products across systems, suppliers, and marketplaces. This capability is especially valuable in e-commerce, inventory management, and API-based integrations, where consistent product referencing is critical. Alternatively, you can set up customer-specific identifiers to make it easier to communicate with specific customers using the names and IDs that they are accustomed to using internally at their companies.

Once your external identifiers are set up, order clerks/processors can use them to search for products when adding lines to a sales order. This improves accuracy during order entry, reduces mismatches, and supports seamless data exchange with third-party platforms like marketplaces or supplier catalogs. It also enhances the user experience by enabling faster, more reliable product lookup and supports compliance with marketplace listing standards.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

Help us improve Dynamics 365 Supply Chain Management by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://experience.dynamics.com/ideas/idea/?ideaid=ce7256cb-7412-e811-80c0-00155d7cd0b4.

Additional resources

Use external item identifiers to add products to orders (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Warehouse management

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 warehouse management solution in Dynamics 365 Supply Chain Management provides a rich and flexible set of capabilities that you can combine and configure to support many warehouse layouts and operational scenarios. You get the same capabilities in warehouse-only mode. With this mode, a dedicated legal entity uses Supply Chain Management's warehouse management features and integrates with other legal entities or external systems.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Capture worker IDs for warehouse packing events

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 1, 2025	✔ Jul 1, 2025

Business value

The Warehouse Management mobile app now captures worker IDs during key container handling steps, so the system can trace packing activities. This traceability feature ensures accountability, improves operational transparency, and supports audit readiness. It helps you identify training needs or process gaps by providing clear visibility into who performs each packing task and when. With this insight, you can enhance overall warehouse efficiency and accuracy.

Feature details

The Warehouse Management mobile app now captures worker IDs during key container handling steps, such as when a worker adds items to a container or closes the container. With this update, Dynamics 365 Supply Chain Management can trace all packing activities.

Benefits

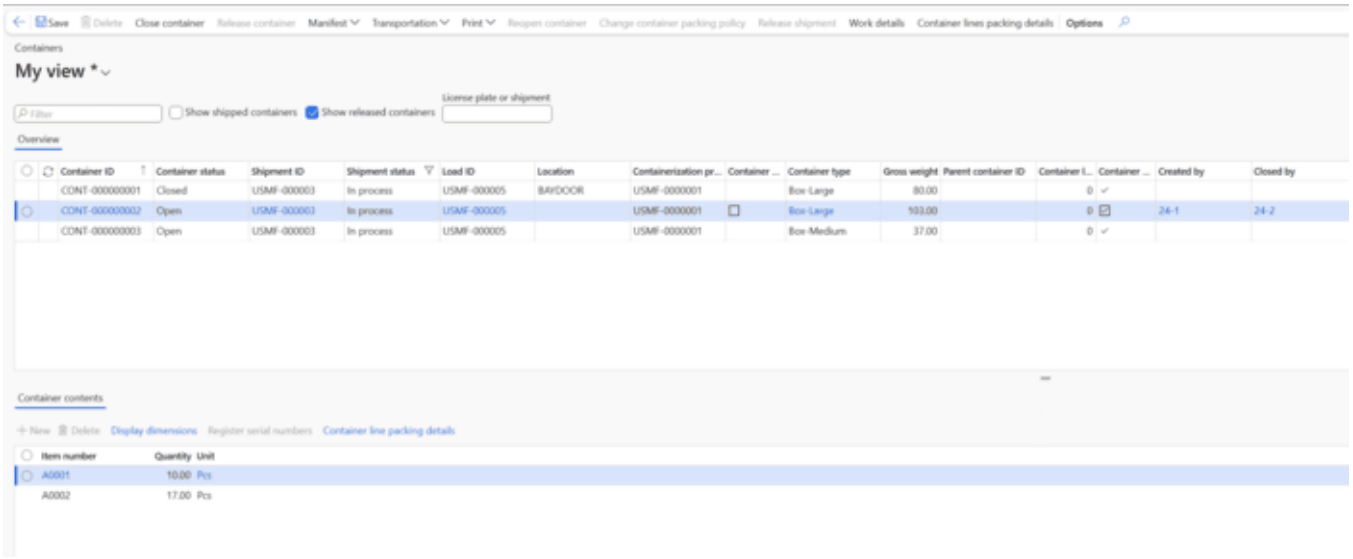
Provides full traceability of who performs each packing action and when.

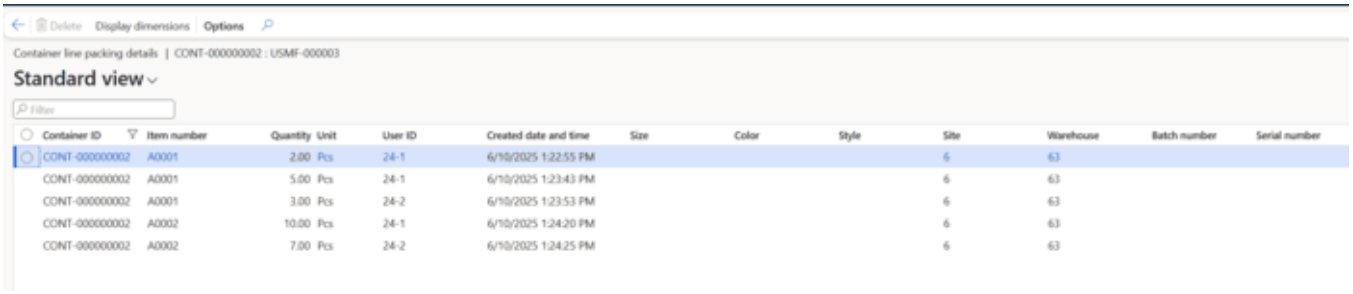
Added value

Enhances accountability and transparency in warehouse operations. By logging worker IDs at each step, the system supports quality control, reduces errors, and enables quick issue resolution when discrepancies arise.

Impact

This feature improves operational efficiency and audit readiness. Managers get visibility into packing workflows, so they can track performance, find training opportunities, and keep up with internal or external standards.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Record and view container line packing details (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Last updated on 11/18/2025

Improve operations with Warehouse Management mobile app V4

10/16/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 1, 2025	-

Business value

In version 4, the Warehouse Management mobile app moves from Xamarin to React Native. With this change, you get richer and more advanced mobile experiences, faster updates, and innovative features that evolve with your business needs.

Feature details

Warehouse Management mobile app version 4 is a major upgrade that moves the app to a modern foundation. With this foundation, the app delivers multiple features, benefits, and improvements.

New features

This version introduces:

- A variety of color themes and sound options for a personalized experience.
- An advanced camera-based barcode scanner for faster, more accurate scanning.
- Performance enhancements for smoother operation.
- Improved network resilience to keep you connected in challenging conditions.
- Built-in Wi-Fi self-diagnostics to help troubleshoot connectivity issues on the go.

Benefits

Version 4 improves the user experience and productivity of warehouse tasks.

Added value

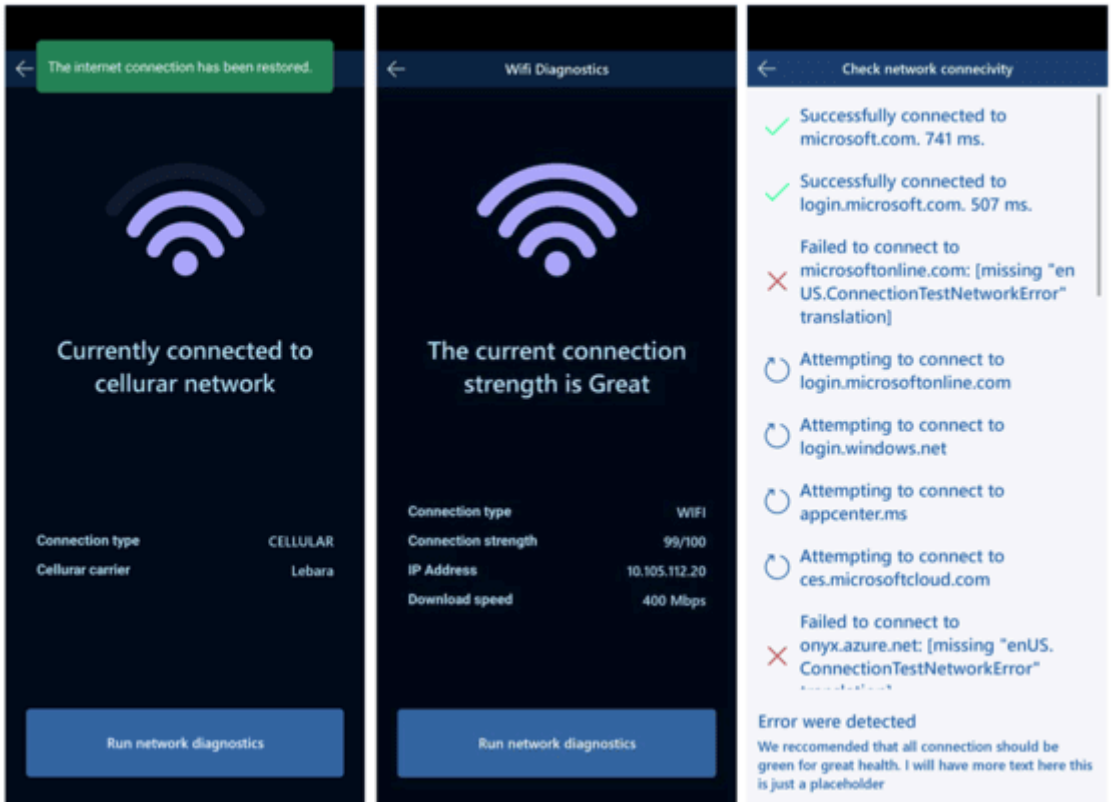
Version 4 provides a custom UI experience for your warehouse workers. It delivers improved performance and adds Wi-Fi monitoring.

Impact

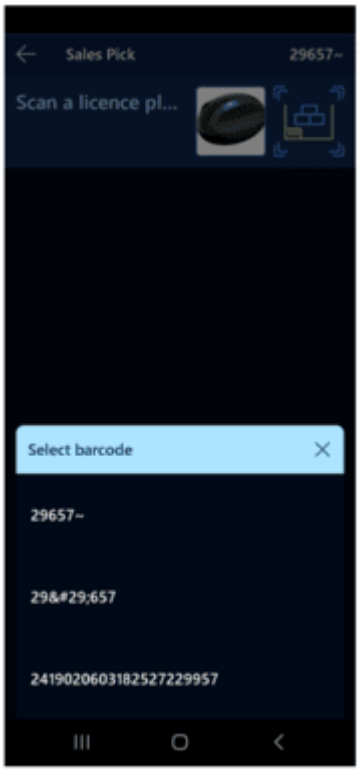
Warehouse workers benefit from the new user experience and get a working tool for optimized task processing.

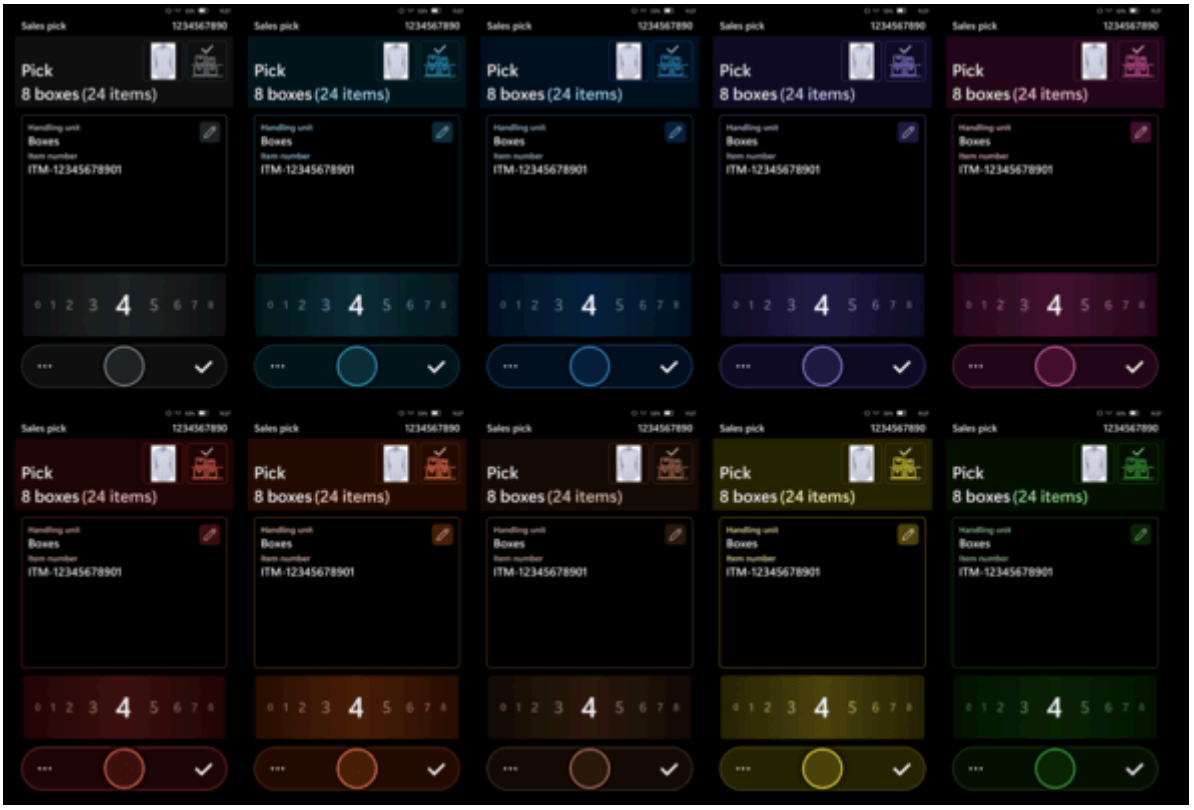
Screenshots

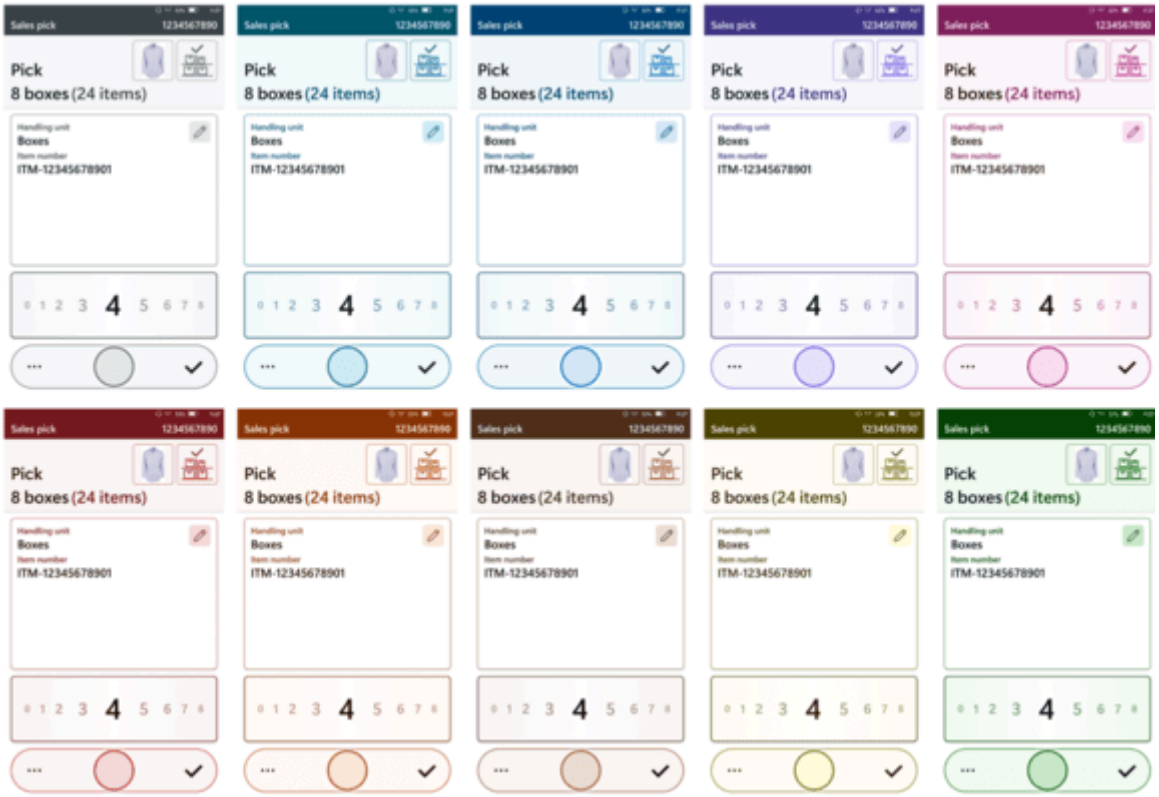
The following screenshots show the Wi-Fi diagnostics feature, the ability to choose from several captured barcodes, and the full set of new dark and light color themes.




Sales Pick
Scan work ID or licence pl...
3


Sales Pick
29657~
Scan a licence pl...
Select barcode
29657~
29&#29;657
241902060318252722995 7


Sales pick
1234567890
Pick
8 boxes (24 items)
Handling unit
Boxes
Item number
ITM-12345678901



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Migrate the Warehouse Management mobile app from V3 to V4 (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Plan and prepare for Dynamics 365 Project Operations in 2025 release wave 1

09/12/2025

> **Important**
>
> The 2025 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2025 to September 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/2025W1/ProjectOperations

Microsoft Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams in one application. With Project Operations, your teams can win more deals, accelerate delivery, empower employees, and maximize profitability. The application gives you the visibility, collaboration, and agility you need across the project lifecycle to drive success for project-centric businesses. Powered by Microsoft Power Platform, customers get an unmatched set of capabilities that enable everyone to analyze, act, and automate across their organization. With Project Operations, you can transform your 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 2025 release wave 1, we deliver functionally rich experiences in the following areas:

- Improvements to the expense management experiences on mobile and browser.
- Improvements to the Time entry experiences on mobile devices and browsers.
- Improvements in project planning with support for WBS templates and copy experiences.
- Usability improvements in billing backlog review, pro forma invoice review, approval, and contract management experiences.
- Improved and enhanced support for stocked items on the modern architecture.
- Support for discounts and fees on the modern architecture.
- Continued investment in the ability to migrate from project management and accounting (PMA) to the modern architecture of Project Operations.
- Flexibility in financial dimensions, revenue recognition based on contract line, and support for creating project G/L journals on the modern architecture.

In addition to the preceding functional and usability investments, this release includes investments in extensibility, reliability, and performance in the following areas:

- Support for larger invoices in the modern architecture that leverage async dual-write.
- Extensibility patterns for additional fields in invoice summary on the modern architecture.
- Consistent paradigms for time zone-agnostic date concepts where applicable.

Updates to Dynamics 365 Project Operations 2025 release wave 1

Investment areas



Copilot in Project Operations
With each release wave, AI and automation investments through Copilot empower consultants, sales personnel, project managers, resource managers, and project accountants in Dynamics 365 Project Operations by providing intelligent, natural-language interactions. These enhancements go beyond business applications to productivity tools like Microsoft Teams, Microsoft Outlook, and Microsoft Excel, so employees can use the tools where they're most productive. Copilot features in Project Operations streamline and speed up workflows from the frontline to the back office, helping service delivery organizations optimize operational efficiency.

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 continues to invest in capabilities that improve usability, performance, and scale across key areas of the product, such as project planning, invoicing, time entry, and core transaction processing 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
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Project Operations.
Product documentation	Find documentation for Project Operations.
User community	Engage with Project Operations experts and peers in the community.
Upcoming events	Find and register for in-person and online events.

Helpful links	Description
Product trials	Get started with Project Operations.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

What's new and planned for Dynamics 365 Project Operations

This topic lists features that are planned to release from April 2025 through September 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 2 plan.
- For a list of the next wave's release plans, go to 2025 release wave 2 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
Optimize processes with agent-led time, expense, and approvals	Users by admins, makers, or analysts	✅ Apr 30, 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 general journals against projects for	Users by admins, makers, or	✅ Sep 30,	Dec 2025

Feature	Enabled for	Public preview	General availability
resource nonstocked scenarios	analysts	2025	
Project cost for service items and procurement categories with item requirements	Users by admins, makers, or analysts	-	✔ Jun 4, 2025
Add time zone-agnostic fields for projects and project tasks	Users, automatically	✔ May 16, 2025	Mar 2026
Post project cost for the procurement category upon product receipt	Users, automatically	-	✔ Jun 4, 2025
Simplify expense management using new enhancements	Users, automatically	-	✔ Sep 12, 2025
Support larger invoices in Project Operations	Users by admins, makers, or analysts	✔ Sep 1, 2025	Jun 2026
Use one grid for material and expense estimates	Users by admins, makers, or analysts	✔ Mar 8, 2024	✔ Apr 30, 2025
Enable milestone date to be time zone independent	Users by admins, makers, or analysts	-	✔ May 2, 2025
Implement access restrictions in Project for the web iFrame	Users, automatically	✔ May 16, 2025	Mar 2026
Record task progress from the tasks grid in Project Operations	Users by admins, makers, or analysts	✔ May 30, 2025	Mar 2026
Use time zone independent accounting date in project invoicing	Users by admins, makers, or analysts	-	✔ Sep 30, 2025
Increase work breakdown structure limits	Users by admins, makers, or analysts	✔ Jun 13, 2025	✔ Jun 13, 2025
Use integration troubleshooting for modern projects	Users by admins, makers, or analysts	✔ Mar 14, 2025	✔ Jun 6, 2025
Customize the Billing hub view	Admins, makers, marketers, or analysts, automatically	-	✔ May 2, 2025
Sync global address book with Project Operations	Users by admins, makers, or analysts	-	✔ Aug 4, 2025
Use improved subcontract info for one vendor in one place	Users by admins, makers, or analysts	✔ Sep 30, 2025	-
Use financial tags for project sales orders	Users by admins, makers, or	-	✔ Jun 6, 2025

Feature	Enabled for	Public preview	General availability
and journals	analysts		
Support for line discounts and fees in resource-based deployments	Users by admins, makers, or analysts	✔ Sep 12, 2025	Mar 2026
Calculate revenue recognition for stand-alone selling price contract lines	Users by admins, makers, or analysts	✔ Sep 12, 2025	Mar 2026
Simplify editing of project invoices to improve efficiency	Users by admins, makers, or analysts	-	✔ Sep 30, 2025
Use the new Time Entry mobile app	Admins, makers, marketers, or analysts, automatically	✔ Mar 1, 2025	Sep 2025
Use the new Calendar interface for time entry	Users by admins, makers, or analysts	✔ May 30, 2025	Sep 2025
Use the enhanced quote experience	Users by admins, makers, or analysts	✔ Feb 21, 2025	✔ May 31, 2025
Enable estimate grid to display cost and sales on one row	Users by admins, makers, or analysts	✔ Mar 31, 2025	✔ Apr 30, 2025
Use the modern architecture for existing legal entities	Users by admins, makers, or analysts	✔ Jun 6, 2025	✔ Oct 3, 2025
Use stocked products in resource-based deployments	Users by admins, makers, or analysts	✔ Jun 13, 2025	Jun 2026
Import projects in MPP files into existing projects	Users by admins, makers, or analysts	✔ Aug 1, 2025	Mar 2026
Add calendar control to the work hour template entity	Users, automatically	-	✔ Aug 31, 2025
Enable number sequences in expense management	Users, automatically	-	✔ Sep 12, 2025
Post expenses on the expense report posting date	Users by admins, makers, or analysts	-	✔ Sep 12, 2025
Enable contract line-based default financial dimensions for expenses	Users by admins, makers, or analysts	-	✔ Sep 12, 2025

* You are able to opt into some features as part of early access on February 3, 2025, 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 information on data residency in Dynamics 365 and Power Platform, visit the Microsoft Dynamics 365 and Power Platform data residency documentation. For more information about geo availability, visit the Dynamics 365 and Microsoft Power Platform availability page.

Last updated on 11/13/2025

Copilot in Project Operations

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 each release wave, AI and automation investments through Copilot empower consultants, sales personnel, project managers, resource managers, and project accountants in Dynamics 365 Project Operations by providing intelligent, natural-language interactions. These enhancements go beyond business applications to productivity tools like Microsoft Teams, Microsoft Outlook, and Microsoft Excel, so employees can use the tools where they're most productive. Copilot features in Project Operations streamline and speed up workflows from the frontline to the back office, helping service delivery organizations optimize operational efficiency.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Optimize processes with agent-led time, expense, and approvals

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 30, 2025	-

Business value

Copilot and agentic automation detect work from Outlook and Teams. By streamlining time entry, expense report creation, and approval processes, the solution reduces administrative burdens and improves invoice accuracy. This business value results in faster invoicing, fewer errors, and greater satisfaction for project managers, consultants, and invoice administrators.

Feature details

By using Copilot and agentic automation, you can remove inefficiencies in the invoice process. The solution automatically detects work from Microsoft Outlook calendars and Microsoft Teams meetings. These features enable automated creation and submission of time entries. You don't need alerts and reminders that often frustrate project managers, consultants, and invoice administrators.

The automation also helps create, submit, and check policy for expense reports from emails and receipt scans. It includes automatic policy validations. Project managers can upload documents with rules to flag approvals that need review while allowing others to approve automatically.

Overall, these advanced technologies use natural language inferences and automation to help project-centered companies submit accurate invoices, reduce corrections, and remove frustrations and last-minute issues for everyone involved.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Note: The author created this article with assistance from AI. Learn more

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Last updated on 11/18/2025

Optimize Project Operations

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 continues to invest in capabilities that improve usability, performance, and scale across key areas of the product, such as project planning, invoicing, time entry, and core transaction processing flows.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Add calendar control to the work hour template entity

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Aug 31, 2025

Business value

This feature simplifies updating the work hour template by reducing the number of steps in the process.

Feature details

Work hour templates come from a bookable resource's work hours, but they don't include a calendar tab. To view or change these templates, go to the resource and update their work hours. If you want to change the work hours in the templates, check the resource's calendar.

To simplify updating the work hour template, we plan to add a calendar tab in the work hour template entity.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Define and edit project calendars (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 11/18/2025

Add time zone-agnostic fields for projects and project tasks

08/07/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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	✅ May 16, 2025	Mar 2026

Business value

With this feature, you can use a field that stores start and end dates on projects and project tasks in a time zone-agnostic way. Currently, the system converts times to GMT before saving them. This conversion can cause issues when it moves a time to a different day. Using time zone-agnostic fields that the system doesn't convert to GMT when storing solves these issues.

Feature details

Project and project task start and end times are saved in a date-time format. The system converts these times to GMT before saving them. When the product displays these times, it converts them back to the user's time zone. However, some integrations and customizations pull only the date from this field. This approach causes problems when the conversion to GMT changes the date. The problem happens when an integration pulls only that date from the field without converting it back to GMT.

To prevent this problem, create new fields on the entity to store the start and end date and time values without converting them to GMT. With these fields, you can confidently pull only the date without worrying about time-zone conversion causing the date to change.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use time zone independent date fields (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Calculate revenue recognition for stand-alone selling price contract lines

09/18/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 12, 2025	Mar 2026

Business value

This feature helps organizations set the contract line value on the project contract lines. The system calculates revenue recognition based on the contract line value amount.

Feature details

In revenue recognition, use fixed price billing arrangements with billing milestones to set the contract value. Customers need to calculate the contract value separately from the billing milestones when extra effort or resources are required to complete a fixed price project or when a contract line is discounted.

Use the contract value to calculate revenue recognition. Use billing milestones to invoice the customer. When you separate these values, you can recognize revenue based on the effort or stand-alone selling price. This approach aligns better with ASC 606 and IFRS 15 requirements.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Additional resources

Enable revenue recognition based on contract standalone selling price (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Customize the Billing hub view

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ May 2, 2025

Business value

Billing hub enables project managers to create proforma invoices in Project Operations, so they can increase invoicing efficiency and get faster revenue recognition. When you customize existing forms and views on Billing hub, you can personalize the billing and invoice creation experience to suit your business needs.

Feature details

With this feature, you can customize the Billing hub at all levels of the nested grid, including contract, contract line, and contract line views. The feature is automatically enabled for admins so you can customize the Billing hub forms and views to fit your organization's needs. For example, with this update, you can add more columns like **Invoice ID** to the contract view or add **Discount %** and **Fee %** to your contract line view in the Billing hub.

This release includes the following fixes:

- Platform bug fix for the grid customizer that makes contract level customization possible.
- Ability to customize views on contract lines for time, material, expense, fee, and milestones.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Customize the Billing hub view for creating project-based proforma invoices (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Enable contract line-based default financial dimensions for expenses

10/16/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Sep 12, 2025

Business value

By integrating financial dimension defaulting rules for expense transactions and reports, you streamline expense management, enhance data consistency, and ensure better compliance with financial policies.

Feature details

This capability builds on the **Enable flexibility in determining financial dimension defaulting for resource-based/non-stocked scenarios** feature.

With this capability, organizations can apply dimension defaulting configuration rules to automatically get financial dimensions from contract lines or the related project for expense lines. This enhancement gives you more flexibility and control over how you apply default financial dimensions to expense-related documents. It improves data accuracy and reduces manual entry.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Enable estimate grid to display cost and sales on one row

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 31, 2025	✔ Apr 30, 2025

Business value

With this feature enhancement, you can view and edit both cost and sales on one line of the estimate grid. You can easily edit these values within the One Grid view.

Feature details

This feature consolidates cost and sales visibility into a single, easily accessible One Grid view. It keeps control over editable fields, so you get better efficiency, accuracy, and user satisfaction when managing estimates.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Map projects and tasks to a project contract line (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Enable milestone date to be time zone independent

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ May 2, 2025

Business value

The milestone date field in the project contract line milestone entity uses user local time, but the same field in the invoice entity is time zone independent. This difference creates a discrepancy in the milestone date when you view it from the invoice schedule in the project contract line in the UI. This feature makes the milestone date consistent in both entities, so invoicing milestones is more accurate.

Feature details

Ensuring that the milestone date (invoice date) consistently appears across both the project contract line milestone entity and the invoice entity improves:

- **Accuracy of invoicing** for fixed price contract lines, which ensures consistency of the milestone date between both the project contract line and the invoice entity. This accuracy reduces corrections downstream.
- **Efficiency** of the invoicing process, which reduces the administrative burden and lets finance teams operate more efficiently. This efficiency leads to faster cash flow and improved financial management.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Subcontract line milestones (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Enable number sequences in expense management

10/16/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Sep 12, 2025

Business value

Expense management doesn't currently offer a simple way to set up number sequences. Users need to go to the number sequence master, which takes extra time and adds complexity. This approach not only adds operational overhead but also raises the risk of configuration problems. With an easy-to-use interface in the expense management module, users can manage number sequences directly. This approach cuts down on effort and lowers the chance of issues.

Feature details

The feature adds a new tab to the expense management parameters page. With this tab, you can assign number sequences directly. The process for configuring number sequences matches the experience in other modules of the application, so it's more intuitive. With this enhancement, you can manage number sequences within the module instead of accessing and modifying the number sequence master.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Implement access restrictions in Project for the web iFrame

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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	✅ May 16, 2025	Mar 2026

Business value

Currently, when a user accesses 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 adds a security system that lets administrators restrict what users can access inside the Project for the web iFrame on projects they access but don't join as team members. Project managers can use the same system to set restrictions for team members on their projects.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Import projects in MPP files into existing projects

08/28/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 1, 2025	Mar 2026

Business value

This feature simplifies the import process by allowing direct import of Microsoft Project desktop client files (.mpp files) into an existing project. It helps make online and offline planning seamless.

Feature details

Previously, importing an .mpp file always created a new project. The import process copied the work breakdown structure from the .mpp file into the new project. You couldn't import an .mpp file into an existing project. This limitation made it difficult to manage projects when overall planning happens in Project Operations and individual planning happened offline in Microsoft Project for desktop.

With this feature, you can import .mpp files into existing projects so you can keep your overall planning intact. This feature works with the **Copy project** feature but uses an .mpp file for import.

You can:

- Set calendar hours (existing capability).
- Set the project manager (existing capability).
- Set schedule mode if the import process allows override (existing capability).

- Select the source MPP file (existing capability).
- Select the target project (new capability).

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Update the Dynamics 365 expense management mobile app (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Increase work breakdown structure limits

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jun 13, 2025	✔ Jun 13, 2025

Business value

Enhance customer satisfaction by improving the performance of the work breakdown structure.

Feature details

We implement this feature in phases. In phase 1, we increase the limits for:

- Number of tasks in a project.
- Number of assignments in a task.
- Number of assignments in a project.

In phase 2, we enhance overall performance after we increase these limits. This enhancement reduces performance-related tickets and boosts customer satisfaction with Project Operations.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Project and task limitations (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Post expenses on the expense report posting date

10/02/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Sep 12, 2025

Business value

With this feature, businesses can post expense transactions on a specific posting date instead of the expense report date. This change improves G/L management, keeps voucher numbering in order, and simplifies statutory compliance. As a result, financial reports are more accurate.

Feature details

The feature provides administrators with a parameter on the **Expense Management Parameters** page. When you enable this parameter, the system posts expenses by using the posting date instead of the transaction date.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Post project cost for the procurement category upon product receipt

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Jun 4, 2025

Business value

With this feature, the system records project costs when you post the purchase product receipt for procurement categories. Currently, the system updates project costs only when you post the vendor invoice.

This feature also generates the sales amount and corresponding financial transactions. With these transactions, you can issue project invoices without waiting for the supplier's purchase invoice.

Feature details

This feature helps you:

- Establish relationships between sales categories and procurement categories.
- Enable item requirements for procurement categories.
- Automatically post item requirements packing slips during the receipt of purchase order products.
- Create project invoices for customers with sales prices that the system calculates automatically during the purchase product receipt.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Manage item requirements for procurement categories using purchase orders (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Project cost for service items and procurement categories with item requirements

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Jun 4, 2025

Business value

When you use this feature with item requirements, it streamlines project costing for service items and procurement categories. Project costs automatically update to reflect:

- **Miscellaneous charges** - extra charges you add to the invoice.
- **Discounts** - discounts you apply as fixed amounts or percentages.
- **Tax adjustments** - applicable taxes, including nondeductible taxes.
- **Price changes** - price variations between the purchase order and the final invoice.

These enhancements help you manage costs more accurately and dynamically. They improve financial oversight and project profitability.

Feature details

This feature resolves key challenges associated with using service items in Project Operations when you enable the item requirement feature:

- Enhances project cost calculations for service, nonstocked items, or procurement categories that you link to item requirement purchase orders.
- Streamlines project cost management in the sales order to purchase order process.
- Improves the handling of project costs for purchase orders, including miscellaneous charges.
- Enhances project cost handling for purchase orders that include tax.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Update project costs upon vendor posting (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Record task progress from the tasks grid in Project Operations

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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	✅ May 30, 2025	Mar 2026

Business value

This feature adds a way to complete a task. You can mark the task 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 because that requires time entries to increase the **Completed** state for the effort. With this update, we're adding functionality to mark a task as complete from the grid view, the way Project for the web does by default.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Simplify editing of project invoices to improve efficiency

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Sep 30, 2025

Business value

Project-based companies often create an invoice for a large team working on a project with a recurring lifespan. Each invoicing period can include thousands of transactions across time, expense, and material usage activities for projects. You review and confirm these transactions before you generate a customer-facing invoice. This reviewing process plays an essential role in ensuring quick invoicing and maintaining healthy operational metrics. A clean, intuitive, and high-performing experience for reviewing and making corrections adds strong business value by helping a project manager keep a service-centric practice running smoothly.

Customers often need to edit invoice line details on an invoice that contains hundreds of transactions. This need might come from changes required during an audit of the invoice prior to confirmation. Or, it might come from a need to correct a wrong invoice that you already confirmed. In both scenarios, invoice editing is a critical step during billing. The ability to quickly edit invoice line details greatly improves the usability of the billing system.

Feature details

This feature improves the usability of invoice editing. The changes include:

- Fewer clicks to edit one or more invoice line details.
- Fewer clicks to bulk edit multiple fields on an invoice line detail.

This feature also gives billing administrators an improved invoice summary with key invoice insights. With these insights, administrators can make decisions faster.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Improve invoice usability with modern invoicing (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 11/18/2025

Simplify expense management using new enhancements

10/16/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Sep 12, 2025

Business value

These enhancements close key functional gaps in the Expense Reports Re-Imagined feature. With these enhancements, the feature matches the legacy expense management interface. You get a streamlined and intuitive expense creation and submission process. You also spend less time completing a report.

Feature details

Key enhancements in this feature include:

- Inclusion of workflow history
- Ability to map expenses to a travel requisition
- Quick matching of expenses with receipts
- Ability to add interim and final approver
- Ability to merge and match expenses
- Ability for expense submitters to attest anti-corruption

You get these enhancements through a feature flag, **Expense Reports Re-Imagined Enhancements**. First, you need to enable the **Expense Reports Re-Imagined** feature.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Support for line discounts and fees in resource-based deployments

10/09/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 12, 2025	Mar 2026

Business value

With this feature, you can set up the line discount and fee for resource-based deployments. Project managers use these discount and fee calculations for project quotations, contracts, and invoices. In some cases, discounts apply to the contracts that organizations enter into with customers. Alternatively, organizations might charge extra fees, such as administrative fees.

Feature details

Project Operations lets you set discount and fee percentages for a project quotation or contract line. When you generate and approve a transaction, the system uses the contract line setup to apply the right discount or fee. Then, the system updates the actuals. During invoicing, the system applies discounts and fee amounts when needed and creates the financial transactions.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Integrate Discount and Fee with ERP (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Support larger invoices in Project Operations

09/04/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 1, 2025	Jun 2026

Business value

The dual-write asynchronous integration for customer invoicing in Dynamics 365 Project Operations offers significant business value by enabling scalable, reliable, and efficient billing processes. Traditional real-time dual-write sync is limited to handling up to 1,000 invoice lines, which can be a bottleneck for organizations managing large, complex projects. Async integration removes this constraint, allowing invoices with thousands of lines to be processed seamlessly.

Feature details

The dual-write asynchronous integration feature in Project Operations enhances the customer invoicing process by enabling scalable and reliable data synchronization between Dataverse and Dynamics 365 Finance. This feature addresses the limitations of real-time dual-write sync, which is restricted to processing a maximum of 1,000 invoice lines per invoice.

With the introduction of asynchronous integration, this constraint is eliminated. The async model allows invoice data—including actuals, transaction connections, and invoice proposals—to be processed in the asynchronous mode. This enables the generation and synchronization of invoices with thousands of lines, ensuring that billing operations are not disrupted by system limitations.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Additional resources

Integrate project invoices using dual-write async configuration (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Sync global address book with Project Operations

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Aug 4, 2025

Business value

With this feature, you can maintain multiple invoices and delivery addresses along with multiple contact details for customers, vendors, and contracts. You can also use these addresses for invoicing purposes.

Feature details

Customers can assign delivery addresses to project contracts and funding sources. The system uses these addresses as the default for project invoices. The addresses synchronize with Dynamics 365 Finance for project invoices.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Manage multiple addresses for accounts (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use financial tags for project sales orders and journals

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Jun 6, 2025

Business value

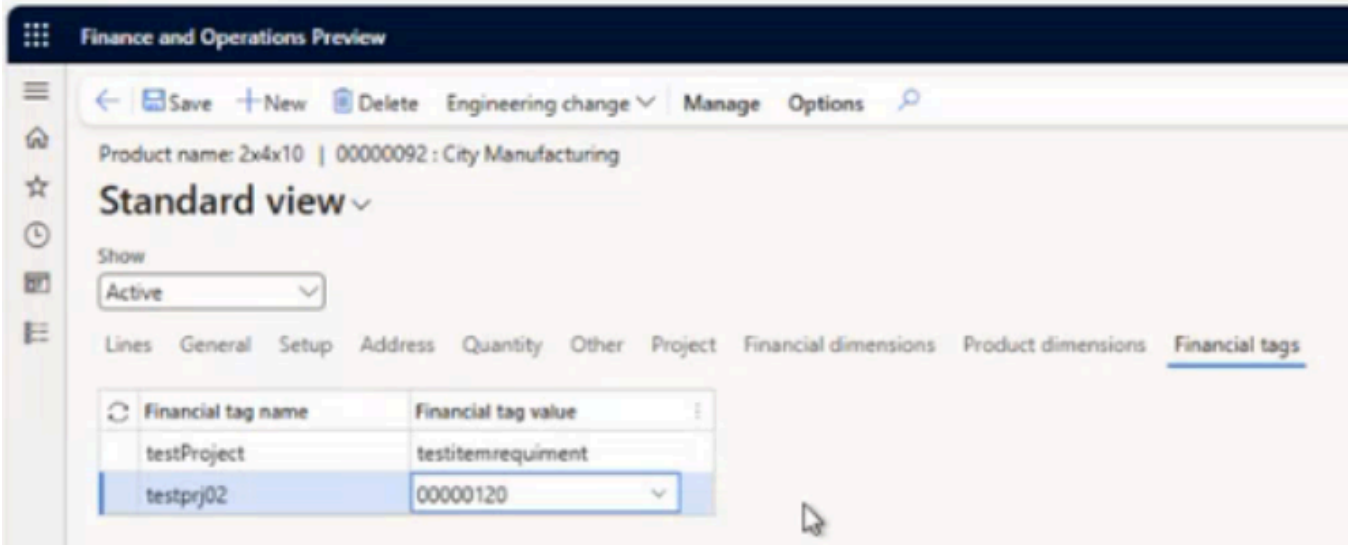
Financial tags help organizations track user-defined fields on accounting entries posted to the general ledger. With financial tags, you don't need to create financial dimensions that contain values you can't reuse.

Use financial tag values for reporting. For example, create a financial tag to track time and expenses related to an initiative without needing a unique financial dimension.

Feature details

The general ledger stores financial tags that you define for accounting entries you post to the general ledger. You define the financial tag names, so data entry clerks have clear guidance about the expected data in each field. By default, the system doesn't validate or enter financial tag values. Enter tags on the journals, and they flow through to the invoice.

In this release, you can add tags to many common project accounting documents and processes. The first supported documents are project journals and sales orders. Tags flow through from document posting to invoicing.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use financial tags for project financial transactions (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use general journals against projects for resource nonstocked scenarios

> **Important**
>
> **Some of the functionality described in this release plan has 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 30, 2025	Dec 2025

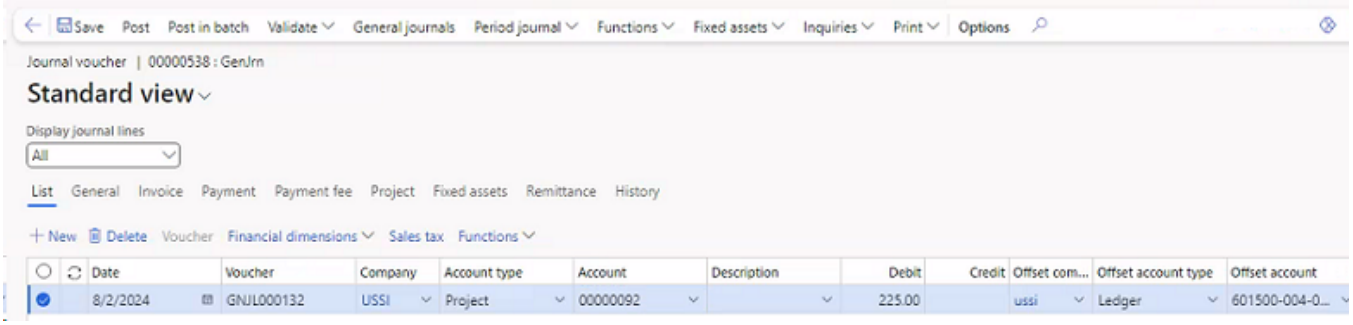
Business value

Microsoft Dynamics 365 Finance offers rich functionality with journals for many scenarios. It includes advanced capabilities such as workflow and reversals. When you use this functionality, you can create general journals in Finance for Microsoft Dataverse-based projects to post expenses.

Feature details

Users requested the ability to use journals in Dynamics 365 Finance with resource and nonstocked projects. This feature relaxes restrictions and allows expense-type general journals to flow through to Dataverse. New capabilities include:

- When you use the resource and nonstocked deployment, you can select **Project** as the source or the offset for the journal. **Ledger** is the other side of the transaction.
- Journals you create in Finance integrate and flow back into Dataverse. In Dataverse, you create actuals against the project.
- You use a new posting approach for this document that eliminates the use of the expense integration account.



Additional resources

Use general journals for advanced accounting (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 11/05/2025

Use improved subcontract info for one vendor in one place

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 30, 2025	-

Business value

Project managers currently need to use multiple forms and interfaces to manage vendors and subcontracts across different projects. This upcoming feature enhancement simplifies the process. With this feature, project managers can more efficiently manage all subcontracts for a single vendor across different projects.

Feature details

Some of the most commonly used business processes that project managers perform during subcontract management include the following tasks:

- Modify subcontract line
- Track subcontract usage
- Monitor billing progress for subcontracts

Currently, project managers need to use multiple forms and interfaces to access these business processes. This complexity increases when project managers manage vendors and subcontracts across various projects.

To enable this feature, enable the feature flag **Enable subcontracting UX enhancements for improved insights and smoother navigation**. With the feature flag, customers and partners can adapt to the changes while preserving any customizations they added.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Enable the improved Subcontracting user experience (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 11/18/2025

Use integration troubleshooting for modern projects

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 14, 2025	✔ Jun 6, 2025

Business value

This feature saves time troubleshooting for customers and partners. It makes it easier to find when data doesn't integrate between the finance and operations architecture and Microsoft Dataverse.

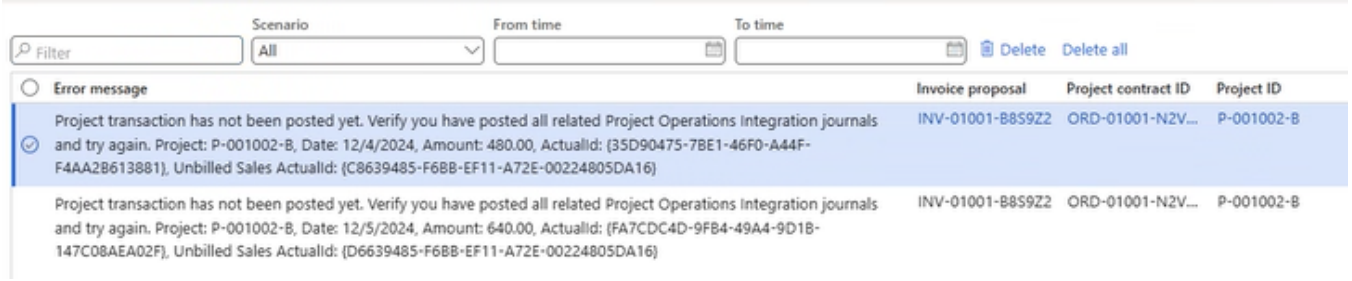
Feature details

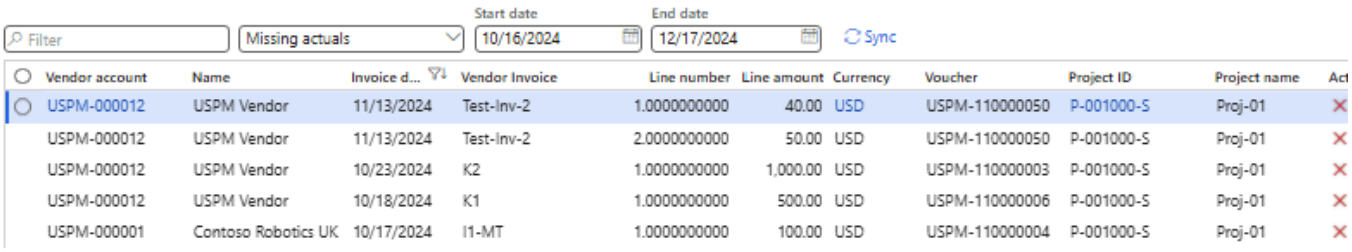
The feature introduces a new workspace for the resource and nonstocked deployment type of Dynamics 365 Project Operations. This workspace enables new scenarios that save time when you troubleshoot errors and review configuration errors, system errors, and other potential issues that logs might otherwise bury or miss.

For example, the workspace enables you to identify and resolve dual-write sync issues that relate to vendor invoices and expenses. It provides detailed insights into the root causes of errors, including the number of affected records and associated amounts, so you clearly understand the scope of the issue.

New capabilities include:

- A new dashboard that supports accountants by highlighting pending journal postings, integration journal lines that aren't created, and missing records to help with efficient ledger reconciliation.
- A new batch process that resyncs data so you can address and resolve issues effectively, ensuring data consistency and operational continuity.
- A detailed view of several documents, such as expense reports and vendor invoices, that shows whether they're in sync between Dataverse and the finance and operations infrastructure.
- A troubleshooting view where the full logs of the integration journal and invoice proposals are available without truncation.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Project Operations integration workspace (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use one grid for material and expense estimates

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 8, 2024	✔ Apr 30, 2025

Business value

Replacing the grid within expense and material estimates gives users a clean experience when they create and edit estimates. The enhanced grid experience provides easy filtering, deletion, and lookup functionality. This change ensures extensibility and improves performance.

Feature details

This feature brings the new grid support to Project's expense and material estimate grids. Currently, these custom grids don't perform well and lack extensibility and capabilities. This feature brings the new modern grid capabilities to improve the overall experience for users.

These enhancements include the following features:

- Improved grid with a view switcher.
- Improved grid that supports extensibility.
- Task sorting by work breakdown structure.
- Quick create experience for easily adding expense and material estimates.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Set up price lists (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use stocked products in resource-based deployments

10/15/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 13, 2025	Jun 2026

Business value

Project managers can use this feature to manage projects that require inventoried products. They can view on-hand inventory counts at different sites and warehouse locations. With this information, project managers can estimate, procure, and manage the usage of inventoried products on their projects.

Feature details

The experiences for using inventoried products in Project Operations use the Inventory and Warehouse modules of Dynamics 365 Supply Chain Management. To accurately estimate the availability of stocked items and their costs, the system uses Pricing and Inventory visibility services. Use the Inventory close process in Supply Chain Management to update the project cost and show accurate consumption of project budgets. Providing all the capabilities needed to manage stocked items on projects takes multiple release waves.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Managed stocked products for Project Operations integrated deployments (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use the enhanced quote experience

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 21, 2025	✔ May 31, 2025

Business value

Reduce manual effort and minimize errors by enabling users to add or edit quote line details directly from a unified grid interface. When you include customer schedules, margins, and budgets in the quote line details, you get deeper insights and better financial oversight.

Feature details

This feature enhances quote management. Users can add or edit quote line details directly from a unified grid interface and access cost details. 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.

These improvements streamline quote management and enhance functionality, accuracy, and efficiency.

Users can access this feature in Early Access Update 1. As of the beginning of 2025 release wave 1, the feature is generally available.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

New Quote form experience (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use the modern architecture for existing legal entities

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jun 6, 2025	✔ Oct 3, 2025

Business value

With this feature, you can use the modern architecture for resource and nonstocked scenarios on the Dataverse platform. You get great user experiences and deep functionality in project planning with Microsoft Project for the Web and resource management with Unified Resource Management.

Feature details

The enhancements in this feature enable parallel use of projects from both deployment types. With this change, you can enter transactions and create invoices for long-running projects. These enhancements support the transition to the modern architecture. This change is part of a larger effort. You won't see all the functionality delivered at once. With these enhancements, you can try the modern architecture in a test environment. If you want, you can move from the stocked deployment type to the resource and nonstocked deployment type.

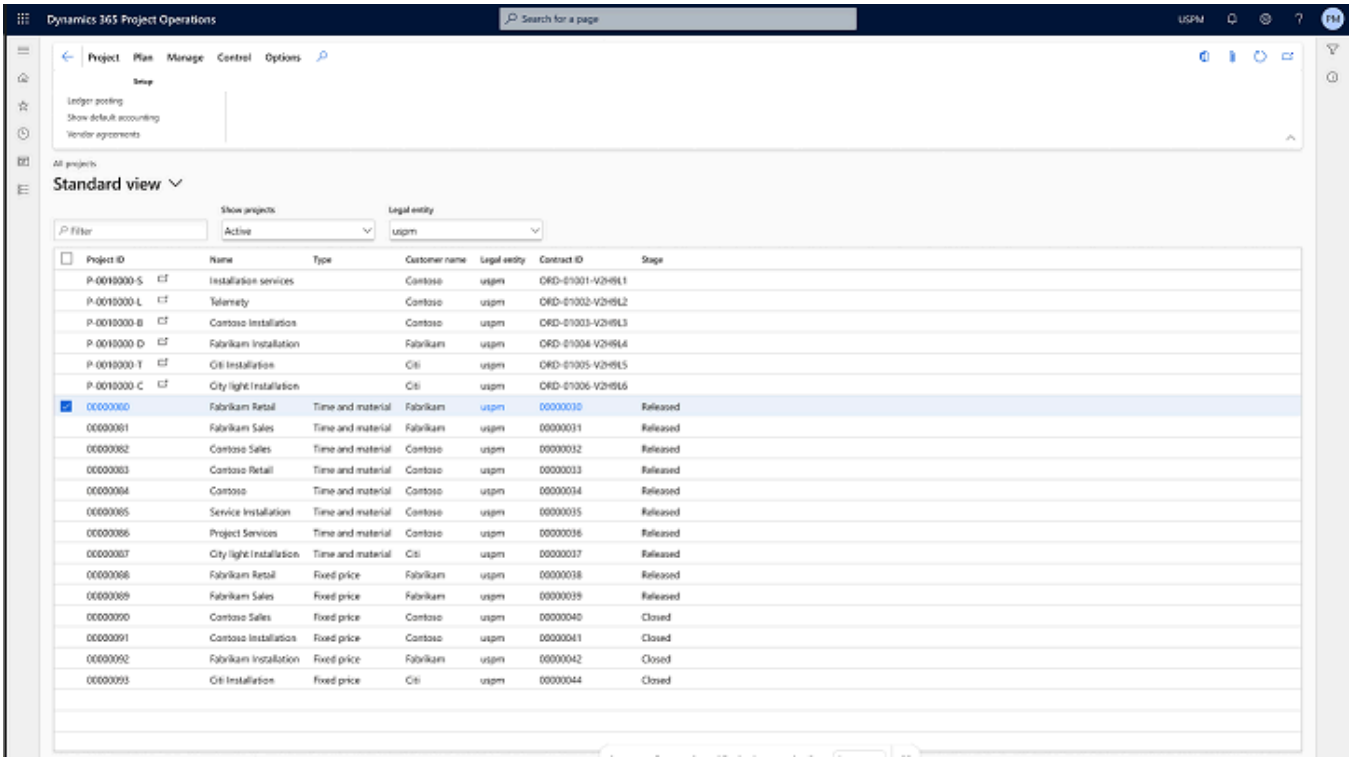
Use this feature if you're using the stocked deployment type and don't need production orders or manufacturing. With this feature, you can enable the resource and nonstocked deployment type for customers who previously used the Project Management and Accounting module without reimplementing your existing legal entity. If you want to continue using the capabilities in the stocked deployment type, you aren't impacted by this feature.

Changes include:

- The existing validation in the **Global project management and accounting parameters** form is relaxed to allow legal entities with existing project data to enable resource and nonstock deployment types.
- The **Global project management and accounting parameters** validation checks that all projects are closed. Initially, you can close all existing projects and create new projects in Dataverse.

- You evaluate business processes to make sure they restrict the appropriate deployment types. For example, you can create invoices for Dataverse-based projects only from Dataverse.

- We remove access or make read-only the legacy functions that exist in both deployment types. For example, when you enable this feature, you can't edit resource management and project work breakdown structures in the finance and operations user interface for the resource/non-stocked deployment mode. For projects you create in resource/non-stocked deployment mode, use **Unified Resource Scheduling** experiences for resource scheduling, and **Project for the Web** experiences for project planning.



Additional resources

Configure Project Operations integration per legal entity (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 11/05/2025

Use the new Calendar interface for time entry

08/07/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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	✅ May 30, 2025	Sep 2025

Business value

Every organization needs an efficient time entry experience for its consultants and team members. The experience gives users the flexibility to log time in different ways. It minimizes the number of clicks and effort required to enter time.

Feature details

The web experience for time entry in Dynamics 365 Project Operations is getting a series of improvements that make time entry faster and more accurate. The improvements give team members better tracking capabilities.

These upgrades include:

- A new calendar interface to view, create, and change time entries.
- The ability to track time across different timelines, such as weekly or monthly.
- Tighter integration of the work breakdown structure for assigned tasks and projects within the time entry creation step (quick create forms).
- Improved tracking with benchmarking of actual versus target hours and visualizations that help team members track their progress on project tasks.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Time Entry Calendar interface overview (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use time zone independent accounting date in project invoicing

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Sep 30, 2025

Business value

When you use the time-zone agnostic accounting date field, the voucher date in finance and operations is always correct. The date stays accurate no matter the signed-in user's time zone, so project invoicing is always accurate.

Feature details

When you use this feature, Dataverse includes a new time-zone (TZ) agnostic accounting date field. Use this TZ agnostic accounting date field instead of the accounting date field, which uses the user's local time zone, when you post transactions in finance and operations (resource deployments).

When you enable usage of this field, you can use a time-zone agnostic accounting date in invoiced transactions so invoicing is accurate.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use time zone independent date fields (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 11/18/2025

Plan and prepare for finance and operations cross-app capabilities in 2025 release wave 1

> **Important**
>
> The 2025 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2025 to September 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 help businesses everywhere accelerate their digital transformation. We deliver frequent updates with product enhancements so customers can stay current consistently, predictably, and seamlessly. Increasing productivity and return on investment is the key driver for the new core capabilities.

Updates to finance and operations cross-app capabilities 2025 release wave 1

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.

Copilot experiences in finance and operations apps complement the experiences across Microsoft offerings, including Power Platform and Microsoft 365.

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.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 10/16/2025

What's new and planned for finance and operations cross-app capabilities

This topic lists features that are planned to release from April 2025 through September 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 2 plan.
- For a list of the next wave's release plans, go to 2025 release wave 2 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
Stay focused and simplify tasks with Immersive Home and adaptive experiences	Users by admins, makers, or analysts	✔ Jun 6, 2025	Mar 2026
Build agents for finance and operations with Model Context Protocol	Admins, makers, marketers, or analysts, automatically	✔ May 19, 2025	Mar 2026

* You are able to opt into some features as part of early access on February 3, 2025, 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.

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For information on data residency in Dynamics 365 and Power Platform, visit the Microsoft Dynamics 365 and Power Platform data residency documentation. For more information about geo availability, visit the Dynamics 365 and Microsoft Power Platform availability page.

Last updated on 12/02/2025

Boost productivity with Copilot

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). 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. Copilot experiences in finance and operations apps complement the experiences across Microsoft offerings, including Power Platform and Microsoft 365.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Build agents for finance and operations with Model Context Protocol

09/10/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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	✔ May 19, 2025	Mar 2026

Business value

A Model Context Protocol (MCP) server simplifies the experience of adding ERP business logic as actions to an agent. With the MCP server, an agent can orchestrate across actions from multiple systems by using a single standard protocol. Any agent platform that supports the standard protocol, including Microsoft Copilot Studio, can connect to actions and logic in finance and operations apps through the MCP server.

Feature details

The Model Context Protocol is an open standard that connects AI agents to various systems. It standardizes how systems and applications provide context to large language models (LLMs) in agent platforms. With this release, you get an MCP server for Dynamics 365 finance and operations apps. The server includes key actions for Dynamics 365 Finance and Dynamics 365 Supply Chain Management. This setup creates a streamlined experience for connecting any agent platform that supports the standard protocol, including Microsoft Copilot Studio, to the actions and business logic of Dynamics 365 finance and operations apps.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use Model Context Protocol for finance and operations apps (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Stay focused and simplify tasks with Immersive Home and adaptive experiences

10/23/2025

> **Important**
>
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Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jun 6, 2025	Mar 2026

Business value

Enable users to efficiently prioritize and complete their most complex tasks, driving productivity. Empower teams with streamlined processes and work with AI agents to enable autonomous operations and proactive job completion.

Feature details

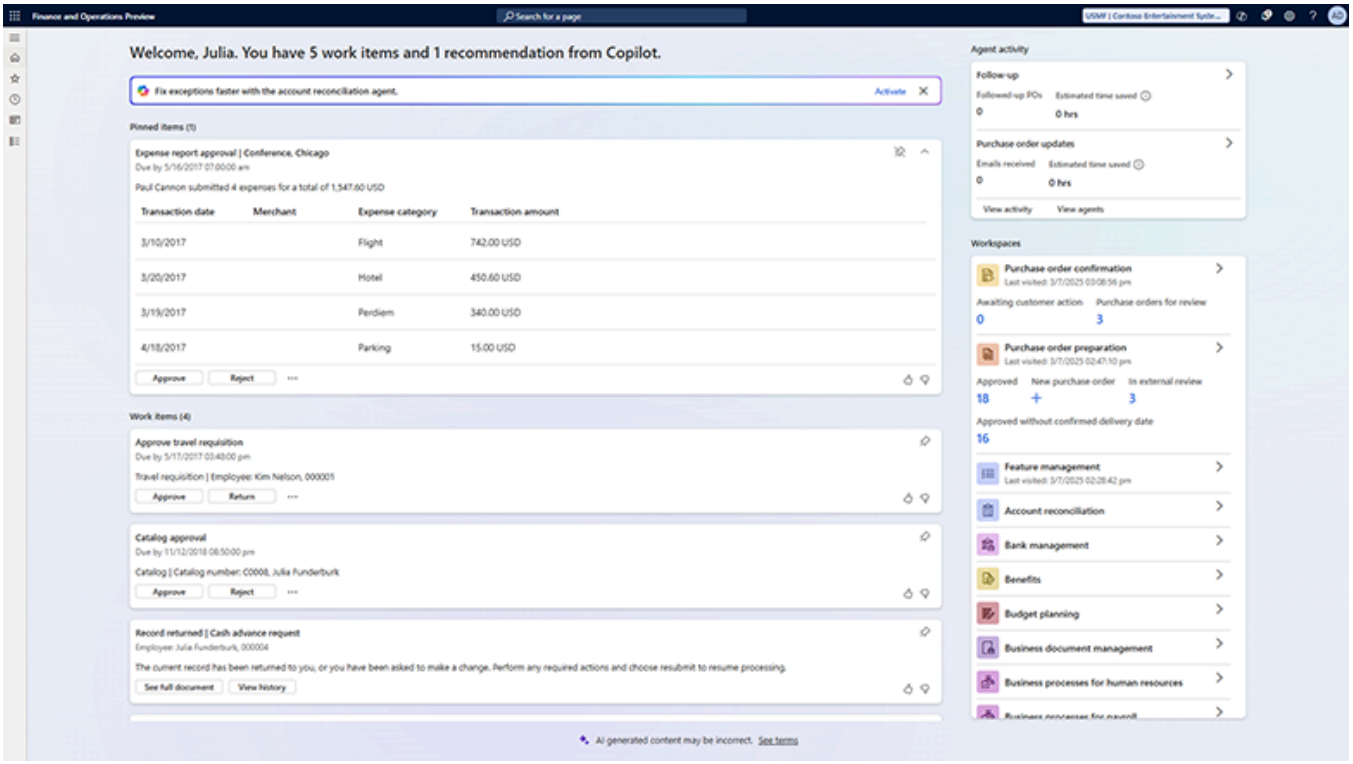
Immersive Home and *adaptive experiences* empower organizations and individual users alike by providing streamlined, agent-supported workflows and intelligent, context-aware work surfaces that promote productivity and efficient decision-making. Key benefits include:

Maximize productivity with smart agents: Receive actionable recommendations on how to use AI agents more effectively so you can offload routine tasks, reduce manual effort, and focus on high-value work. This boosts individual productivity and helps your organization run more smoothly.

Stay focused on critical tasks: By surfacing the most relevant work items and providing action-ready information directly where it's needed, these features help you stay focused on the tasks that matter most. They help reduce the time needed to find details and ensure faster task completion, ultimately driving better results for the company.

Adapt to changing priorities for maximum impact: Adaptive prioritization makes sure you always work on the most important tasks first. As priorities change, the system evolves, enabling both users and teams to stay agile and aligned with strategic goals, ensuring maximum business impact.

Gain transparency with agent activity summaries: Active summaries provide full visibility into what agents have accomplished on your behalf. This transparency builds trust in automated processes and lets you quickly understand progress, which saves time and reinforces confidence in the technology.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Immersive Home overview (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Plan and prepare for Dynamics 365 Human Resources in 2025 release wave 1

> **Important**
>
> The 2025 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2025 to September 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/2025W1/HumanResource

Microsoft Dynamics 365 Human Resources is a comprehensive HR solution that helps organizations manage the entire hire-to-retire lifecycle for employees. With 2025 release wave 1, Dynamics 365 Human Resources enhances capabilities that optimize core HR operations. The release covers personnel management, compensation, benefits, and performance management. These improvements help HR teams streamline administrative tasks, improve the employee experience, and foster greater alignment with organizational goals.

This release also introduces new innovations in Copilot and AI. With these advancements, HR professionals can use AI to get actionable insights, automate repetitive tasks, and support more strategic decision-making. From automating administrative workflows to giving employees self-service options for common HR requests, Copilot and AI innovations redefine productivity and engagement across HR functions.

Key investment areas for 2025 release wave 1

- **Optimize human resource operations**: Enhancements across personnel, compensation, benefits, and performance management bring a seamless, connected approach to the hire-to-retire lifecycle. With these enhancements, organizations can efficiently manage and support employees throughout their tenure.
- **Copilot and AI innovation**: By embedding AI-driven capabilities, Dynamics 365 Human Resources offers a proactive approach to HR that delivers data-driven insights and automates routine tasks. With these innovations, HR teams can focus on strategic priorities while enhancing the employee experience with intuitive, intelligent tools.

With Dynamics 365 Human Resources, organizations can build a modern, resilient workforce by enabling HR to be more efficient, responsive, and aligned with the evolving needs of their people and business.

Investment areas



Optimize human resource operations

Each new release wave of the Dynamics 365 Human Resources application brings enhancements that help corporations and organizations optimize their human resource operations. These enhancements cover personnel management, compensation, benefits, and performance management. Improvements in recruiting operations, skills and competency management, and succession management bring efficiencies to the hire-to-retire lifecycle. Investments in core employee experiences around leave and absence, learning, and training management bring 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
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Human Resources.
Product documentation	Find documentation for Human Resources.
User community	Engage with Human Resources experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Human Resources.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 10/16/2025

What's new and planned for Dynamics 365 Human Resources

This topic lists features that are planned to release from April 2025 through September 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 2 plan.
- For a list of the next wave's release plans, go to 2025 release wave 2 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.

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
Use recruiting for service-centric organizations	Users by admins, makers, or analysts	✅ Jul 17, 2024	✅ Aug 29, 2025
Ability to link variable pay to position	Users by admins, makers, or analysts	✅ May 2, 2025	✅ Jun 6, 2025
Streamline benefits eligibility processing	Users by admins, makers, or analysts	✅ May 2, 2025	✅ Jun 6, 2025

* You are able to opt into some features as part of early access on February 3, 2025, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

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Last updated on 11/13/2025

Optimize human resource operations

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Each new release wave of the Dynamics 365 Human Resources application brings enhancements that help corporations and organizations optimize their human resource operations. These enhancements cover personnel management, compensation, benefits, and performance management. Improvements in recruiting operations, skills and competency management, and succession management bring efficiencies to the hire-to-retire lifecycle. Investments in core employee experiences around leave and absence, learning, and training management bring core HR data and processes to meet employees where they are.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Ability to link variable pay to position

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ May 2, 2025	✔ Jun 6, 2025

Business value

When you link variable compensation to specific positions, you simplify award administration. This link also promotes uniformity across comparable roles and reduces manual work during employee transitions.

Feature details

Variable pay enrollment — Compensation managers link employee positions to variable compensation enrollment through a designated path. The solution adds a section for positions, where you can link multiple positions to variable pay plans. The solution creates a grid to maintain these relationships. **Variable compensation awards** — The solution adds a **Position** field to the **Variable compensation awards** section. Managers use this field to specify positions when they assign awards. Dropdown lists are populated with the active positions for each employee. **Data entity modifications** – The solution modifies data entities to include position details in exported data for both enrollments and awards. The solution adds new columns for positions. You need this change for correct data management and reporting.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Enroll an employee in a variable compensation plan (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Streamline benefits eligibility processing

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ May 2, 2025	✔ Jun 6, 2025

Business value

When you update the benefits eligibility processing, you improve system performance and administrative productivity. By automating the removal of outdated process results, you keep the system lean and responsive. Adding an employee start date filter enables more precise and efficient processing. This filter supports key activities like open enrollment and onboarding with greater accuracy and less manual effort.

Feature details

Clean up benefits eligibility process results - A batch job deletes process results that are older than a set time frame. This feature cleans up results regularly and helps improve system performance. You can use this feature when you enable Benefits management.

Employee start date filters for benefits eligibility processing batch job - The benefits eligibility processing batch job includes a new filter for the employee start date field. You can limit processing by employee start date.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use recruiting for service-centric organizations

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 17, 2024	✔ Aug 29, 2025

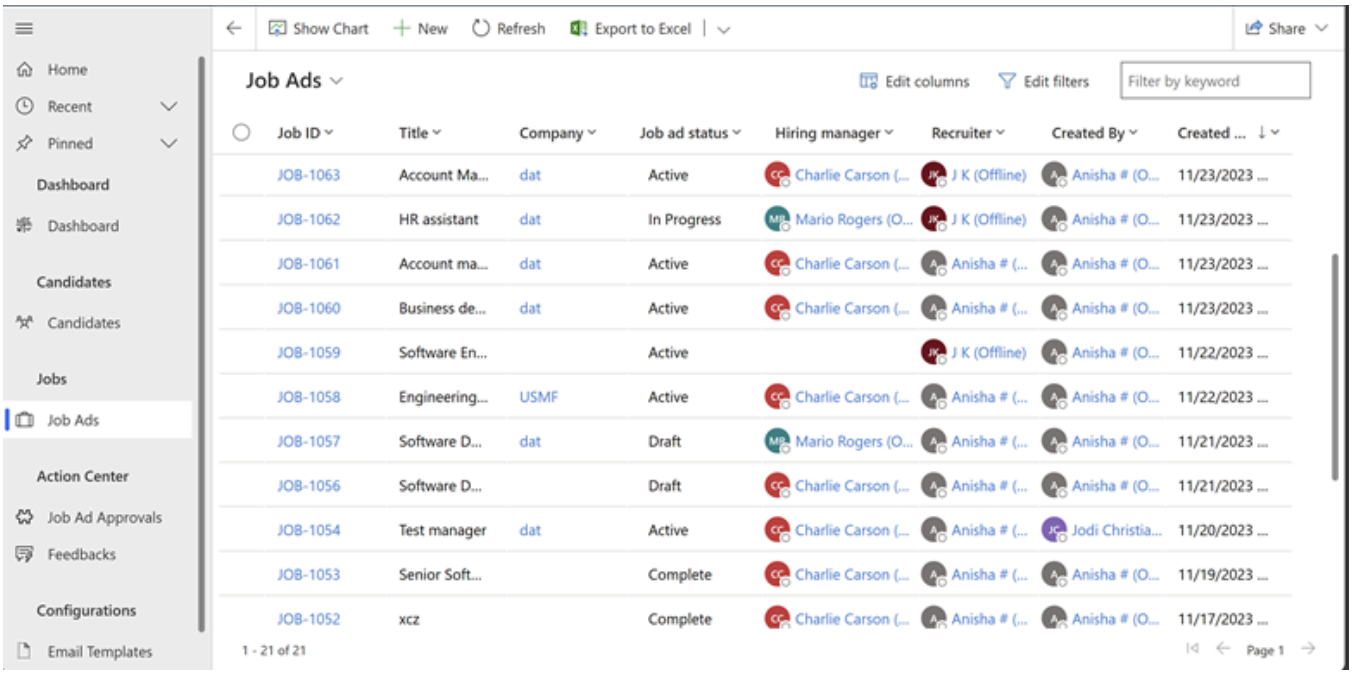
Business value

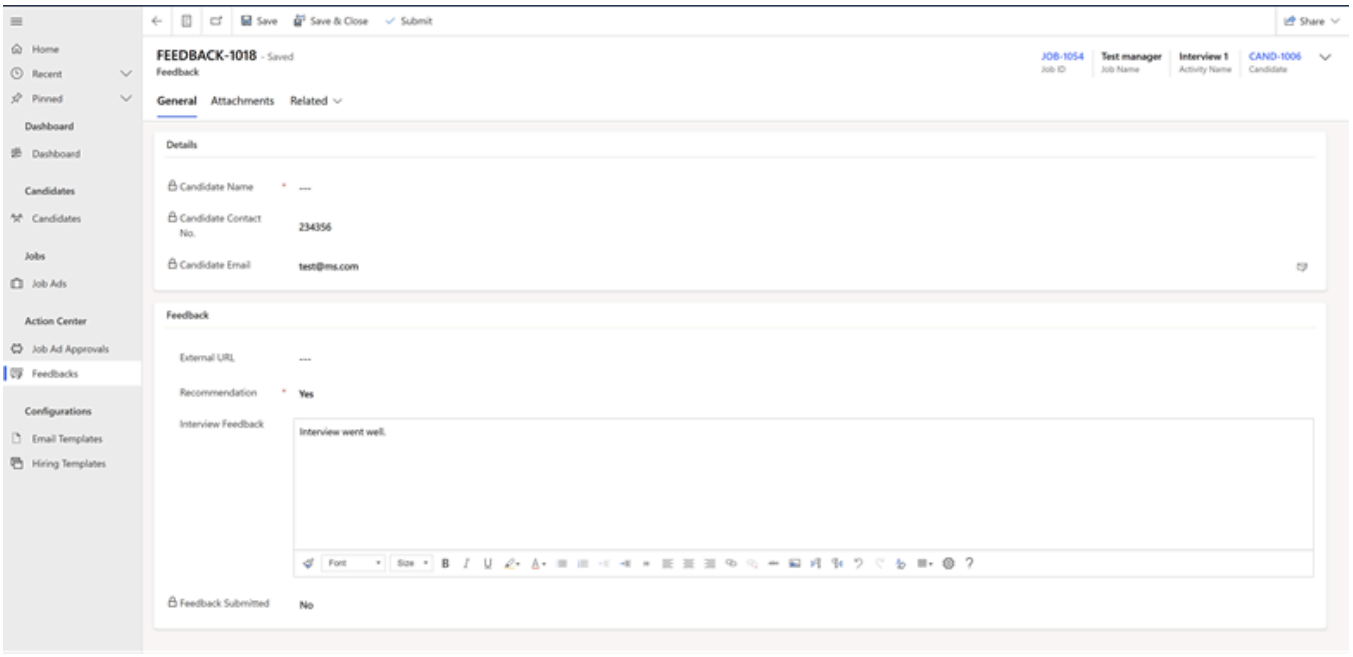
The recruiting feature gives human resources business partners, recruiters, and hiring managers the ability to create interview process templates, build talent pools, view candidate profile information from LinkedIn, collaborate with others, and add relevant information about the position when they create a job posting.

Feature details

The solution enables an end-to-end flow for the hiring process. It uses both Finance and Power Platform to align with the different personas in the process. Hiring managers use manager self-service in Dynamics 365 to submit a recruitment request. This request starts the recruiting activities for the hiring team. Recruiters use a model-driven Power Apps app to manage jobs and internal job postings, interviews, feedback, and candidate pipelines. Candidates use a job portal built on Power Pages to apply for jobs and track their progress.

The experiences align with how each person works. Companies can extend and customize the experiences to meet their business needs.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Set up the HR Recruiting app (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 11/18/2025

Plan and prepare for Dynamics 365 Commerce in 2025 release wave 1

10/16/2025

> **Important**
>
> The 2025 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2025 to September 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/2025W1/Commerce

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 get an all-encompassing view of their customers. With this view, retailers can provide personalized shopping experiences that 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 helps 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 the 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 supports DTC, B2B, and B2B for wholesaler operations.

Key features for this release include:

- **Support for modern payments**: With support for asynchronous notifications, the out-of-the-box Adyen payment connector enables a pay by link (QR code) payment method that lets cashiers complete transactions without dedicated payment terminals. This support also enables modern buy-now-pay-later payment methods such as Klarna, Affirm, and Afterpay. Additionally, merchants can receive crucial payment-related notifications such as dispute, capture failures, and reconciliation reports.
- **Simplified peripheral integration on iOS**: Simplify peripheral integration in iOS POS devices by eliminating the need for a shared hardware station. This change allows extensibility on iOS POS for third-party payment providers and fiscal integration.
- **Improved offline device management**: Offline device dashboards for IT managers to monitor device health and readiness to detect issues. Reduce database sizes of offline devices by using data compression. Notifications and health check on POS devices to notify store employees on device readiness for offline switching.
- **Multifaceted pricing strategies**: Omnichannel pricing that allows attribute-based pricing, price segmentation, complex pricing structures, and more. Apply flexible pricing strategies using a rich set of pricing techniques including long-term trade agreements, short-term price adjustments, promotional discounts, auto charges, and retrospective rebates.

Updates to Dynamics 365 Commerce 2025 release wave 1

Investment areas



Digital commerce

With its responsive React-based web front end and scalable headless retail engine, the Dynamics 365 Commerce digital commerce solution provides quick-to-market websites that

enable manufacturers and retailers around the world to sell directly to their wholesalers, other businesses, and consumers.

Promotions play a key role in digital commerce sales conversions. When customers see all available and applicable discounts on a single page, you land more sales with higher per-order values.

Omnichannel commerce
Developed as a modern, cloud-based, software as a service 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 supports products, pricing, and promotions. Each channel captures customer and order data that any other sales channel can access.

Merchandisers who define complex pricing structures can use the unified pricing management module to simplify their workflow. Use attribute-based pricing models to configure, simulate, and approve rules-based pricing across products, attributes, channels, and customers.

Store Commerce
Built on a modern omnichannel retail platform, the Dynamics 365 Commerce Store Commerce POS enables retailers to provide fast, efficient, and modern checkout experiences on fixed and mobile devices that operate online 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. Streaming the checkout workflow to optimize efficiency, standardize payment flows, and provide contextual in-line controls results in time saved on every transaction, leading to 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
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Get the most out of Commerce

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Commerce.
Product documentation	Find documentation for Commerce.
User community	Engage with Commerce experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Commerce.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

What's new and planned for Dynamics 365 Commerce

10/07/2025

This topic lists features that are planned to release from April 2025 through September 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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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
Drive sales, improve efficiency with Copilot for merchandising data	Users, automatically	✅ Jun 20, 2024	Sep 2025
Discover retail statement insights using Copilot summaries	Users, automatically	✅ Jun 20, 2024	Sep 2025

Digital commerce

Digital commerce on Dynamics 365 Commerce enables retailers to provide direct-to-consumer, business-to-business, and business-to-wholesaler online retail operations.

Expand table

Feature	Enabled for	Public preview	General availability
Use Adyen risk management to minimize e-commerce fraud	Users by admins, makers, or analysts	✔ Jan 27, 2025	✔ Jun 6, 2025
Migrate to Azure Maps support in Commerce	Users by admins, makers, or analysts	✔ Jul 28, 2025	✔ Sep 12, 2025
Enable associates to monitor and detect offline health issues	Admins, makers, marketers, or analysts, automatically	-	✔ Jun 27, 2025

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
Modernize Commerce payments to enable new payment methods	Users by admins, makers, or analysts	✔ May 16, 2025	✔ Jun 6, 2025
Roll out multifaceted pricing strategies	Users by admins, makers, or analysts	✔ Oct 25, 2024	✔ Apr 4, 2025
Enable custom price attributes for POS and e-commerce	Users by admins, makers, or analysts	✔ Jul 28, 2025	Oct 2025
Enable use of sales order attributes to define pricing rules	Users by admins, makers, or analysts	✔ Apr 25, 2025	✔ Jul 4, 2025
Allow net price in Unified pricing management	Users by admins, makers, or analysts	✔ Apr 24, 2025	✔ Jul 4, 2025

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
Boost efficiency with modern Store Commerce designs and workflows	Users by admins, makers, or analysts	✔ Apr 25, 2025	✔ Jun 6, 2025
Monitor and manage Store Commerce offline readiness	Admins, makers, marketers, or analysts, automatically	✔ Feb 3, 2025	✔ Apr 1, 2025
Enable business continuity with Store Commerce offline on Android	Users by admins, makers, or analysts	✔ Sep 12, 2025	Dec 2025
Customize payments, peripherals on Store Commerce app for iOS	Users by admins, makers, or analysts	✔ Apr 25, 2025	✔ Jun 6, 2025
Enable business continuity with Store Commerce offline on iOS	Users by admins, makers, or analysts	✔ Sep 12, 2025	Dec 2025
Enable Klarna payments for customers in physical stores	Users by admins, makers, or analysts	✔ Apr 25, 2025	✔ May 5, 2025
Notify store associates of offline data and network issues	Admins, makers, marketers, or analysts, automatically	-	✔ Jun 13, 2025
Defer gift card activation until post customer payment	Users by admins, makers, or analysts	✔ Aug 8, 2025	✔ Sep 12, 2025
Simplify Store Commerce offline database size management	Users by admins, makers, or analysts	-	✔ Apr 1, 2025

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Digital commerce

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 its responsive React-based web front end and scalable headless retail engine, the Dynamics 365 Commerce digital commerce solution provides quick-to-market websites that enable manufacturers and retailers around the world to sell directly to their wholesalers, other businesses, and consumers.

Promotions play a key role in digital commerce sales conversions. When customers see all available and applicable discounts on a single page, you land more sales with higher per-order values.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Enable associates to monitor and detect offline health issues

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Jun 27, 2025

Business value

Administrators use the Store Commerce health check feature to get insights into the status of the network and other hardware peripherals. Offline readiness and business continuity are crucial for maintaining service levels and customer satisfaction during network issues. Store employees need to know if their devices are ready for offline mode to ensure seamless transitions and uninterrupted operations.

This feature provides a new view for offline health checks that shows key diagnostic information such as database size, database health, download session status, and sync failures. These details give critical warnings and alerts that affect the ability to switch to offline mode and offer recommendations for resolving these issues.

Feature details

With this feature, your store associates and managers see the following improvements in the Store Commerce app health check:

- **A new offline health check view** that displays information such as database size, database health, download sessions, data sync issues, and sign-in failures.
- **Alerts and warnings** that notify associates of issues that might affect the offline switching experience.
- **Recommendations for mitigation** to quickly resolve issues and ensure a smooth and reliable offline switching experience.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Migrate to Azure Maps support in Commerce

10/09/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 28, 2025	✔ Sep 12, 2025

Business value

Microsoft Dynamics 365 Commerce currently uses Bing Maps to show customers nearby store locations for order pickup. With changes in Bing Maps service availability, Commerce is introducing a new mapping module based on Azure Maps, which customers can migrate to for continued location services.

Feature details

To prepare for the Bing Maps deprecation, Commerce is introducing a new Azure Maps module for customers to migrate to. The Azure Maps module is available as a standard module starting with the Commerce version 10.0.45 release.

The Azure Maps module shows the locations of stores on an interactive map. An API key is required and must be added to the shared parameters page in Commerce headquarters. The Azure Maps module provides different views such as road, aerial, and streetside that you can select to view map locations. It also allows interactions such as zooming and user geolocation.

The Azure Maps module works in conjunction with the store selector module to determine the geographic locations of stores that must be rendered on a map. The store selector and Azure Maps modules interact when a user selects a store using one of those modules on an e-commerce site page. The Azure Maps module can be extended for other scenarios beyond interaction with store selector modules.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Azure Maps Module (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use Adyen risk management to minimize e-commerce fraud

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jan 27, 2025	✔ Jun 6, 2025

Business value

In today's digital age, many businesses operate online with minimal human involvement. While this method lowers costs and enhances customer experiences, it also makes companies vulnerable to significant fraud risks from individuals who exploit the online channel's anonymity and ease of access. When customers use the Microsoft Adyen connector with e-commerce, they can leverage Adyen's risk management capabilities to detect, mitigate, analyze, and monitor fraud.

Feature details

Adyen provides comprehensive risk management capabilities that effectively detect and mitigate fraud. For more information, see https://docs.adyen.com/risk-management/. Merchants who use Microsoft's Adyen connector for their e-commerce websites can get Adyen's risk management capabilities by enabling the capability in the Adyen customer portal. There's no extra setup required from the Dynamics 365 Commerce side.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Omnichannel commerce

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 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 supports products, pricing, and promotions. Each channel captures customer and order data that any other sales channel can access.

Merchandisers who define complex pricing structures can use the unified pricing management module to simplify their workflow. Use attribute-based pricing models to configure, simulate, and approve rules-based pricing across products, attributes, channels, and customers.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Allow net price in Unified pricing management

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 24, 2025	✔ Jul 4, 2025

Business value

This feature enhances the Unified pricing management module by adding support for negotiated final prices in trade agreements. With this feature, you can define sales prices directly with or without price adjustments and explicitly prevent the application of extra discounts. This functionality ensures accurate discount-exempt pricing that aligns with your contractual or wholesale pricing needs. In some situations, when you negotiate a trade agreement price with customers, you treat that price as an exclusive final price without discounts. Unified pricing management allows you to set sales prices as negotiated net prices without considering discounts.

Feature details

This feature enhances the Unified pricing management module sales trade agreement pricing experience by allowing pricing administrators to define:

- A final exclusive net price that reflects the outcome of negotiation.
- Inclusion of price adjustments, such as percentage increases or decreases.
- Prevention of promotional or system-applied discounts from further affecting the transaction price.

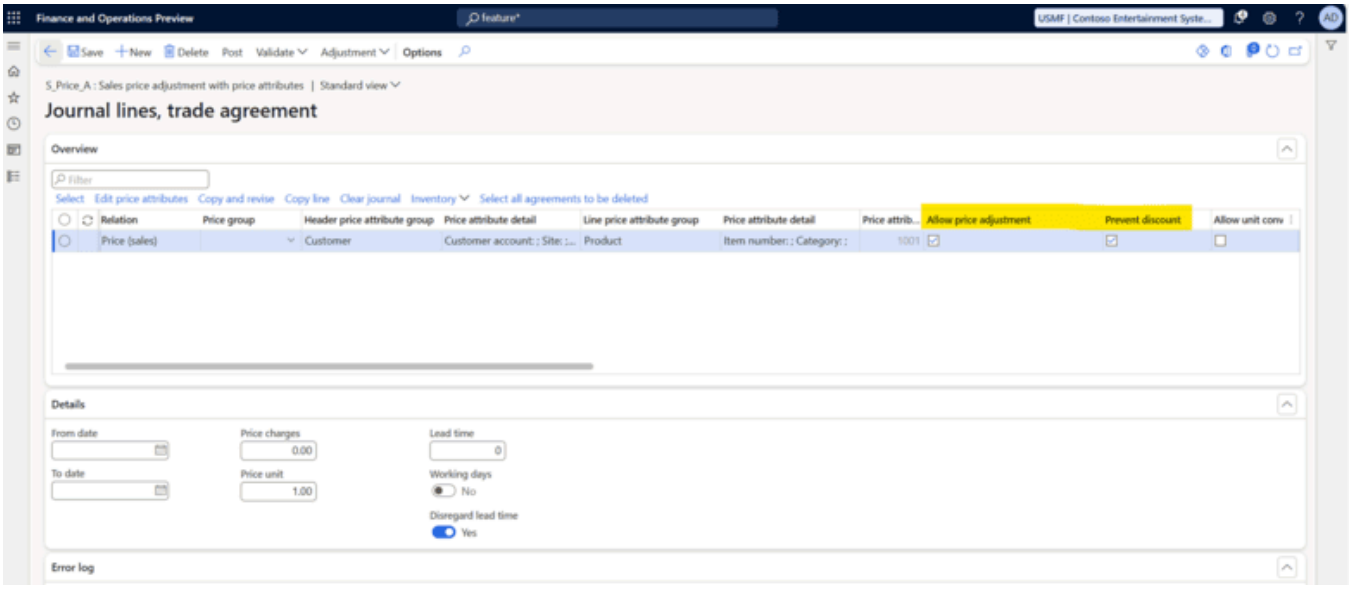
The feature supports the following key use cases:

- B2B or wholesale pricing where negotiated prices are honored without promotional interference.
- Long-term contracts that require strict adherence to fixed pricing, which excludes further discounts.

This functionality is especially relevant in B2B, channel sales, and regulated pricing models, where discount logic shouldn't alter the agreed price.

This feature provides the following key capabilities:

- **Prevent discount**: Prevent any additional discount.
- **Allow price adjustment**: Apply adjustments, such as markup or markdown, to include in the sales price.
- **Net price definition**: Define the trade agreement sales price as a net (final, exclusive) price that isn't subject to further discounting by setting **Allow price adjustment** to *No* and **Prevent discount** to *Yes*.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Enable custom price attributes for POS and e-commerce

10/16/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 28, 2025	✔ Oct 3, 2025

Business value

The improved unified pricing feature enhances pricing flexibility, improves customer targeting, and enables these capabilities through the Commerce Scale Unit (CSU)-based application programming interface for point of sale and store operations.

Feature details

The unified pricing feature now provides a simplified approach for defining custom attributes for customers and products in Dynamics 365 Commerce headquarters. You can easily implement these custom attributes via the CSU with minimal customization, enabling pricing flexibility in POS and e-commerce store operations.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Enable use of sales order attributes to define pricing rules

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 25, 2025	✔ Jul 4, 2025

Business value

Order attributes influence ordering behavior segmentation and attribute-based pricing. These attributes include omnichannel attributes such as promotion campaign IDs, order types, and channel-specific attributes. Dynamics 365 Commerce provides the attribute framework so you can edit and set attribute values for orders directly in Commerce headquarters, point of sale (POS), and Commerce runtime (CRT).

You can classify order attributes as header and line attributes, and link them to channels. With the unified pricing management feature, omnichannel and channel-specific order header and line attributes are part of the price attributes.

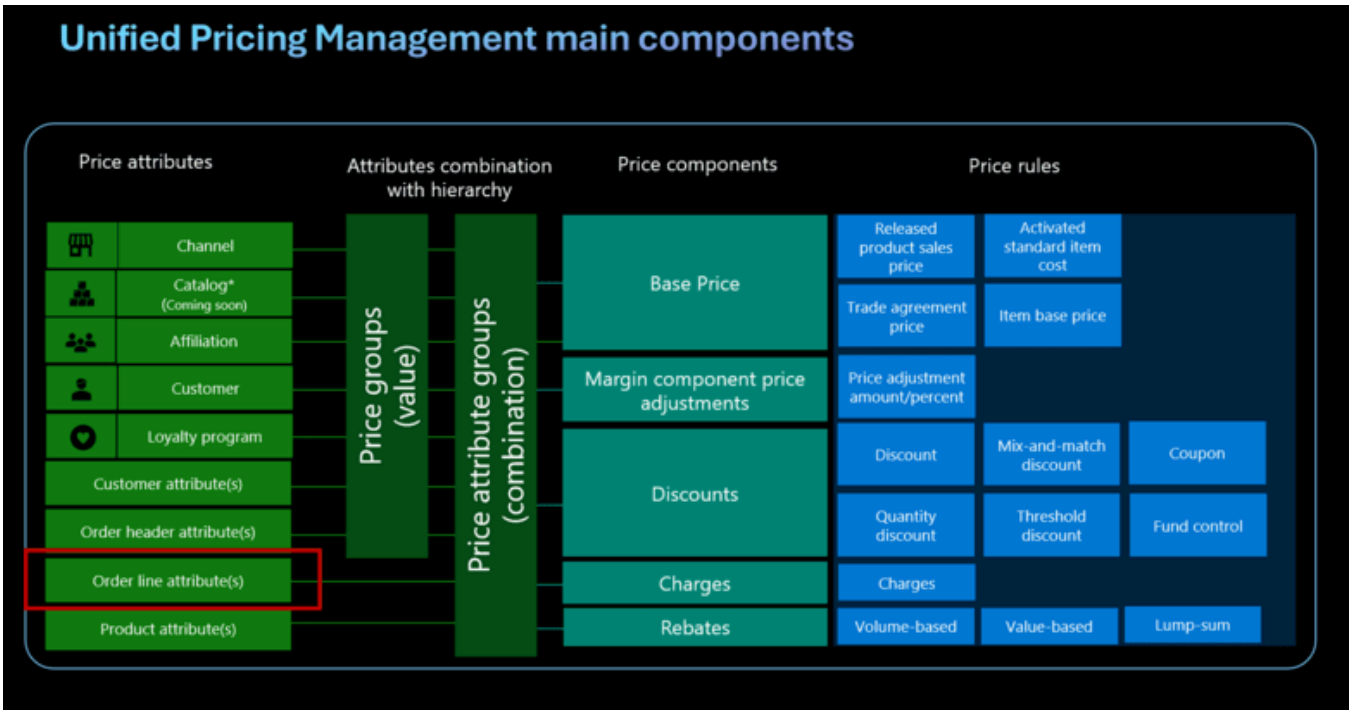
Feature details

With the unified pricing management feature, price managers use order header and line attribute values to define attribute-based pricing rules.

Price managers can:

- Define omnichannel order attributes by using order attributes in Commerce parameters.
- Include channel-specific attributes in the price attribute group.

In addition to Dynamics 365 Commerce users using channel-specific order attributes to define price rules, Dynamics 365 Supply Chain Management users define the order header and order line attribute groups in parameters and use the attributes to define the price rules.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Modernize Commerce payments to enable new payment methods

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ May 16, 2025	✔ Jun 6, 2025

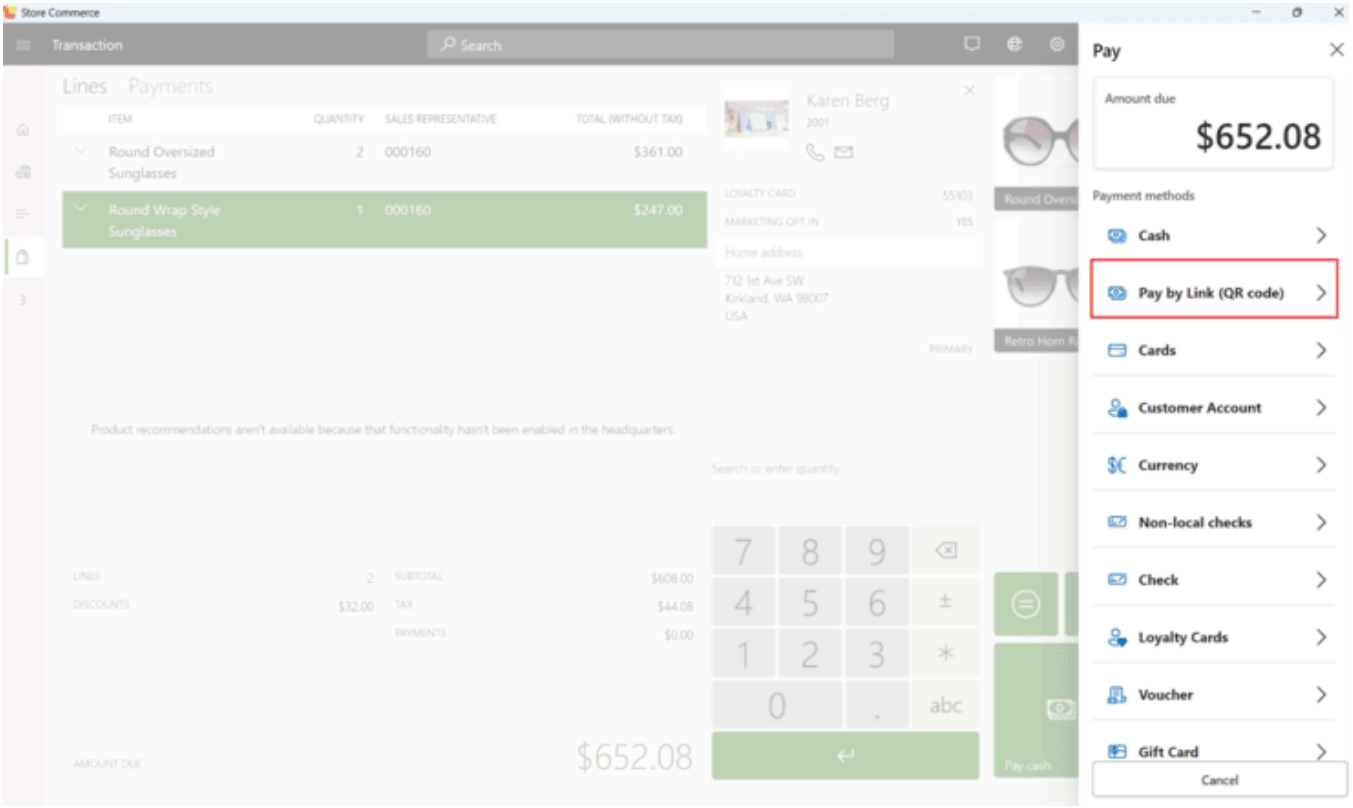
Business value

In today's e-commerce environment, consumers can choose from many different payment methods. Businesses want to give consumers the flexibility to choose their preferred payment option. However, unlike traditional credit and debit card payments, many modern payment methods don't provide payment authorizations in real time. As a result, modern e-commerce systems need to support asynchronous payment processing to help businesses support modern payment methods and improve their sales conversion rates.

Feature details

As part of this feature, Dynamics 365 Commerce enables support for asynchronous payment processing by providing the capability to process payment-related notifications from payment service providers such as Adyen. The Commerce Scale Unit (CSU) provides access to these notifications.

The Store Commerce app uses these notifications to enable a new Pay by Link quick response (QR) code payment method that the Store Commerce app displays for customers to scan, or that cashiers use to generate a link to share with customers via email. Customers open the webpage mapped to the payment link and complete their payment using the available payment options on the webpage.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Roll out multifaceted pricing strategies

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 25, 2024	✔ Apr 4, 2025

Business value

In their omnichannel transformations, organizations are adopting multifaceted pricing strategies and seeking better control over pricing. 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.

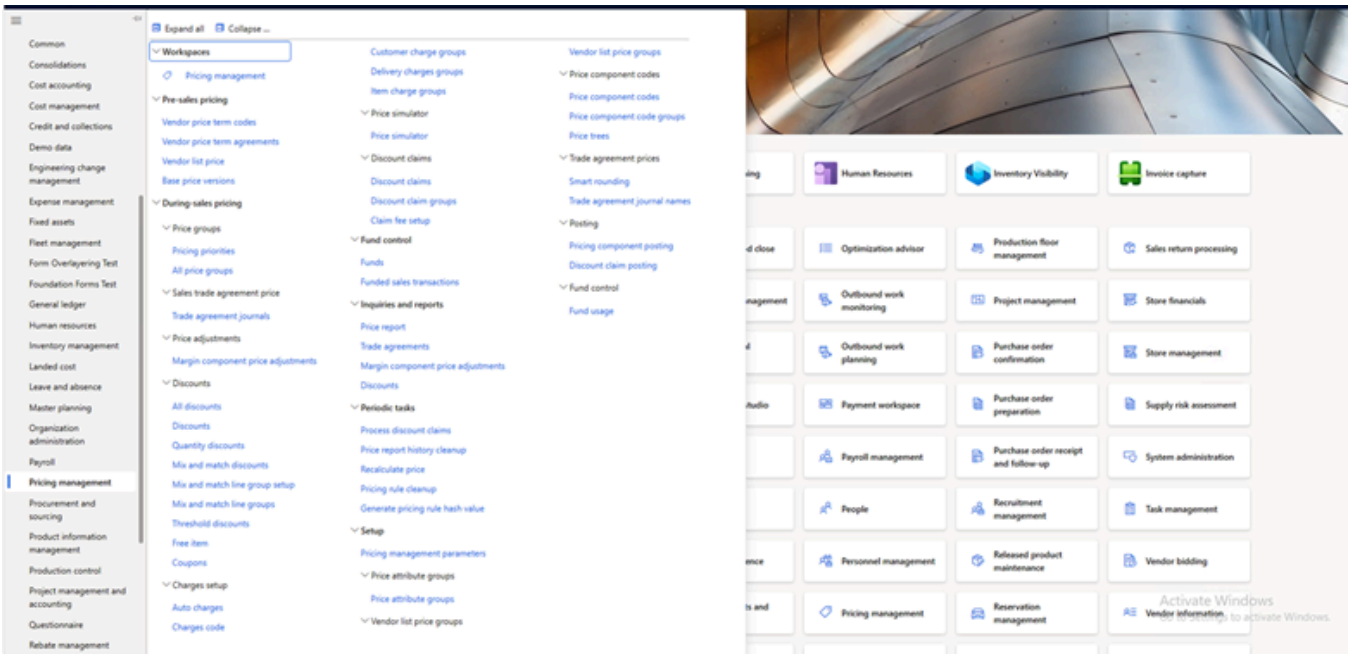
The omnichannel experience also requires real-time and performant pricing execution that enables businesses to quickly adapt to market changes and customer demands. With this feature, you can implement a unified pricing management module that works consistently and comprehensively across supply chain, 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 the pricing engine to fit business-specific needs.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Unified pricing management module overview (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Store Commerce

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 omnichannel retail platform, the Dynamics 365 Commerce Store Commerce POS enables retailers to provide fast, efficient, and modern checkout experiences on fixed and mobile devices that operate online 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. Streaming the checkout workflow to optimize efficiency, standardize payment flows, and provide contextual in-line controls results in time saved on every transaction, leading to 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.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Boost efficiency with modern Store Commerce designs and workflows

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 25, 2025	✔ Jun 6, 2025

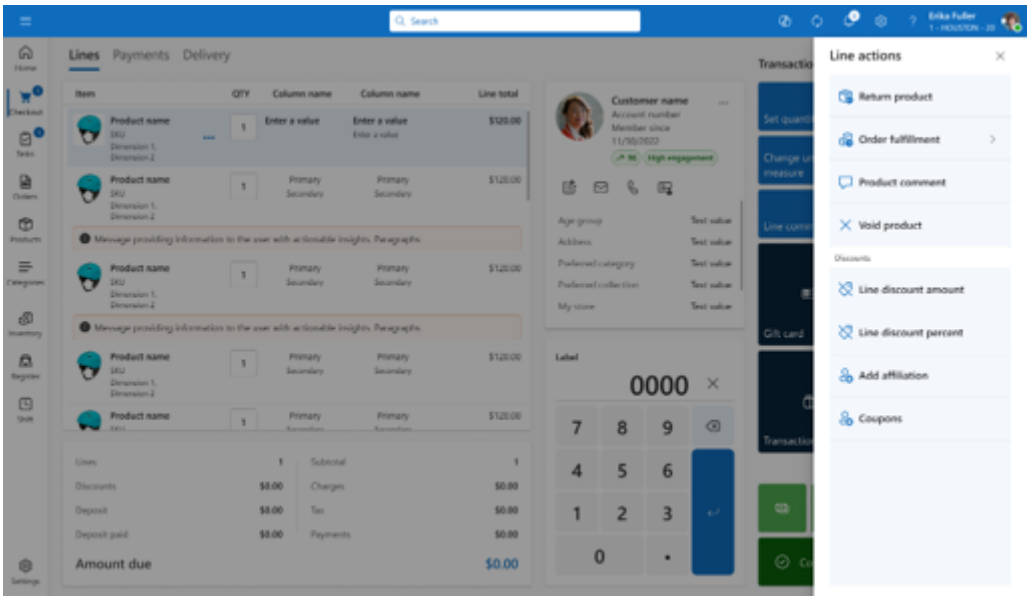
Business value

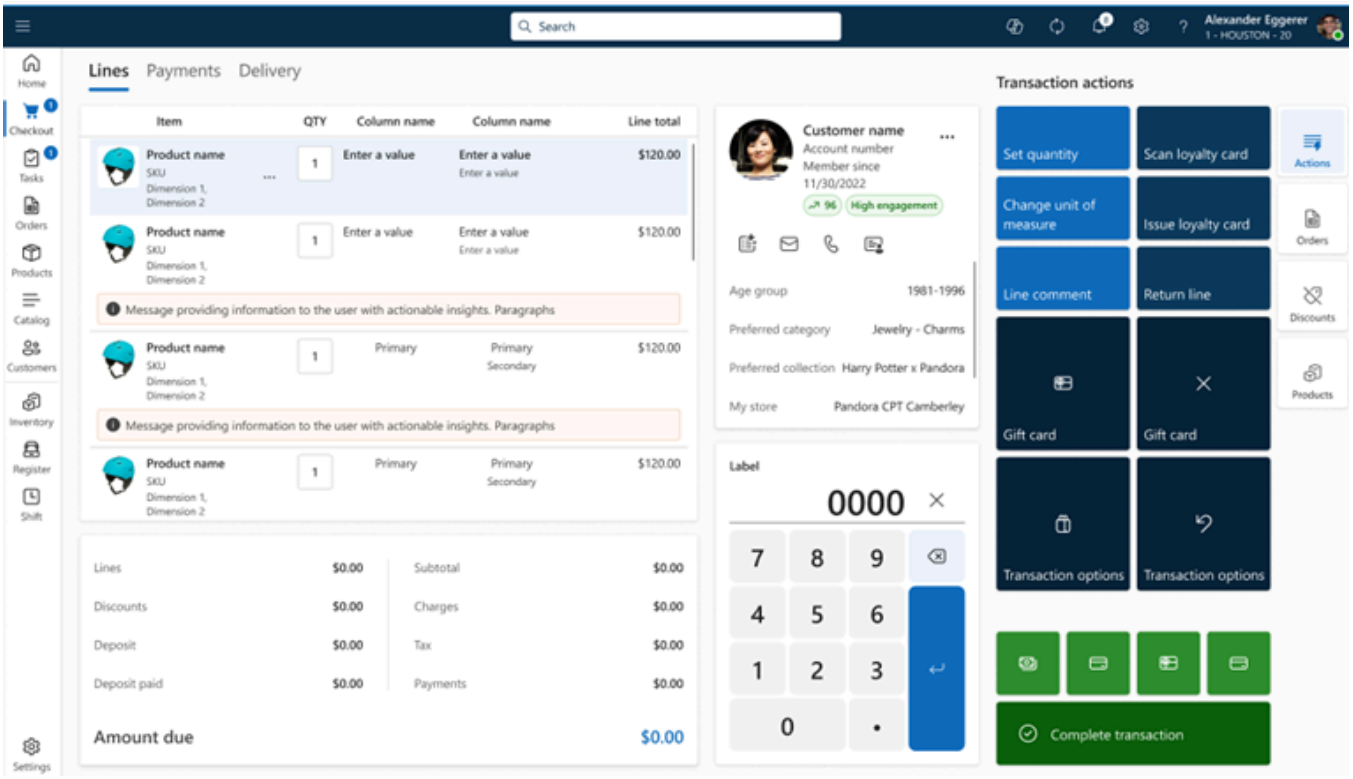
In a busy retail setting, a point-of-sale (POS) system that prioritizes usability and brings the most common user actions to the surface with minimal clicks helps cashiers and sales associates work more efficiently. This system keeps customers satisfied with their experience. This feature enhances transaction workflows in Store Commerce POS by using modern styles and interactions that offer extra efficiencies and the ability to perform inline actions with minimal clicks.

Feature details

Improvements in the Store Commerce app in Dynamics 365 Commerce simplify and streamline the POS checkout experience by adopting the React framework and Fluent 2 design for the Store Commerce app transaction page and activating the following capabilities:

- **React framework and Fluent 2 design on transaction page**: Applies modern styling and improves the appearance of the transaction page with product and image variants, button grids, total panels, and customer cards. Delivers strong dark and light themes, diverse color coding, and rounded corners for a more modern experience.
- **Inline item quantity update on transaction grid**: Change item quantity directly from the transaction grid, reducing the number of clicks required.
- **Inline actions on transaction grid**: Shortcuts for primary inline actions save time and reduce clicks compared with going through nested button grids.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Modern workflows in POS (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Customize payments, peripherals on Store Commerce app for iOS

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 25, 2025	✔ Jun 6, 2025

Business value

The sealed Store Commerce app for mobile platforms simplifies deployment and maintenance, making it easier for organizations to introduce or expand mobile point of sale (POS) devices in retail stores. With Dynamics 365 Commerce, you can implement hardware station extensions for the Store Commerce app on iOS, so customers using payment providers other than Adyen can easily deploy mobile solutions.

Feature details

This feature introduces hardware station extensibility for Store Commerce app for iOS, enabling greater flexibility in hardware integration. With this feature, you can build and deploy customizations for Store Commerce app for iOS's in-built hardware station to support:

- **Integration with your preferred payment processing service**: Easily implement connectors for custom or existing payment processing services, allowing for seamless transactions within your iOS devices.
- **Fiscal printers for compliance needs**: Connect iOS devices with fiscal printers to fulfill specific fiscal integration requirements, ensuring compliance in regions with strict fiscal regulations.
- **Custom peripheral devices**: Enable peripherals not currently supported by the Store Commerce app, allowing you to adapt the system to your store's unique hardware needs.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Store Commerce Hardware station extensibility for Android and iOS devices (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Defer gift card activation until post customer payment

10/09/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 8, 2025	✔ Sep 12, 2025

Business value

To enhance operational efficiency and reduce the risk of revenue leakage, this feature ensures that gift cards are only activated after customer payment is successfully received. By deferring activation, merchants can avoid the administrative overhead and potential financial exposure associated with voiding gift cards when customers abandon or change their minds mid-transaction. This approach strengthens transactional integrity, simplifies reconciliation, and aligns gift card issuance with confirmed sales, ultimately improving both customer experience and backend processes.

Feature details

This feature enhances the design of external gift cards by ensuring they are activated, and funds are made available only after customer payment is received. Until the payment is received, the gift card remains inactive. Similarly, any balance addition requests on the existing gift cards are not issued unless the payment is completed. Once the payment is received, the Point of Sale sends the request to the payment terminal to activate or add balance to the gift cards. This design allows gift cards to be issued through self-checkout kiosks, providing greater convenience for customers. This functionality is enabled using the "Enable gift card balance post-payment completion" feature flag.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Select when the balance is made available on the gift cards (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Enable business continuity with Store Commerce offline on Android

10/09/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 12, 2025	Dec 2025

Business value

The offline capabilities of the Store Commerce app for Android ensure uninterrupted business operations during network or service outages. The Store Commerce offline on Android feature allows seamless order and transaction processing, extending the app's usability to locations with unreliable or no network access. It helps businesses increase their customer base and broaden their mobile footprint. When connectivity is restored, the app stores all transactional data locally and synchronizes it with the cloud to prevent data loss.

Feature details

The Store Commerce app supports working offline on Android mobile devices. The app captures customer orders and sales transactions and stores them locally on the device. When connectivity is available, the app automatically synchronizes order and transaction data in the background.

Administrators install and configure Store Commerce with offline support for use by store managers, cashiers, and associates.

The Store Commerce offline on Android feature includes these capabilities:

- A new SDK experience in Store Commerce within Android that provides in-app extensibility and database extensibility to support your custom requirements.

- Support for cash and carry and customer order scenarios with pricing and discounts in offline mode.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Store Commerce app for mobile platforms (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Enable business continuity with Store Commerce offline on iOS

10/09/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 12, 2025	Dec 2025

Business value

The offline capabilities of the Store Commerce app for iOS ensure uninterrupted business operations during network or service outages. With this feature, users can seamlessly process orders and transactions. The app stays usable in locations with unreliable or no network access. Businesses can increase their customer base and broaden their mobile footprint. The app stores all transactional data locally and syncs it with the cloud when connectivity returns, so there's no data loss.

Feature details

The Store Commerce app supports working offline on iOS mobile devices. The app captures customer orders and sales transactions and stores them locally on the device. When connectivity returns, the app automatically synchronizes order and transaction data in the background.

Administrators install and configure Store Commerce with offline support for store managers, cashiers, and associates.

The app supports the following features:

- New SDK experience in Store Commerce within iOS provides in-app and database extensibility to support custom requirements.

- Cash and carry and customer order scenarios with pricing and discounts in offline mode.
- Database upgrade scenarios.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Store Commerce app for mobile platforms (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Enable Klarna payments for customers in physical stores

08/07/2025

Expand table

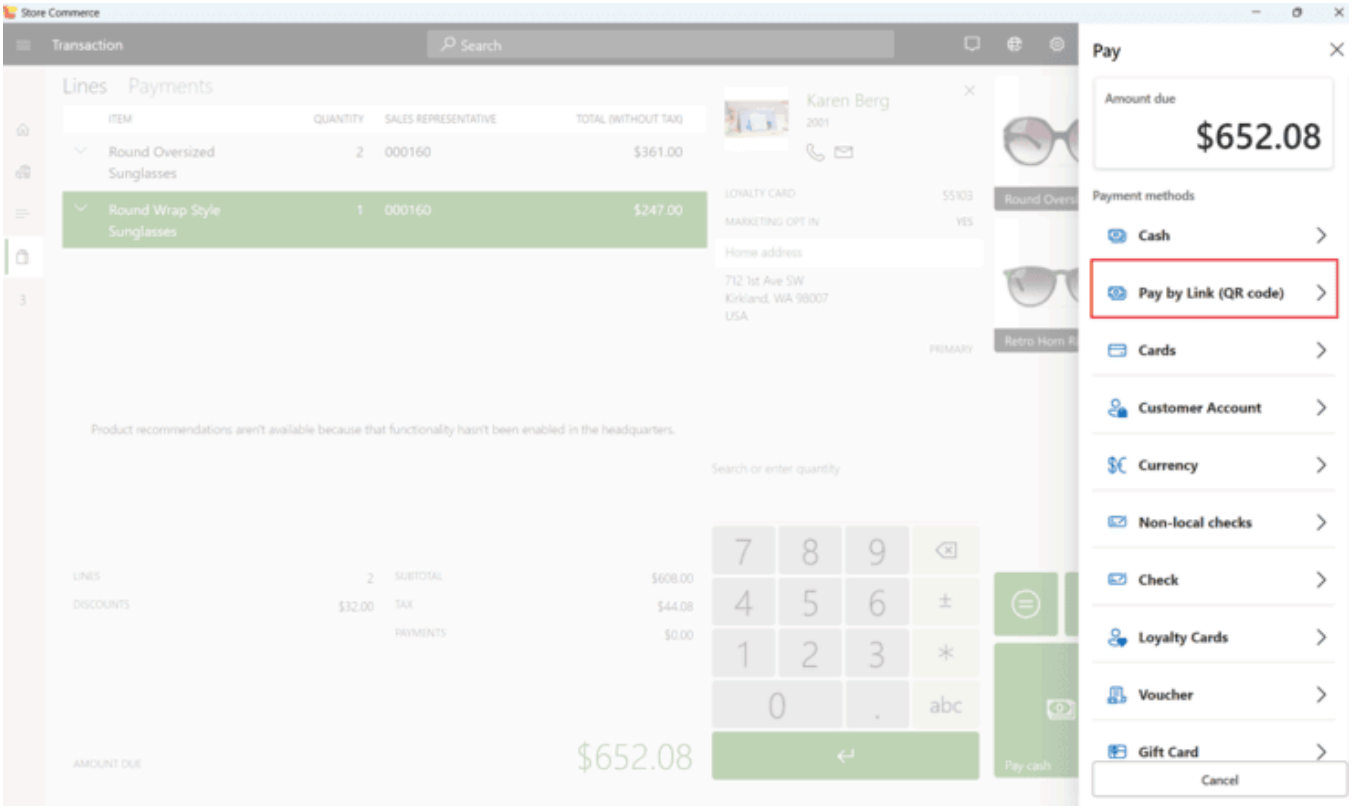
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 25, 2025	✔ May 5, 2025

Business value

Buy Now Pay Later (BNPL) payment methods are becoming more popular. Millions of people use BNPL services across the world, and the number of users is growing. Klarna is one of the top BNPL providers because it helps merchants increase conversion rates and average order value (AOV).

Feature details

As part of this feature, Dynamics 365 Commerce enables support for the Klarna payment method for in-person payments through the Adyen connector. When you enable the Klarna payment method with Adyen for a merchant account, the merchant can offer the Klarna payment option in their physical stores. Cashiers can select Klarna from the list of supported wallet payments on the payment terminal. Selecting Klarna generates a quick response (QR) code on the payment terminal that customers can scan. Scanning the QR code opens the Klarna portal, where customers can complete payments on their phones. When a payment is complete, the Store Commerce App adds the corresponding payment line and completes the transaction if no further payments are due.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Monitor and manage Store Commerce offline readiness

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Feb 3, 2025	✔ Apr 1, 2025

Business value

You can monitor and manage Store Commerce offline readiness to efficiently detect and troubleshoot critical issues that impact offline readiness. With this capability, you ensure that all offline-enabled devices running Store Commerce across your organization are healthy and available to switch to offline mode when needed.

Feature details

Dynamics 365 Commerce customers rely on the successful operation of Store Commerce in offline mode to maintain business continuity during network or service interruptions.

With offline readiness monitoring, you can quickly ensure that all offline-enabled devices running Store Commerce across your organization are healthy and available to switch to offline mode when needed.

You can also efficiently detect and troubleshoot critical issues that might impact offline readiness of multiple devices within or across stores.

Enhanced filtering and summarization of data synchronization sessions help you with faster correlation and cause detection.

Administrators automatically have access to offline readiness monitoring for their organization.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Download sessions overview (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Notify store associates of offline data and network issues

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Jun 13, 2025

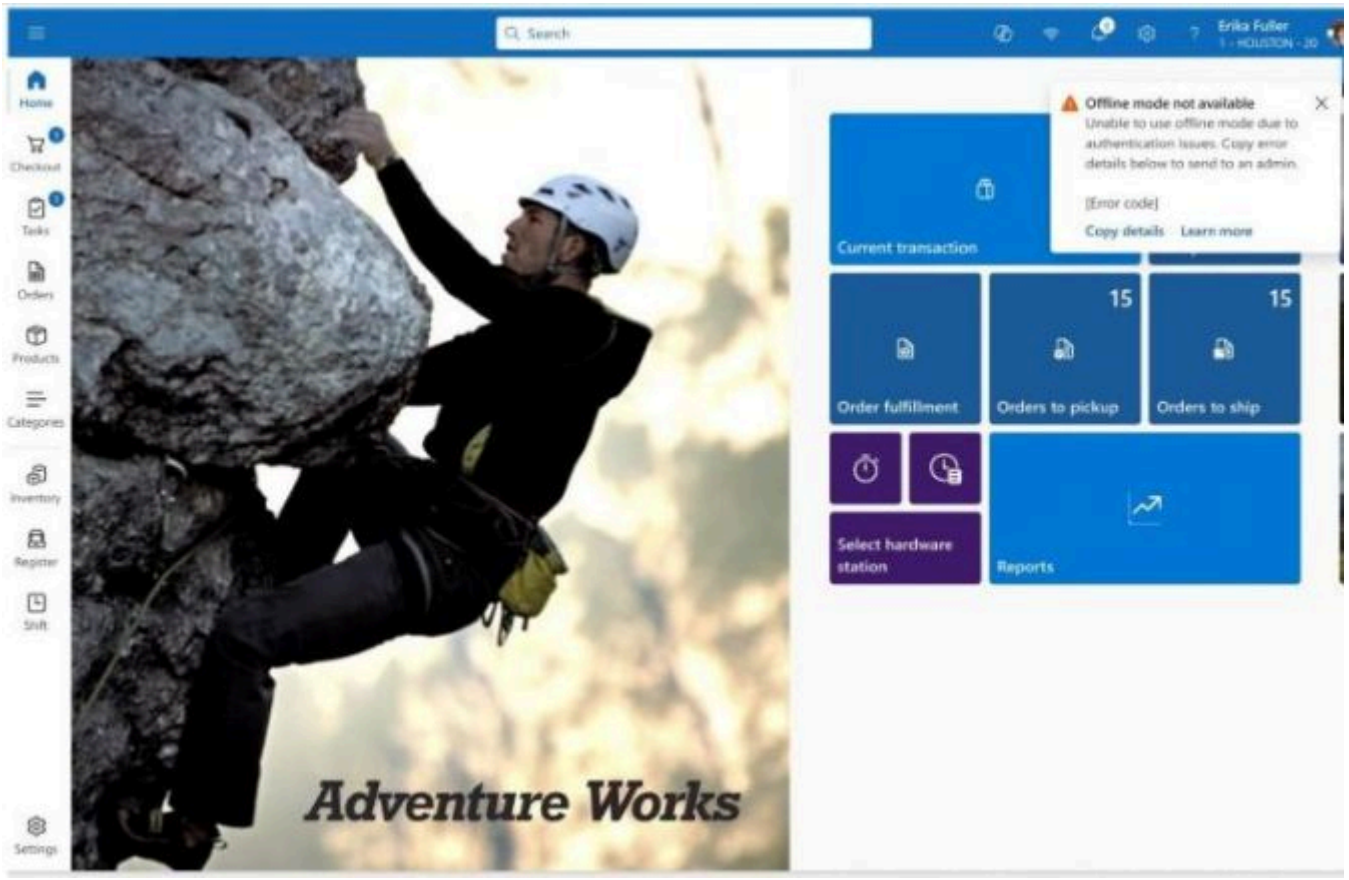
Business value

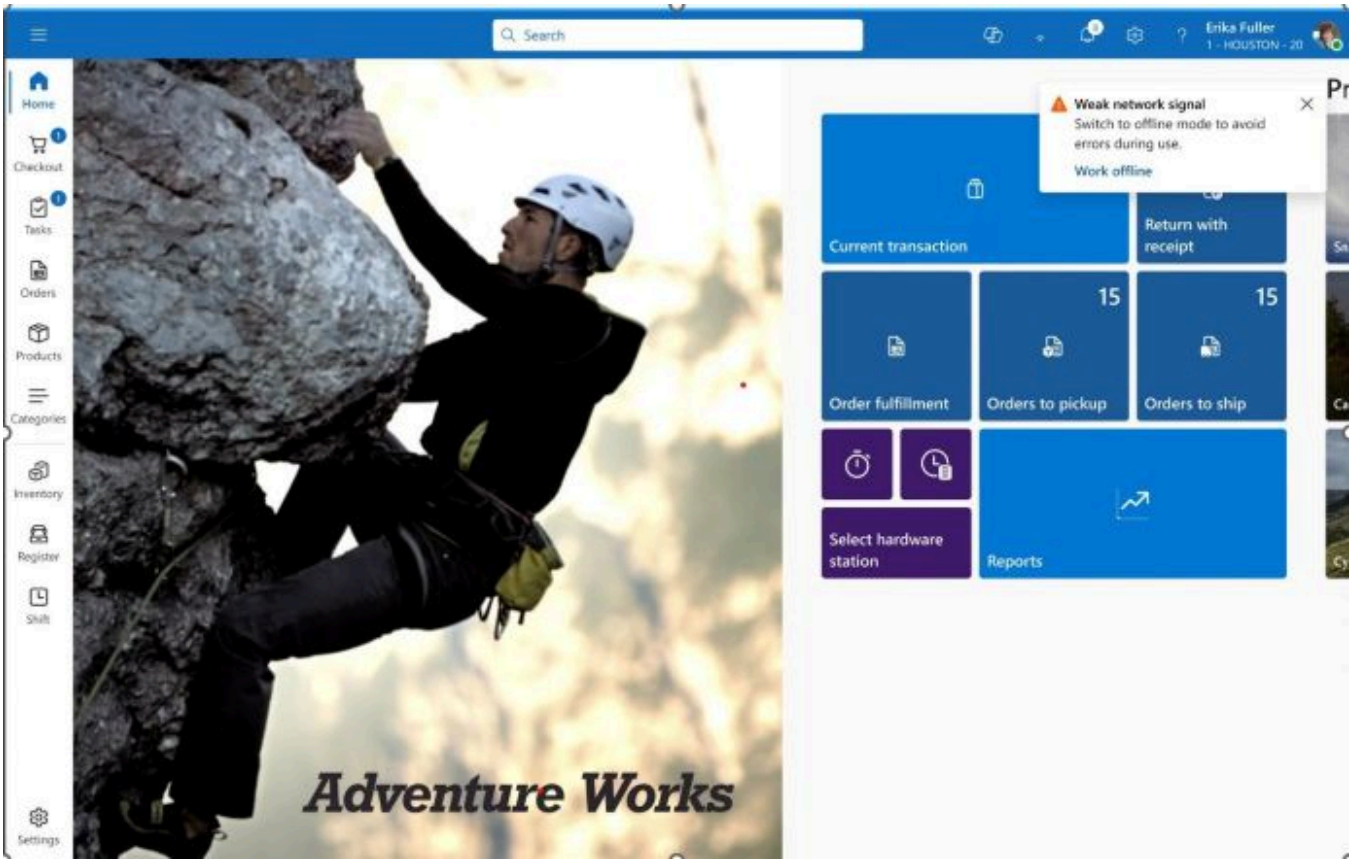
Dynamics 365 Commerce customers use the offline capabilities of the Store Commerce app to maintain business continuity during network or service outages. When customers switch to offline mode, the offline switch can fail due to missing data in the offline database. This feature helps create proactive notifications about the offline health status in the Store Commerce app that it sends to cashiers or store managers, and it recommends appropriate actions for mitigation. This feature also introduces the toast notification framework for the first time within the Store Commerce app, which you can expand for use in other scenarios in the future.

Feature details

With this release, you see toast notifications within the Store Commerce app when you enable them in headquarters. These notifications appear if offline data or the network is in an unhealthy state.

- **Offline logon credentials**: Store associates see notifications when offline sign-in credentials aren't up to date, or when a data sync fails. Recommended actions might include contacting the administrator with specific steps.
- **Network connectivity**: Store associates see notifications when there's a loss of network or Wi-Fi connections.
- **Seamless offline switch**: Store associates see notifications when a seamless offline switch occurs.
- **Data sync**: Store associates see notifications when there are data sync issues that might cause issues when switching to offline.
- **Extensibility**: You can extend the notification framework to use for your core business scenarios.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Simplify Store Commerce offline database size management

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

Proactive offline database size management reduces the time and effort needed to manage database size. Automatic recovery of offline databases that exceed the size limit reduces downtime for point of sale (POS) devices and saves the cost and time of manual recovery.

Feature details

Dynamics 365 Commerce customers use the offline capabilities of the Store Commerce app to maintain business continuity during network or service interruptions. Additionally, most customers using Store Commerce offline use SQL Server Express for their offline database, which limits the database size.

With automatic, proactive compression and removal of large indexes, you can prevent the Store Commerce offline database from exceeding the SQL Server Express size limit. By using index compression with extension tables, you can reduce the size of the offline database.

Automatic index compression and removal capabilities speed up and ease the recovery of offline databases that exceed the size limit.

Administrators use the feature management workspace to enable these capabilities for their organization.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Commerce database index compression (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Plan and prepare for Dynamics 365 Business Central in 2025 release wave 1

> **Important**
>
> The 2025 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2025 to September 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Business Central**.

Overview

https://aka.ms/ReleaseHighlight/2025W1/BusinessCentral

Business Central is a business management application for small and midsize 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 selecting 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.

In this release, you get AI innovation with intelligent agents. These AI-driven agents integrate with Business Central and bring efficiency and automation to your business operations. The new AI agents understand and perform complex tasks in the Business Central environment. Whether it's generating insightful reports, automating routine processes, or providing real-time assistance, these agents enhance productivity at every level.

One of the standout features of the AI agents is their ability to optimize order creation processes. By leveraging natural language processing, agents can create sales orders directly from email interactions, making the process faster and more intuitive. Agents also play a crucial role in data management. For example, they can assist in creating detailed product information, such as variants and units of measure, to help ensure that your data is accurate and comprehensive. With these advanced capabilities, the agents revolutionize how businesses manage their operations, bringing a new era of efficiency and intelligence to Business Central. The core AI-powered business capabilities continue to improve for this release.

The application focus is on the manufacturing area. The release continues to enhance sustainability management and e-document capabilities. Integrations to Shopify and Dynamics 365 Field Service reach the next level.

Investment areas



Application
To determine what goes into the application in each release, we prioritize the top requests from customers and respond to market trends. For example, we invest in helping customers use Copilot to optimize their business processes.

For the last couple of releases, we invested in multicompany capabilities because more businesses use Business Central across borders and to manage multiple companies. We commit to enhancing the Business Central experience by integrating Copilot capabilities that boost productivity in financial data entry tasks.

Copilot and agents
Business Central is the comprehensive, AI-powered application for small and medium-sized organizations that want to scale their business with AI automation, eliminate tedious tasks, and simplify work with powerful generative AI. Microsoft invests in its customers' AI transformation and empowers its diverse partner community to bring industry expertise to accelerate this mission.

Even in the AI era, customers can trust that their data is safe. World-class security, privacy, and compliance controls protect their data. The application follows Microsoft's Responsible AI principles, which put people at the center of the experience.

- **Microsoft Copilot** is the AI-powered assistant that improves efficiency, boosts creativity, and eliminates tedious tasks. With your Business Central license, everyone gets a copilot at no extra cost. Copilot in Business Central has an ever-growing set of skills to guide, find, compare, analyze, suggest, and summarize. Assistive features such as **Chat** and task-specific features such as bank account reconciliation assistance are ready to use with no complex setup or training. The features are seamlessly integrated to reduce or eliminate the need to switch between applications.

- **Autonomous agents** intelligently automate key business processes. For example, the Sales Order Agent handles the intake of sales orders from emails and attachments, interprets unstructured data, and generates accurate sales documents. With just a few clicks to configure and activate, you can run these built-in agents. They offer extensive oversight capabilities so you can review and approve activity, ensuring control while reducing manual effort.

- **For makers and pro developers**, Business Central gives you the flexibility to add custom AI solutions and connect to the broader Microsoft cloud of AI-powered apps and services.

Copilot and agents are available only to Business Central online customers.

Country and regional
To ensure Business Central remains compliant with evolving global regulations, every release includes foundational updates that align with the latest legal, fiscal, and data governance requirements. These updates are driven by continuous monitoring of regulatory changes across key markets and industries. Whether it's tax schema adjustments or electronic invoicing mandates, we embed the necessary capabilities to help customers meet their compliance responsibilities without disruption.

We not only address immediate legislative changes, but also build extensible frameworks that support future mandates with minimal friction. These efforts include enhancements to configuration models, localization layers, and reporting structures that allow customers to tailor compliance settings to their specific jurisdictions. By abstracting complexity and offering guided setup experiences, we reduce the operational burden on IT and finance teams while ensuring audit readiness.

Development
These releases bring powerful new extensibility features that empower developers to create adaptable, resource-efficient solutions. With these features, developers get greater flexibility to meet evolving business needs.

By defining profile extension objects, developers can change and customize user profiles without duplicating code. This approach boosts productivity and keeps code integrity intact. Developers can now add resources to extensions and access them from AL, which simplifies data initialization and setup. Improvements to the **Explore in Visual Studio Code** feature provide seamless access to GitHub repositories. With this feature, developers can easily pull, inspect, or hotfix code versions, even when IP protection is in place. By using full-text search metadata on table fields, developers enable data search capabilities that deliver faster, more accurate results. This enhancement increases user satisfaction and efficiency.

Resellers and publishers save time when they validate their solutions by running multiple AppSource apps through a public NuGet feed that provides downloadable symbols and AL-Go

for GitHub handling this automation. Also, a rule-based scheduling mode for performance profiling enables background profiling to pinpoint and address performance issues, so you spend less time troubleshooting.

E-commerce
In each release of Business Central, we enhance its integration with Shopify based on customer feedback. With this integration, you can efficiently manage planning, procurement, and product costs. You also gain control over inventory levels across locations and item variants.

When you integrate the apps, you simplify the process of defining prices and discounts. You also simplify managing and reporting taxes to comply with government regulations. Whether you're using Shopify or Shopify Plus, which includes business-to-business capabilities, this integration helps streamline your operations and boost your business efficiency.

Electronic Documents
Electronic Documents in Business Central streamlines the process of sending and receiving electronic documents by reducing the need for manual data entry and minimizing errors. This smoother process helps users become more efficient and productive because they can focus on more strategic tasks. Additionally, Electronic Documents enhances data accuracy and security, ensuring that sensitive information stays protected. By implementing Electronic Documents in Business Central, businesses save time and costs while improving overall operational efficiency.

Financial Management
To determine the Financial Management capabilities for each release, we prioritize customer requests and respond to market trends. For example, we focus on helping customers use Copilot to optimize their business processes. This focus includes leveraging AI to streamline data entry, automate routine tasks, and provide intelligent insights that enhance decision-making.

Currently, we focus on enabling agents to help with tasks related to financial management. For example, agents help with bookkeeping tasks based on previous patterns or business practices. We're committed to ensuring that our financial management tools are robust and adaptable to the diverse needs of our global user base. This commitment involves enhancing the management of taxes to comply with various international regulations and continuously updating Business Central to address the evolving financial landscape.

Governance and administration
Business Central gives administrators more tools for managing environments, apps, and data migrations. With these tools, administrators can solve customer needs and handle a variety of administrative scenarios.

New features in Business Central improve security, flexibility, and partner management for customers with multiple environments. Administrators can assign partner access to specific environments, which simplifies control and compliance. Customer-managed encryption keys enhance data protection and help businesses meet privacy standards. Extended update windows give administrators more flexibility to schedule upgrades. A unified interface for managing per-tenant extensions (PTEs) and AppSource apps streamlines deployment across environments and saves time. IPv6 supports connectivity, ensures seamless service, and enhances data security.

Reporting and data analysis

In today's world, data is an invaluable resource. It forms 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 turn complex information into actionable intelligence. These advances reveal hidden patterns and trends, and they find correlations that earlier methods missed. The critical insights that data analysis provides empower organizations to optimize their strategies, enhance customer experiences, and identify potential risks. With these insights, organizations gain unprecedented understanding of their operations and environments. They can innovate in ways that once seemed impossible.

As data continues to fuel innovation and drive transformative advancements, harnessing its potential is essential for staying competitive. For small and medium-sized businesses, data helps shape a more efficient and sustainable future.

Our reporting strategy focuses on 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. With flexible self-service capabilities, you can easily access and use your data for maximum value.

Service and platform

With the new service and platform improvements, users see fewer interruptions. Business Central generally feels faster, and web services and certain scenarios are noticeably quicker. We continue to invest in the fundamentals of our service, with a focus on performance, stability, resource governance, security, and compliance. This focus lets Business Central grow in scale along with our customers' needs.

The new full-text search on lists, drill-downs, and look-ups gives you faster, more accurate access to key data. It focuses only on relevant columns for quicker, targeted results. This improvement boosts productivity and enhances user satisfaction by reducing search time and delivering precise, actionable information. You still have the flexibility to enable the previous search method when needed.

The improved job queue flow keeps the job order (FIFO) and adds a priority system in job queue categories. This system makes sure that high-priority tasks go first. Reduced locking

during concurrent warehouse postings lowers bottlenecks. This reduction lets operations run more smoothly in high-traffic environments. Automated performance testing in AL-Go for GitHub helps developers find and fix performance issues earlier. This testing step makes reliability and overall system performance better.

Supply chain management
Supply chain management in Business Central offers a range of features, from procurement and production to distribution and logistics. These features help businesses streamline their operations and improve efficiency.

Business Central provides tools for managing the entire supply chain, including inventory management, order processing, and demand forecasting. Businesses can create and manage purchase orders, track inventory levels, and ensure timely delivery of products to customers. Business Central supports various supply chain methodologies, so businesses can choose the approach that best suits their operations.

A key benefit of using Business Central for supply chain management is its integration with other Microsoft products, such as Power BI and Microsoft Teams. These integrations give businesses deeper insights into their supply chain data, help their people collaborate more effectively, and support good decisions based on real-time information.

The investments for the supply chain management area focus on quality management and subcontracting.

Sustainability Management
To align with customer feedback and evolving regulatory demands, we continuously expand key parts of the Sustainability Management capabilities in Business Central.

Collect sustainability data

- Capture environmental data with sustainability journals and purchase documents, either manually or through formulas.
- Monitor emissions, water usage, and waste intensity across companies, countries, regions, or facilities. You can also purchase carbon credits directly within Business Central.
- Import emission factors from external sources through open APIs to ensure accurate and reliable calculations.
- Use Copilot to help estimate your carbon footprint, even when the system doesn't yet have emission factors.

Track your progress

- Use the modern Sustainability Role Center to access all sustainability data and key performance indicators (KPIs) in one place.

- Set baselines and targets, and track your progress with scorecards and goal management tools.

Gain insights and simplify reporting

- Access built-in reports, Excel-based reporting, embedded Power BI dashboards, and analysis views tailored to your sustainability data.
- Use financial reports to compare sustainability entries with statistical or general ledger data.
- Report on various greenhouse gases in CO_2 equivalents, as well as water and waste metrics.
- Customize reports to focus on the sustainability indicators that matter most to your business.
- Meet regulatory requirements by reporting in line with the Corporate Sustainability Reporting Directive (CSRD) and other standards through integration with **External ESG Reporting**.
- Calculate and report data required for Carbon Border Adjustment Mechanism (CBAM) and extended producer responsibility (EPR) compliance.

Enhance brand reputation

- Use the integrated sustainability features in Business Central to enable full value chain tracking of Scope 3 emissions across all operations.
- Add carbon footprint data on product invoices to promote transparency and accountability.

These capabilities provide a comprehensive approach to sustainability management. They help you measure, analyze, and report your environmental impact with confidence and efficiency.

User experiences
Business Central offers a broad portfolio of user interfaces that enable you to work with your 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 you need them.

Each release includes enhancements to usability, accessibility, performance, and reliability. In this release wave, we boost efficiency when you work with actions across selections in lists of records and when you view 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
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Business Central.

Helpful links	Description
Product documentation	Find documentation for Business Central.
User community	Engage with Business Central experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Business Central.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Last updated on 10/16/2025

What's new and planned for Dynamics 365 Business Central

This topic lists features that are planned to release from April 2025 through September 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 2 plan.
- For a list of the next wave's release plans, go to 2025 release wave 2 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

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
Integrate Field Service with service management	Users, automatically	-	✔ Apr 1, 2025
View item availability in Field Service work orders	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Edit price lists in Excel	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Use SecretText with control add-ins and in JSON objects	Admins, makers, marketers, or analysts, automatically	✔ May 2, 2025	✔ May 2, 2025
Use improved troubleshooting options for cost adjustments	Users, automatically	✔ Mar 14, 2025	✔ Apr 1, 2025

Copilot and agents

Scale your business without the traditional friction that accompanies growth, and eliminate tedious tasks with powerful, generative AI. Business Central includes Copilot, built-in autonomous agents, and the flexibility to add custom AI.

Expand table

Feature	Enabled for	Public preview	General availability
Capture more sales with enhanced Sales Order Agent	Users by admins, makers, or analysts	✔ Sep 2, 2025	✔ Nov 7, 2025
Chat with Copilot to learn how to use installed add-on apps	Users by admins, makers, or analysts	✔ Sep 7, 2025	-
Summarize with Copilot	Users, automatically	✔ Apr 1, 2025	-
Enhance purchase order line matching with Copilot	Users, automatically	✔ Apr 1, 2025	-
Automate tests for Copilot extensions with Business Central Test Toolkit	Admins, makers, marketers, or analysts, automatically	✔ May 1, 2025	✔ May 1, 2025
Use AI resources for your Copilot extensions	Admins, makers, marketers, or analysts, automatically	✔ Jun 6, 2025	Apr 2026
Use autofill with Copilot to suggest field values	Users, automatically	✔ Apr 1, 2025	-
Automate payables processes with the Payables Agent	Users by admins, makers, or analysts	✔ Jul 4, 2025	✔ Nov 7, 2025

Country and regional

Business Central is now available in more countries and regions to help businesses run smoothly and comply with regulatory requirements.

Expand table

Feature	Enabled for	Public preview	General availability
Post cash documents to projects in Czech localization	Users, automatically	-	✔ Apr 1, 2025

Feature	Enabled for	Public preview	General availability
Add more text in cash documents in Czech localization	Users, automatically	-	✔ Apr 1, 2025
Calculate and post VAT settlement by Activity Code - Italy	Users, automatically	-	✔ Jul 1, 2025
Get UI improvements for Unreliable Payer for Czechia	Users, automatically	✔ Sep 1, 2025	✔ Oct 1, 2025
Use Peppol PINT A-NZ format for e-documents in AU and NZ	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Define allowed languages per environment	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Check total amounts on purchase advances for Czechia	Users, automatically	✔ Sep 1, 2025	✔ Oct 1, 2025
Reconciliation feature in cash documents for Czechia	Users, automatically	✔ Sep 1, 2025	✔ Oct 1, 2025
Showcase Business Central with Czech localization demos	Users, automatically	-	✔ Apr 1, 2025
Use ZUGFeRD format for E-Documents in Germany	Users, automatically	✔ Jul 1, 2025	✔ Aug 1, 2025
New Contoso Coffee Demo Dataset for Intrastat in Czechia	Users, automatically	✔ Sep 1, 2025	✔ Oct 1, 2025
New pages for purchase and sales advance entries for Czechia	Users, automatically	✔ Sep 1, 2025	✔ Oct 1, 2025
Use VAT Return to report VAT in local and functional currencies in Czech Republic	Users, automatically	-	✔ Apr 1, 2025
Use modern search to access data in Czech localization	Users, automatically	-	✔ Apr 1, 2025
Hide lines with zero quantity in Czech document reports	Users, automatically	-	✔ Apr 1, 2025
Alternative posting groups for employees in Czechia	Users, automatically	✔ Sep 1, 2025	✔ Oct 1, 2025

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
Overloaded JsonObject data type GetValue method	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025
Move tables and fields with data across extensions as part of refactoring	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025
Extend CardPageId on list and listpart pages	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025
Experience user-friendly client activity descriptions in performance profiles	Users, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025
Use the new continue keyword for AL loops	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025
Manage external files more easily through unified API in External File Storage module	Admins, makers, marketers, or analysts, automatically	-	✔ Apr 1, 2025
Read and write YAML in AL using JsonObject	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025
Select extensions to open in Visual Studio Code from the web client	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025
Troubleshoot clients, apps, and add-ins with telemetry	Users, automatically	-	✔ Apr 1, 2025
Mock outbound HttpClient web service calls during testing	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025
Search, navigate and use app symbols as context for GitHub Copilot	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025
View build metadata in Extension Management page	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025
Validate certificates on external web service endpoints called from AL HttpClient	Users, automatically	-	✔ Apr 1, 2025
Work with multiline strings in AL	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Feature	Enabled for	Public preview	General availability
Use new AL project templates for creating Copilot features in Visual Studio Code	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025
Use new properties on a report layout	Users, automatically	-	✔ Apr 1, 2025
Self-service App Key Vault onboarding for AppSource apps	Admins, makers, marketers, or analysts, automatically	✔ Apr 7, 2025	✔ Apr 7, 2025
Use new IncStr parameter to change integers by more than 1 in string variables	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025
Embed Power BI content in web client with new page type	Users, automatically	-	✔ Apr 1, 2025
Convert simple type values to text using new ToText method	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025
Create lists and dictionaries of interfaces in AL	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025
Generate launch json file from the web client	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025
Running objects in actions defaults to UI descriptors on target object	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

E-commerce

Broaden your customer reach and handle business-to-business transactions seamlessly with Business Central and Shopify.

Expand table

Feature	Enabled for	Public preview	General availability
Import and export more data for Shopify B2B companies and company locations	Users, automatically	-	✔ Apr 1, 2025
Activate sales channels in Shopify Connector	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Import and export more data using Shopify metafields	Admins, makers, marketers, or analysts, automatically	-	✔ Apr 1, 2025

Feature	Enabled for	Public preview	General availability
Troubleshoot export issues on Shopify Skipped Records page	Admins, makers, marketers, or analysts, automatically	-	✔ Apr 1, 2025
Use the latest update for the Shopify connector	Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Electronic Documents

Electronic Documents in Business Central streamlines document exchange processes, enhances data accuracy and security, and leads to significant time and cost savings to ultimately improve operational efficiency.

Expand table

Feature	Enabled for	Public preview	General availability
Delete incorrect e-documents and avoid duplicates	Users, automatically	-	✔ May 1, 2025
Generate multiple incoming e-documents for multiple attachments	Users, automatically	-	✔ Apr 1, 2025
Use B2B Router as a service provider for e-documents	Users, automatically	✔ May 1, 2025	✔ Jun 1, 2025
Automate embedded attachments in PEPPOL	Users, automatically	✔ Apr 1, 2025	✔ Jun 1, 2025
Use Logiq as a service provider for e-documents	Users by admins, makers, or analysts	✔ Apr 1, 2025	✔ May 1, 2025
Use ExFlow by SignUp connector for e-documents	Users by admins, makers, or analysts	✔ Apr 1, 2025	✔ May 1, 2025
Process e-documents in two steps	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Preview incoming e-invoices prior to processing	Users, automatically	-	✔ May 1, 2025
Use Continia as a service provider for e-documents	Users, automatically	✔ Jun 1, 2025	✔ Jul 1, 2025
Use e-documents to fix unposted	Users, automatically	-	✔ May 1, 2025

Feature	Enabled for	Public preview	General availability
purchase documents			
Extend E-Documents features using a new interface	Admins, makers, marketers, or analysts, automatically	-	✔ Apr 1, 2025

Financial Management

Accelerate financial close, improve forecasting, and get real-time performance metrics while fostering compliance and security across subsidiaries.

Expand table

Feature	Enabled for	Public preview	General availability
Analyze subscription billing data with Power BI reports	Users, automatically	-	✔ Jun 15, 2025
Require Intrastat classifications on documents	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Check total purchase amounts on documents	Users by admins, makers, or analysts	-	✔ Apr 1, 2025

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
Add support for MultiSubnetFailover	Users, automatically	-	✔ Apr 1, 2025
Manage environment updates more flexibly	Admins, makers, marketers, or analysts, automatically	✔ Oct 1, 2024	✔ Apr 30, 2025
Enhanced index troubleshooting	Users, automatically	-	✔ Apr 1, 2025
Support IPv6 for enhanced security and scalability	Users, automatically	-	✔ May 31, 2025

Feature	Enabled for	Public preview	General availability
Update sandbox environments to preview versions	Admins, makers, marketers, or analysts, automatically	-	✔ Sep 1, 2025
Link to Power Platform to use Copilot Studio messages	Users by admins, makers, or analysts	✔ Mar 1, 2025	✔ Apr 1, 2025

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
Use enhanced analytics for inventory	Users, automatically	-	✔ Apr 1, 2025
Use enhanced analytics for sales	Users, automatically	-	✔ Jun 15, 2025
Use enhanced analytics for purchasing	Users, automatically	-	✔ Jun 15, 2025
Use enhanced analytics for projects	Users, automatically	-	✔ Jun 15, 2025
Use enhanced Excel reports for sustainability	Users, automatically	-	✔ Jun 15, 2025
Enhance reports with PDF post-processing capabilities	Users, automatically	-	✔ Apr 1, 2025
Validate report layouts for errors as an admin	Users, automatically	-	✔ Apr 1, 2025
Add fields from related tables in analysis mode	Users, automatically	✔ Jun 6, 2025	✔ Jun 6, 2025
Use enhanced analytics for manufacturing (updated Power BI app)	Users, automatically	-	✔ Jun 15, 2025
Access report and request metadata in Word layouts	Users, automatically	-	✔ Apr 1, 2025

Feature	Enabled for	Public preview	General availability
Use enhanced Financial Reporting capabilities	Users, automatically	-	✔ Apr 1, 2025
Use enhanced analytics for finance	Users, automatically	-	✔ Apr 1, 2025

Service and platform

We're continuing to invest in the fundamentals of our service, with focus on performance, stability, resource governance, security, and compliance.

Expand table

Feature	Enabled for	Public preview	General availability
Calculate values only for visible FlowFields	Users, automatically	-	✔ Apr 1, 2025

Supply chain management

Business Central has rich supply management functionality from sales, purchase, invoice, inventory and warehouse management, project management, service order management, and manufacturing. In each release, we expand the capabilities in these areas to help users be more productive.

Expand table

Feature	Enabled for	Public preview	General availability
Reschedule production orders within a safety lead time	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Use enhanced customer document layout for service management	Users, automatically	-	✔ Apr 1, 2025
Cancel production orders that have consumption	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Add more columns to various pages to gain more insight	Users, automatically	-	✔ Apr 1, 2025

Feature	Enabled for	Public preview	General availability
Allow multiple people to post inventory at the same time	Users by admins, makers, or analysts	✔ Apr 1, 2025	✔ Apr 1, 2025
Experience improved usability in manufacturing	Users, automatically	-	✔ Apr 1, 2025
Enable overpicking for production orders	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Achieve greater accuracy in manufacturing costing	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Omit warehouse pick for manual flushing methods	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Create demo data for Subscription Billing with demo data tool	Admins, makers, marketers, or analysts, automatically	-	✔ Apr 1, 2025
Create subscription contract lines manually	Users, automatically	-	✔ Apr 1, 2025
Add unit cost in subscription lines	Users, automatically	-	✔ Apr 1, 2025
Track and rebill quantity changes in subscriptions	Users, automatically	-	✔ Apr 1, 2025
Align Subscription Billing with standard user experience and terminology	Users, automatically	-	✔ Apr 1, 2025
Receive project items with receipts or put-aways	Users, automatically	-	✔ Apr 1, 2025
Block items or variants from production output	Users, automatically	-	✔ Apr 1, 2025
Avoid document number errors when you post project journals	Users, automatically	-	✔ Apr 1, 2025
Handle production output with warehouse put-aways	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Reopen finished production orders	Users, automatically	-	✔ Apr 1, 2025
Use streamlined product design tools in manufacturing	Users, automatically	-	✔ Apr 1, 2025
Print barcodes from production orders	Users, automatically	-	✔ Apr 1, 2025
Manage document attachments in	Users, automatically	-	✔ Apr 1, 2025

Feature	Enabled for	Public preview	General availability
manufacturing			
Use Edit in Excel on output, consumption, and item journals	Users by admins, makers, or analysts	-	✔ Apr 1, 2025
Combine service shipments on a single service invoice	Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Sustainability Management

Sustainability in Business Central enables customers to drive positive environmental and social impact, enhance operational efficiency, meet regulatory requirements, and contribute to a more sustainable future.

Expand table

Feature	Enabled for	Public preview	General availability
Specify default sustainability values for various entities	Users, automatically	-	✔ Apr 1, 2025
Use enhanced analytics for Sustainability	Users, automatically	-	✔ Jun 1, 2025
Capture sustainability data with general journals	Users, automatically	-	✔ Apr 1, 2025
Use water and waste management with sustainability	Users, automatically	✔ Apr 1, 2025	✔ May 1, 2025
Use sustainability Scope 3 value chain for assembly and transfers	Users, automatically	✔ Apr 1, 2025	Jan 2026
Provide carbon equivalent data for sales based on Scope 3 automation	Users, automatically	✔ Apr 1, 2025	Jan 2026
Start value chain in purchase process for Scope 3 in sustainability	Users, automatically	✔ Apr 1, 2025	Jan 2026
Use refreshed demo data for Sustainability	Users, automatically	-	✔ Apr 1, 2025
Use sustainability Scope 3 value chain in manufacturing	Users, automatically	✔ Apr 1, 2025	Jan 2026

Feature	Enabled for	Public preview	General availability
Use the new Out of Scope emission category	Users, automatically	✔ Apr 1, 2025	✔ May 1, 2025

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
Preview PDF attachments directly in web client	Users, automatically	-	✔ Apr 1, 2025
Optimize screen estate usage on the web	Users, automatically	✔ Apr 7, 2025	✔ Apr 22, 2025
Adjust the FactBox pane width	Users, automatically	-	✔ Apr 1, 2025
Use user interface enhancements for better experience	Users, automatically	✔ Apr 1, 2025	✔ Apr 7, 2025

* You are able to opt into some features as part of early access on February 3, 2025, 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 information on data residency in Dynamics 365 and Power Platform, visit the Microsoft Dynamics 365 and Power Platform data residency documentation. For more information about geo availability, visit the Dynamics 365 and Microsoft Power Platform availability page.

Last updated on 12/02/2025

Application

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 each release, we prioritize the top requests from customers and respond to market trends. For example, we invest in helping customers use Copilot to optimize their business processes.

For the last couple of releases, we invested in multicompany capabilities because more businesses use Business Central across borders and to manage multiple companies. We commit to enhancing the Business Central experience by integrating Copilot capabilities that boost productivity in financial data entry tasks.

Note: The author created this article with assistance from AI. Learn more

Edit price lists in Excel

08/07/2025

Expand table

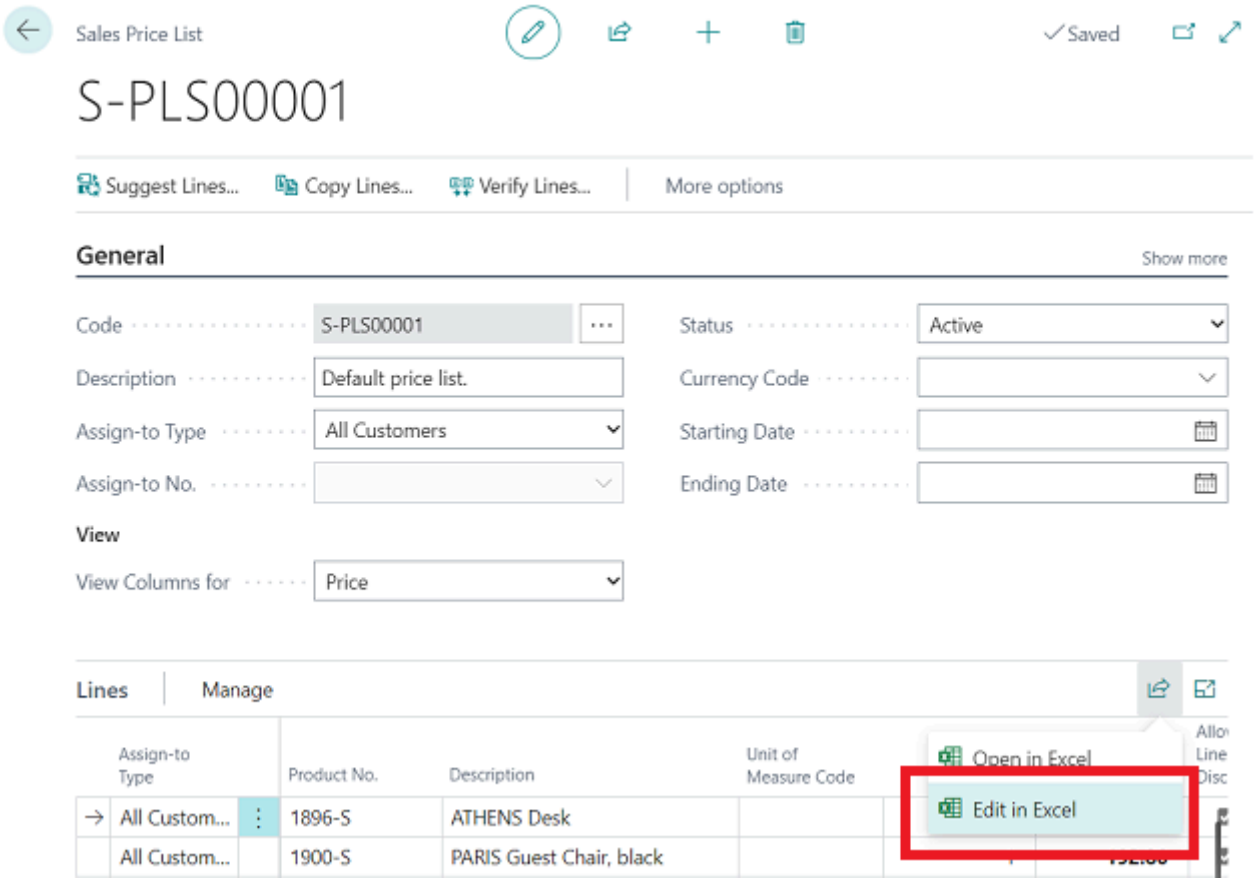
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

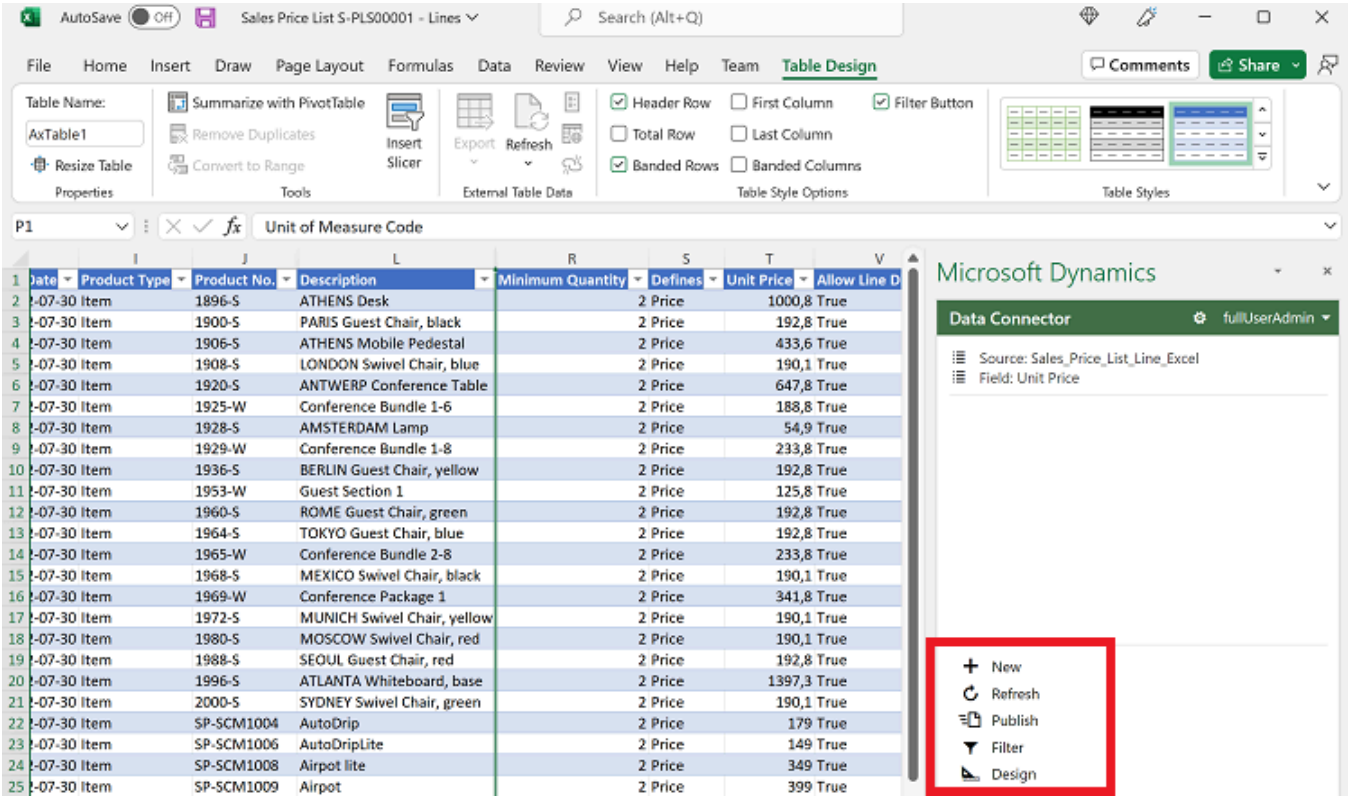
Sales price lists can be long and complex documents that require maintenance. Plus, many businesses have complex rules for creating and updating prices. When you edit price lists in Excel, you make complex calculations easier for your salespeople.

Feature details

Turn on the **Feature Update: New sales pricing experience** feature on the **Feature Management** page for all users. The new pricing experience organizes prices into lists. You can edit lines on the **Sales Price List** page in Excel by using the **Edit in Excel** action.



After you edit a price list in Excel, you can easily publish the updated list to Business Central.



	Date	Product Type	Product No.	Description	Minimum Quantity	Defines	Unit Price	Allow Line D
2	-07-30	Item	1896-S	ATHENS Desk		2 Price	1000,8	True
3	-07-30	Item	1900-S	PARIS Guest Chair, black		2 Price	192,8	True
4	-07-30	Item	1906-S	ATHENS Mobile Pedestal		2 Price	433,6	True
5	-07-30	Item	1908-S	LONDON Swivel Chair, blue		2 Price	190,1	True
6	-07-30	Item	1920-S	ANTWERP Conference Table		2 Price	647,8	True
7	-07-30	Item	1925-W	Conference Bundle 1-6		2 Price	188,8	True
8	-07-30	Item	1928-S	AMSTERDAM Lamp		2 Price	54,9	True
9	-07-30	Item	1929-W	Conference Bundle 1-8		2 Price	233,8	True
10	-07-30	Item	1936-S	BERLIN Guest Chair, yellow		2 Price	192,8	True
11	-07-30	Item	1953-W	Guest Section 1		2 Price	125,8	True
12	-07-30	Item	1960-S	ROME Guest Chair, green		2 Price	192,8	True
13	-07-30	Item	1964-S	TOKYO Guest Chair, blue		2 Price	192,8	True
14	-07-30	Item	1965-W	Conference Bundle 2-8		2 Price	233,8	True
15	-07-30	Item	1968-S	MEXICO Swivel Chair, black		2 Price	190,1	True
16	-07-30	Item	1969-W	Conference Package 1		2 Price	341,8	True
17	-07-30	Item	1972-S	MUNICH Swivel Chair, yellow		2 Price	190,1	True
18	-07-30	Item	1980-S	MOSCOW Swivel Chair, red		2 Price	190,1	True
19	-07-30	Item	1988-S	SEOUL Guest Chair, red		2 Price	192,8	True
20	-07-30	Item	1996-S	ATLANTA Whiteboard, base		2 Price	1397,3	True
21	-07-30	Item	2000-S	SYDNEY Swivel Chair, green		2 Price	190,1	True
22	-07-30	Item	SP-SCM1004	AutoDrip		2 Price	179	True
23	-07-30	Item	SP-SCM1006	AutoDripLite		2 Price	149	True
24	-07-30	Item	SP-SCM1008	Airpot lite		2 Price	349	True
25	-07-30	Item	SP-SCM1009	Airpot		2 Price	399	True

> **Note**
>
> To use this capability, you must enable the **Feature Update: New sales pricing experience** feature in the Feature Management ** page**.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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:

- Edit pricelists in Excel
- This idea

We listened to your ideas, along with comments and votes, to help us decide what to add to our product roadmap.

Additional resources

Set up prices and discounts (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Integrate Field Service with service management

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

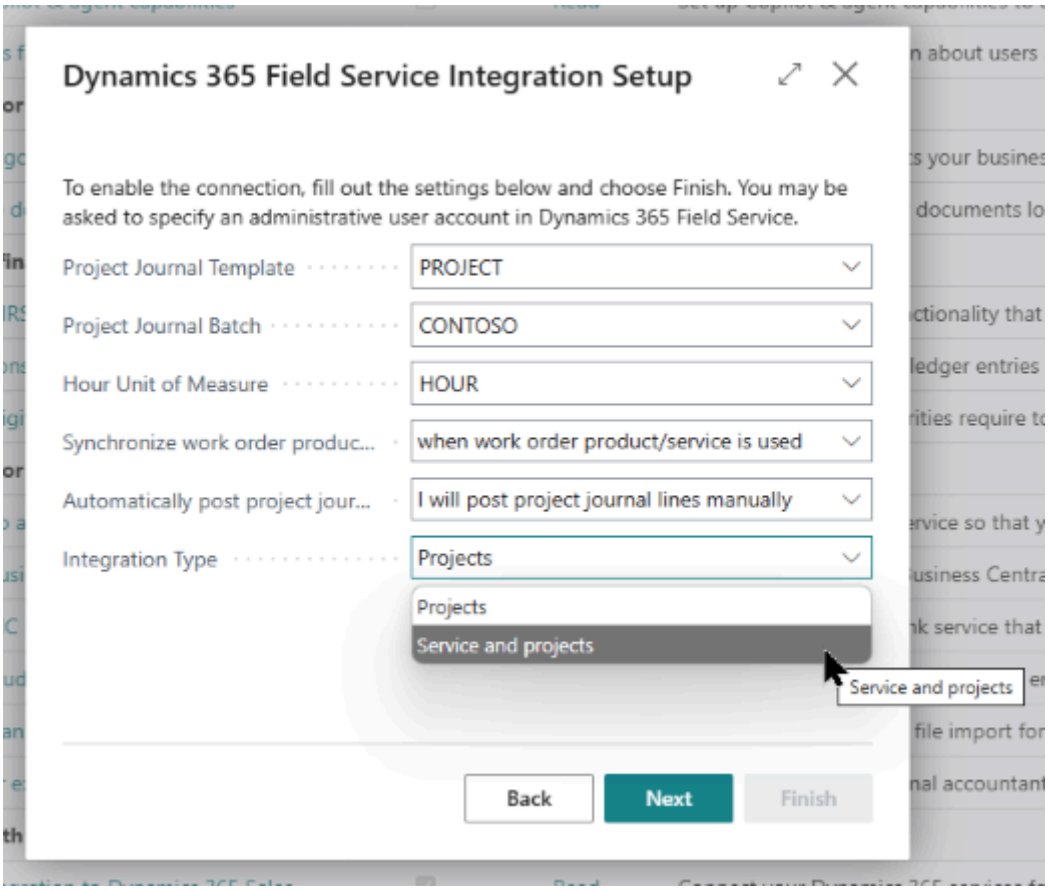
Integrating Business Central with Dynamics 365 Field Service is valuable for organizations that provide regular maintenance and repair services. It offers a seamlessly integrated solution for managing service tasks, consumption, and financial transactions to benefit service technicians, service managers, 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 have a Premium license, set the **User Experience** field to **Premium** on the **Company Information** page in Business Central.

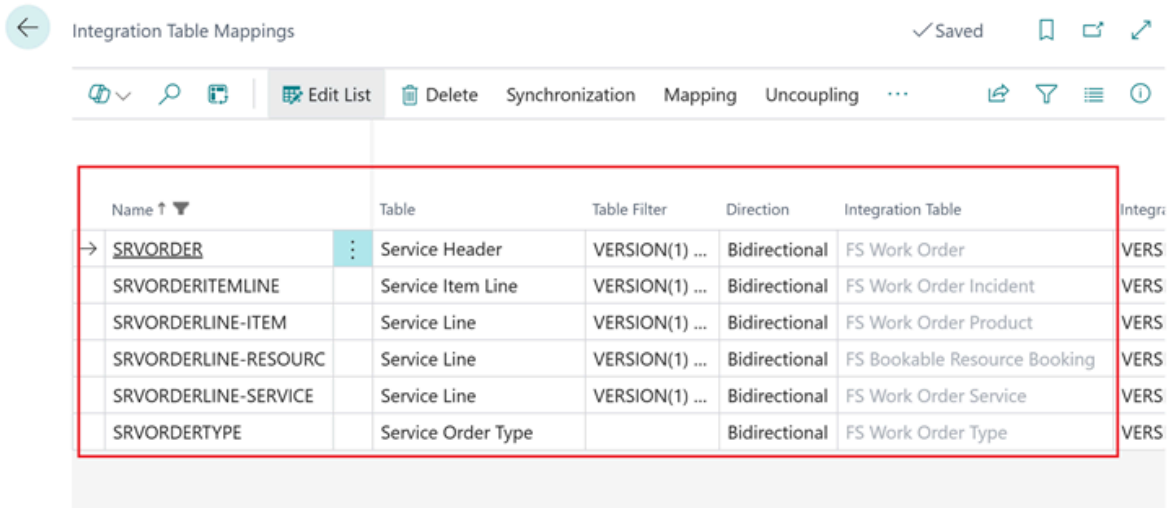
You can enable integration by selecting **Projects** or **Service and projects** in the **Integration Type** field in the following locations:

- The **Set up integration to Dynamics 365 Field Service** assisted setup guide.
- The **Dynamics 365 Field Service Integration Setup** page.



When you set the **Integration Type** field to **Service and projects**, the feature does the following steps 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** field is mandatory on Field Service work orders.



- 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 you're repairing.
- **Service Line** fields align with **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 sync to a service order. The system posts consumption based on the settings on the **Dynamics 365 Field Service Integration Setup** page.

During consumption and invoice posting in Business Central, the system updates the consumed and invoiced quantities on the original work order product and work order service lines in Field Service.

If you select **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 synced service orders.

> **Note**
>
> To integrate Dynamics 365 Field Service with the Business Central service management module, you need a Premium license.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Integrate with Microsoft Dynamics 365 Field Service (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use improved troubleshooting options for cost adjustments

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 14, 2025	✔ Apr 1, 2025

Business value

The improvements to cost adjustment in Business Central enhance processing speed, provide greater control over adjustments, introduce proactive issue notifications, offer visibility into adjustment progress, and save partial progress to prevent full reruns on failure. These improvements lead to more accurate inventory valuation, reduced financial discrepancies, improved decision-making, and increased operational efficiency.

Feature details

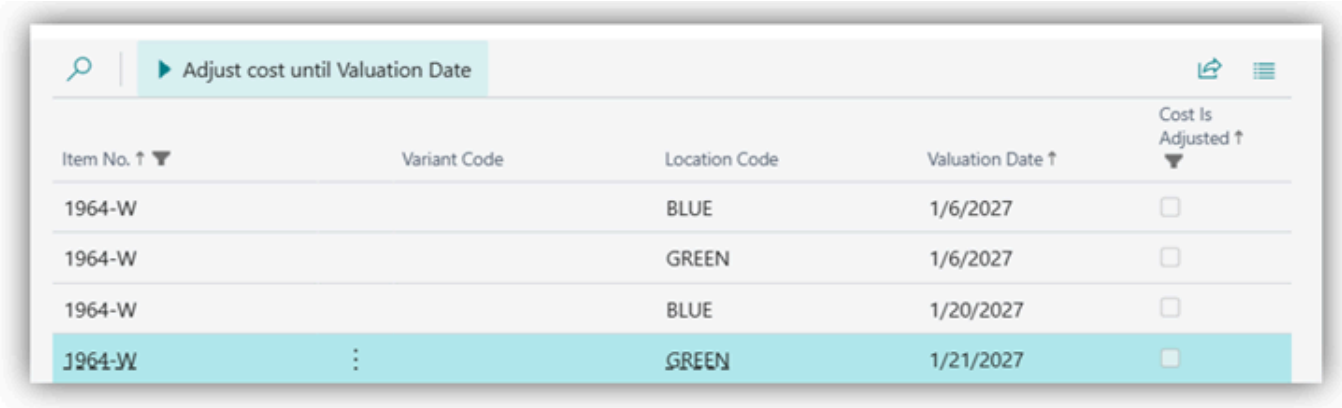
Inventory cost adjustment in Business Central is the process of ensuring that item costs are accurate. The process adjusts costs based on changes in purchase prices, revaluations, or applied costs through transactions such as sales, consumption, and transfers.

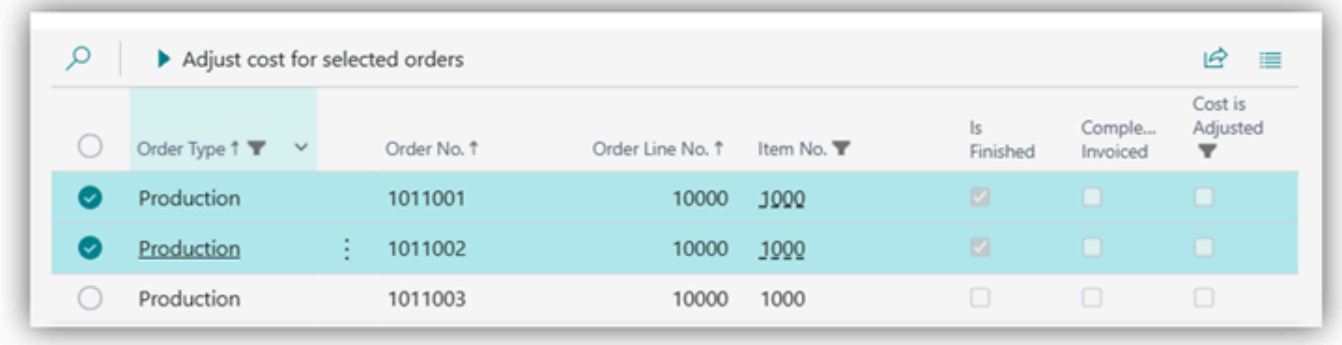
Inventory cost adjustment is essential for maintaining correct inventory valuation and COGS. It's especially important when businesses use costing methods such as FIFO, LIFO, or Average. You can run inventory cost adjustment automatically or manually. The process affects historical transactions and financial reports. To avoid discrepancies, set up inventory cost adjustment correctly and monitor it regularly.

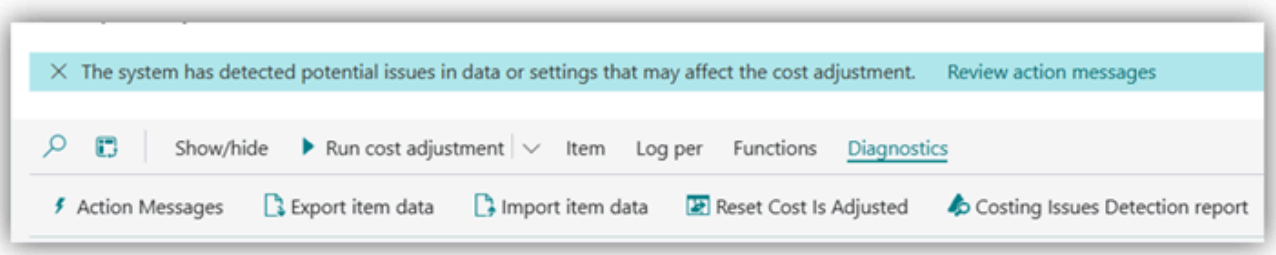
This release introduces enhancements to the inventory cost adjustment process. These enhancements improve performance for larger workloads and make troubleshooting and monitoring easier:

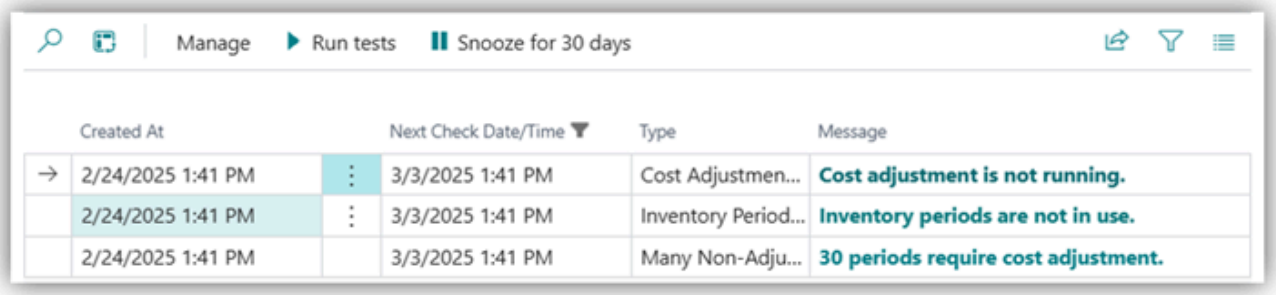
- Removed bottlenecks based on telemetry data and code analysis. This change significantly improves processing speed.
- Added period-by-period adjustments and selected production and assembly order adjustments for high-transaction items. These changes give you more control over the processing scope.

- Adds notifications for potential issues, suboptimal settings, high volumes of entries, and data discrepancies.
- Develops a tool to visualize adjustment progress, so you can analyze performance issues and identify inefficiencies.
- Enables item-by-item adjustments, so partial progress is saved in long-running processes. This feature prevents full reruns if things go wrong.









Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Track item cost adjustments (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use SecretText with control add-ins and in JSON objects

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ May 2, 2025	✔ May 2, 2025

Business value

You can now use SecretText with control add-ins and JSON objects. With this capability, AL developers can integrate credentials with JavaScript-based authentication solutions and embed secrets when working with JSON objects.

Feature details

Pass SecretText value to control add-ins

You can now pass a SecretText value to control add-in procedures. With this feature, you can integrate credentials with JavaScript-based authentication solutions.

New method to add SecretText values to JSON objects - WriteWithSecretsTo

We added a new method to the JsonObject type that you use to add SecretText values. To use this method, you create a JSON object with placeholder values for your secret values. Then, you provide the paths to the values in JPath format, along with the values. The method returns a new SecretText value with the credentials replaced.

```
procedure CreateSecretBody(ApiKey: SecretText, SecretSalt: SecretText) : SecretText
var
    JsonBody: JsonObject;
    Secrets: Dictionary of [Text, SecretText];
    Result: SecretText;
begin
    // Create a debuggable body
    JsonBody.Add('type', 'Some type');
    JsonBody.Add('api_key', 'placeholder');
    JsonBody.Add('salt', 'placeholder');

    // Prepare the replacements
    Secrets.Add('$.api_key', ApiKey);
    Secrets.Add('$.salt', SecretSalt);

    // Produce the secret body
    JsonBody.WriteWithSecretsTo(Secrets, Result);
    exit(Result);
end
```

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

JsonObject Data type (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

View item availability in Field Service work orders

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

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.

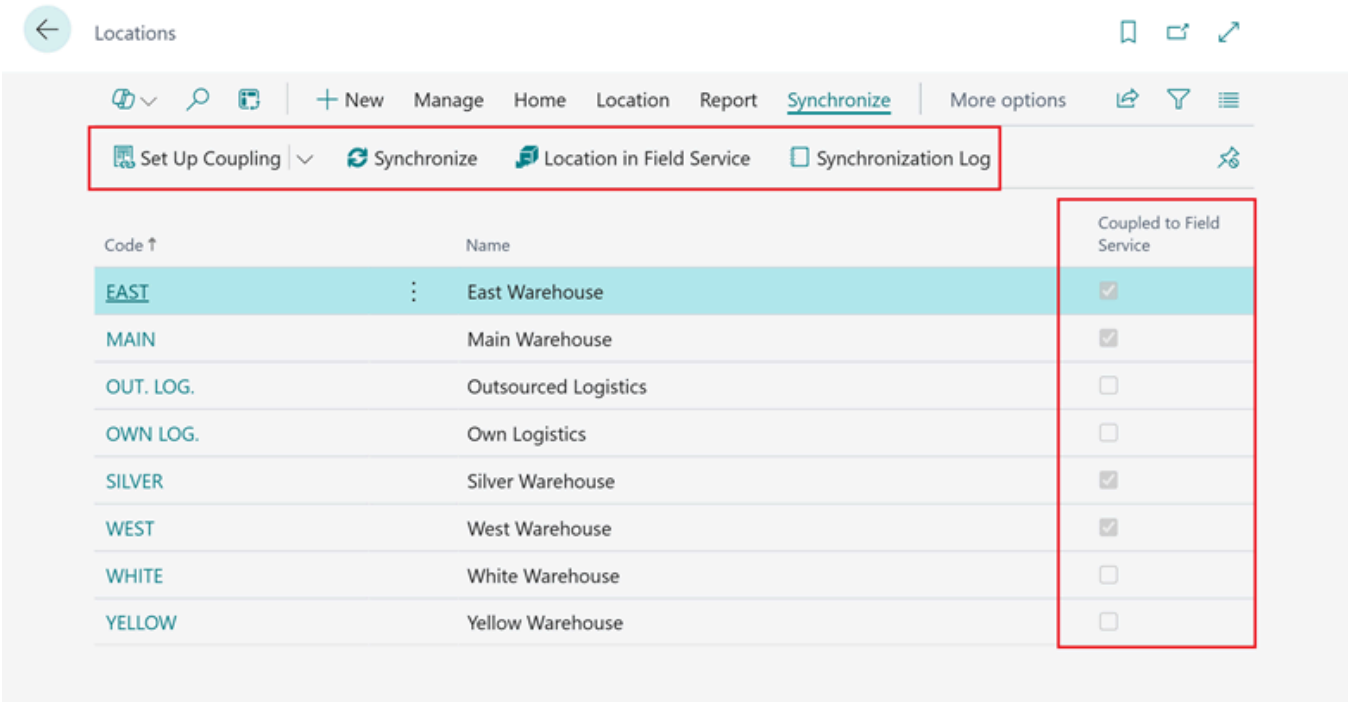
Feature details

Now you can integrate, configure, and customize Field Service warehouses with Business Central locations. To manage data synchronization, we added a unidirectional integration table mapping (from Business Central) between Business Central locations and Field Service warehouses. To use the new integration table mapping, turn on the **Location Mandatory** toggle on the **Inventory Setup** page in Business Central.

Business Central syncs locations with the following settings on the **Location Card** page:

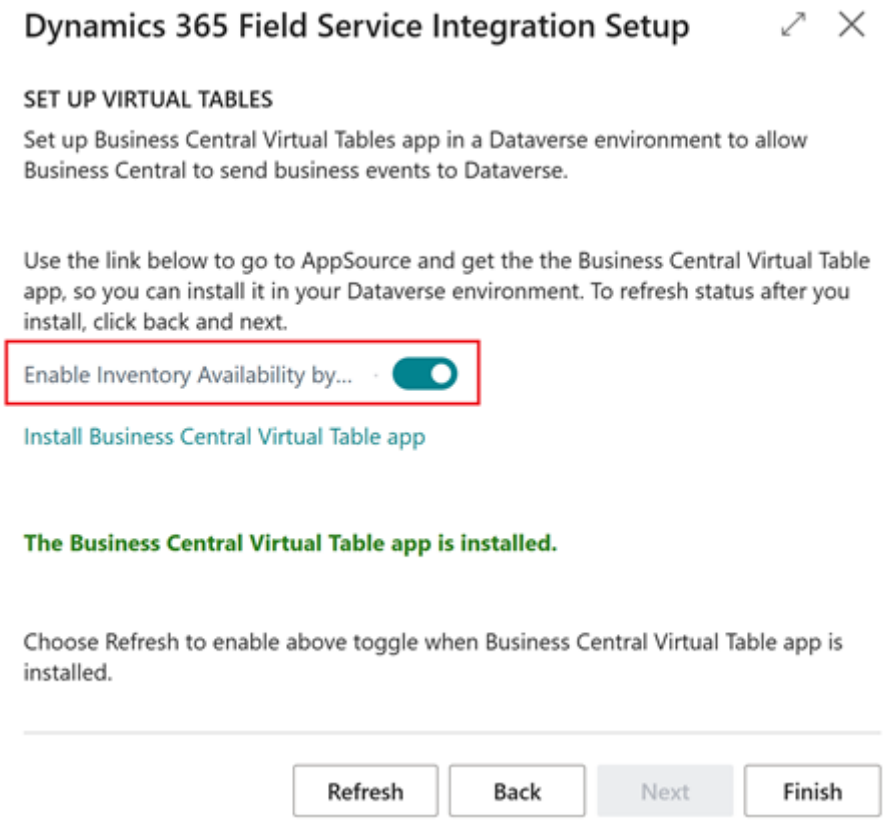
- The **Use as In-Transit** toggle is off.
- **Project Consump. Whse. Handling** is different from Warehouse Pick (required).
- **Assm. Consump. Whse. Handling** is different from Warehouse Pick (required).

On the **Locations** and **Location Card** pages, use the **Warehouse** action to open a coupled location in Field Service. With this action, you can sync the location, set up and delete couplings, and view sync logs.



In Field Service, use **Open in Business Central** to open a location in Business Central. This location couples to a warehouse in Field Service.

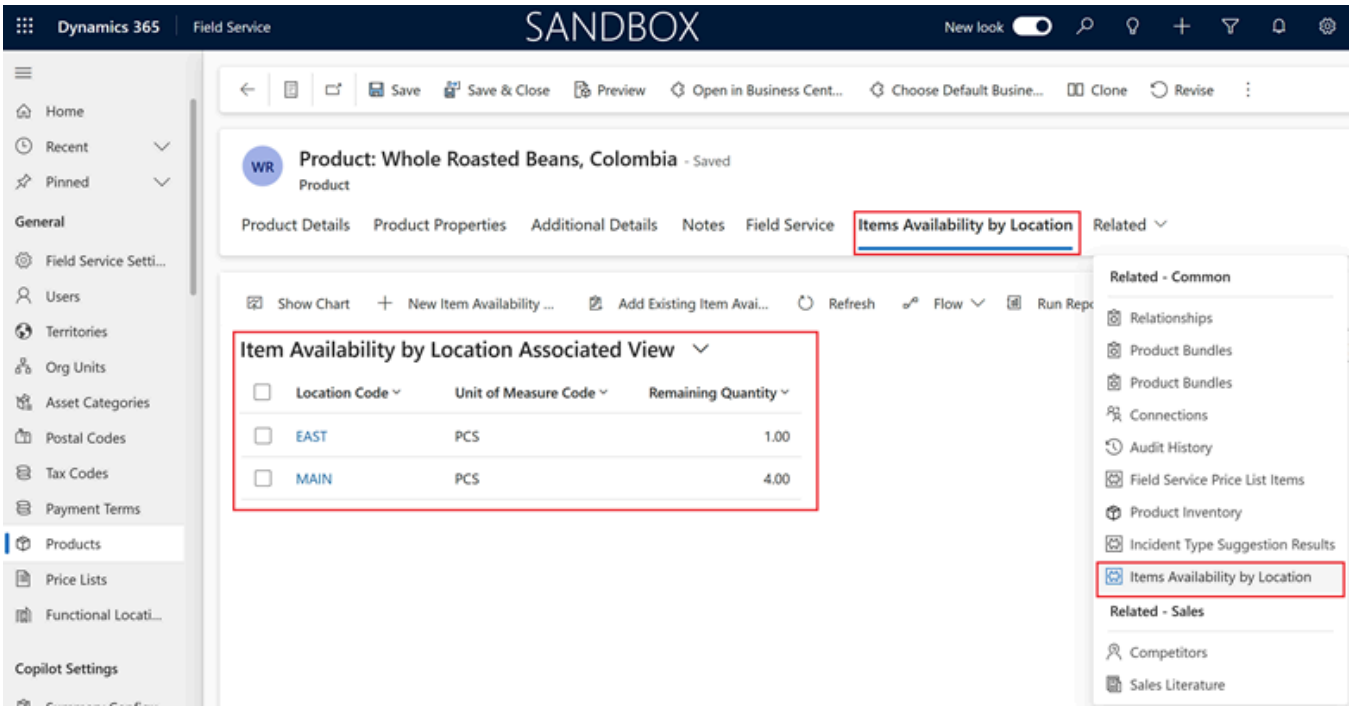
Select **Enable Inventory Availability by Location** on the **Dynamics 365 Field Service Integration Setup** page or on the **Set up integration to Dynamics 365 Field Service** page.



When you turn on inventory availability by location, you get a new Inventory Availability by Location API as a Dataverse virtual table available. The API creates a synthetic relationship

between this virtual table and the native **Products** table in Field Service.

In Field Service, on the **Products** page, technicians can see how much of a product is available at a warehouse they choose.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Integrate with Microsoft Dynamics 365 Field Service (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Copilot and agents

08/14/2025

> **Important**
>
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Business Central is the comprehensive, AI-powered application for small and medium-sized organizations that want to scale their business with AI automation, eliminate tedious tasks, and simplify work with powerful generative AI. Microsoft invests in its customers' AI transformation and empowers its diverse partner community to bring industry expertise to accelerate this mission.

Even in the AI era, customers can trust that their data is safe. World-class security, privacy, and compliance controls protect their data. The application follows Microsoft's Responsible AI principles, which put people at the center of the experience.

- **Microsoft Copilot** is the AI-powered assistant that improves efficiency, boosts creativity, and eliminates tedious tasks. With your Business Central license, everyone gets a copilot at no extra cost. Copilot in Business Central has an ever-growing set of skills to guide, find, compare, analyze, suggest, and summarize. Assistive features such as **Chat** and task-specific features such as bank account reconciliation assistance are ready to use with no complex setup or training. The features are seamlessly integrated to reduce or eliminate the need to switch between applications.
- **Autonomous agents** intelligently automate key business processes. For example, the Sales Order Agent handles the intake of sales orders from emails and attachments, interprets unstructured data, and generates accurate sales documents. With just a few clicks to configure and activate, you can run these built-in agents. They offer extensive oversight capabilities so you can review and approve activity, ensuring control while reducing manual effort.
- **For makers and pro developers**, Business Central gives you the flexibility to add custom AI solutions and connect to the broader Microsoft cloud of AI-powered apps and services.

Copilot and agents are available only to Business Central online customers.

Note: The author created this article with assistance from AI. Learn more

Automate payables processes with the Payables Agent

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 4, 2025	✔ Nov 7, 2025

Business value

The Payables Agent in Business Central helps you automate tedious and time-consuming accounts payable (AP) and accounting tasks. It saves time and reduces errors. The agent gets vendor invoice attachments from Microsoft 365 email and creates purchase invoice documents in Business Central for review. The agent uses available purchase history or your company's accounting policies to register purchase invoices. With the Payables Agent, AP professionals, clerks, and accountants can focus on more demanding tasks, which boosts productivity and efficiency.

Feature details

Every company has expenses. Some expenses relate to the supply chain. Others relate to operating costs like rent, utilities, leasing, food, phone bills, and software subscriptions. The Payables Agent focuses on operating costs, which are known as overhead expenses. You often receive these expenses as email attachments or through other channels.

Sourcing files and attachments related to purchase of overhead expenses

In the first version, the Payables Agent sources purchase attachments as PDF files from a Microsoft 365 email account where vendors send their invoices. The agent imports these invoice documents into **Inbound E-Documents** in Business Central for further processing.

Processing imported purchase attachment and files

After you import files, Azure Document Intelligence processes them by using optical character recognition (OCR) technology. The results are stored in Business Central in the e-document. An updated PDF attachment viewer lets you validate the OCR processing by viewing the attachment in a near-full screen.

Creating purchase invoices

When Azure Document Intelligence processes a purchase attachment, the Payables Agent creates a purchase invoice document that you can approve and post. The agent uses various predictors and indicators to create these invoices. These predictors and indicators come from the company's available purchase history and history created while using the Payables Agent. The Payables Agent streamlines the entire flow from identifying and importing purchase attachments, capturing relevant information to categorize the expense, registering the expense correctly in the general ledger, and creating purchase documents.

In the future, the Payables Agent will handle more complex scenarios and match them with open purchase orders. The agent also will support e-invoices received through other channels, like PEPPOL and other access points.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Payables Agent overview (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 11/18/2025

Automate tests for Copilot extensions with Business Central Test Toolkit

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ May 1, 2025	✔ May 1, 2025

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 plays a vital role in making sure AI systems stay accurate with diverse inputs. It helps preserve the trust and safety of our customers and their data, and it keeps systems resilient to changes in AI model versions. The developer tools for Copilot in Business Central provide an end-to-end toolkit that covers development, deployment, administration, feedback loops, and now test automation.

Feature details

With this feature, you can:

- Author tests for your prompt dialogs by using a familiar framework in AL and Visual Studio Code.
- Organize your test datasets by purpose and prompt variations.
- Implement automated verification depending on your feature use case.
- Run tests as fully automated or semiautomated.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Test the Copilot capability in AL (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Capture more sales with enhanced Sales Order Agent

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 2, 2025	✔ Nov 7, 2025

Business value

Enhancements to the Sales Order Agent enable it to handle more complex and varied sales inquiries on its own. You spend less time on manual tasks and respond faster. Sales and customer service teams can process more requests with improved accuracy, even when the input is unstructured or incomplete. Guide the agent with natural language inputs, which minimizes workflow disruptions and keeps tasks moving.

Feature details

This release wave adds several enhancements to the Sales Order Agent to improve its ability to process sales inquiries more efficiently and independently. These enhancements benefit users in sales, customer service, and order processing roles who handle high volumes of incoming sales-related emails. These improvements streamline data entry, increase the accuracy of quote creation, and reduce the need for user intervention in repetitive tasks.

- **Attachment processing**: The agent processes email attachments, such as PDFs or images, that contain quote requests. It extracts relevant information from these files and generates a sales quote based on the content. With this capability, users can handle inquiries submitted in less structured formats.
- **Support for multiple ship-to addresses**: When a customer has multiple registered ship-to addresses, the agent detects and applies the correct address if the email request specifies it. This feature improves quote accuracy and reduces the need for follow-up clarification.
- **Capable-to-promise responses**: When the agent responds to item availability requests, it can include items that the company can promise within a reasonable timeframe, such as a later date. This response type uses the built-in planning tools, and you turn it on with a new configuration setting.
- **Automatic email processing**: The agent can automatically start processing emails from registered customers without waiting for manual confirmation of every inbound email. This feature boosts efficiency in scenarios that involve trusted, recurring customers. A new agent configuration setting turns on this feature.

- **Resume with user input**: When users manually modify a quote or assist the agent during a processing issue, they can provide natural language instructions in the Agent pane. This input helps the agent understand the context and details of the manual changes. The agent resumes the task without restarting and incorporates the user's guidance into the ongoing process.
- **Create a sales order, skipping the quote confirmation**: Based on the agent configuration and with all necessary quotation details available to the agent, it can proceed directly to creating a sales order document from the sales quote, without first requiring customer approval of the sales quote. This feature boosts efficiency in scenarios that involve recurring customers.
- **Include custom email signature**: Administrators can configure the email signature they want added to the emails generated by the agent, instead of the generic built-in signature.
- **Set daily limit for the number of emails**: Administrators can control how many emails they want the agent to process per day. The emails that don't fit that limit are automatically processed on the next day.

This release wave expands the availability of the Sales Order Agent to more countries: Denmark, Germany, Italy, France, and Spain. More organizations can use its capabilities. The rollout includes localization support, accuracy testing, and better handling of requests and emails in the local language. These improvements ensure reliable, context-aware performance.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

- Sales Order Agent improvements (video)
- Getting started with Sales Order Agent (video)
- Sales Order Agent overview (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Last updated on 11/18/2025

Chat with Copilot to learn how to use installed add-on apps

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 7, 2025	-

Business value

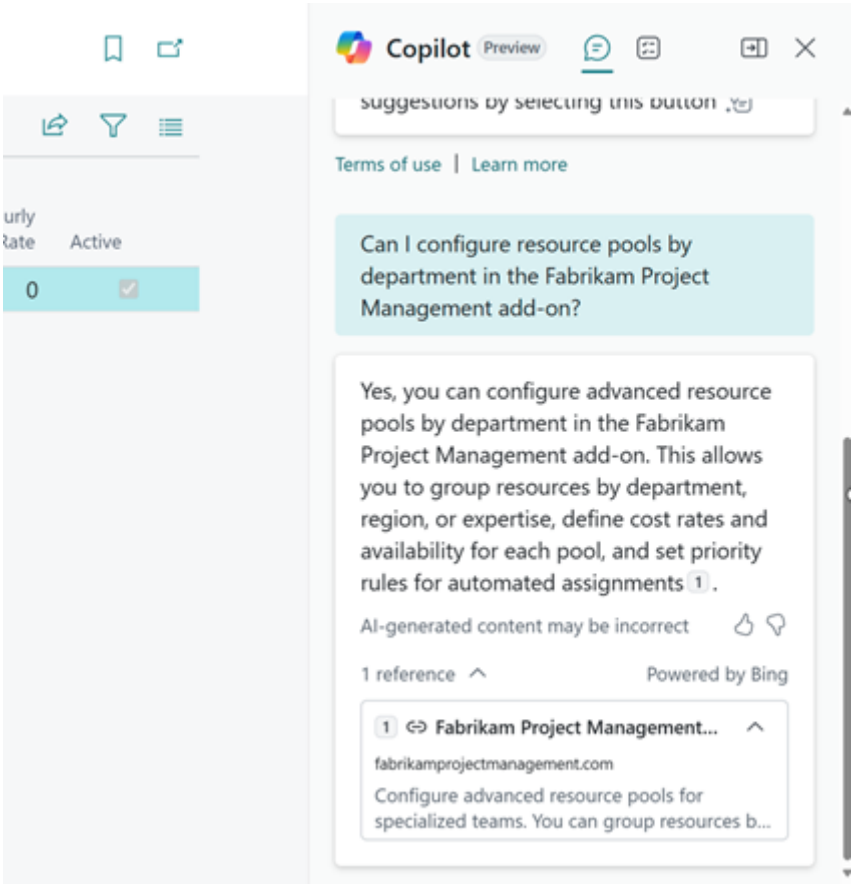
With 2024 release wave 1, we introduced chat with Copilot: a conversational experience where people can get assistance from Microsoft Copilot to find data, get unblocked, or learn new skills. Most of our customers install one or more ISV add-on apps from Microsoft AppSource to enhance Business Central 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. Copilot saves time and reduces context switching when you need answers by searching add-on app documentation on your behalf.

Feature details

Copilot's chat capabilities are enhanced with the following:

- You can ask questions about installed add-on apps, such as setup tips, getting past errors, how to use new pages, fields, and business processes.
- Copilot explains and guides based on online documentation provided by the apps installed in your Business Central environment.
- To enhance Copilot with information from the web, administrators must first **Enable Bing Search** from the **Copilot & agent capabilities** page.



> **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 for sandbox and production environments of any country localization. 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.

Availability

This addition to Chat rolls out in September 2025 and requires Update 26.3 or later.

Preparing your online content for Copilot

We appreciate that app publishers need time to plan their online content strategy. To give our partner community the opportunity to verify compatibility with their own content and move more of their guidance and troubleshooting material online, this functionality is available only in sandbox environments from update 26.3. With update 27.0, it also becomes available in production environments.

Learn more in Prepare your app help for Copilot.

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. To learn more, 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/bcIdeas, 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

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Chat with Copilot (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 11/10/2025

Enhance purchase order line matching with Copilot

10/16/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Apr 1, 2025	-

Business value

The E-Documents feature in Business Central automates the receipt and processing of invoices from vendors. Copilot helps this process by improving how vendor invoices map to and match purchase orders. With Copilot's assistance, you spend less time on tasks that normally require extensive search, lookup, and data entry. This feature improves accuracy and adds new capabilities to matching e-document lines with Copilot.

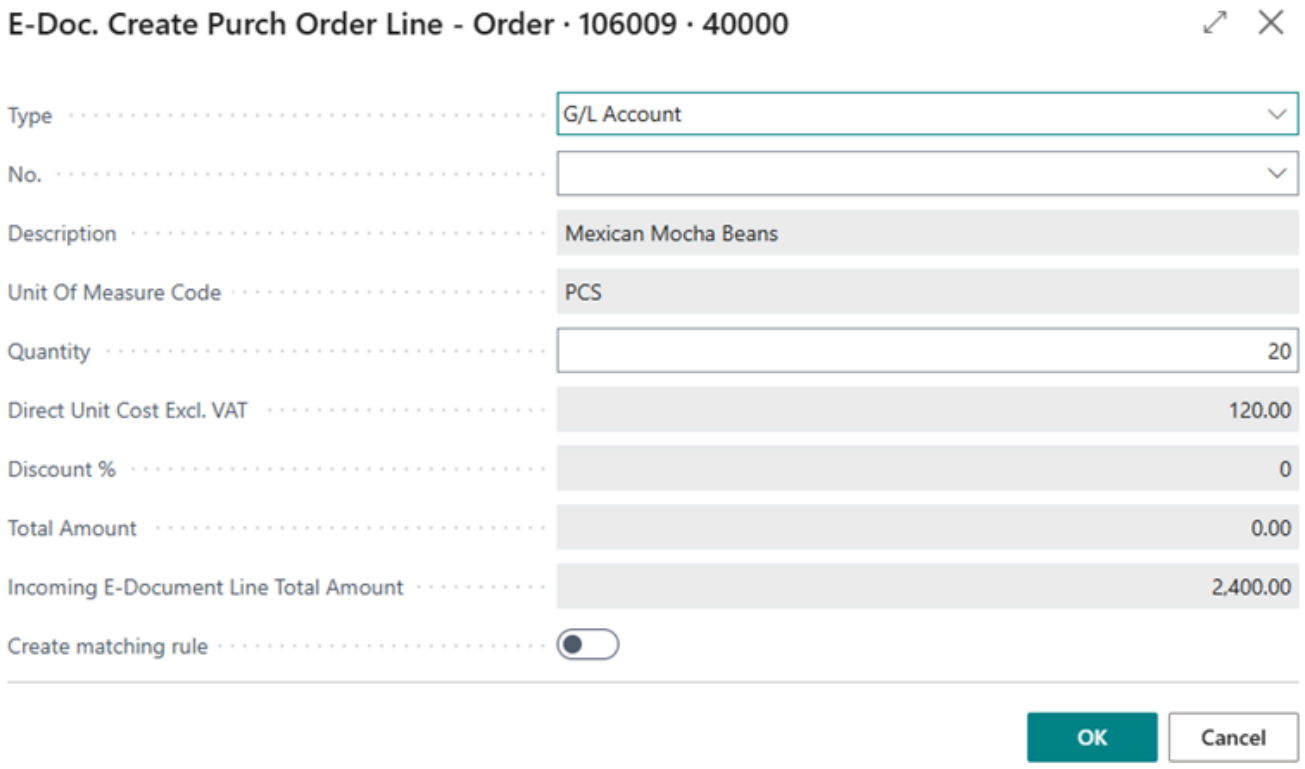
Feature details

> **Note**
>
> - You get this feature as a production-ready preview for production and sandbox environments in any country localization. Supplemental terms of use apply to production-ready previews. For more information, see Supplemental terms of use for Dynamics 365 preview.
> - This feature supports English only. If you use it in other languages, it might not work as intended. Language quality can vary based on your interaction and system settings. This variation can affect accuracy and the user experience.
> - AI-generated content might be incorrect.

Sign in to your Business Central online environment and follow these instructions to use this feature. The feature adds the following capabilities to Copilot:

- In addition to using an 80% string match in descriptions for automated matching, Copilot also uses item references and G/L mappings in preprocessing.

- If an incoming e-document has lines that aren't in the related purchase order, Copilot highlights the discrepancy. You can run the **Create Purchase Order Line** action to resolve the discrepancy. The action prompts you to specify the **Type** (**G/L account**, **Item Charge**, **Resource**, and so on) and the **Number** to connect. You can change the **Quantity** for the purchase order line, but you keep the same total amount for the line. Business Central creates a new line in the **Purchase Order** and keeps it matched with the base line from the incoming e-document.
- When you turn on the **Create matching rule** setting, the lines that Copilot matches are saved for future use as an item reference or a G/L mapping.



Join the conversation

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Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Map e-documents to purchase order lines with Copilot (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Summarize with Copilot

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Apr 1, 2025	-

Business value

Whether you're looking at customer details, a large order, or any other record, you might spend a lot of time trying to understand the current state of your data and the fields that matter. Microsoft Copilot is the AI-powered assistant that helps spark creativity, boost productivity, and eliminate tedious tasks. Copilot summarizes a record into a couple of brief sentences, so you don't have to spend extra effort getting insights about your data and planning your approach.

Feature details

Summarize is a new capability of Copilot in Business Central.

Available from update 26.0:

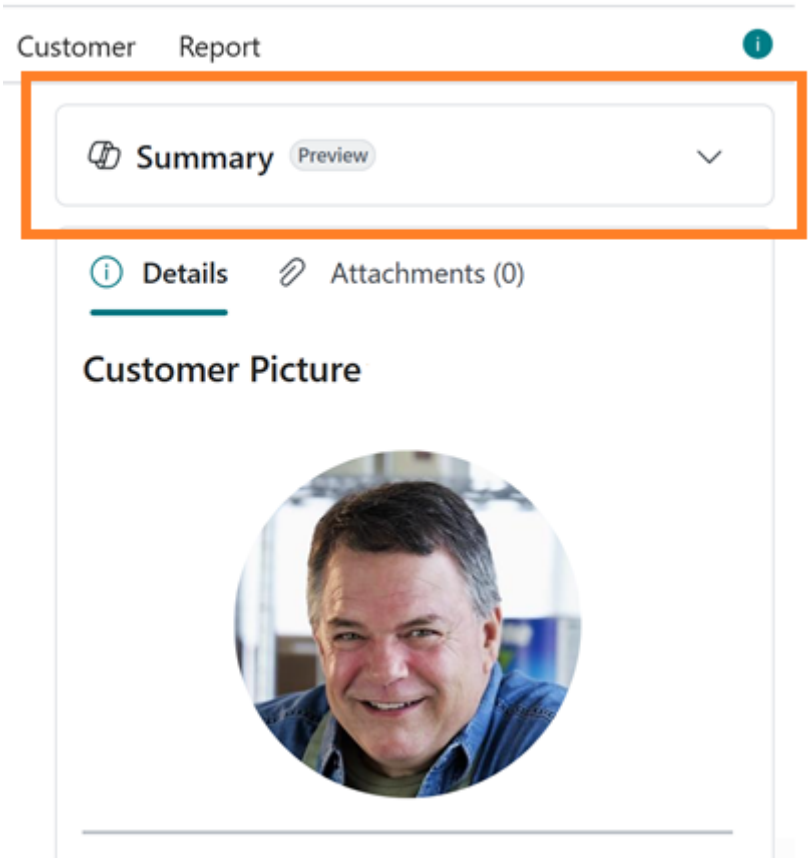
- A new summary FactBox that appears on card and document pages, such as Customer, Sales Order, and Item pages, and even your custom pages.
- Summaries of the record that display a few bullet points with the top things you need to know, plus more insights available on demand.
- Copilot searches through data from the current page, from FactBoxes, and from related pages and statistics to identify what's urgent and important.
- Summaries that are tailored to your role and focus on what matters to you.
- Interaction with the summary to help you navigate, explore, and quickly act on your data.
- The ability to refresh the summary based on the latest data.

Enhancements with update 26.3 (July update)

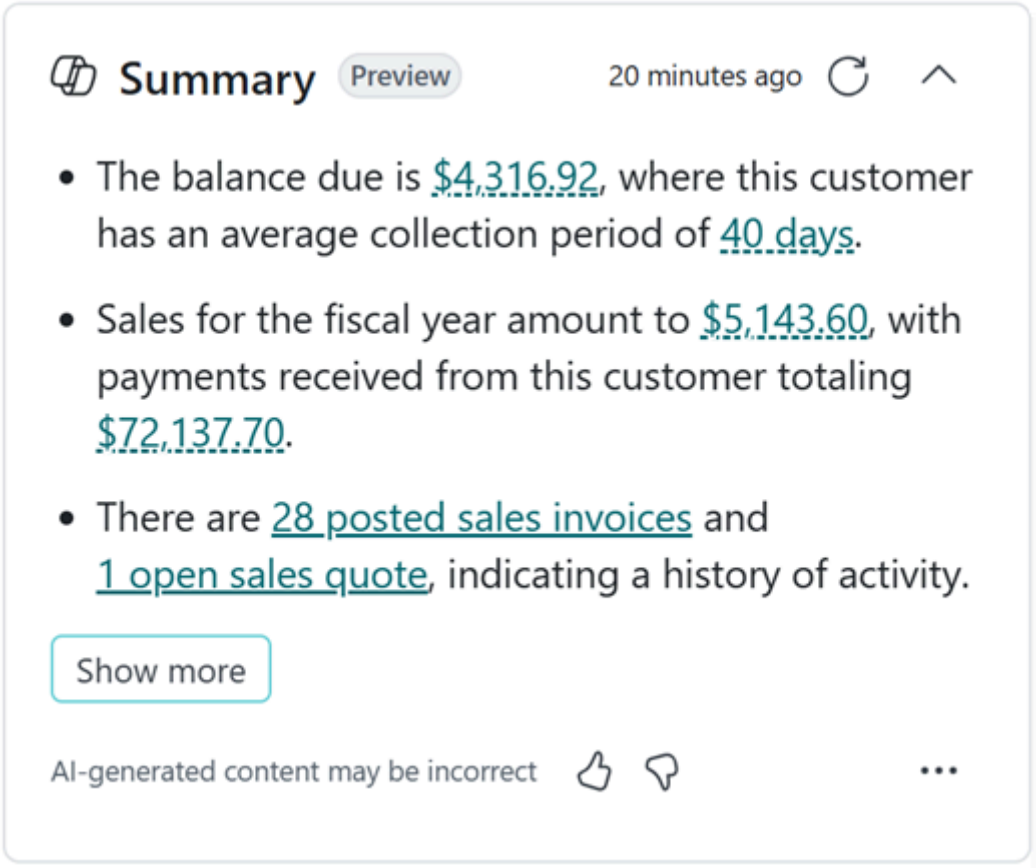
- Summaries are ready in half the time.
- Copy summaries from the FactBox or Copilot pane with the new **Copy summary** menu option or press **Ctrl+C**. Then, paste the summary to share with your coworkers.

Try it out

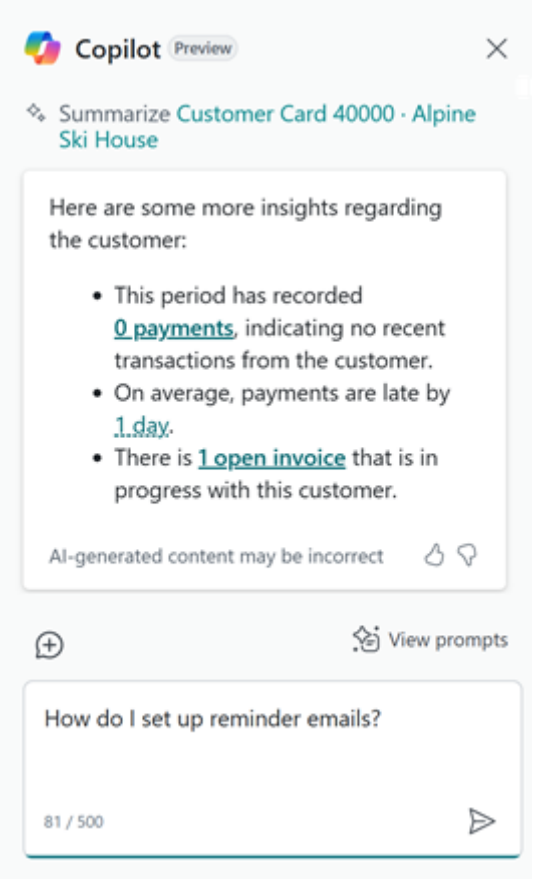
Look for the **Summary** FactBox on your pages and expand it to get started.



Use the links to scroll to the field or go to the page that has more detail.



Show more insights in the Copilot pane, where you can ask follow-up questions to find records, analyze your data, or learn how to act in Business Central.



> **Note**
>
> - As a production-ready preview, this feature is available 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.
> - The feature supports English only. Although you can use it with other languages, it might not function as intended. Language quality can vary based on your interaction and system settings. This variation can affect accuracy and the user experience.
> - AI-generated content might be incorrect.

Security, privacy, and AI

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For more information, see FAQ for Copilot data security and privacy for Dynamics 365.

Join the discussion

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Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Summarize records with Copilot (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use AI resources for your Copilot extensions

> **Important**
>
> **Some of the functionality described in this release plan has 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	✔ Jun 6, 2025	Apr 2026

Business value

A key feature of the developer tools for Copilot in Business Central is that publishers in their AppSource apps use large language models through Microsoft-managed Azure OpenAI resources when they extend Copilot in Business Central. This approach eliminates the need for customers to independently get and manage Azure OpenAI subscriptions. Using the Business Central AI resources is the default and recommended approach. However, some partners or customers might have special requirements that require them to use their own Azure OpenAI subscription when running the feature in production or when developing and testing in sandboxes, which is also supported in the developer tools for Copilot in Business Central.

Feature details

Using the AI resources provides several benefits:

- **Reduced operational overhead**: Avoid the need to handle infrastructure management, updates, monitoring, troubleshooting, or maintenance of custom Azure OpenAI subscriptions. This benefit frees up resources to focus on core business operations and provides value-adding intellectual property (IP) to customers.
- **Simplified onboarding**: Quickly integrate AI capabilities into your solutions without having to navigate the complexities of setting up and managing your own Azure OpenAI subscription.
- **Improved reliability**: Proactive scaling, throttling, load balancing, and fault tolerance measures ensure consistent performance during peak demand.

- **Enhanced security compliance**: Built-in compliance measures and governance, including robust protection from malicious and harmful content, ensure compliance with data residency requirements. This benefit reduces the burden of ensuring regulatory compliance for ISVs.
- **Streamlined experience for customers**: Customers get a seamless AI resource management process without maintaining different configurations for separate ISV solutions.

This capability also provides a cohesive AI consumption tracking and billing experience for Business Central customers. Customers who use AI resources across multiple AI-enabled solutions built with Business Central customer developer tools for Copilot benefit from a unified approach to AI consumption monitoring and invoicing. They don't need to reconcile multiple invoices or metrics from separate ISVs.

For details on billing costs, see AI tools at Message scenarios.

For most publishers, the default Business Central AI resources are enough. However, if you need specific models, including fine-tuned models, that the Business Central AI resources don't provide, you can bring your own subscription for customers. In this case, the publisher is responsible for deploying, maintaining, scaling, and securing the service. The publisher also handles billing AI resources to customers.

We recommend using the developer toolkit AI resources when you extend Copilot in Business Central. You just need to authenticate with the `SetManagedResourceAuthorization` method in the AI Module AzureOpenAI codeunit. You also provide your own Azure OpenAI subscription details, but the authentication process doesn't use them.

AL

```
// Example of using the default toolkit AI resources in AL
AzureOpenAI.SetManagedResourceAuthorization(Enum::"AOAI Model Type"::"Chat
Completions",AzureOpenAIAccountName,AzureOpenAIApiKey,AOAIDeployments.GetGPT4oLatest
());
```

To use your own subscription, authenticate it with the `SetAuthorization` method.

AL

```
// Example of using your own Azure OpenAI subscription in AL
AzureOpenAI.SetAuthorization(Enum::"AOAI Model Type"::"Chat
Completions",GetEndpoint(),GetDeployment(),GetApiKey());
```

This AI billing model isn't designed to replace the existing AppSource monetization pathway for publishers who create Business Central apps. Instead, it offers another option that simplifies

AI consumption for customers and partners. ISVs can use the AppSource monetization option to monetize their IP.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Business Central AI resources (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 12/04/2025

Use autofill with Copilot to suggest field values

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Apr 1, 2025	-

Business value

Entering data can take a lot of time and lead to errors. This challenge affects both casual users of Business Central and expert users who enter record after record throughout their workday. Microsoft Copilot is an AI-powered assistant for work that helps spark creativity, boost productivity, and eliminate tedious tasks. Copilot now suggests appropriate field values so that you can choose them instead of typing.

Feature details

Autofill is a new capability of Copilot in Business Central.

Available from Update 26.0:

- When you create a new record or edit an existing record, Copilot suggests values for some of the editable fields on the page.
- Autofill works for fields in card and document pages, such as Customers, Sales Orders, and Items. It doesn't work for rows or columns. You can use Autofill on your own custom pages.
- Suggestions come from your company data. They might be based on recently used values, frequently used values, or intelligent selections from a choice of values in a lookup or option field. Depending on the field and context, suggestions can also be AI-generated.
- Copilot just suggests the value. You get the chance to review where the suggestion comes from. You stay in control and decide whether to apply the value, discard it, or replace it.

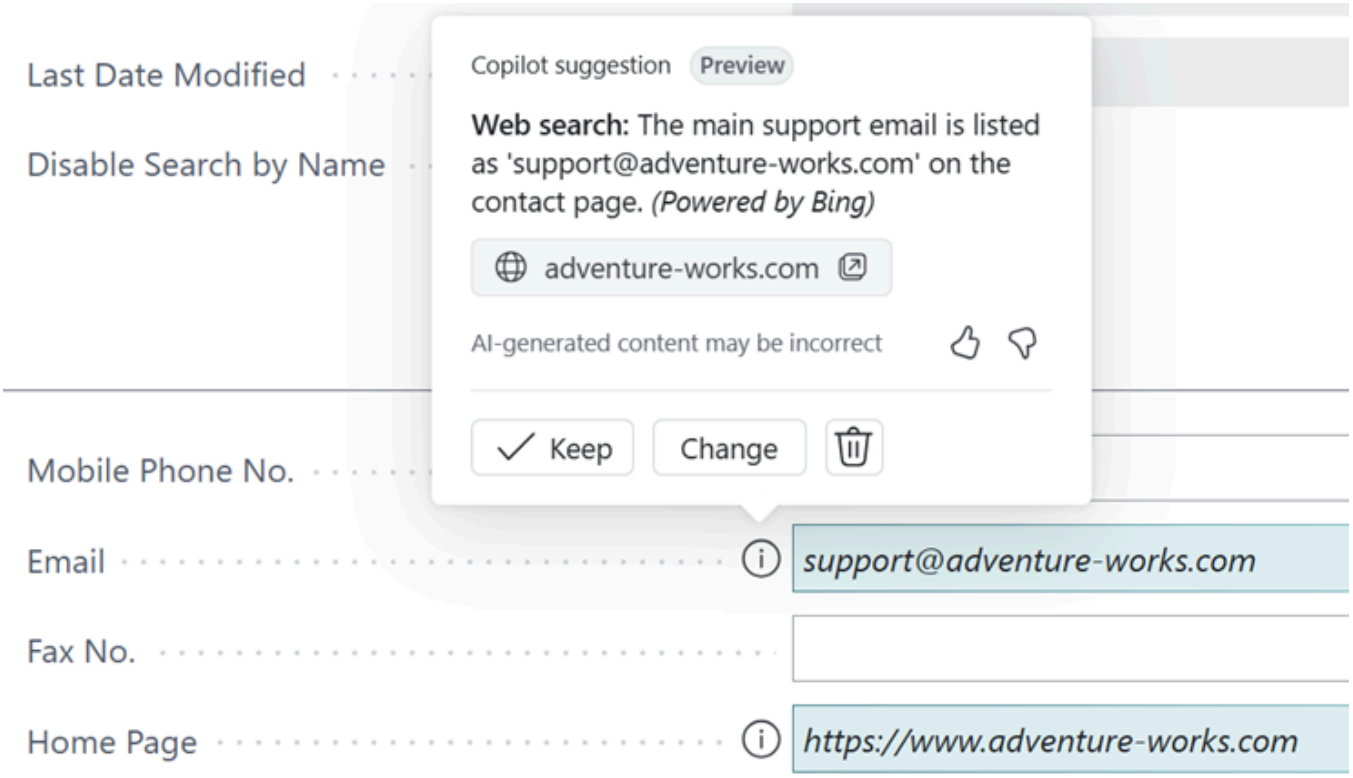
Enhancements with Update 26.3

- Improved accessibility with support for screen readers.
- On fields where Copilot suggests a value, you can now use **Alt + Up arrow** to show the info tip. **Alt + Up** toggles any available field information, such as the info tip, tooltip, or validation error.

Enhancements releasing August 2025

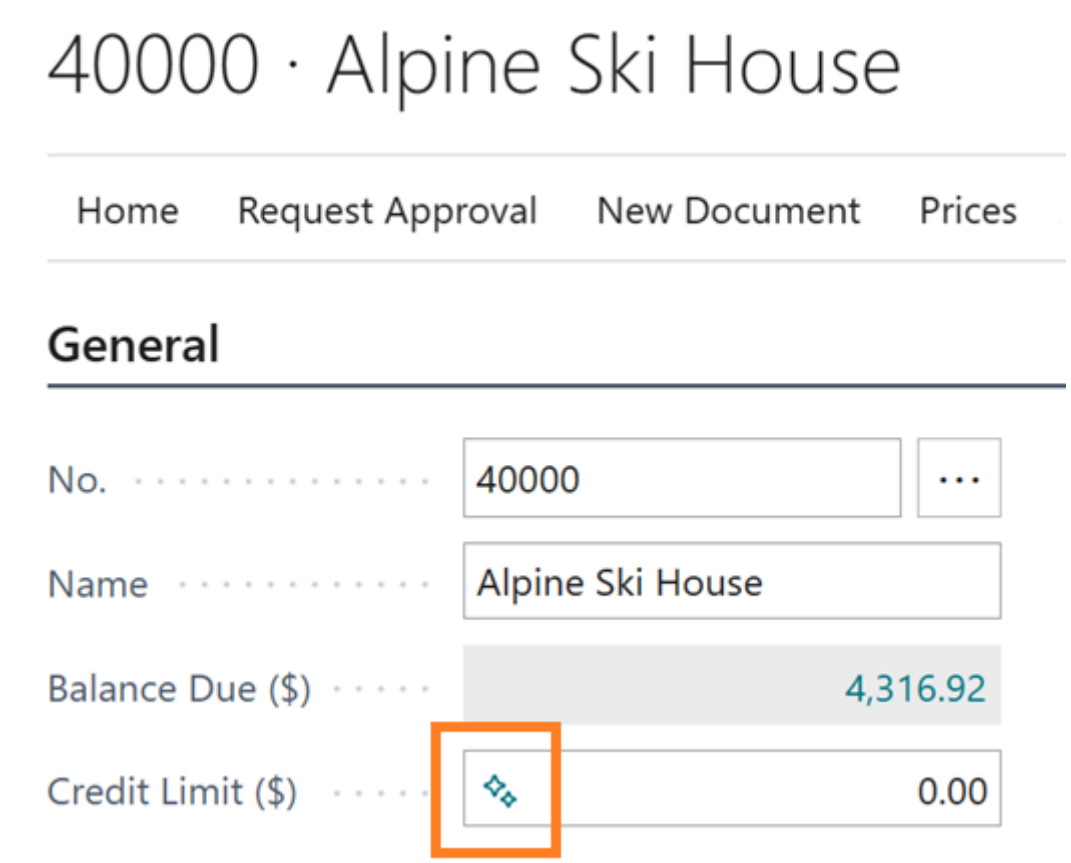
Copilot automatically searches the web for information and provides suggestions for customer or vendor contact details, and similar fields that typically contain publicly-available information.

- Initially, only Sandbox environments support this feature.
- To enable Copilot to get information from the web, administrators must first **Enable Bing Search** on the **Copilot & agent capabilities** page.

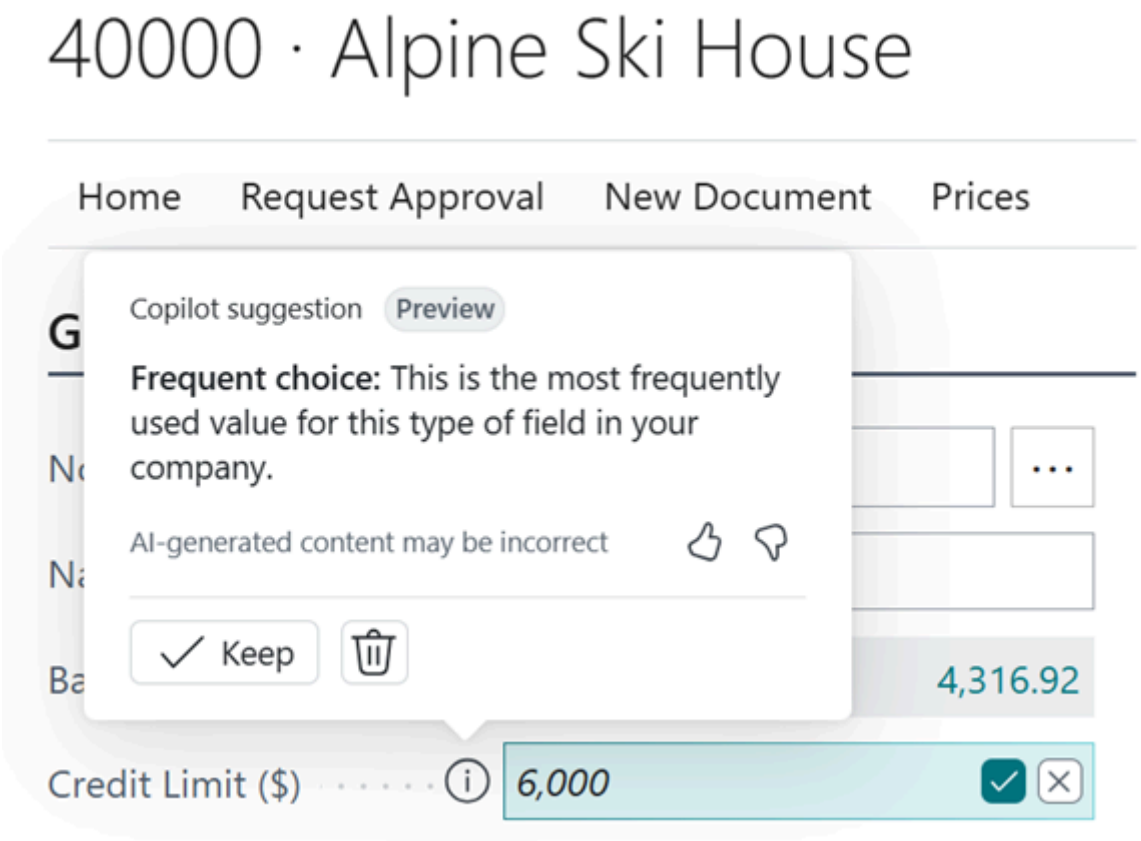


Try it out

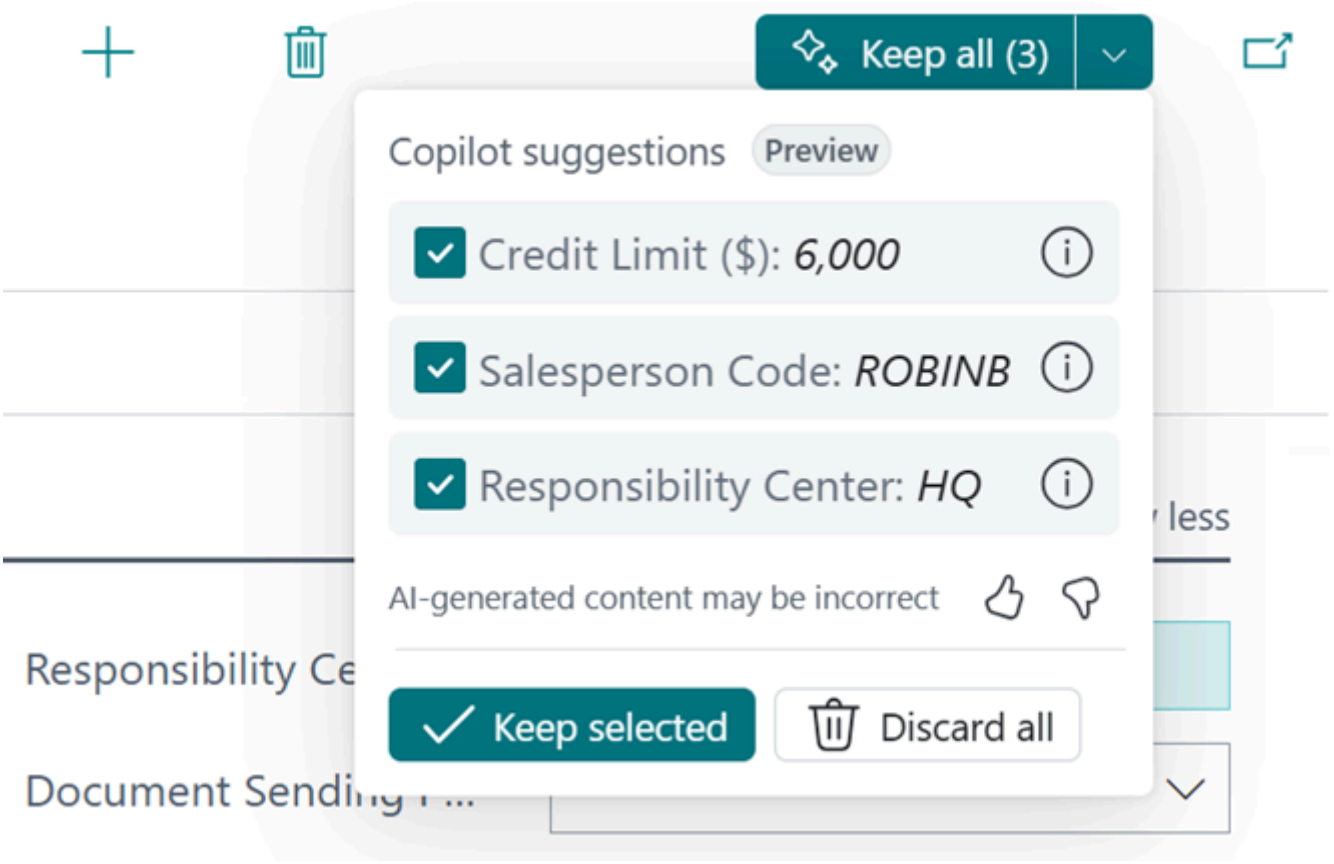
Look for the sparkle icon on fields to ask Copilot for suggestions.



Copilot suggests values for multiple fields in the FastTab group. Use the information icon to see how Copilot created the suggestion.



Review a suggestion, and choose to keep or discard it. You can keep or discard all suggestions in bulk.



> **Note**
>
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Security, privacy, and AI

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Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Autofill fields with Copilot (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Country and regional

09/11/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 ensure Business Central remains compliant with evolving global regulations, every release includes foundational updates that align with the latest legal, fiscal, and data governance requirements. These updates are driven by continuous monitoring of regulatory changes across key markets and industries. Whether it's tax schema adjustments or electronic invoicing mandates, we embed the necessary capabilities to help customers meet their compliance responsibilities without disruption.

We not only address immediate legislative changes, but also build extensible frameworks that support future mandates with minimal friction. These efforts include enhancements to configuration models, localization layers, and reporting structures that allow customers to tailor compliance settings to their specific jurisdictions. By abstracting complexity and offering guided setup experiences, we reduce the operational burden on IT and finance teams while ensuring audit readiness.

Note: The author created this article with assistance from AI. Learn more

Add more text in cash documents in Czech localization

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

Use Business Central's extended text feature to make your cash, sales, and purchase documents for general ledger accounts more informative for your clients and staff. You can turn on the extended text feature manually or automatically.

Feature details

Include extra information in the description for general ledger accounts to notify clients and employees of important information. Add extra lines as extended text in purchase and sales documents. You can also add extra lines to cash documents.

Activate the **Automatic Ext. Texts** on the **G/L Account card** to automatically add extended text on sales, purchases, or cash documents. Use the **Insert Ext. Texts** function to add extended text to cash documents manually.

Automatically enable extended text for a general ledger account

To enable the feature for a general ledger account, use the following steps:

1. Open the card for the general ledger account that you want to add more text to, and then select the **Automatic Ext. Texts** action.
2. Select **New**.
3. Enter the **Code** and **Description** fields.
4. Select the checkboxes for the document types where you want to print the extended text. To include cash documents, select **Cash Desk** on the **Sales** FastTab.
5. Close the page.

Enable extended text manually in a cash document

To add this feature in a cash document, use the following steps:

1. Open a **Cash Document** and insert a general ledger account that has extended text.
2. Select the line, and then choose the **Insert Ext. Text** function.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Add extended text (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Alternative posting groups for employees in Czechia

10/09/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2025	✔ Oct 1, 2025

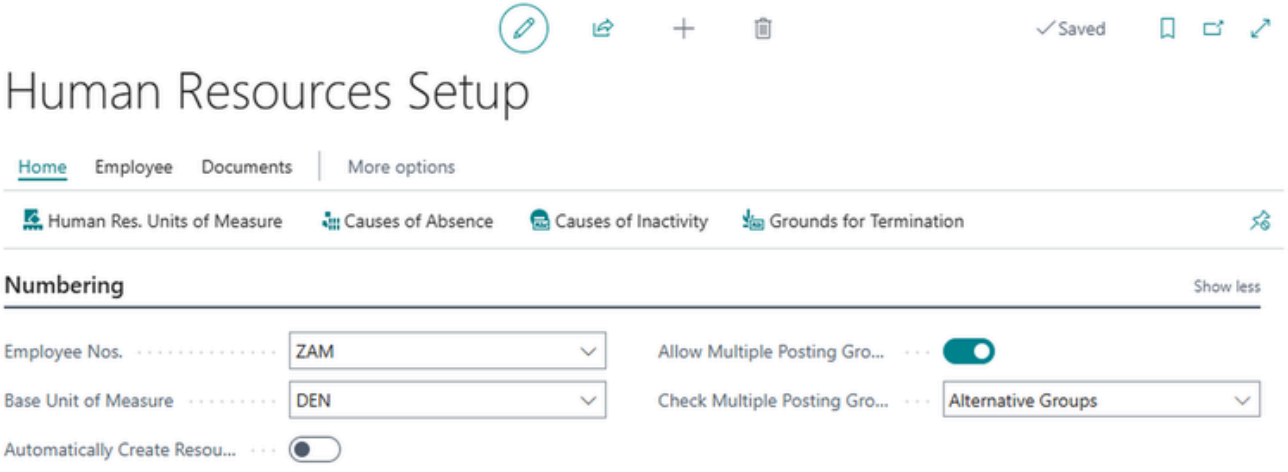
Business value

With this modification, turnovers on employee balance accounts will remain unchanged and values will be preserved during analysis.

Feature details

If **different employee posting groups** are used in a general journal or payment document, the G/L entries are automatically reallocated among the accounts of each posting group when employee entries are applied.

The previous posting method for applying items increased turnover on both the debit and credit sides by the same amount. With this modification, the balancing is treated as a correction—meaning that postings are made to only one side, either debit or credit account. This **approach prevents turnover from increasing on balance accounts** and ensures that values remain accurate in analysis.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Alternative posting groups for employees in the Czech version (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Calculate and post VAT settlement by Activity Code - Italy

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Jul 1, 2025

Business value

By calculating VAT settlements based on activity codes, you ensure full compliance with Italian tax regulations.

Feature details

This feature enables you to set up different **Activity Codes**, like trade or service, for use in **VAT Settlements**. When you turn on this feature, Business Central lets you post multiple VAT settlements in the same period, with each settlement linked to a different activity code. The system also records these activity codes in the **Periodic Settlement VAT Entry**. When you post a VAT settlement for a specific period, the system automatically records the period in the related activity codes, so your reporting stays accurate and compliant.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Submit VAT Statements in the Italian Version - To settle and post VAT transactions (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Check total amounts on purchase advances for Czechia

10/09/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2025	✔ Oct 1, 2025

Business value

Take control of purchase advances with improved accuracy and financial integrity. This feature ensures that all line items align perfectly with the external purchase advance amounts, eliminating discrepancies and reducing manual errors in accounts payable processes. With automated validation, financial teams gain greater confidence in their data, leading to smoother operations and compliance.

Feature details

Financial controls and compliance are enhanced by introducing advanced verification mechanisms for purchase advance transactions. With the latest updates, organisations can ensure greater accuracy and alignment between document headers and line items, reducing the risk of manual errors and improving the reliability of their procurement workflows. These improvements are designed to support robust audit trails and streamline operations, particularly in environments where precise documentation and regulatory adherence are paramount.

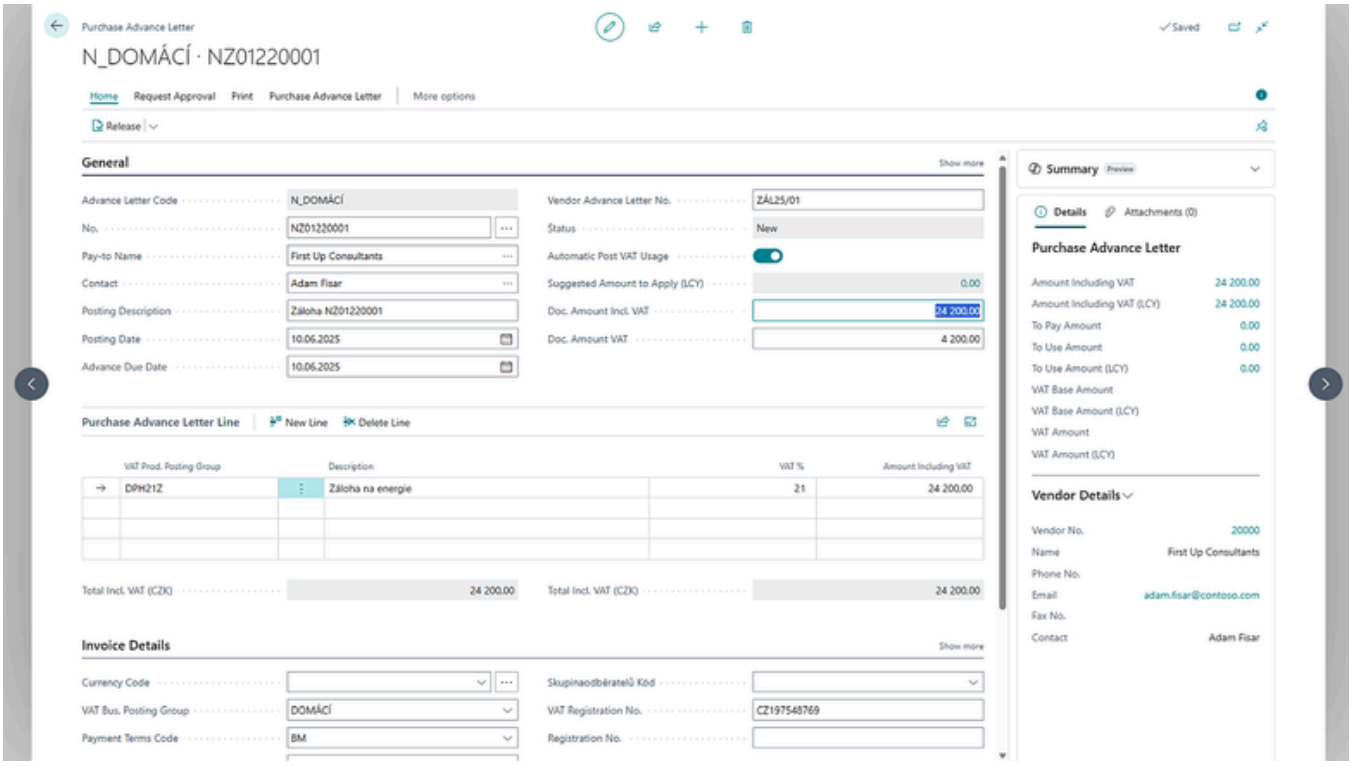
The feature includes the following fields and benefits:

- Seamless total amount verification for Purchase Advances
  - Expands standard total amount validation to the Czech localization, ensuring consistency in purchase processes.
  - Users can activate the feature in Purchases & Payables Setup by selecting Check Doc. Total Amounts.
- Introduce new validation fields
  - When enabled, the following fields appear on Purchase Advance Letter pages:
    - **Doc. Amount Incl. VAT**: Indicates the total amount, including VAT.
    - **Doc. Amount VAT**: Indicates the VAT amount on the document.

    - These fields must be filled before release, ensuring that advance totals match line entries.
- Enables real-time accuracy checks.

Before releasing the document, Business Central automatically validates whether the amounts in the document header match the total of purchase advance letter lines.

If inconsistencies arise, the system prevents errors by prompting users to correct discrepancies before finalizing transactions.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

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Additional resources

Advance payments localization for Czech (Extension) (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Define allowed languages per environment

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

You can now more easily select or change the UI language that you use. When administrators make only the languages that their environment supports available for selection on the **My Settings** page, they save time and reduce confusion for users.

Feature details

Business Central's user interface is translated by apps that Microsoft provides, or by language apps that our partners provide on AppSource. Administrators install the language apps in their Business Central environment. On the **My Settings** page, you select the language you want to use for Business Central.

Previously, when you selected your desired language, you chose from the full list of all languages that the Business Central platform supports, regardless of whether a language app is installed. This experience sometimes caused confusion and made it more difficult to select a language. In most cases, only a few languages are relevant for an environment.

Administrators can now use the new **Allowed Languages** page to define the languages that appear when people select their language. When you show only supported languages, it's easier to select a language you can use. This change helps avoid confusion.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Specify the languages that are available in your Business Central environment (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Get UI improvements for Unreliable Payer for Czechia

10/09/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2025	✔ Oct 1, 2025

Business value

This enhancement improves the user interface by providing greater flexibility and efficiency in managing vendor bank accounts. It enables users to work more effectively with unreliable VAT payer data and streamlines the vendor bank account creation process. With intuitive changes in dialog interactions and improved accessibility to key functionalities, users can save time and reduce errors in financial data management.

Feature details

The Unreliable VAT Payer functionality is enhanced with the following improvements:

- Enhanced VAT Payer Reliability Check
  - When the import process completes, an interactive dialog appears instead of a static confirmation message. With the interactive dialog, you can immediately open the Unreliable Payer Entries page.
  - When you select **Yes**, you go directly to the Unreliable Payer Entries page. You can create a new vendor bank account.

- Improvements to Vendor Bank Account Creation
  - A new **Preferred Bank Account** checkbox is available on the **Get Vendor Bank Account Code** page. When you select the checkbox, Business Central automatically fills in the **Preferred Bank Account Code** field on the **Vendor Card** page.
  - Quick access to vendor bank accounts. A new shortcut on the **Unreliable Payer Entries** page gives you direct access to the **Vendor Bank Accounts** page. This shortcut simplifies navigation and helps you quickly access relevant financial data.

These changes help you work more efficiently, access key financial information more easily, and reduce potential errors in vendor bank account management.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Unreliable payer in the Czech version (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Hide lines with zero quantity in Czech document reports

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

When you hide lines with zero quantity in the Czech localization document reports, you make these reports clearer. The **Hide lines with zero quantity** toggle prevents the system from printing order lines in the posted document when there's no quantity to process.

Feature details

By setting the **Hide lines with zero quantity** toggle in the dialog for the following Czech localization document reports, you can control whether the report prints or hides lines with zero quantity:

- Sales Invoice
- Sales Shipment
- Sales Credit Memo
- Sales Return Receipt
- Purchase Invoice

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

New Design of Output Documents in the Czech Version (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

New Contoso Coffee Demo Dataset for Intrastat in Czechia

10/09/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2025	✔ Oct 1, 2025

Business value

We are creating a demonstration tool that includes Intrastat configuration and data, tailored specifically for Czech localization in Business Central. This tool aims to help users more effectively comprehend and optimize their Intrastat workflows within the Czech localization context.

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 Intrastat 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.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Introduction to Contoso Coffee Demo Data (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

New pages for purchase and sales advance entries for Czechia

10/09/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2025	✔ Oct 1, 2025

Business value

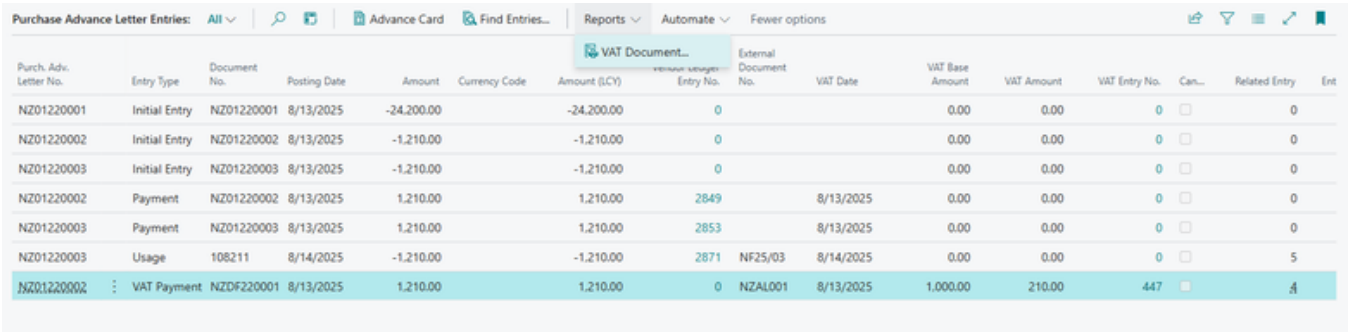
New pages for Purchase and Sales Advance Entries improve financial oversight and streamline the management of advance payments. Users gain a clear, centralized view of all advance-related transactions, enhancing efficiency and decision-making.

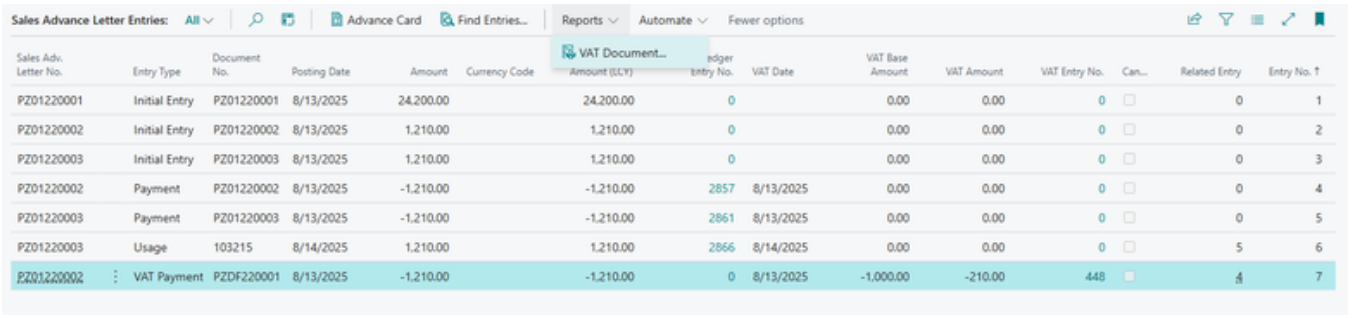
Feature details

The introduction of dedicated pages for Purchase Advance Entries and Sales Advance Entries enhances visibility and efficiency in managing advance transactions. Similar to the existing pages for Vendor Ledger Entries, Purchase Lines, and Cash Document Lines, these new pages provide users with a centralised overview of all advance-related entries. This improvement simplifies navigation, enables better financial oversight, and enhances decision-making for purchase and sales processes.

The following are the benefits:

- These pages display all advance-related entries, providing users with a structured and unified view, similar to other transactional lists in Business Central.
- Users can quickly filter, search, and access relevant financial data relating to advance payments.
- Improved financial management and transparency.
- By offering a clear and comprehensive view of purchase and sales advance lines, users can efficiently track outstanding advances and monitor financial obligations.
- The new functionality ensures a more intuitive workflow by aligning with the existing pages for various transaction types.
- This enhancement streamlines the handling of advance payments, improves usability, and provides users with a consistent experience across related financial records.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Advance payments localization for Czech (Extension) (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Post cash documents to projects in Czech localization

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

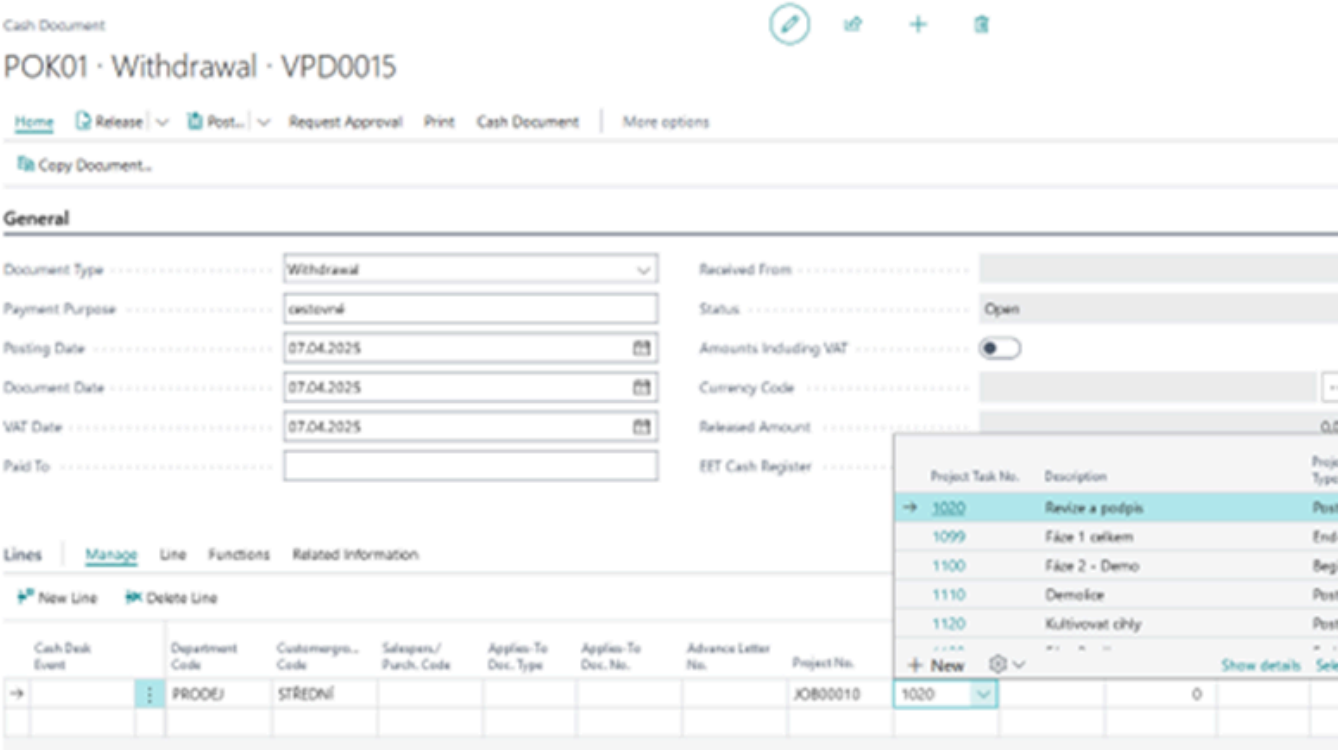
The cash documents in Czech localization are enhanced so that you can post related costs and revenues to projects. This enhancement works just like the usual method of posting to projects from Project G/L Journals.

Feature details

Use the **Project G/L Journal** page to post exceptional or one-time project expenses directly to the relevant project account. If these expenses involve cash payments, use **Cash Documents** to post them to the project.

Open a **Cash Document** to enter the expense details. Create a new line, and enter the expense details, including the **Project No.** and **Project Task No.** fields.

When the **Cash Document** is complete, select **Post**.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Cash Desk localization for Czech (extension) (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Reconciliation feature in cash documents for Czechia

10/09/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2025	✔ Oct 1, 2025

Business value

The new reconciliation feature in cash documents enhances financial transparency and control by allowing users to preview the net change and balance across all relevant accounts before posting. It supports more accurate and efficient financial reviews by including not only general ledger accounts marked for reconciliation, but all financial accounts and related account types such as bank accounts, customers, vendors, employees, and fixed assets.

By providing a clear overview of the financial impact directly from the document, this functionality helps users identify discrepancies early and reduce posting errors.

Feature details

The new reconciliation feature for cash documents allows users to preview net change and balance after posting.

When this function is used on a cash document, the system displays a preview of the net change and balance not only for the selected cash account, but also for all accounts used in the document lines.

Reconciliation is performed not only for general ledger accounts marked as Reconciliation Account, but for all financial accounts as well as accounts of other types, including:

- Bank accounts
- Customers
- Vendors
- Employees
- Fixed assets

The function works exclusively with the amounts entered in the document lines and doesn't calculate VAT amounts for VAT accounts.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Cash desk localization for Czech (extension) (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Showcase Business Central with Czech localization demos

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

The Contoso Coffee app's demo tool makes it easy for you to set up demos in any environment. It includes content tailored for the Czech market. This content helps boost sales and marketing efforts while providing a great user experience.

This localized content makes sure that demos are relevant to the Czech market. It enables presales specialists to effectively showcase Business Central's features in a realistic setting.

Feature details

The **Contoso Coffee** app offers a demo tool that comes with demo data for the Czech localization. This tool improves the Business Central experience by adding content specific to the Czech Republic on top of the base application.

Install this tool in any environment so that presales specialists can run it on Cronus or MyCompany. They can get the setup and demo data they need to showcase features in different Czech localization scenarios. For Business Central on-premises, the product media includes the demo tool and data as source code.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Introduction to Contoso Coffee Demo Data (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use modern search to access data in Czech localization

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

Fast access to data is key. The Czech localized version of Business Central provides a modern search option on lists that focuses exclusively on columns enhanced with full-text search capability. At the same time, the version keeps the option to use the older method.

Modern search speeds up the search process and delivers more precise, relevant results. This improvement boosts user satisfaction and productivity.

Feature details

You 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 and lists.

Turn on modern search by selecting **Use optimized text search** on the **Feature Management** page. When enabled, modern search is the default search method on list pages that include full-text search columns. To switch between modern and legacy search methods on pages, use the **Use legacy search** and **Use modern search (faster)** options in the search box.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Searching (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use Peppol PINT A-NZ format for e-documents in AU and NZ

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

Users in Australia and New Zealand can use e-invoicing in Business Central. This feature introduces electronic documents for invoices, which significantly enhance business efficiency by streamlining administrative processes and reducing operational costs.

The feature minimizes manual data entry errors and accelerates transaction processing, so users get quicker and more accurate financial computation and tracking. It also reduces the need for physical storage space and paper usage, which helps environmental sustainability. Real-time access to electronic documents improves transparency and facilitates better decision-making. This feature leads to increased productivity and customer satisfaction.

Feature details

Use the **E-Documents** framework localized for Australia and New Zealand to boost productivity and customer satisfaction.

This framework supports the **Peppol PINT A-NZ** electronic invoice format to meet local requirements. You can choose from existing Peppol service providers for your communication channel through access points. You can exchange documents by uploading them manually or send them through email.

You configure the setup by going to the **E-Document Service** page. Select **PINT A-NZ** as the **Document Format** and choose your preferred service provider in the **Service Integration** field.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Electronic invoicing in Australia (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use VAT Return to report VAT in local and functional currencies in Czech Republic

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

Starting January 1, 2024, Czech legislation permits Czech companies to set a functional currency and keep accounts in a currency other than Czech currency. This change is part of the amendment to Act No. 563/1991 Coll. on Accounting. Companies can use the Additional Reporting Currency functionality to track transactions in the local currency. Therefore, you see the addition of the extra reporting currency to the VAT Return.

Feature details

Previously, Czech legislation handled VAT with a functional currency only through the **VAT Statement**. The VAT statement shows the VAT amount in either the local currency or another reporting currency.

The **VAT Return** feature now shows amounts in both the local and extra reporting currencies. It also generates files for submitting the VAT return with the correct amounts according to Czech legislation. This feature is part of the extended option for reporting VAT through **VAT Return**.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Functional Currency – Czechia (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use ZUGFeRD format for E-Documents in Germany

08/21/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Jul 1, 2025	✔ Aug 1, 2025

Business value

The ZUGFeRD e-document format combines regulatory compliance, process automation, and modern document standards. The format also takes advantage of the new PDF/A platform capabilities.

Feature details

Use the **E-Documents** framework localized for Germany to boost productivity and customer satisfaction while following Germany's e-invoicing rules.

This framework supports the **ZUGFeRD** hybrid electronic invoice format and meets local requirements. You can choose from existing Peppol service providers for your communication channel through access points. You can exchange documents by uploading them manually or send them through email.

You configure the setup on the **E-Document Service** page. Select **ZUGFeRD** in the **Document Format** field, and choose your service provider in the **Service Integration** field.

When you post the sales invoice, Business Central creates a PDF using the report layout you choose and automatically attaches the XML file. When you receive an e-invoice from your vendor, Business Central automatically extracts the XML from the PDF and proceeds as it would with any other e-document format.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Electronic invoicing in Germany (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Development

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

These releases bring powerful new extensibility features that empower developers to create adaptable, resource-efficient solutions. With these features, developers get greater flexibility to meet evolving business needs.

By defining profile extension objects, developers can change and customize user profiles without duplicating code. This approach boosts productivity and keeps code integrity intact. Developers can now add resources to extensions and access them from AL, which simplifies data initialization and setup. Improvements to the **Explore in Visual Studio Code** feature provide seamless access to GitHub repositories. With this feature, developers can easily pull, inspect, or hotfix code versions, even when IP protection is in place. By using full-text search metadata on table fields, developers enable data search capabilities that deliver faster, more accurate results. This enhancement increases user satisfaction and efficiency.

Resellers and publishers save time when they validate their solutions by running multiple AppSource apps through a public NuGet feed that provides downloadable symbols and AL-Go for GitHub handling this automation. Also, a rule-based scheduling mode for performance profiling enables background profiling to pinpoint and address performance issues, so you spend less time troubleshooting.

Note: The author created this article with assistance from AI. Learn more

Convert simple type values to text using new ToText method

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

Easily convert the value of simple types to text by using the new ToText method on the type. For example, use this method on a Date type.

Feature details

The ToText method is now available for simple types such as BigInteger, Boolean, Byte, Date, DateTime, Decimal, Duration, Guid, Integer, Time, and Version. Use this method to easily convert these types to text.

For advanced formatting options, use the FORMAT method.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

BigInteger.ToText() Method (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Create lists and dictionaries of interfaces in AL

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

In the Business Central AL language, dictionaries and lists are powerful data structures that offer efficient lookup of key-value pairs and ordered collections. Both data structures let you dynamically manage collections of data. Now, you can create lists and dictionaries of interfaces. This capability gives you more flexibility and power when you work with interface abstractions.

Feature details

Now you can create lists or dictionaries of interfaces.

The syntax follows these patterns. They align with the syntax for creating a List or Dictionary of a simple type:

- List of [Interface IFoo]
- Dictionary of [; Interface IFoo]

In the system application, you can find complete examples of using a list of interfaces in the Telemetry Logger.

The following examples show how to create lists and dictionaries with interfaces.

```al
codeunit 50120 MyDictionaryCodeunit
{
    0 references
    procedure MyProcedure(): Dictionary of [integer, Interface "Barcode Font Provider"]
    var
        localDict: Dictionary of [integer, Interface "Barcode Font Provider"];
        IProvider: Interface "Barcode Font Provider";
    begin
        localDict.Add(2, IProvider);

        exit(localDict);
    end;

}
```

src/System Application/App/Telemetry/src/Logging/TelemetryLoggersImpl.Codeunit.al

```al
15          RegisteredTelemetryLoggers: List of [Interface "Telemetry Logger"];
50  …re GetRelevantTelemetryLoggers(ExcludePublisher: Text) RelevantTelemetryLoggers: List of [Interface "Telemetry Logger"]
```

src/System Application/App/Telemetry/src/Logging/TelemetryLoggers.Codeunit.al

```al
61      internal procedure GetRelevantTelemetryLoggers(ExcludePublisher: Text): List of [Interface "Telemetry Logger"]
```

src/System Application/App/Telemetry/src/Logging/TelemetryImpl.Codeunit.al

```al
58      var
59          TelemetryLoggers: Codeunit "Telemetry Loggers";
60          TelemetryLogger: Interface "Telemetry Logger";
61          RelevantTelemetryLoggers: List of [Interface "Telemetry Logger"];
62      begin
63          AddCustomDimensionsFromSubscribers(CustomDimensions, Publisher);
64          AddCustomDimensionsSafely(CustomDimensions, CallerCustomDimensions);
```

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Create List and Dictionary of an interface (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Embed Power BI content in web client with new page type

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

Get an enhanced user interface when you view embedded Power BI reports in Business Central. The new interface makes it easier to navigate and interact with your data.

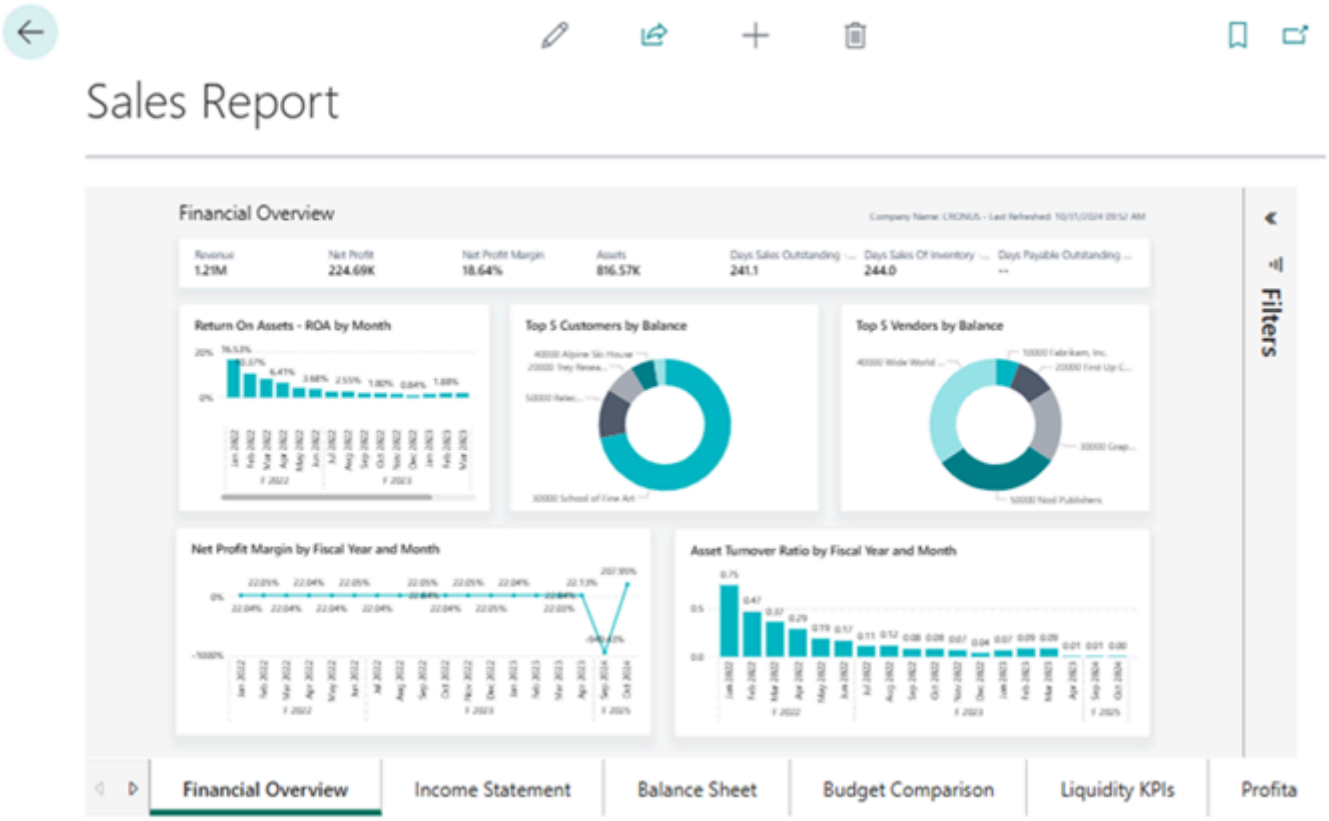
Feature details

This release wave introduces a new page type that enhances the Power BI report embedding experience. Power BI reports display in a slim, visually appealing, and user-friendly interface. Key improvements include:

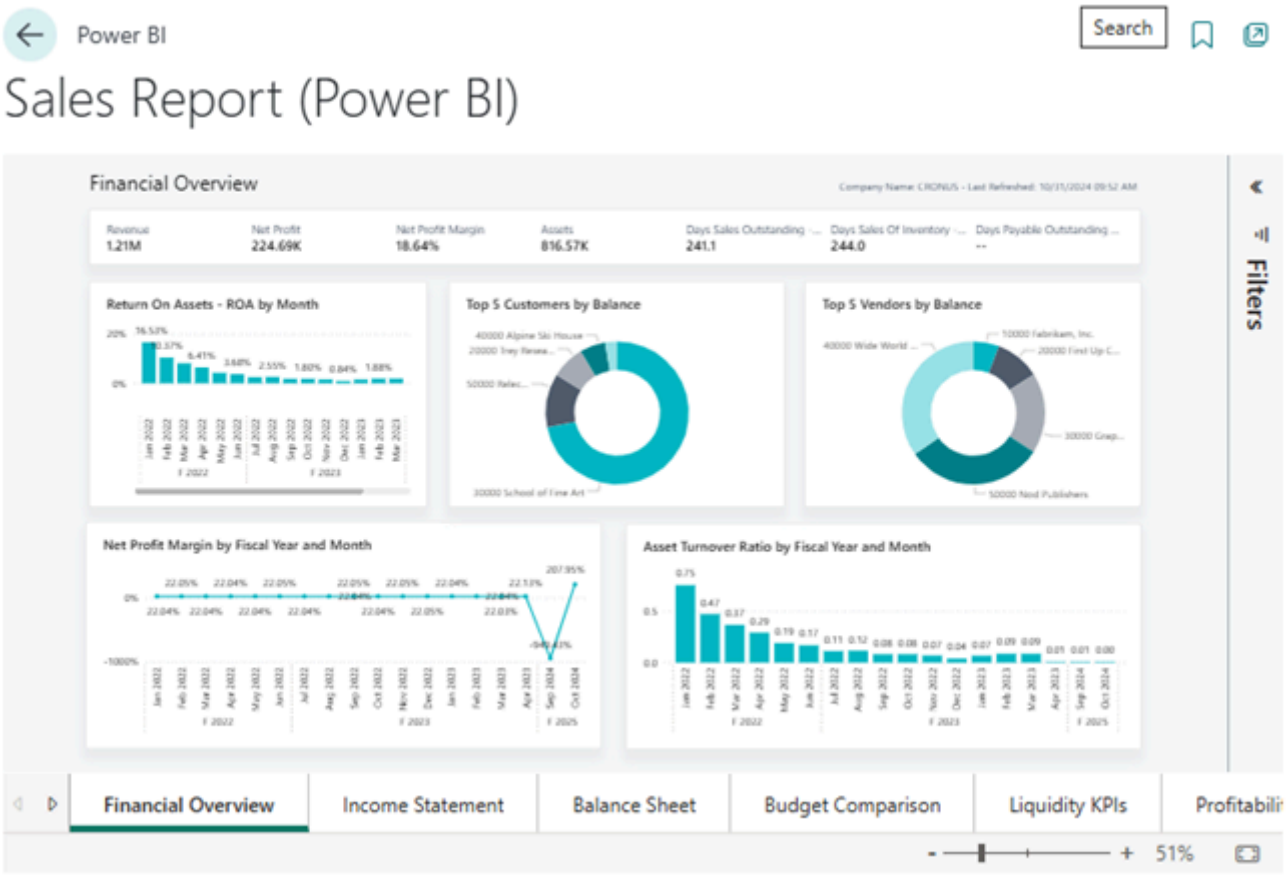
- The interface removes irrelevant buttons, such as **Delete** and **Edit**, for embedded reports.
- The interface refines and balances margins and spacing around reports.
- The interface uses titles that take up less space.
- The interface adds new zoom and fit-to-page controls.

These enhancements apply to most Power BI reports in Business Central, so you get a consistent, improved experience across the platform. The following images show the difference between the previous and new experiences for the Sales Report:

Before



Now



New UserControlHost page type

The `UserControlHost` page type in AL enables the new Power BI report embedded experience. The `UserControlHost` page type simplifies embedding custom controls, such as Power BI reports, compared to using a `Card` page type in previous releases by removing unnecessary complexities.

Key aspects of the page type include:

- It excludes properties and triggers that don't apply to control add-ins, such as the SourceTable property and the OnAfterGetRecord trigger.
- In the UI, the embedded control takes up the entire page space, so there are no extra actions or buttons.
- Developers can easily use the page type in AL code.

Consider this simplified code example of a page that shows a WebPageViewer control by using the `Card` page type.

AL

```
page 50100 UserControl
{
    PageType = Card;
    ApplicationArea = All;
    SourceTable = Customer;
    InsertAllowed = false;
    ModifyAllowed = false;
    DeleteAllowed = false;
    Editable = false;
    Caption = 'UserControl Example';

    layout
    {
        area(Content)
        {
            usercontrol(Webpageview; WebPageViewer)
            {
                ApplicationArea = All;

                trigger ControlAddInReady(callback: text)
                begin
                    CurrPage.Webpageview.Navigate(HyperLinkTxt)
                end;
                trigger Refresh(CallbackUrl: Text)
                begin
                    CurrPage.Webpageview.Navigate(HyperLinkTxt)
                end;
            }
        }
    }
}
```

The following code uses the `UserControlHost` page type. The `UserControlHost` page type doesn't allow the `SourceTable`, `InsertAllowed`, `ModifyAllowed`, and `DeleteAllowed` properties.

AL

```
page 50122 UserControl
{
    PageType = UserControlHost;
    ApplicationArea = All;
    Editable = false;
    Caption = 'UserControl Example';

    layout
    {
        area(Content)
        {
            usercontrol(Webpageview; WebPageViewer)
            {
                ApplicationArea = All;

                trigger ControlAddInReady(callback: text)
                begin
                    CurrPage.Webpageview.Navigate(HyperLinkTxt)
                end;

                trigger Refresh(CallbackUrl: Text)
                begin
                    CurrPage.Webpageview.Navigate(HyperLinkTxt)
                end;
            }
        }
    }
}
```

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

The UserControlHost page type (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Experience user-friendly client activity descriptions in performance profiles

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

Recently, we introduced the ability to capture performance profiles in the background with scheduled profiles. A challenge with investigating the resulting profile was that it's hard to filter and group entries by actual user actions. In this release, we added better contextual user action capture, so you can more easily analyze scheduled performance profiles.

Feature details

The performance profiler now maps client browser interactions to user-centric descriptions. Measurements include descriptive values that resemble the user actions, so you get more clarity when analyzing profiles, especially when you filter and group them.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Extend CardPageId on list and listpart pages

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

You can't modify several page properties by using page extensions. This restriction mainly prevents race conditions that happen when multiple extensions try to modify the same property. However, some properties can be modified. We received many votes on Ideas for those properties. One of the most popular requests is to extend the **CardPageId** property on list and list part pages. You can add a card page when an existing list doesn't have a card page, or you can replace the card page with a different card page. In this release, you can extend the **CardPageId** property.

Feature details

You can now change the `CardPageID` property on list and list part pages by using a `PageExtension` object. With this change, you can choose which card page appears when a user double-clicks an item on a list or list part page.

If the base page already has the property, the value you set in the `PageExtension` replaces it. If multiple `PageExtension` objects change the property, the change in the last extension takes effect. Because per-tenant extensions apply after AppSource apps, you can resolve any conflict between multiple AppSource apps that set the same `CardPageId` in a per-tenant extension. This conflict rarely happens.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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:

- Allow CardPageId on Page Extensions for standard BC tables without card page.

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Additional resources

CardPageId Property (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Generate launch json file from the web client

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

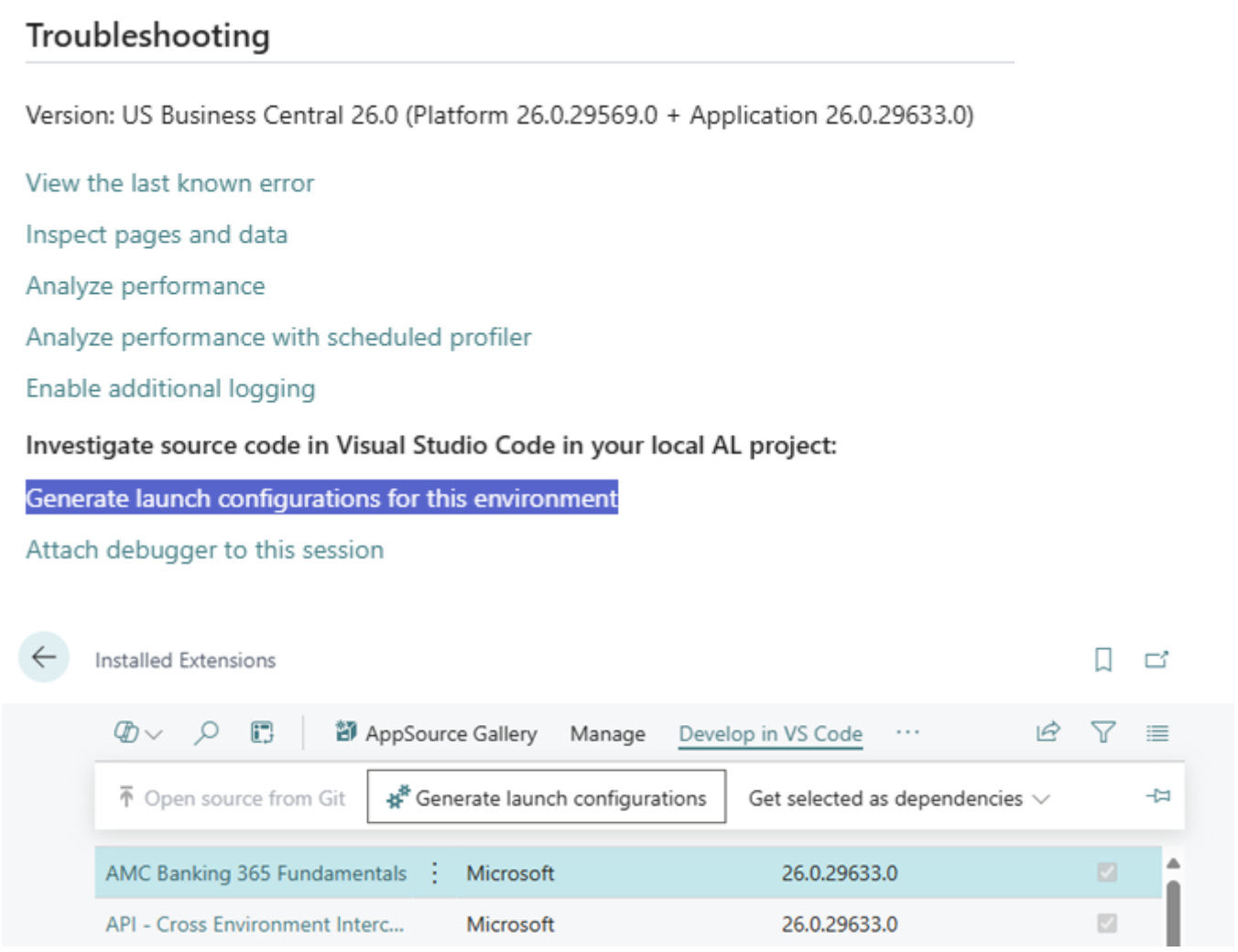
One request for the **Open in Visual Studio Code** feature was the ability to quickly generate a launch configuration that matches the specific environment. In this release, we added actions in the web client that add this capability. With these actions, you can more easily create a launch configuration to investigate or debug a specific environment in Visual Studio Code.

Feature details

Now, directly within the web client, you can generate a matching `launch.json` configuration for the specific environment. With this configuration, you can more easily investigate or debug a specific environment from Visual Studio Code.

The Business Central web client offers two options to generate the `launch.json` configuration.

- Use the **Generate launch configurations for this environment** action in the **Troubleshooting** section of the **Help & Support** page.
- Use the **Generate launch configurations** action in the **Develop in VS Code** action group on the **Extension Management** page menu.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Generate launch configuration files directly from the web client (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Manage external files more easily through unified API in External File Storage module

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Apr 1, 2025

Business value

The External File Storage module gives you a simple API for storing files outside of Business Central. When you install External File Storage Connector apps, you can easily set up where to store data for file scenarios that Business Central applications implement.

Feature details

Connect to external storage accounts, containers, and blobs, and work with them from your AL code. The External File Storage module gives you a framework to connect easily to Azure Blob Services or Azure Files.

As an AL developer, use the module to:

- Create, open, change, and delete files through an easy-to-use API.
- Specify external file storage scenarios and let users configure the storage for each scenario.
- Browse through external file storages.

For more information, see External File Storage.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

External File Storage Module for Business Central (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Mock outbound HttpClient web service calls during testing

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

To make it easier to test AL code that calls outbound web services, you can now mock those calls. With this feature, you can hardcode return values for calling code during tests without making the actual outbound web service call. Mocking calls is especially valuable when you test Copilot and AI features. Developers can write unit tests for these features without connecting to Azure OpenAI Service, so you save token consumption. This feature is available only for on-premises instances, including containers used for automated testing.

Feature details

AL developers can mock `HttpClient` Get, Put, Delete, and Post calls in unit tests. By adding a handler function, you can intercept `HttpClient` calls and easily substitute the responses for `HttpClient` calls in unit tests.

When you add an `HttpClientHandler` to a test method, the handler intercepts every HTTP request that occurs during the execution of that test. The handler receives a `TestHttpRequestMessage` that contains information about the HTTP request. It also receives a `TestHttpResponseMessage` that contains the mocked HTTP response values that the handler updates. The handler returns a Boolean value that indicates whether to fall through and issue the original HTTP request (true) or to use the mocked response (false).

The `TestHttpRequestPolicy` property on test codeunits determines how outbound HTTP requests are treated during test execution. It supports the following values:

- `BlockOutboundRequests`: Any HTTP request issued during the test execution that an HTTP client handler doesn't catch and handle raises an exception.
- `AllowOutboundFromHandler`: An HTTP client handler catches all HTTP requests issued during the test execution. The handler can allow the request to go through and issue the

original request to the external endpoint.

- `AllowAllOutboundRequests`: The test execution allows all outbound HTTP requests.

The following example shows a codeunit that makes an external web service call and a test codeunit that intercepts and mocks the call. Notice the use of the HttpClientHandler in the test codeunit.

```
codeunit 50111 MyCodeunitTests
{
    Subtype = Test;
    TestHttpRequestPolicy = AllowOutboundFromHandler;

    [Test]
    [HandlerFunctions('HttpClientHandler')]
    0 references
    procedure TestUnauthorizedResponseHandled()
    var
        MyCodeunit: Codeunit "MyCodeunit";
    begin
        MyCodeunit.MethodWithHttpRequest();
    end;

    [HttpClientHandler]
    0 references
    procedure HttpClientHandler(request: TestHttpRequestMessage; var response: TestHttpResponseMessage): Boolean
    begin
        // Mock a '401 Unauthorized' response for the 'GET http://example.com/' request
        if (request.RequestType = HttpRequestType::Get) and (request.Path = 'http://example.com/') then begin
            response.HttpStatusCode := 401;
            response.ReasonPhrase := 'Unauthorized';
            exit(false); // Use the mocked response
        end;

        // Fall through and issue the original request in case of other requests
        exit(true);
    end;
}
```

```
codeunit 50100 MyCodeunit
{
    1 reference
    procedure MethodWithHttpRequest()
    var
        Client: HttpClient;
        Response: HttpResponseMessage;
    begin
        Client.Get('http://example.com/', Response);
    end;
}
```

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Mock outbound HttpClient web service calls during testing (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Move tables and fields with data across extensions as part of refactoring

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

As extensions mature or as a consequence of an extension that you initially create as a large monolith, you need to split the extension. You also need to move ownership of tables or fields along with the data. This feature adds the same controlled process for releasing and taking ownership of tables or fields to partner extensions as part of the extension upgrade process.

Feature details

In the past two releases, you could move tables and fields across extensions for first-party extensions from Microsoft. In this release, partners can use these capabilities on their extensions.

For the best coverage of these capabilities, see the existing documentation that covers support in first-party apps. For more information, see Moving tables and fields between extensions.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Moving tables and fields between extensions (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Overloaded JsonObject data type GetValue method

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

To work more efficiently with JSON in AL, access JSON data through the AL API with a new set of overloaded JsonObject GetValue methods.

Feature details

The API for accessing JSON data now includes methods that you can use instead of always reading data through a JsonToken.

For JsonObject instances, use:

```
value := GetBoolean(Key: Text [; DefaultIfNotFound: Boolean])
value := GetByte(Key: Text [; DefaultIfNotFound: Boolean])
value := GetChar(Key: Text [; DefaultIfNotFound: Boolean])
value := GetInteger(Key: Text [; DefaultIfNotFound: Boolean])
value := GetBigInteger(Key: Text [; DefaultIfNotFound: Boolean])
value := GetDecimal(Key: Text [; DefaultIfNotFound: Boolean])
value := GetOption(Key: Text [; DefaultIfNotFound: Boolean])
value := GetDateTime(Key: Text [; DefaultIfNotFound: Boolean])
value := GetDate(Key: Text [; DefaultIfNotFound: Boolean])
value := GetTime(Key: Text [; DefaultIfNotFound: Boolean])
value := GetDuration(Key: Text [; DefaultIfNotFound: Boolean])
value := GetText(Key: Text [; DefaultIfNotFound: Boolean])
value := GetArray(Key: Text [; DefaultIfNotFound: Boolean])
value := GetObject(Key: Text [; DefaultIfNotFound: Boolean])
```

For JsonArray instances, use:

```
value := GetBoolean(Index: Integer [; DefaultIfNotFound: Boolean])
value := GetByte(Index: Integer [; DefaultIfNotFound: Boolean])
value := GetChar(Index: Integer [; DefaultIfNotFound: Boolean])
value := GetInteger(Index: Integer [; DefaultIfNotFound: Boolean])
value := GetBigInteger(Index: Integer [; DefaultIfNotFound: Boolean])
value := GetDecimal(Index: Integer [; DefaultIfNotFound: Boolean])
value := GetOption(Index: Integer [; DefaultIfNotFound: Boolean])
value := GetDateTime(Index: Integer [; DefaultIfNotFound: Boolean])
value := GetDate(Index: Integer [; DefaultIfNotFound: Boolean])
value := GetTime(Index: Integer [; DefaultIfNotFound: Boolean])
value := GetDuration(Index: Integer [; DefaultIfNotFound: Boolean])
value := GetText(Index: Integer [; DefaultIfNotFound: Boolean])
value := GetArray(Index: Integer [; DefaultIfNotFound: Boolean])
value := GetObject(Index: Integer [; DefaultIfNtFound: Boolean])
```

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

JsonObject Data type (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Read and write YAML in AL using JsonObject

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

Data-driven testing often requires reading YAML test data, especially when testing Copilot features. Instead of creating a new YAML object model, you can use the extended JSON support to read YAML data into a JsonObject. You can manipulate the data as JSON with the JsonObject API and write it out as YAML if needed.

Feature details

The feature extends the existing JsonObject so you can read YAML into the JsonObject, manipulate it as JSON with the JsonObject API, and possibly write it out again as YAML.

The feature adds two new methods to read YAML into a JsonObject instance:

```
[Ok :=] ReadFromYaml(String)
[Ok :=] ReadFromYaml(InStream)
```

The feature adds two new methods to write a JsonObject instance as YAML:

```
[Ok :=] WriteToYaml(String)
[Ok :=] WriteToYaml(OutStream)
```

> **Note**
>
> The feature is also backported to version 14.3 of the compiler, in 2024 release wave 2.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

JsonObject Data type (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Running objects in actions defaults to UI descriptors on target object

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

When you add actions that run pages and reports in AL, you specify the AboutText and AboutTitle properties. To keep consistency and enable reuse, these actions now default to the AboutText and AboutTitle of the report or page object you target when the action appears in the Report Explorer. This change also makes sure that existing actions get the AboutText and AboutTitle from the targeted object. For pages, actions to reports default to the Tooltip on the target report.

Feature details

When you specify the `RunObject` property in an action and refer to a page or report, the action uses the `AboutText` and `AboutTitle` properties from the targeted page or report application object in the Report Explorer. If you specify these properties on the action itself, the action uses those values. This behavior ensures consistency and reuse in the Report Explorer, even for existing actions.

On pages, actions that refer to reports default to the "Tooltip" defined on the target report. To support this behavior, you can set the `ToolTip` property on reports.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

RunObject Property (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Search, navigate and use app symbols as context for GitHub Copilot

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

You can search AL objects in downloaded symbol package files from within Visual Studio Code. This feature makes it much easier to find related objects for inspection, troubleshooting, or inspiration. Use it as context when you work with GitHub Copilot to get better suggestions based on existing code.

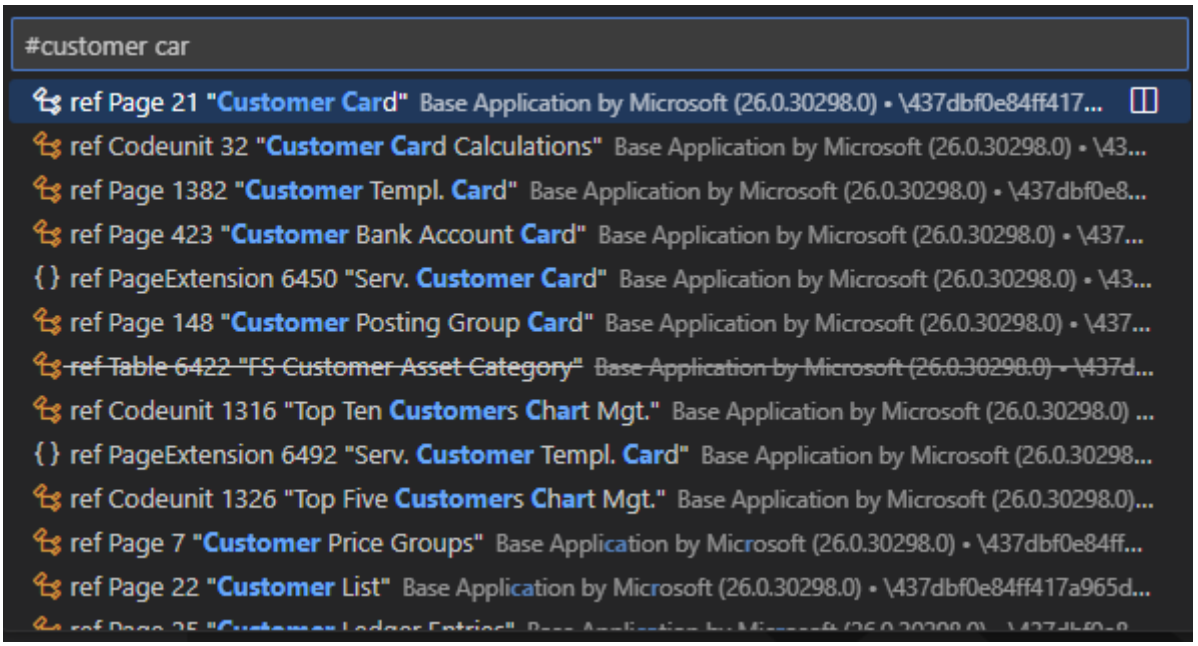
Feature details

You can now search objects from downloaded symbol packages through the **Open Symbol by Name** functionality (Ctrl+T).

This feature makes it easier to find objects and open the source when the symbols include source code.

It also empowers GitHub Copilot in Visual Studio Code. You can open the source for selected related symbols to use as context for Copilot Studio when you write your own code, so you get better suggestions.

You can also take advantage of improved performance when searching workspace symbols to support the larger number of available symbols.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Text.IncStr(Text, BigInteger) Method (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Select extensions to open in Visual Studio Code from the web client

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

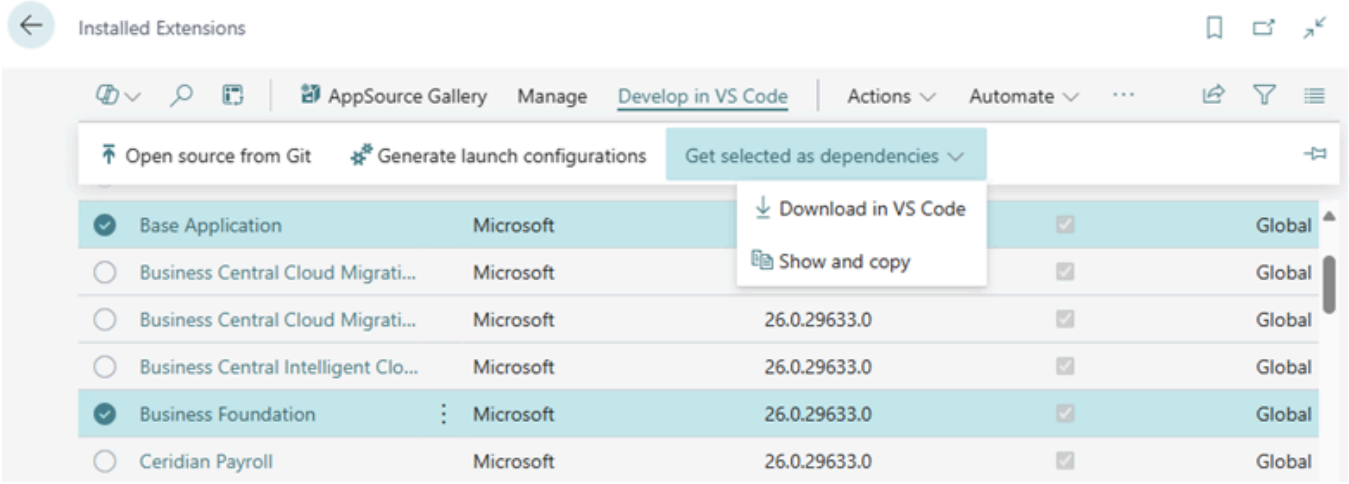
Business value

In earlier releases, we introduced the ability to open Visual Studio Code from the web client, giving you a specific environment to investigate or debug code. Now, you can select which extensions to include in the project when you open Visual Studio Code. If you have permissions to access source code, you see that code in Visual Studio Code. If you don't have permissions, you see symbols that you can use to investigate functionality in AL Explorer or to code against.

Feature details

On the **Extension Management** page, the **Develop in VS Code** action group gives developers new options. One option is the **Download in VS Code** action. With this action, you can select one or more extensions to open in Visual Studio Code.

In the opened Visual Studio Code project, you always have access to symbols for those extensions. Access to source code depends on the IP protection settings for the extensions and user permissions.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Troubleshoot in Visual Studio Code directly from the web client (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Self-service App Key Vault onboarding for AppSource apps

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 7, 2025	✔ Apr 7, 2025

Business value

AppSource apps for Business Central can read secrets from Azure Key Vault that the publishing partner owns. To make this feature available to a partner's AppSource app, the partner previously needed to complete a manual process that involved contacting Microsoft. This process could cause waiting times. The process also required a new version of the app to ensure Azure Key Vault availability. To simplify the process, you now onboard to Azure Key Vault as part of the AppSource submission. The app can use its Azure Key Vault right away.

Feature details

To register a key vault for an app, partners no longer need to send an email and wait for us to register their Entra Tenant ID.

Instead, partners must:

- Grant read permission to the Dynamics 365 Business Central ISV Key Vault Reader app.
- Create a special secret named `AllowedBusinessCentralAppIds` in their key vault. This secret contains the app IDs for all apps that access the key vault. For multiple app IDs, separate them with a comma.

To reduce registration waiting time, follow this process.

To submit higher versions of an app, AppSource apps must add the `AllowedBusinessCentralAppIds` secret if they already registered their Entra Tenant ID. If this reserved secret is missing, the submission likely fails.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Set up app key vaults for Business Central online (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Troubleshoot clients, apps, and add-ins with telemetry

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

This new feature in the Business Central client enhances the overall reliability and user experience by logging exceptions in client add-ins. With this feature, administrators can quickly find and fix issues before they affect users. It helps keep operations running smoothly and reduces downtime. By capturing detailed telemetry data, businesses get valuable insights into the performance and stability of their extensions. This data helps improve user satisfaction.

Feature details

The Business Central client sends a telemetry event when an exception happens in a client add-in. With telemetry, administrators can monitor errors and fix them before users report the issues.

The client logs the following types of information about issues:

- The environment and company.
- The extension, app, or add-in.
- The type of client (browser, tablet, phone, and so on).
- The error information.
- The user who encounters the error.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Analyzing client control add-in exception telemetry (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use new AL project templates for creating Copilot features in Visual Studio Code

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

To speed up AL project creation in Visual Studio Code, we added a command that lets you select predefined project templates. In this release, partners can't provide their own templates. We added two Copilot samples that align with the GitHub sample repositories. These samples make it easier to build new Copilot features in Business Central. We also added the classic Hello World AL project.

Feature details

To create a new template-based AL project in Visual Studio Code, use the **AL: New Project** command. The shortcut is **Alt+A Alt+P**.

When you run the command, choose to create Copilot sample apps or the classic Hello World AL project.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Get started with Copilot templates (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use new IncStr parameter to change integers by more than 1 in string variables

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

The `IncStr` method on `Text` types lets you increase a positive number or decrease a negative number inside a string variable by 1. This method is useful when you handle iterations that involve number series. If you wanted to change the number by more than 1, you had to write extensive custom logic. To simplify these scenarios, the `IncStr` method now supports an optional `increments` parameter to change the number by more than 1.

Feature details

The new overload of the `IncStr` method supports increasing or decreasing a number in a string variable by any amount. With this method, you can increment number series or similar series by more than one position in a single step.

To decrease a positive number, use a `try` function to handle cases where the string can't decrease further. When you decrease a number, the method adds leading zeros as needed.

The following example shows how to increment the integer 99 in the `AText` string variable to 109 in one call by using the new `IncStr` method overload with an increment value of 10.

```
codeunit 50111 MyAccountCodeunit
{
    0 references
    procedure MyIncStr()
    var
        Account: Text[60];
        ResultAccount: Text[60];
        AText: TextConst ENU = 'Account no. 99 does not balance.';

    begin
        Account := AText;
        ResultAccount := IncStr(Account, 10);
    end;
}
```

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Text.IncStr(Text, BigInteger) Method (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use new properties on a report layout

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

The new properties that you add to report layouts give you more flexibility and functionality in your reporting. With the **ObsoleteState** property, you can mark layouts as deprecated. This property helps ensure a smoother transition and better management of future updates. The **ExcelLayoutMultipleDataSheets** property enables you to create more complex and customized Excel reports without affecting existing layouts. These enhancements make your reporting processes more efficient, reduce the risk of errors, and save time and resources for your business.

Feature details

The following new properties are available for report layouts:

- ObsoleteState
- ExcelLayoutMultipleDataSheets

With the **ObsoleteState** property, you can mark a layout as deprecated and specify that the layout is removed in a future release. The property appears on the **Report Layouts** page.

With the **ExcelLayoutMultipleDataSheets** property, you can set the property for the layout to override the global property on the report object. For reports where you didn't set the global property ExcelLayoutMultipleDataSheets (which the system interprets as false), you can add Excel layouts that use the ExcelLayoutMultipleDataSheets property without risking breaking existing Excel layouts that users added.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Defining multiple report layouts (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use the new continue keyword for AL loops

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

To make AL loops easier to write and read, you can now use the `continue` keyword in AL loops to go to the next iteration. This behavior is like other major programming languages.

Feature details

Like many other programming languages, AL now supports using `continue` in loops to trigger the next loop iteration. Before, only the `break` keyword was supported. The `break` keyword cancels the whole loop. The `continue` keyword skips the current loop iteration and goes to the next iteration.

To avoid a breaking change, the compiler doesn't support the `continue` keyword in loops if the context has a member called `continue` member, such as a method or field. The compiler warns about this restriction but still lets you declare object types with the name `continue`.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Continue statement (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Validate certificates on external web service endpoints called from AL HttpClient

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

This feature enhances the security of HTTP calls in your AL applications by validating all server certificates for outgoing web service calls. When you enable certificate validation by default, you get a higher level of trust and security in your communications. If needed, you can disable certificate validation for specific calls. A new telemetry event helps you debug failures. By providing robust security measures and debugging tools, this feature protects your business from potential security threats and ensures smooth, secure operations.

Feature details

To enhance the security of HTTP calls from AL, the AL runtime now validates all server certificates when you call a web service endpoint with the HttpClient data type. Certificate validation is on by default. A server certificate is on the endpoint side. It's not the certificate you attach to a request in AL.

If an app or per-tenant extension needs to turn off certificate validation, add the new property to the HttpClient data type. AL code can turn off server certificate validation for the outgoing web service call.

If the publisher of an app or per-tenant extension needs to debug failing HTTP calls because server certificates can't be validated, add the new telemetry event. The event happens when certificate validation fails.

App and per-tenant extension publishers can disable certificate validation by using a feature management key. In version 27, certificate validation is always on and you can't disable it.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

HttpClient.UseServerCertificateValidation(Boolean) Method (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

View build metadata in Extension Management page

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

When we introduced the Source and Build properties in Business Central 2024 release wave 1, you got better traceability for extensions you create in DevOps pipelines. You can quickly find the source repository, commit ID, and build system you used to create the extension. With Business Central 2024 release wave 2 and this new release, you get even more information to help you identify and resolve issues, access information about extensions, and share that information.

Feature details

To help track extensions that you create as part of DevOps pipelines, we introduced the **Source** and **Build** properties in the app.json manifest file of extensions in Business Central 2024 release wave 1. With these properties, you can easily find the relevant source repo, commit ID, and build system used to create the extension. In Business Central 2024 release wave 2, we added the ability to view **Source** information on the extension card in the **Extension Management** page. In 2025 release wave 1, we added the **Build** information.

The details card page for extensions in the **Extension Management** page now includes the **Build** information. The **Build** information has two parts: *by* tracks the build agent, and *url* specifies the URL to the build system invocation where the build is located.

For more information about the source and build information, see Track source and build metadata on extensions.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

JSON files (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Work with multiline strings in AL

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

When you develop AL, you sometimes use very long strings. Previously, you had to write these strings in one line, which made it hard to read the content. In this release, we added support for strings that span multiple lines. You can now format string content in a way that's easier to read. This feature is especially helpful when you work with structured string content, such as JSON content.

Feature details

You can now write a string in AL that spans multiple lines by prefixing it with `@`. This feature lets you write the string in a more readable form. Use it when the string contains structured formats, like JSON content.

When you use this option, avoid adding extra white space, such as indenting lines. The white space becomes part of the string.

The following example shows how to use this feature when you assign a JSON template structure to a text variable. The example uses `@` at the start of the string to indicate a multiline string.



```
codeunit 50110 MyCodeunit
{
    0 references
    trigger OnRun()
    begin
        template := @'{
  "name": "Example Name",
  "description": "This is an example description.",
  "details": {
    "attribute1": "value1",
    "attribute2": "value2",
    "attribute3": "value3"
  },
  "items": [
    {
      "item1": "value1",
      "item2": "value2"
    },
    {
      "item1": "value3",
      "item2": "value4"
    }
  ]
}';
    end;

    var
        1 reference
        template: Text;
}
```

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Multiline strings (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Ecommerce

10/02/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 each release of Business Central, we enhance its integration with Shopify based on customer feedback. With this integration, you can efficiently manage planning, procurement, and product costs. You also gain control over inventory levels across locations and item variants.

When you integrate the apps, you simplify the process of defining prices and discounts. You also simplify managing and reporting taxes to comply with government regulations. Whether you're using Shopify or Shopify Plus, which includes business-to-business capabilities, this integration helps streamline your operations and boost your business efficiency.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Activate sales channels in Shopify Connector

08/07/2025

Expand table

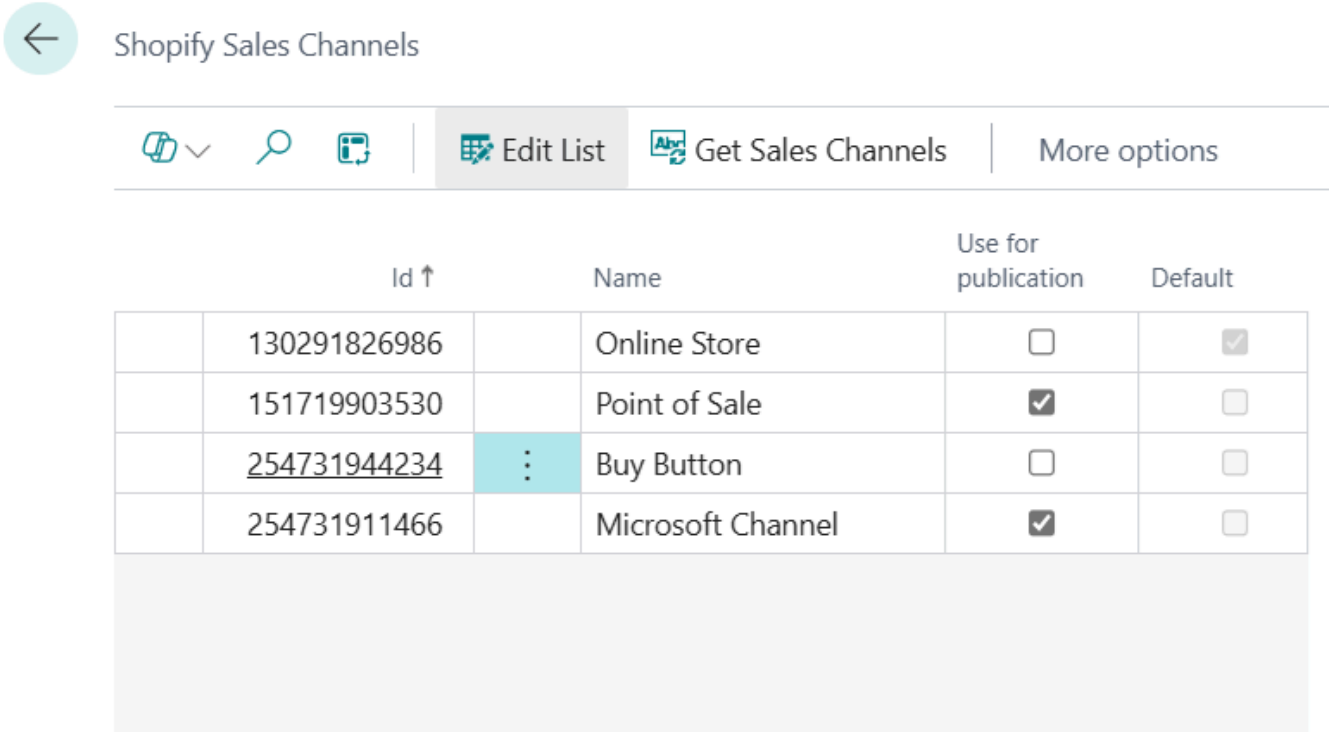
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

Businesses often sell different products through different sales channels. When you activate specific channels, you simplify workflows and get full control over how you share products across different sales channels.

Feature details

When you publish products from Business Central to Shopify, you can now choose which sales channels to activate directly from the **Shopify Sales Channels** page. On the new **Shopify Sales Channels** page, you can access all available channels in Shopify, just like you do with **Locations** or **Languages**. Just activate the channels you want. The Shopify Connector handles the rest. If you didn't set up this page yet, don't worry. Your products default to the Online Store.



> **Note**
>
> This feature only applies to new products you publish. It doesn't affect products that are already on Shopify.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Activate sales channels (docs)

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Import and export more data for Shopify B2B companies and company locations

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

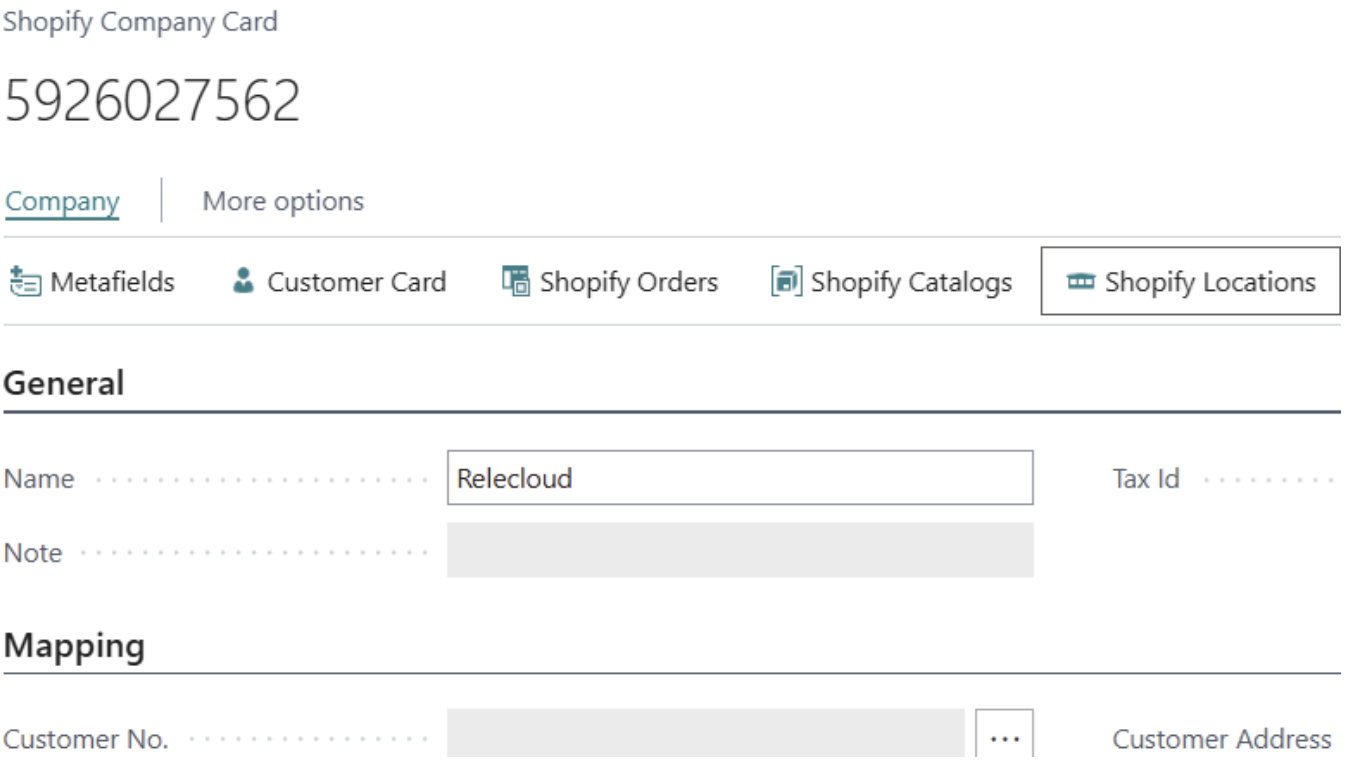
To make e-commerce more efficient and reliable, the connector expands the information that Shopify and Business Central exchange in B2B scenarios. The Shopify Connector now imports all company locations, including payment terms and tax IDs, and uses this information for automatic entity mapping. When you export data to Shopify, the sync includes the tax ID, company ID, and company/attention details to improve order information and traceability. When you create catalogs automatically, you ensure consistent pricing across both Shopify and Business Central.

Feature details

We've improved how we handle company details for B2B scenarios. We continue to enhance the integration between Shopify and Business Central, so you can provide exceptional service to your B2B customers.

When you import a company from Shopify, you also import all its locations. You can access these locations on the **Shopify Locations** page. You can open this page from the **Shopify Companies** and **Shopify Company Card** pages.

The first imported location is the default location. It creates the customer and adds address information and other fields on the customer card. When you export a customer as a Shopify company, the Shopify Connector creates one company location. In Business Central, you see this location as the default location.



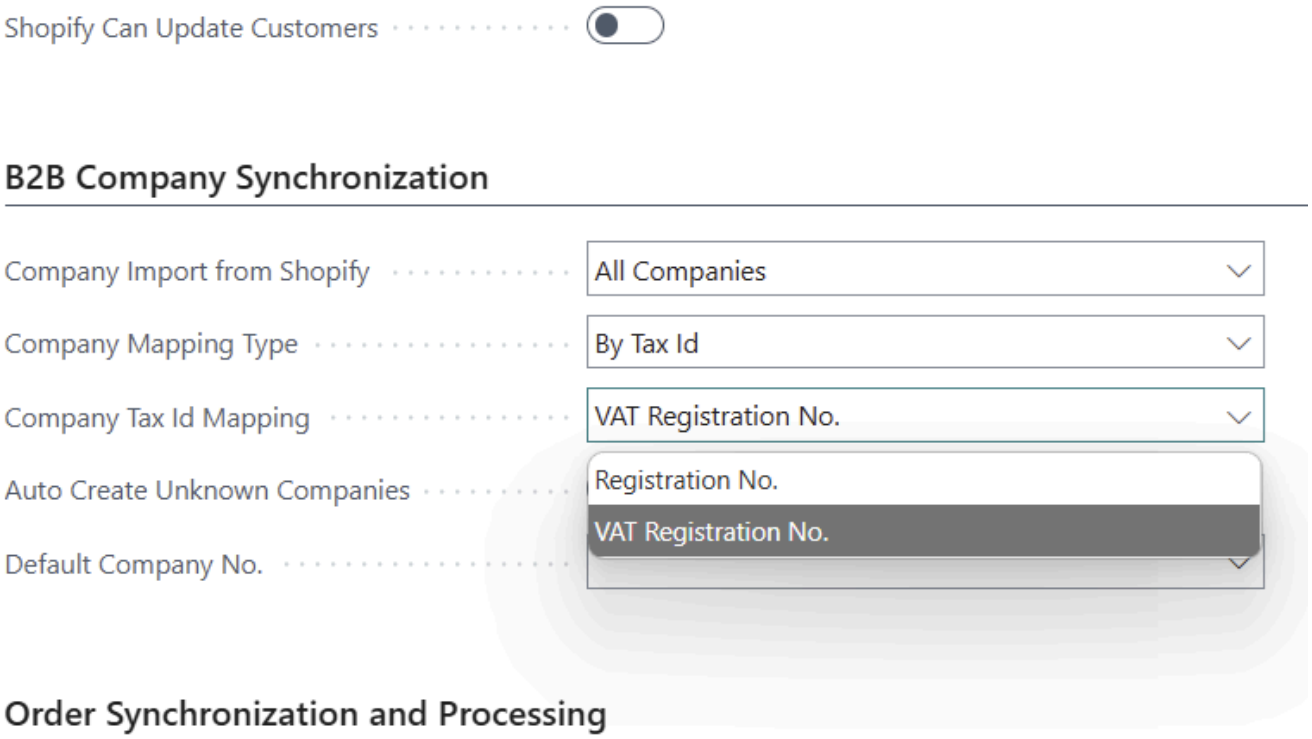
The Company Location feature in Shopify enables merchants to set default payment terms. When you export customer information as a Shopify company, the process transfers payment term details to Shopify and stores them in the default company location if:

- The **Payment Term** field in the **Customer Card** contains a value.
- The **Shopify Payment Terms Mapping** page has a corresponding record.

When you import a Shopify company, you see the payment terms for each company location. If you configure the Shopify Connector to update the customer, it uses the payment term from the default location. The corresponding record on the **Shopify Payment Terms Mapping** page must exist.

In Shopify, each company location can have a tax ID. When you export a customer as a Shopify company, the process stores the tax ID in the default company location. Use the new **Company Tax ID Mapping** field on the **Shopify Shop Card** page to choose whether to send the **Registration Number** or the **VAT Registration No.** as the tax ID.

When you import Shopify companies, the tax ID at the default **Shopify Location** enables you to map imported companies to existing customers. Select **By Tax ID** in the **Company Mapping Type** field on the **Shopify Shop Card** page to turn on this mapping logic.



The latest release of the Shopify connector introduces individual prices and discounts. These prices and discounts complement the global pricing structure and the customer price group and customer discount group pricing structures. Individual prices and discounts give you more flexibility and personalization for B2B customers.

When you export a customer as a Shopify company, you fill in the **Customer No.** field for the catalog if you set up the Shopify Connector to create a catalog. This enhancement makes sure the connector uses the specific customer to calculate prices. You don't need to fill in the **Customer Price Group**, **Customer Discount Group**, or **Allow Line Discount** fields. Turn on the **Sync Prices** toggle and select **Sync Prices** to start synchronizing catalog prices. Your customers see consistent pricing in Shopify and Business Central.

When you export a customer as a Shopify company, the connector adds the value from the **No.** field on the **Customer Card** page to the **Company ID** field. This step improves traceability. The Shopify Connector also adds the company name to the **Company/Attention** field in the company location it creates. You use this name in imported orders.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

B2B Companies (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Import and export more data using Shopify metafields

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Apr 1, 2025

Business value

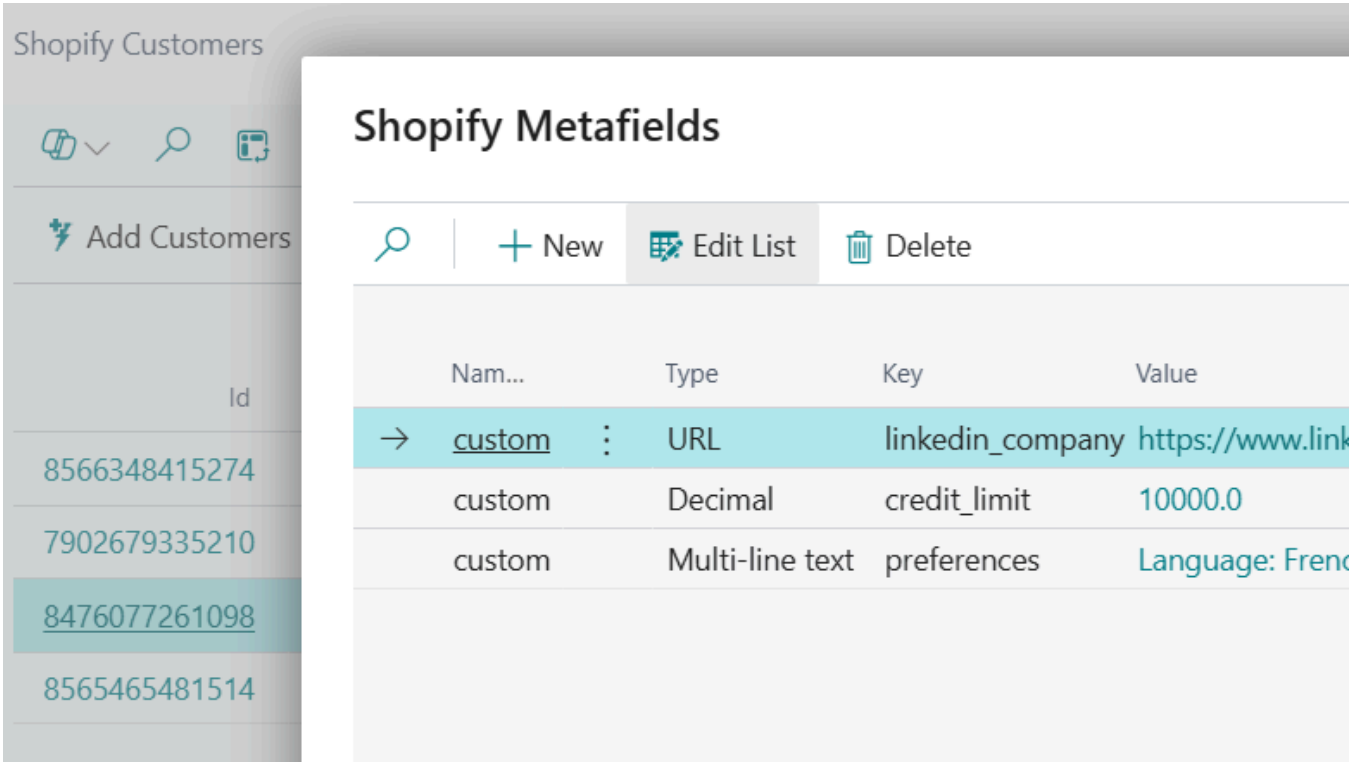
Metafields give you a flexible way to add and store extra information about a Shopify resource, such as a customer or company. You can synchronize and manage metafield data from Business Central by using the UI or the extensibility model to map fields or related entries in Business Central to metafields in Shopify.

Feature details

Shopify's platform includes data models for basic commerce concepts. However, commerce is diverse and often requires more complex or specific data models. With the custom data platform, you can extend Shopify's data models and create your own data models by using metafields. Metafields give you a flexible way to add and store extra information about a Shopify resource, such as a product, customer, or company. You can store almost any type of extra information in metafields. Some examples are preferences, credit limit, loyalty program, social media links, or segment information.

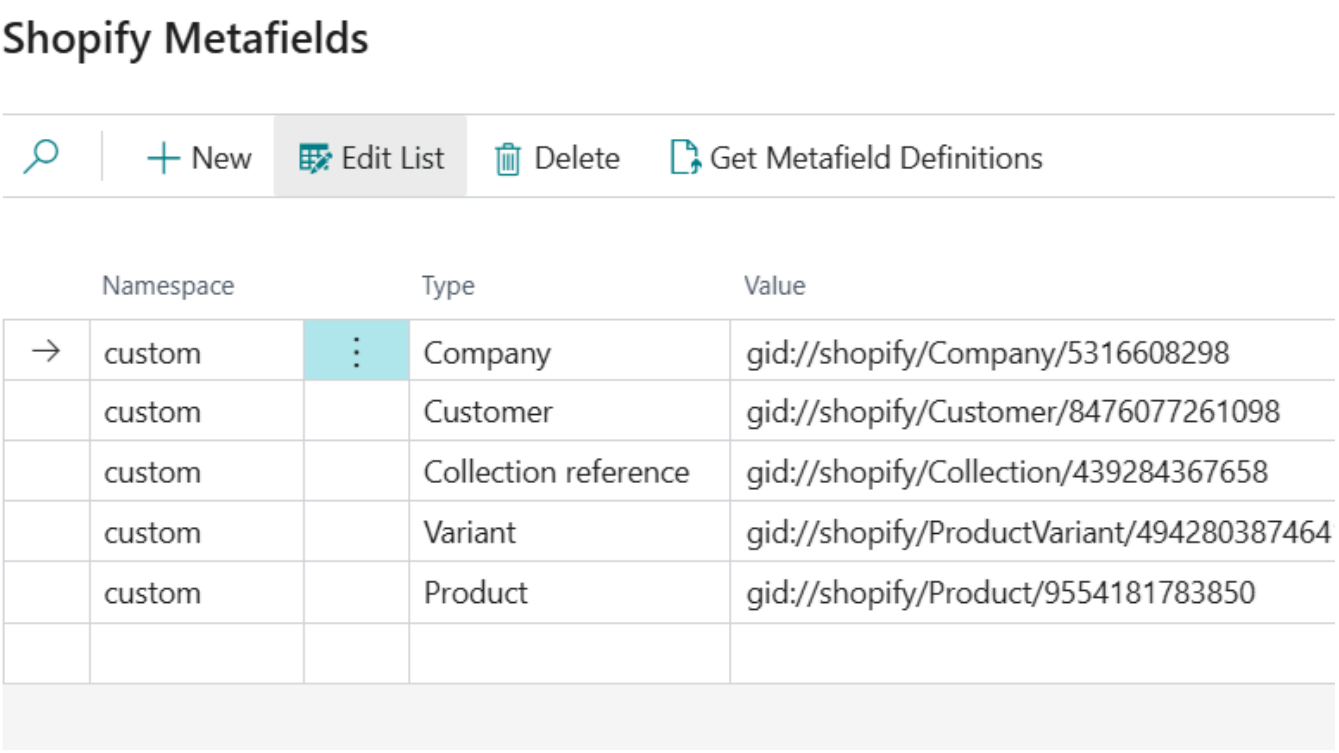
You can import and export data stored in metafields into Business Central. Also, an extensibility model is available that lets developers map standard or custom fields, attributes, or other related entries in Business Central to metafields in Shopify.

You can edit metafields on the **Shopify Metafields** page. Open this page from the **Shopify Customers**, **Shopify Customer Card**, **Shopify Companies**, or **Shopify Company Card** pages.



> **Note**
>
> You can edit the **Shopify Metafields** page in the following cases:
>
> - For a Shopify customer, when the system sets the **Customer Import from Shopify** field to **None** or **With Order Import** and you turn on the **Can Update Shopify Customers** toggle.
> - For a Shopify company, when the system sets the **Company Import from Shopify** field to **None** or **With Order Import** and you turn on the **Can Update Shopify Companies** toggle.
>
> When you add a new record, the connector immediately sends a request to Shopify. It 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.

Based on feedback, we added enhancements to Shopify Metafields such as Customer, Companies, Products, and Variants. You can now set the content type to **Customer** or **Company**.



If you define standard metafields, use the **Get Metafield Definitions** action to get the list from Shopify. The action imports all supported metafields. You just need to update the values.

The new **Sync Product/Variant Metafields to Shopify**, **Sync Customer Metafields to Shopify**, and **Sync Company Metafields to Shopify** actions on the **Shopify Shop Card** page let you choose whether to sync metafields when you sync to or from Shopify. These settings can help sync performance if you don't use metafields but have large product or customer lists.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Import and export more data using Shopify metafields (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Troubleshoot export issues on Shopify Skipped Records page

08/07/2025

Expand table

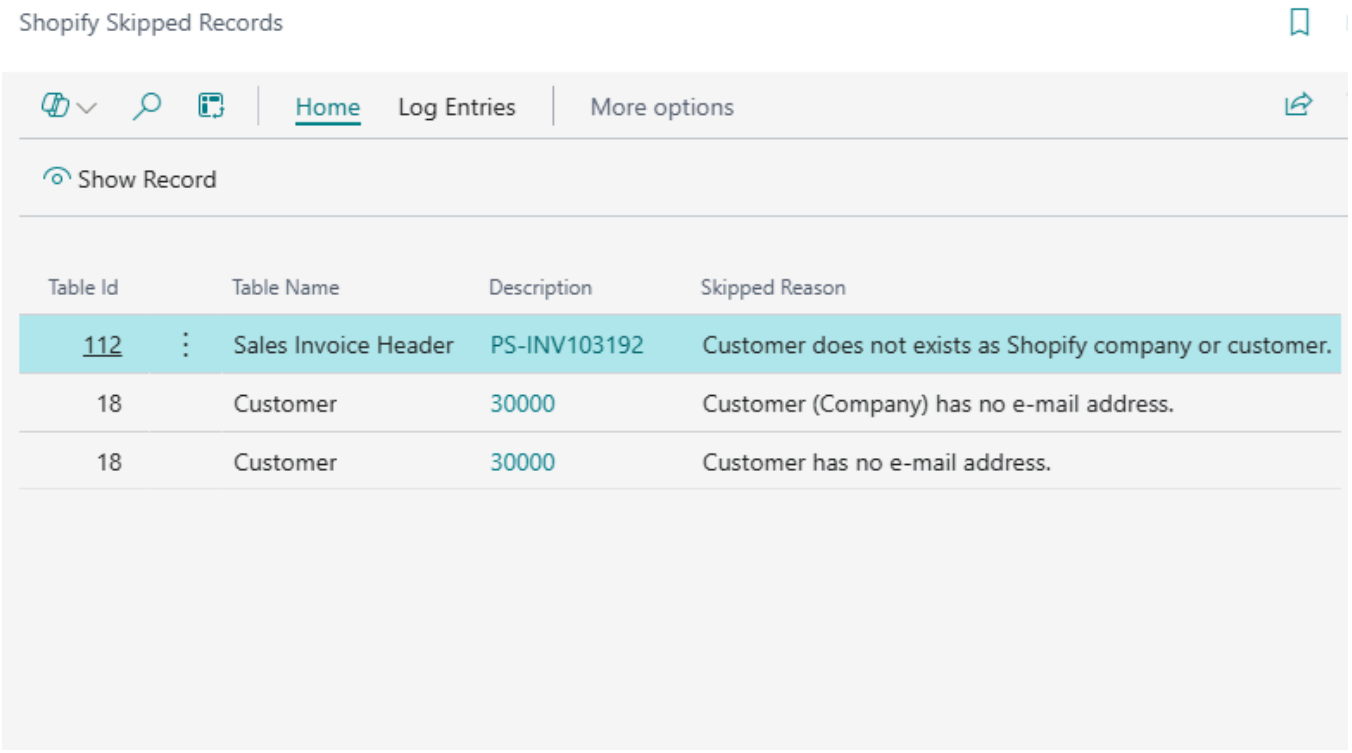
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Apr 1, 2025

Business value

When a business experiences a problem with the integration between its front end Shopify and back end Business Central, it's important to quickly resolve the issue. Different levels of logging reduce the time it takes to fix a problem with your integration between Shopify and Business Central.

Feature details

When you export data to Shopify, the Shopify Connector skips records that Shopify rejects or that aren't valid for export for other reasons. While this behavior is expected, you might be confused if the connector doesn't process some information. You can now find those entries on the **Shopify Skipped Records** page. The page shows all skipped records and provides the reasons and the date and time for each record.



Cases that the Shopify Connector logs

Customer:

- A customer has an empty email address.
- A customer with the same email address or phone number exists.

Posted sales invoice:

- Customer doesn't exist in Shopify.
- Payment term mapping is missing.
- Customer number is the default customer number for the Shopify shop.
- Customer number is used in the Shopify customer template.
- No lines exist in the sales invoice.
- Invalid (negative or fractional) quantity.
- Empty number value.

Product:

- Item is blocked or sales blocked (item variant).
- Item is blocked.
- Item description is empty.

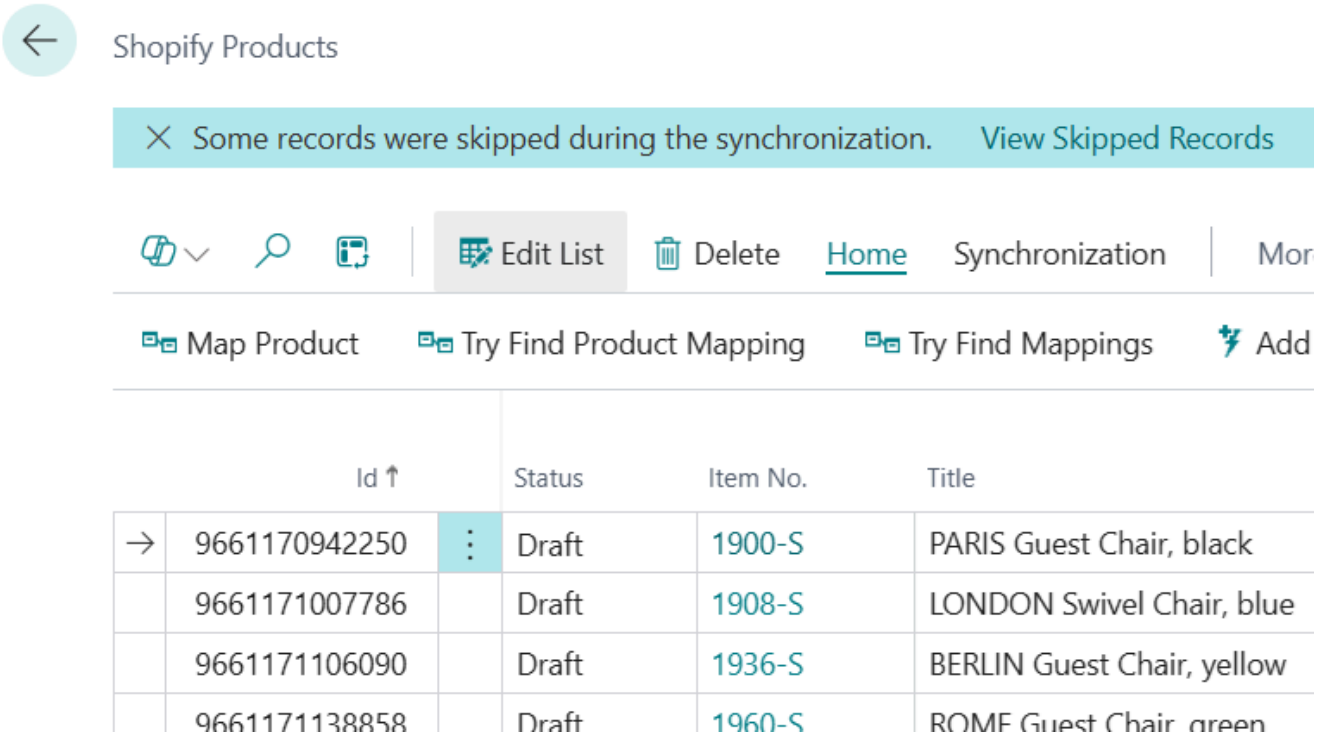
Catalog:

- Price sync if the catalog isn't found in Shopify.

Shipments:

- Related Shopify order doesn't exist.
- No lines in the posted sales shipment are applicable for fulfillment.
- No corresponding fulfillment is found in Shopify.

If you run sync in the foreground, you get a notification when the process skips records. Select **View Skipped Records** to open the **Shopify Skipped Records** page.



Setup

The **Logging Mode** field controls the content for the **Shopify Skipped Records** page. The **All** option works the same way as **Error Only** and only logs skipped entries. The page doesn't log entries that the process previously skipped.

Retention policy

To help keep your database size under control, the system includes Shopify Skipped Records in Define Retention Policies.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Troubleshoot export issues (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use the latest update for the Shopify connector

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

The latest update for the Shopify connector includes changes from Shopify, such as bulk variant handling and new product information management. In addition to these changes, we added multiple enhancements based on feedback from our community.

Feature details

Shopify releases a new API version every three months at the beginning of the quarter. Shopify supports each version for 12 months. Updated versions might contain important changes. To take advantage of these changes, update Shopify API versions in major releases of Business Central. Typically, new versions of APIs increase stability and security. They also enable additional capabilities. Starting with this release, the Shopify connector uses the Shopify API that was released in January 2025.

> **ⓘ Important**
>
> The Shopify connector released in 2024 release wave 2 (October 2024) relies on API 2024-07. Shopify supports this API until July 1, 2025. To continue to use your integration, upgrade to the latest version of Business Central before this date.

Bulk updates of product variants

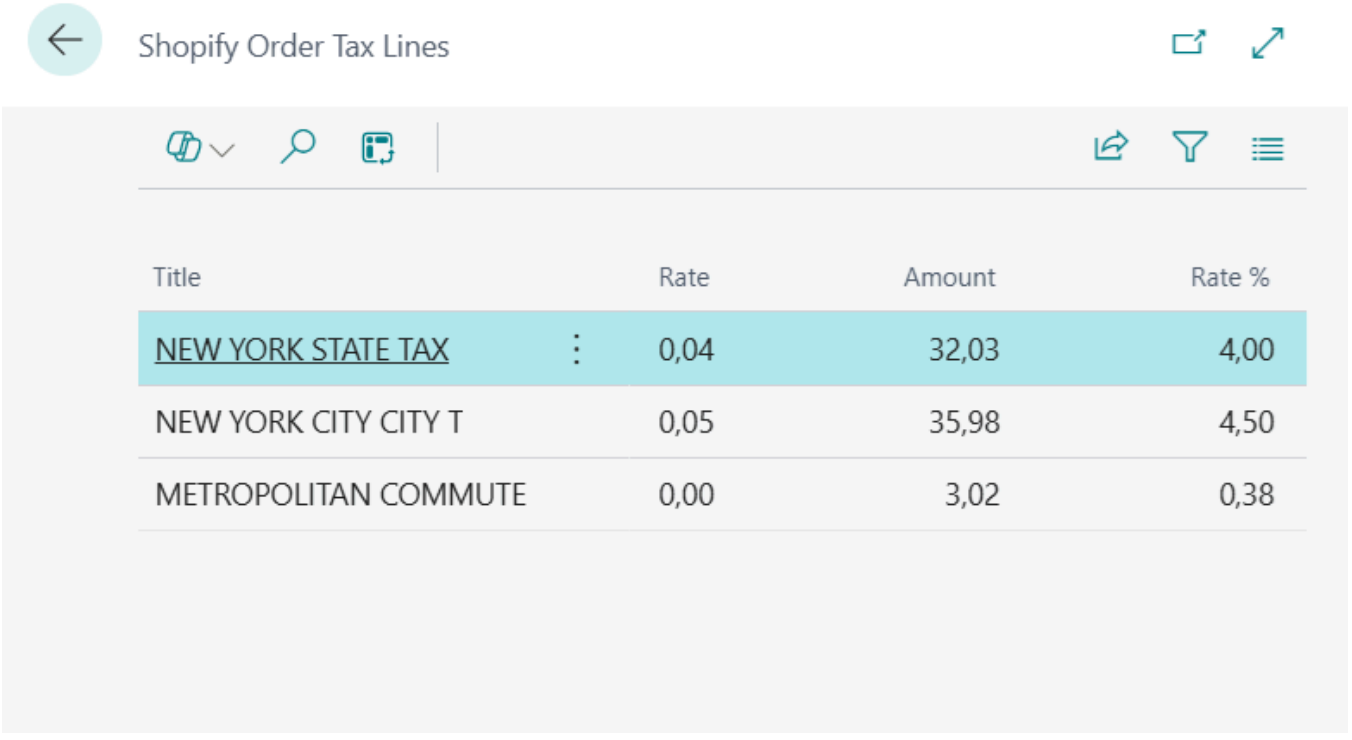
Shopify deprecated singular product variants in favor of bulk versions. Now, the Shopify connector creates or updates variants in bulk. This change improves the overall performance of the connector because a single call handles hundreds of updates. This change affects the initial creation of products with variants and scheduled updates of Shopify products and variants.

Handle the Price Including Tax setting

Starting with this release, the **Price Including VAT** toggle in the **Shopify Shop Card** page no longer affects the creation of sales documents. The app gets the information about whether prices include tax directly from Shopify. This information is helpful when you sell to different markets and use the **Include or exclude tax based on your customer's country** setting in Shopify Admin.

> **Important**
>
> For merchants using the US or Canadian localizations, select **Include sales tax in product price and shipping rate** in Shopify Admin. If you select this setting, you can't convert imported orders into sales documents because Business Central doesn't support backward sales tax calculation.
>
> If you select this field and don't charge taxes, you can turn off the **VAT (Tax) Included** field in the **Shopify Order** page and proceed.

To simplify troubleshooting, you can inspect tax lines from the **Shopify Order** page.



More capabilities for filtering orders

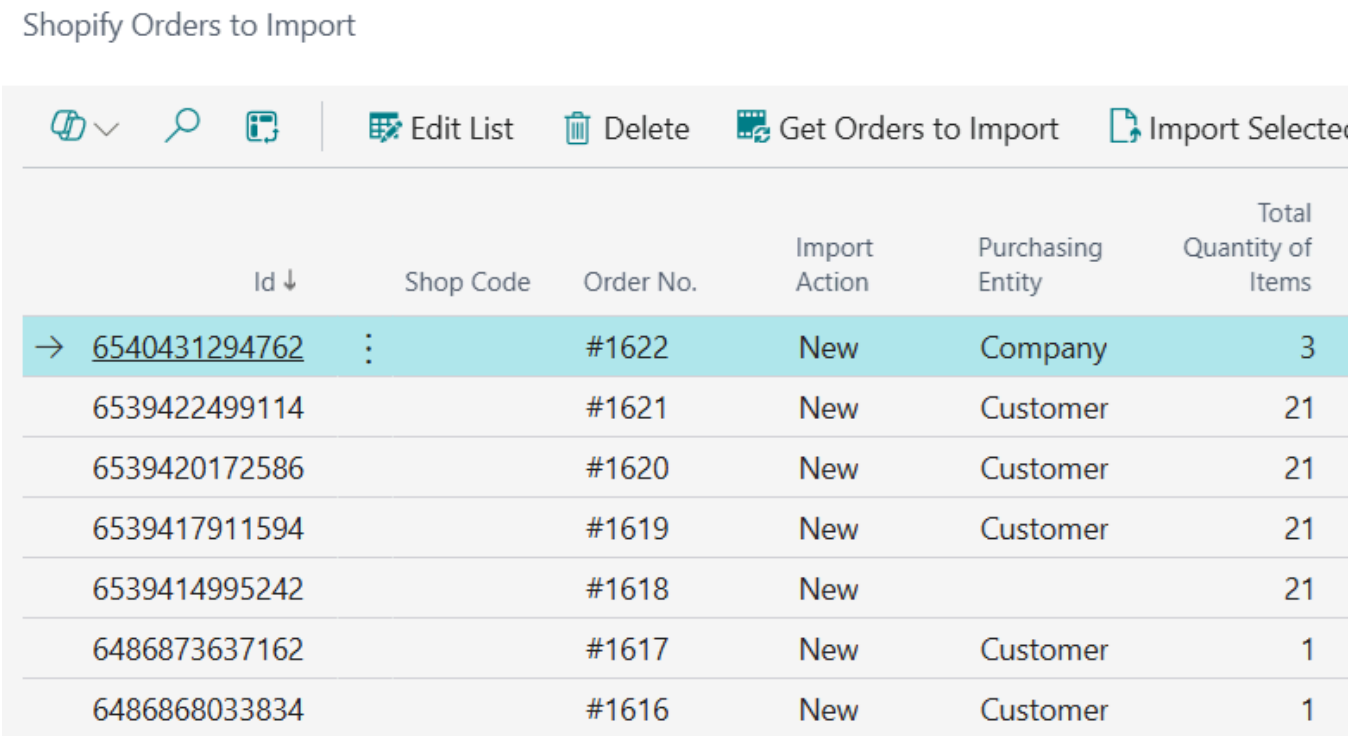
Order synchronization now supports the **Ship-to**, **Bill-to**, and **Sell-to Countries** filters, and the **Tax Amount** filter. These filters are useful for merchants in the European Union who sell to B2B

customers in other EU member states. Because of reverse charges, the order doesn't include VAT.

For more information about rules like this, see Different processing rules for orders.

Sorting in the Shopify Orders to Import page

The **Shopify Orders to Import** page now shows the newest orders first.



Id	Shop Code	Order No.	Import Action	Purchasing Entity	Total Quantity of Items
6540431294762		#1622	New	Company	3
6539422499114		#1621	New	Customer	21
6539420172586		#1620	New	Customer	21
6539417911594		#1619	New	Customer	21
6539414995242		#1618	New		21
6486873637162		#1617	New	Customer	1
6486868033834		#1616	New	Customer	1

Use this page to troubleshoot issues with order imports. You can review the available orders and take the next steps:

- Check whether an error blocks the import of a specific order. Select the **Has Error** field to view error details.
- Process only specific orders. Enter a value in the **Shop Code** field, select one or more orders, and choose the **Import Selected Orders** action.
- Delete orders from the **Shopify Orders to Import** page to exclude them from the sync.

Deprecation of REST resources

Shopify is moving from REST to GraphQL. In this release, Shopify deprecates endpoints for the Country and Province resources. The Shopify connector uses that information to fill the **Shopify Customer Templates** page with a list of countries where shipping is allowed. This feature still works because the Shopify connector gets this information from the shop properties.

Shopify can't get the list of associated provinces. The Shopify connector includes the list of provinces as setup data. Several countries require a province code to validate address information. Because Business Central doesn't enforce the use of the Country field or validate the content, the Shopify connector uses the **County Code** field in the **Shopify Shop Card** with the **Shopify Tax Area** page to get a province code when you create a customer or company in Shopify.

Shopify requires a state or province for the following countries:

- United Arab Emirates
- Argentina
- Australia
- Brazil
- Canada
- Chile
- China
- Colombia
- Costa Rica
- Egypt
- Spain
- United Kingdom
- Guatemala
- Hong Kong SAR
- Indonesia
- Ireland
- India
- Italy
- Japan
- South Korea
- Kuwait
- Mexico
- Malaysia
- Nigeria
- Panama
- Peru
- Philippines
- Portugal
- Romania
- Russia
- El Salvador
- Thailand

- United States
- Uruguay
- Venezuela
- South Africa

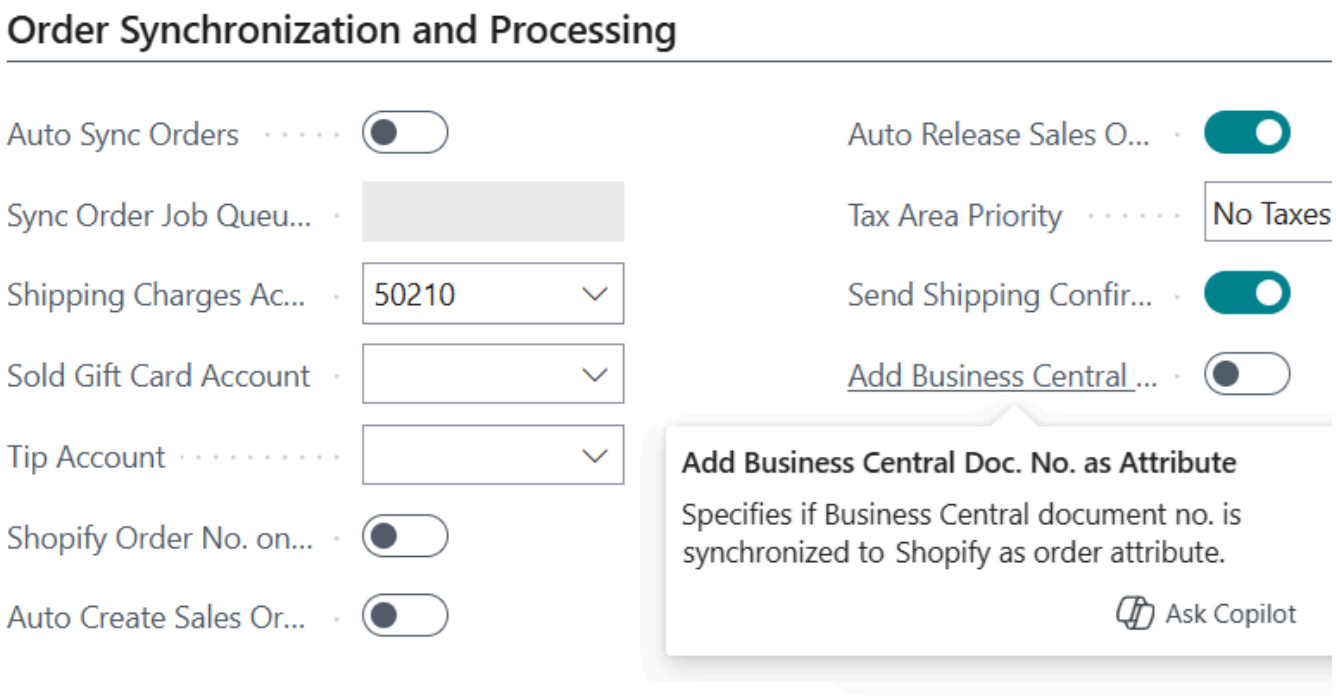
> **Note**
>
> Great Britain has provinces, but you don't need to include a province in addresses.

Other improvements

We implemented improvements that enhance the general usability of the connector.

After you import a Shopify order to Business Central, you can create a sales document automatically or manually. You can create a sales invoice if you fulfill the Shopify order, or a sales order if you handle fulfillment in Business Central. When you create a sales document, the document number synchronizes to Shopify as an order attribute.

People who work with Shopify Admin find it useful to see whether orders synchronize to Business Central. In some cases, such as high-load environments, turn off synchronization. Use the new **Add Business Central Doc. No. as Attribute** toggle to control synchronization.



The previous release gives you a new way to handle risk assessments. Shopify now supports two levels and external providers. The connector still imports both risk and sentiments. However, the connector didn't have a single value that represents the risk associated with an

order. To fill that gap, the release adds a **High Risk** field to the **Shopify Order** and **Sync Orders from Shopify** request pages. The field is Boolean. Enable it when an order is high risk.

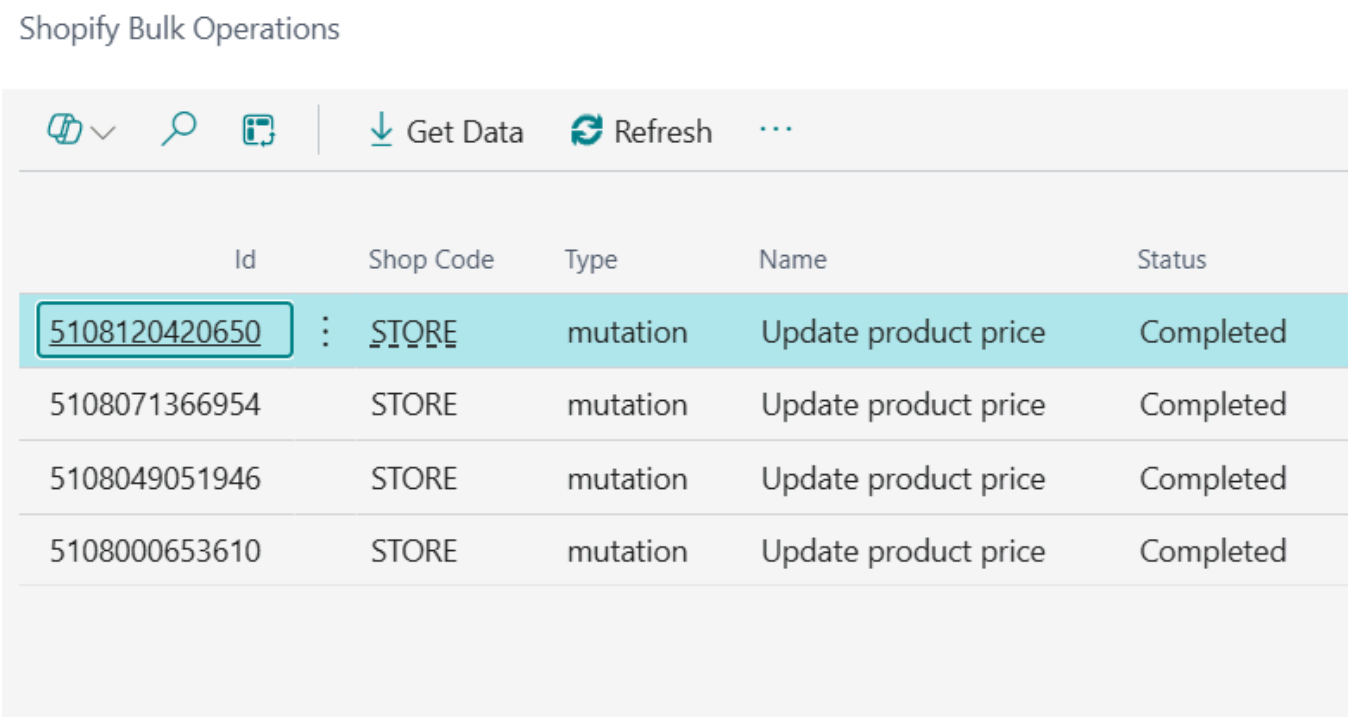
The **Request Data** and **Response Data** on the **Shopify Log Entry** page, and **Json Data** in the **Shopify Data Capture List** now use a rich text control that shows more information. This change makes troubleshooting simpler.

The **Create Shopify Fulfilment Service** action is now on the **Shopify Locations** page. With this action, you can create fulfillment service locations when you map locations.

Changes that are mandatory

The **Enable using bulk operations for Shopify connector** feature is now mandatory. You can't disable this feature. The feature affects price synchronization. With this feature, the connector synchronizes prices in bulk.

You can check the status of the synchronization on the **Shopify Bulk Operations** page.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Get started with the Shopify Connector (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Electronic Documents

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Electronic Documents in Business Central streamlines the process of sending and receiving electronic documents by reducing the need for manual data entry and minimizing errors. This smoother process helps users become more efficient and productive because they can focus on more strategic tasks. Additionally, Electronic Documents enhances data accuracy and security, ensuring that sensitive information stays protected. By implementing Electronic Documents in Business Central, businesses save time and costs while improving overall operational efficiency.

Note: The author created this article with assistance from AI. Learn more

Automate embedded attachments in PEPPOL

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Apr 1, 2025	✔ Jun 1, 2025

Business value

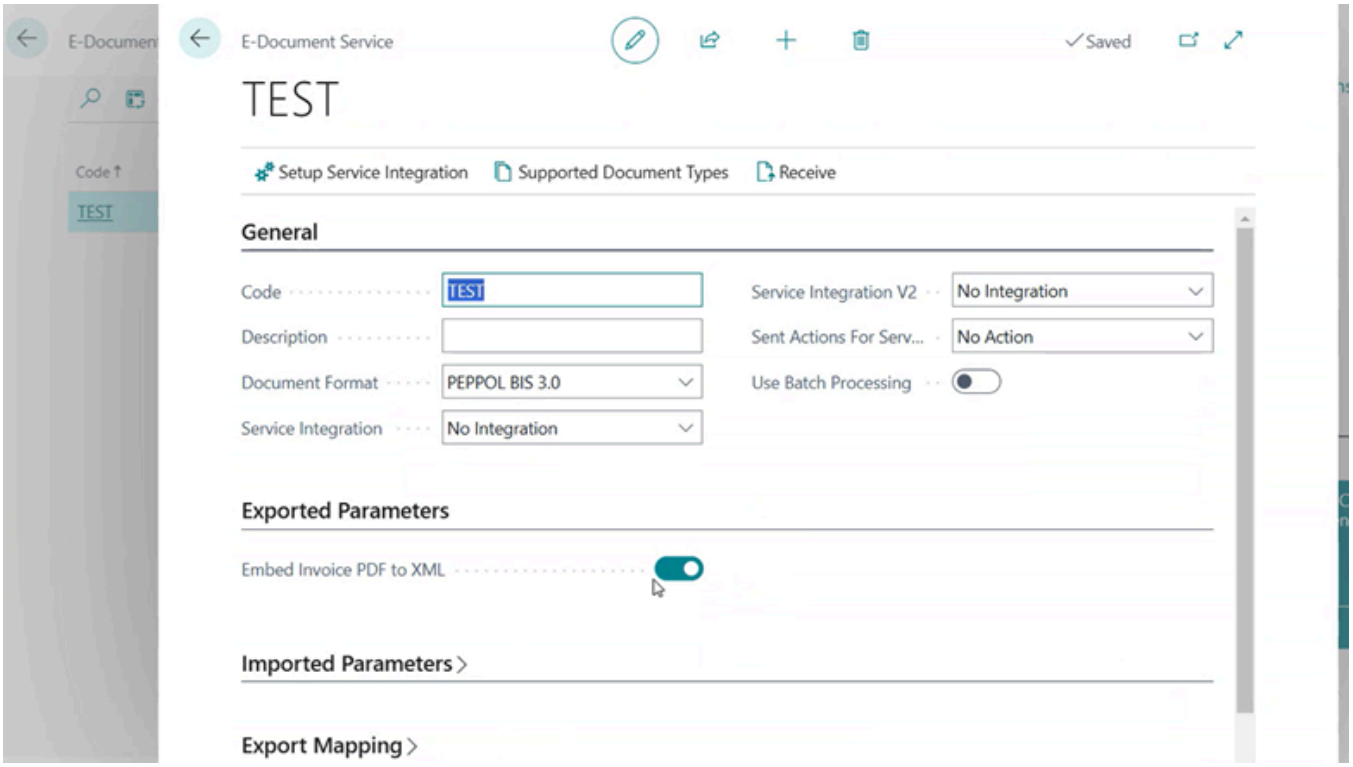
Businesses can boost productivity by using embedded PDFs in the PEPPOL file format for sales and purchase documents. This format ensures human-readable formats with e-documents.

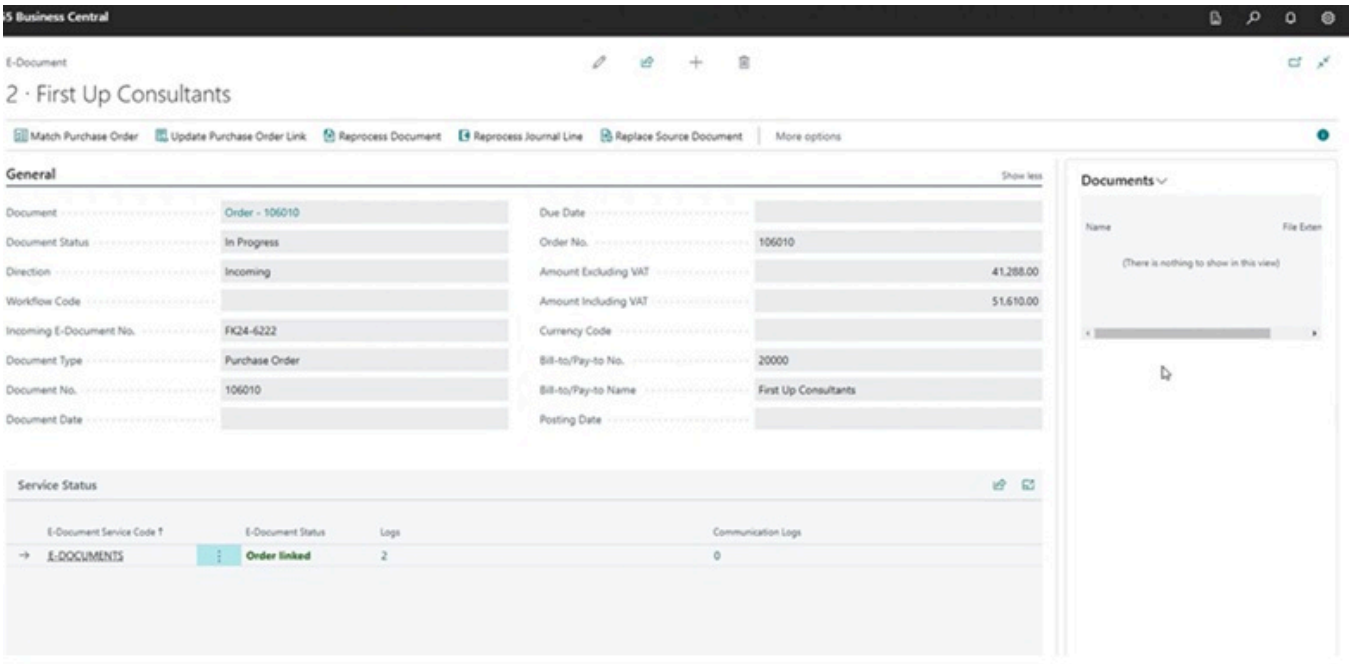
Feature details

By adding the ability to encode attachments in the PEPPOL file format in Business Central 2024 release wave 2, you get extra automation. You can automate embedding sales document attachments in the PEPPOL file format. When you post a document, Business Central creates a PDF file and embeds it in the PEPPOL format, which includes both the full XML and a human-readable format. To turn on this option, select the **Embed document PDF to export** field on the **E-Document Service** page.

During the purchase process, Business Central can process PEPPOL files with embedded attachments, like invoices. It decomposes the embedded file, adds it as an attachment to the e-document record, and makes it available on the **E-Document** page for further processing.

```
<?xml version="1.0" encoding="UTF-8" standalone="no"?>
<Invoice xmlns:cac="urn:oasis:names:specification:ubl:schema:xsd:CommonAggregateComponents-2" xmlns:cbc="urn:oasis:names:specifica
  <cbc:CustomizationID>urn:cen.eu:en16931:2017#compliant#urn:fdc:peppol.eu:2017:poacc:billing:3.0</cbc:CustomizationID>
  <cbc:ProfileID>urn:fdc:peppol.eu:2017:poacc:billing:01:1.0</cbc:ProfileID>
  <cbc:ID>103032</cbc:ID>
  <cbc:IssueDate>2025-01-28</cbc:IssueDate>
  <cbc:DueDate>2025-01-28</cbc:DueDate>
  <cbc:InvoiceTypeCode>380</cbc:InvoiceTypeCode>
  <cbc:DocumentCurrencyCode>EUR</cbc:DocumentCurrencyCode>
  <cbc:BuyerReference>abc123</cbc:BuyerReference>
  <cac:ContractDocumentReference>
    <cbc:ID>103032</cbc:ID>
  </cac:ContractDocumentReference>
  <cac:AdditionalDocumentReference>
    <cbc:ID>103032</cbc:ID>
    <cbc:DocumentType />
    <cac:Attachment>
      <cbc:EmbeddedDocumentBinaryObject mimeCode="application/pdf" filename="Invoice_103032.pdf">JVBERi0xLjcNCiXIycrLDQo1IDAgb2JqD
      <cac:ExternalReference>
        <cbc:URI />
      </cac:ExternalReference>
    </cac:Attachment>
  </cac:AdditionalDocumentReference>
  <cac:AccountingSupplierParty>
    <cac:Party>
      <cbc:EndpointID schemeID="">123456789</cbc:EndpointID>
      <cac:PartyName>
        <cbc:Name>Test Company</cbc:Name>
      </cac:PartyName>
      <cac:PostalAddress>
        <cbc:StreetName>Street 15</cbc:StreetName>
        <cbc:CityName>Paris</cbc:CityName>
        <cbc:PostalZone>12</cbc:PostalZone>
        <cac:Country>
          <cbc:IdentificationCode>FR</cbc:IdentificationCode>
        </cac:Country>
      </cac:PostalAddress>
```





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Set up e-documents (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Delete incorrect e-documents and avoid duplicates

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ May 1, 2025

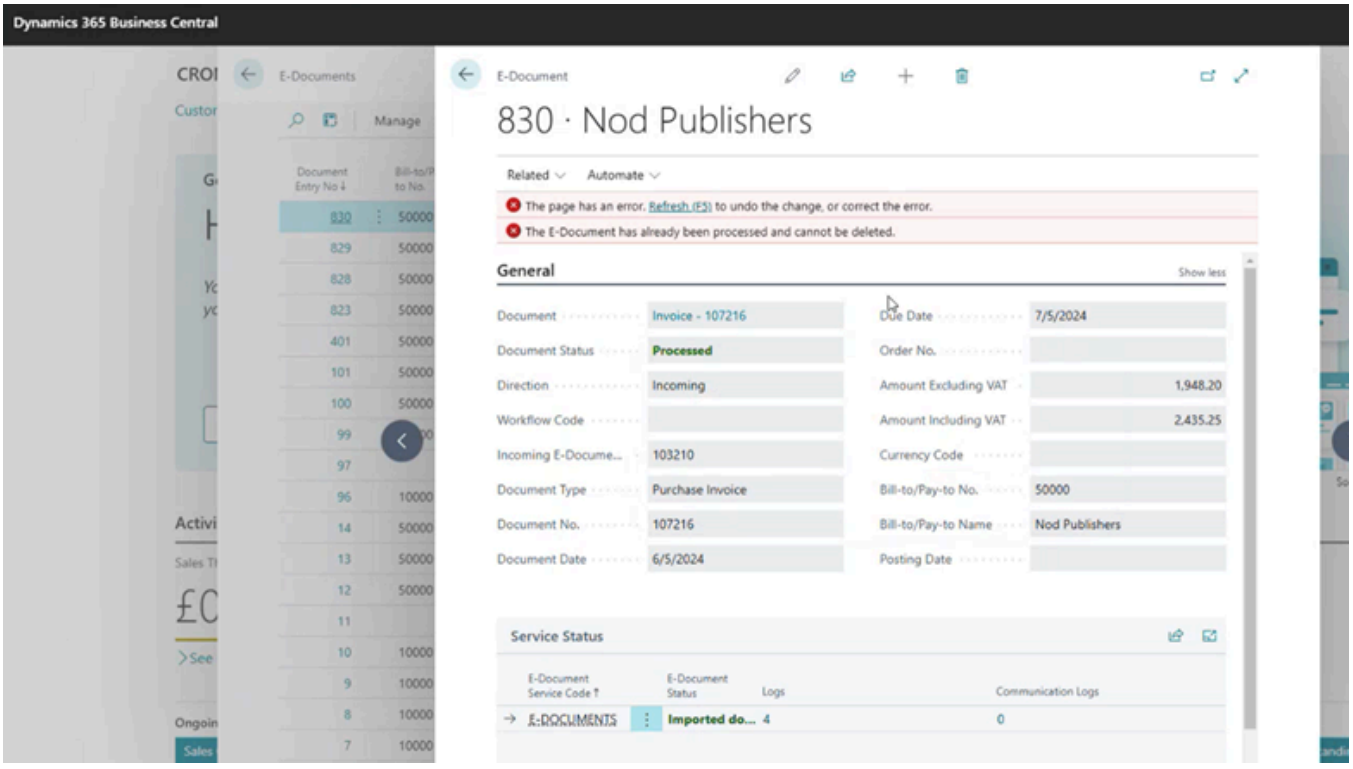
Business value

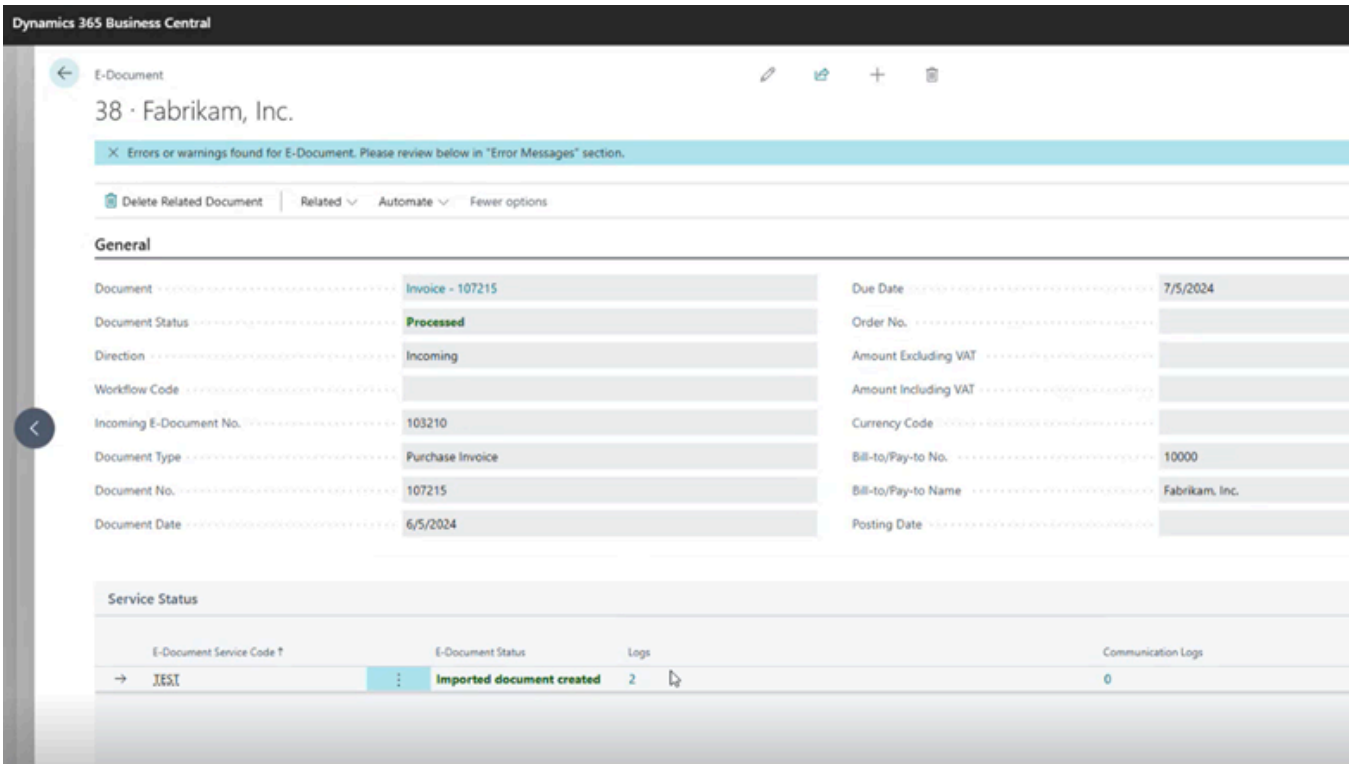
You can easily discard incorrect or duplicate e-documents. You don't need to keep unprocessed e-documents, so you save space in data storage.

Feature details

Business Central doesn't create new incoming e-documents if you import a batch that contains duplicates. Duplicates are documents with the same vendor, external document number, and date.

If a duplicate or incorrect e-document exists in Business Central, administrators can delete it by running the **Delete Related Document** action. However, you can't delete e-documents that are already processed and connected with purchase documents.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Delete incorrect e-documents and avoid duplicates (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 12/04/2025

Extend E-Documents features using a new interface

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Apr 1, 2025

Business value

The extensible framework in the E-Document Core module gives ISVs and localization partners the power to easily add new document types, formats, and connectors. This framework enhances customization and adaptability for different local needs. This flexibility encourages innovation and simplifies the development of tailored solutions, which drives business growth and efficiency.

Feature details

The E-Document module works as an extension and a framework. It includes only a few E-Document formats for specific localizations. These formats and other details are part of localization apps that handle specific local needs. This framework meets most requirements for e-invoice communication processes. Localization apps handle some requirements. The framework supports extending functionalities to other electronic documents beyond e-invoices.

When you select **Service Integration** on the **E-Document Service** page, you see several available choices. To add your own service, add a local connector or add another global or regional connector. You can extend this app with new services. You can add new services as part of a localization or as a new ISV app.

To meet all requirements for both localization and new electronic document features, Microsoft updated the interface. The update makes it easy for you to extend the framework with different document types, formats, connectors, and more. For more information, see Extending the e-documents functionality.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Extending the e-documents functionality (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Generate multiple incoming e-documents for multiple attachments

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

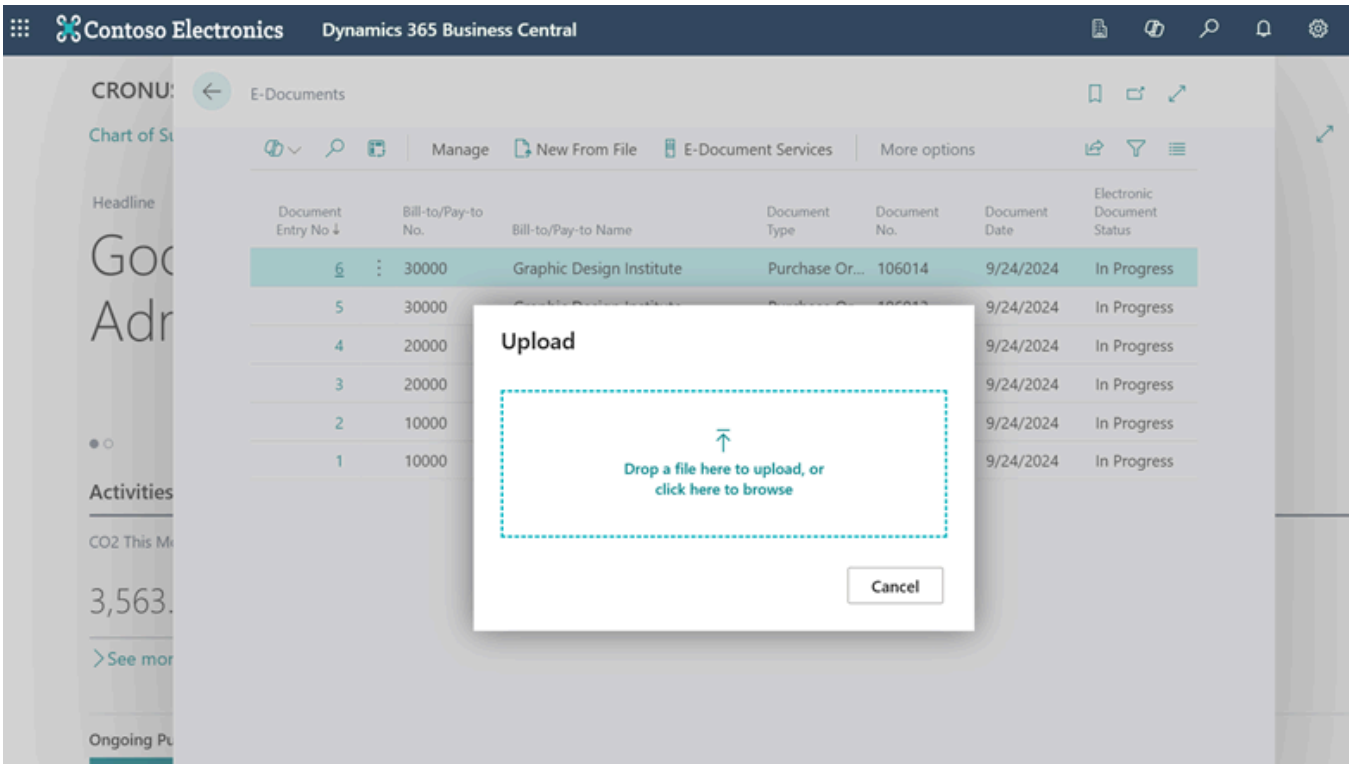
Business value

If you don't use an external endpoint to receive e-documents, you can save significant time when you generate multiple incoming e-documents and manually upload multiple attachments instead of uploading each attachment one by one.

Feature details

You can create multiple new incoming electronic documents by selecting **New From File** on the **E-Documents** page. Choose the right service for the correct **Document Format**, and then upload multiple documents.

Business Central processes all uploaded documents. If a document's format matches the chosen **Document Format**, Business Central creates a new incoming **E-Document** for that file.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Use e-documents in the purchases process (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Preview incoming e-invoices prior to processing

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ May 1, 2025

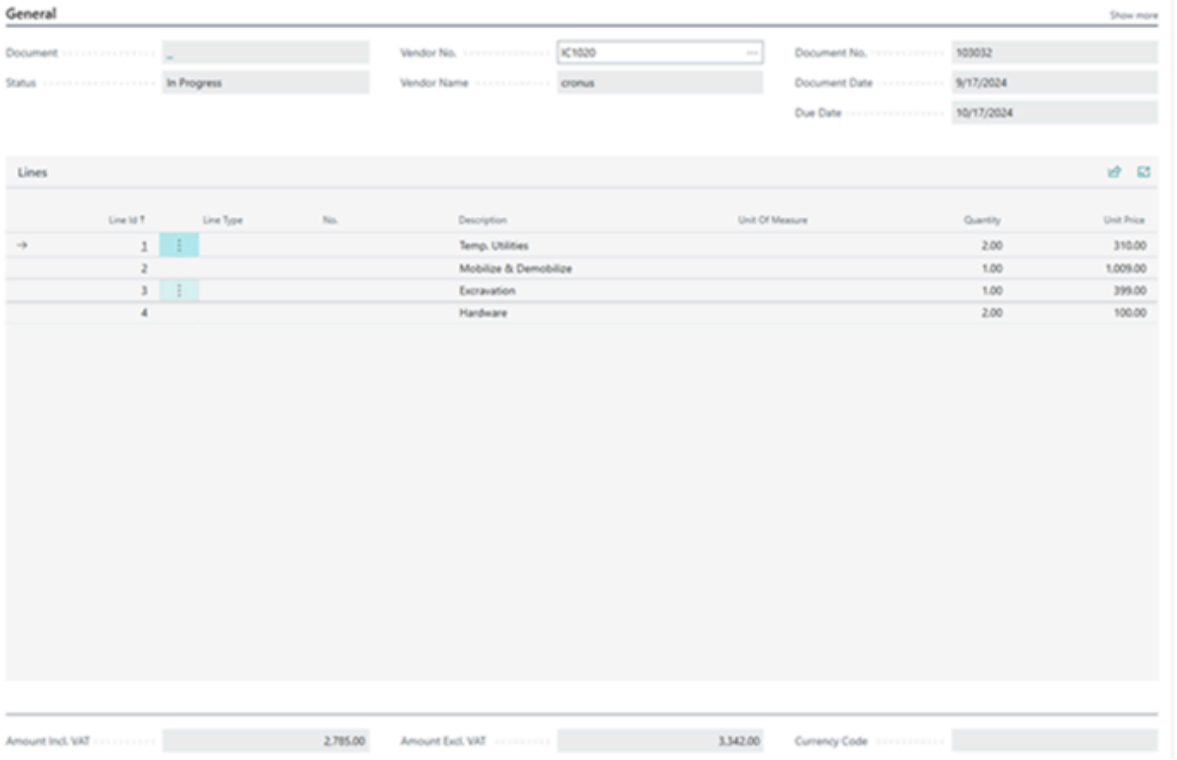
Business value

You can improve the accuracy of your data by previewing the details of incoming electronic documents, such as invoices and credit memos, before you process them.

Feature details

When you receive an incoming e-document from an external service or manually upload one, you typically get an XML or similar format that's difficult to read. For example, if you're not technical and don't understand the XML format, it's hard to review an invoice before you process it. To make it easier for everyone to review incoming e-documents, invoices and credit memos have an **E-invoice Lines** FastTab that displays details from the imported file, such as line and header information, in a way that's easy to understand.

This feature is available only for invoice and credit memo types of incoming e-documents.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Work with purchase invoices (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 12/04/2025

Process e-documents in two steps

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

In most cases, businesses want to save time by automating as many processes as possible. However, some cases require pausing a process to allow time for a review. Business Central supports both approaches. You can configure Business Central to create purchase documents in a fully automated, one-step process or in a two-step process that requires approval. Pausing for review gives you greater control over how you process e-documents and create purchase documents.

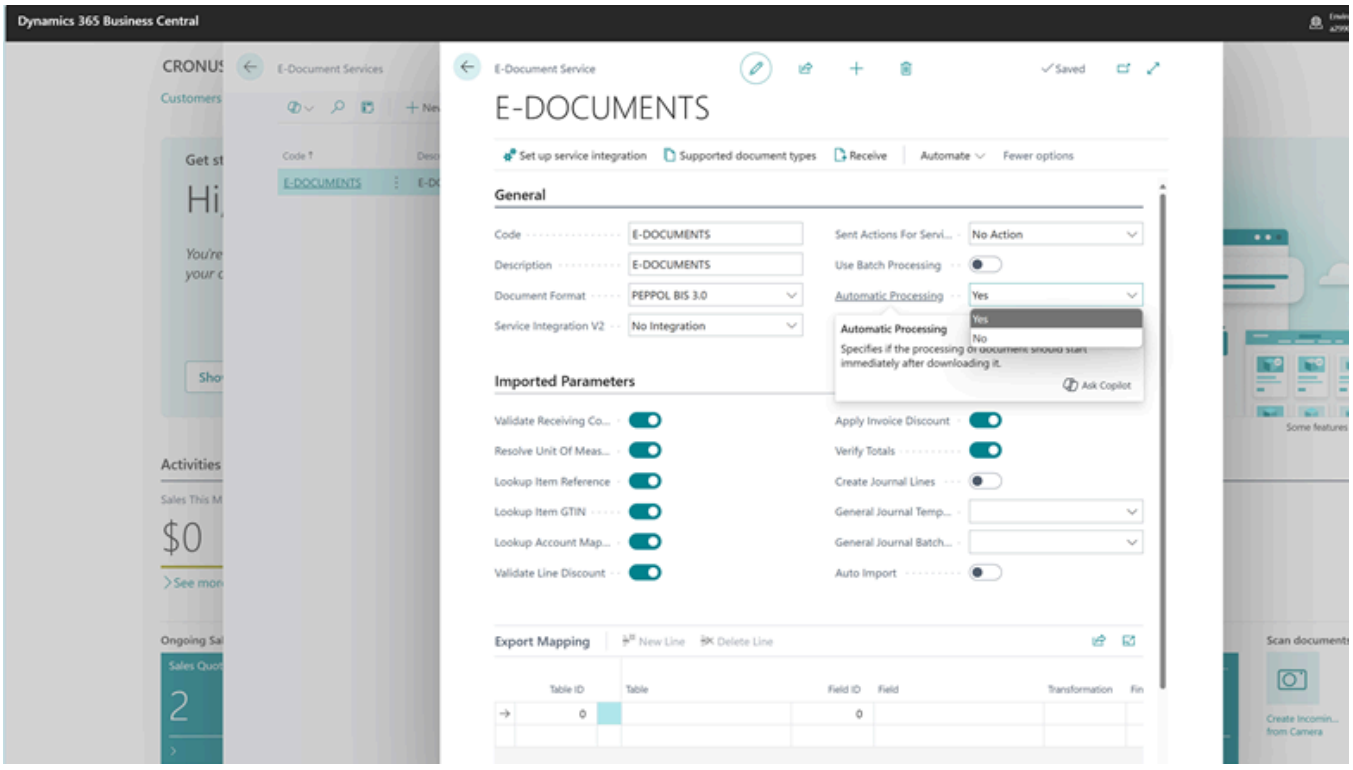
Reviewing e-documents gives you more control over their processing.

Feature details

You can choose to use automatic processing for purchase documents, where Business Central creates new documents right away, or a two-step process that requires explicit confirmation before creating a purchase document. In the two-step process, Business Central creates the e-document, but you must confirm it before you can take the next step.

To set up the process, turn on or turn off the **Automatic processing** toggle on the **E-Documents Service** page:

- **Turn on**: Business Central uses your e-document setup to automatically create a purchase document from the received e-document.
- **Turn off**: Business Central creates the e-document. You use the **Create Invoice** or **Create Order** actions to create the purchase document. You can review the received document before proceeding.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Set up e-documents (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use B2B Router as a service provider for e-documents

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ May 1, 2025	✔ Jun 1, 2025

Business value

When businesses exchange electronic invoices during business-to-business (B2B) or business-to-government (B2G) communication, they can choose from many external service providers. This choice gives businesses the flexibility to pick the provider that best fits their needs. This flexibility boosts operational efficiency, lowers costs, and reduces risks that come with relying on a single provider. Businesses can speed up invoice processing, meet different regulatory requirements, and simplify their financial workflows.

Feature details

You can use more options as access points for electronic invoicing because we added more electronic document service providers to Business Central. Now, in addition to Avalara, Pagero, SignUp, and Logiq, you can choose the **B2BRouter** connector for your electronic invoicing.

You can choose new options as the **Service Integration** endpoints on the **E-Document Service** page. When you select **B2BRouter** as a service provider and consent to using non-Microsoft systems, you set up the connection. To set up the connection, use the **Setup Service Integration** action to configure the credentials and API URLs.

When you integrate the new service provider, you can automate the receipt and delivery of electronic invoices. The provider acts as the endpoint for e-document exchanges. This automation streamlines invoice management, reduces manual processing errors, and accelerates transaction times. It significantly enhances operational efficiency and boosts overall productivity.

Although the **E-Document Services** page already includes several global service integrations, partners can easily add their own integrations by publishing a connector app on AppSource. For more information, see the technical documentation.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Set up the E-Documents connector with external endpoints (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use Continia as a service provider for e-documents

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Jun 1, 2025	✔ Jul 1, 2025

Business value

When businesses exchange electronic invoices during business-to-business (B2B) or business-to-government (B2G) communication, they can choose from many external service providers. This choice gives businesses the flexibility to pick the provider that best fits their needs. With this flexibility, businesses boost operational efficiency, lower costs, and reduce risks that come with relying on a single provider. Businesses can speed up invoice processing, meet different regulatory requirements, and simplify their financial workflows.

Feature details

You can use more options as access points for electronic invoicing because we added more electronic document service providers to Business Central. Now, in addition to Avalara and Pagero, you can choose the **Continia** connector for your e-invoicing.

You can choose new options as the service integration endpoints on the **E-Document Service** page. When you select **Continia** as a service provider and consent to using non-Microsoft systems, you set up the connection. Use the **Setup Service Integration** action to start your onboarding process and get credentials from Continia as the service provider.

When you integrate the new service provider, you automate the receipt and delivery of electronic invoices. The provider serves as the endpoint for e-document exchanges. This automation streamlines invoice management, reduces manual processing errors, and accelerates transaction times. It enhances operational efficiency and boosts overall productivity.

Although the **E-Document Services** page has several global service integrations, partners can easily add their own integrations by publishing a connector app on AppSource. For more information, see the technical documentation.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

learn.microsoft (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use e-documents to fix unposted purchase documents

Expand table

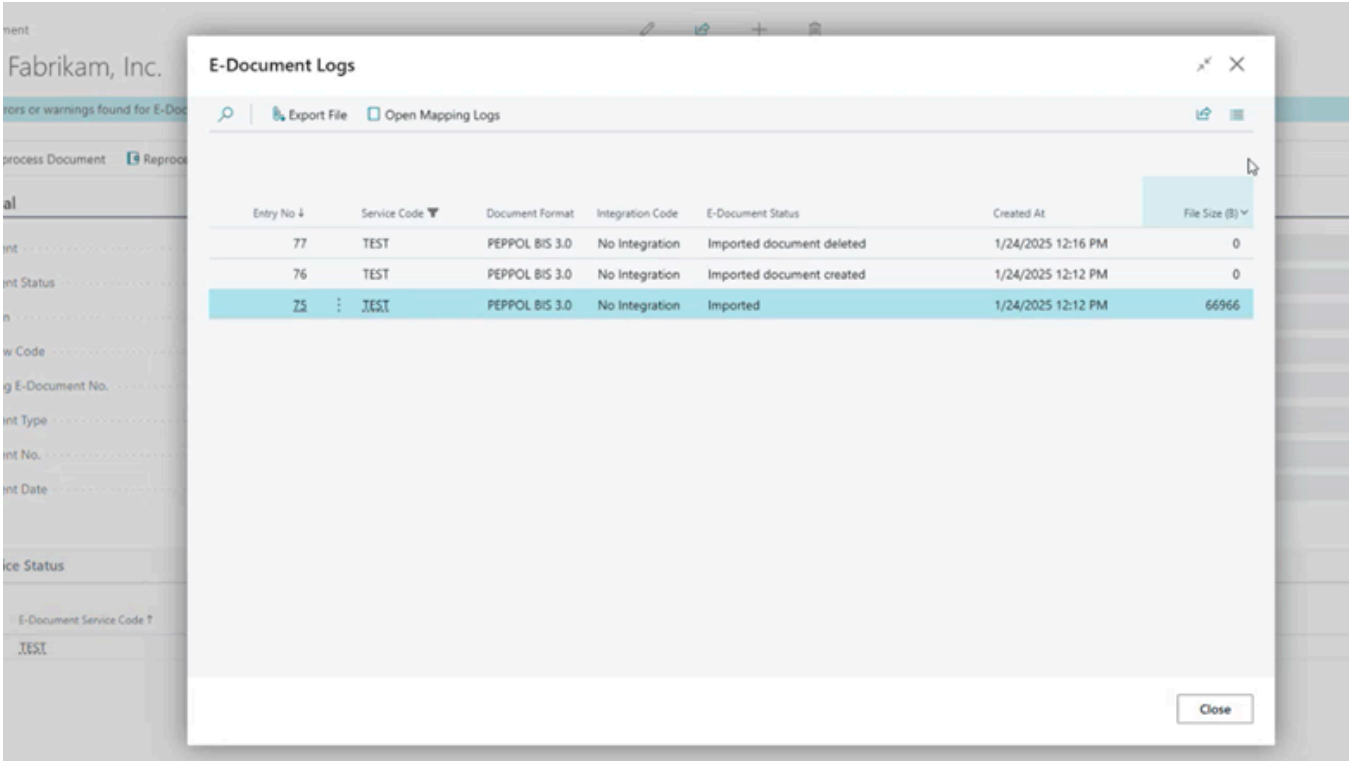
Enabled for	Public preview	General availability
Users, automatically	-	✔ May 1, 2025

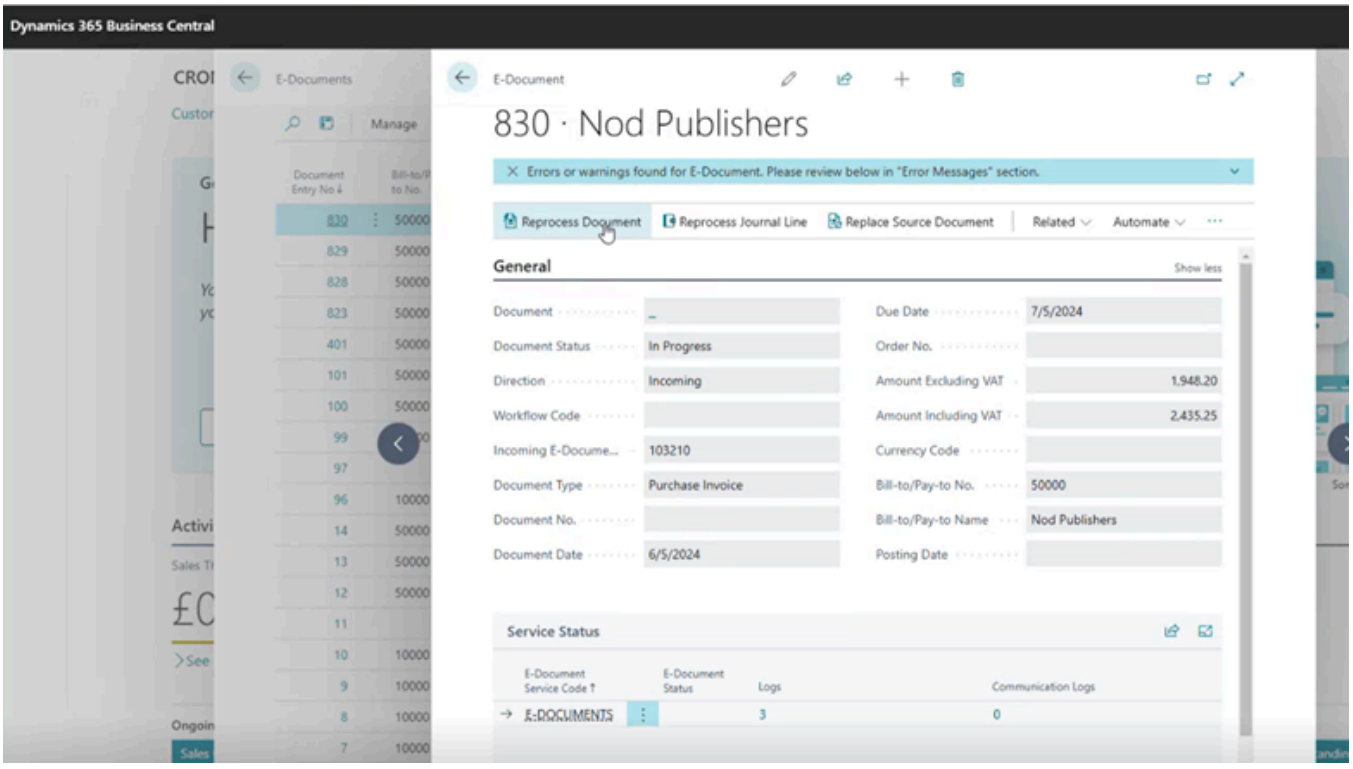
Business value

Mistakes happen, so it's important to fix them quickly. If you accidentally delete a purchase invoice or credit memo and can't link the incoming e-document to the correct document, you can now recreate the purchase document from the details in the e-document. Problem solved.

Feature details

If you accidentally delete a purchase invoice or credit memo, you can't connect the e-document with the regular purchase document in Business Central. To resolve the issue, run the **Recreate Document** action from the e-document. The action creates an unposted purchase invoice or credit memo based on the incoming document type. It uses the information in the incoming document, G/L mapping, and item references.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Recreate a deleted purchase invoice or credit memo (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 12/04/2025

Use ExFlow by SignUp connector for e-documents

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2025	✔ May 1, 2025

Business value

When businesses exchange electronic invoices during business-to-business (B2B) or business-to-government (B2G) communication, they can choose from many external service providers. This choice gives businesses the flexibility to pick the provider that best fits their needs. With this flexibility, businesses boost operational efficiency, lower costs, and reduce risks that come with relying on a single provider. Businesses can speed up invoice processing, meet different regulatory requirements, and simplify their financial workflows.

Feature details

You can use more options for access points for electronic invoicing because we added more electronic document service providers to Business Central. Now, in addition to Avalara and Pagero, you can use the **ExFlow** by SignUp connector for your electronic invoicing.

You can choose new options for the service integration endpoints on the **E-Document Service** page. When you select **ExFlow** as a service provider and consent to using non-Microsoft systems, you set up the connection. To set up the connection, use the **Setup Service Integration** action to start your onboarding process and configure the credentials and API URLs.

When you integrate the new service provider, you automate the receipt and delivery of electronic invoices. The provider acts as the endpoint for e-document exchanges. This automation streamlines invoice management, reduces manual processing errors, and accelerates transaction times. It enhances operational efficiency and boosts overall productivity.

Although the **E-Document Services** page already includes several global service integrations, partners can easily add their own integrations to the list. To add an integration, publish a connector app on AppSource. For more information, see the technical documentation.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Set up the E-Documents connector with external endpoints (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use Logiq as a service provider for e-documents

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2025	✔ May 1, 2025

Business value

When businesses exchange electronic invoices during business-to-business (B2B) or business-to-government (B2G) communication, they can choose from many external service providers. This choice gives businesses the flexibility to pick the provider that best fits their needs. With this flexibility, businesses boost operational efficiency, lower costs, and reduce risks that come with relying on just one provider. Businesses can speed up invoice processing, meet different regulatory requirements, and simplify their financial workflows.

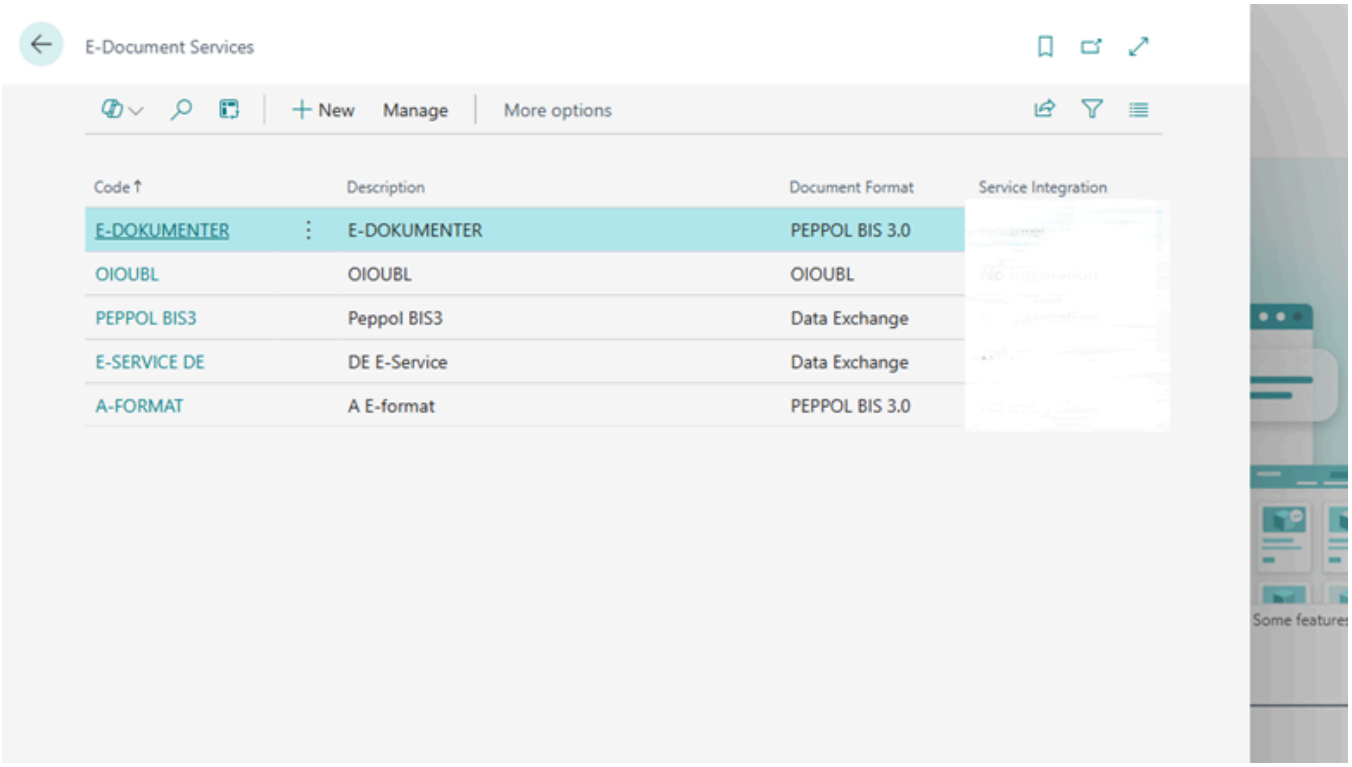
Feature details

Business Central now supports more electronic document service providers, so you have more options for access points for electronic invoicing. In addition to Avalara and Pagero, you can now choose the **Logiq** connector for your electronic invoicing.

On the **E-Document Service** page, you select new options for the **Service Integration** endpoints. When you select **Logiq** as the 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 the credentials and API URLs.

When you integrate the new service provider, you can automate the receipt and delivery of electronic invoices. The provider acts as the endpoint for e-document exchanges. This automation streamlines invoice management, reduces manual processing errors, and accelerates transaction times. It enhances operational efficiency and boosts overall productivity.

Although the **E-Document Services** page has several global service integrations, partners can easily add their own integrations by publishing a connector app on AppSource. For more information, see the technical documentation.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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Additional resources

Set up the E-Documents connector with external endpoints (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Financial Management

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 the Financial Management capabilities for each release, we prioritize customer requests and respond to market trends. For example, we focus on helping customers use Copilot to optimize their business processes. This focus includes leveraging AI to streamline data entry, automate routine tasks, and provide intelligent insights that enhance decision-making.

Currently, we focus on enabling agents to help with tasks related to financial management. For example, agents help with bookkeeping tasks based on previous patterns or business practices. We're committed to ensuring that our financial management tools are robust and adaptable to the diverse needs of our global user base. This commitment involves enhancing the management of taxes to comply with various international regulations and continuously updating Business Central to address the evolving financial landscape.

Note: The author created this article with assistance from AI. Learn more

Analyze subscription billing data with Power BI reports

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Jun 15, 2025

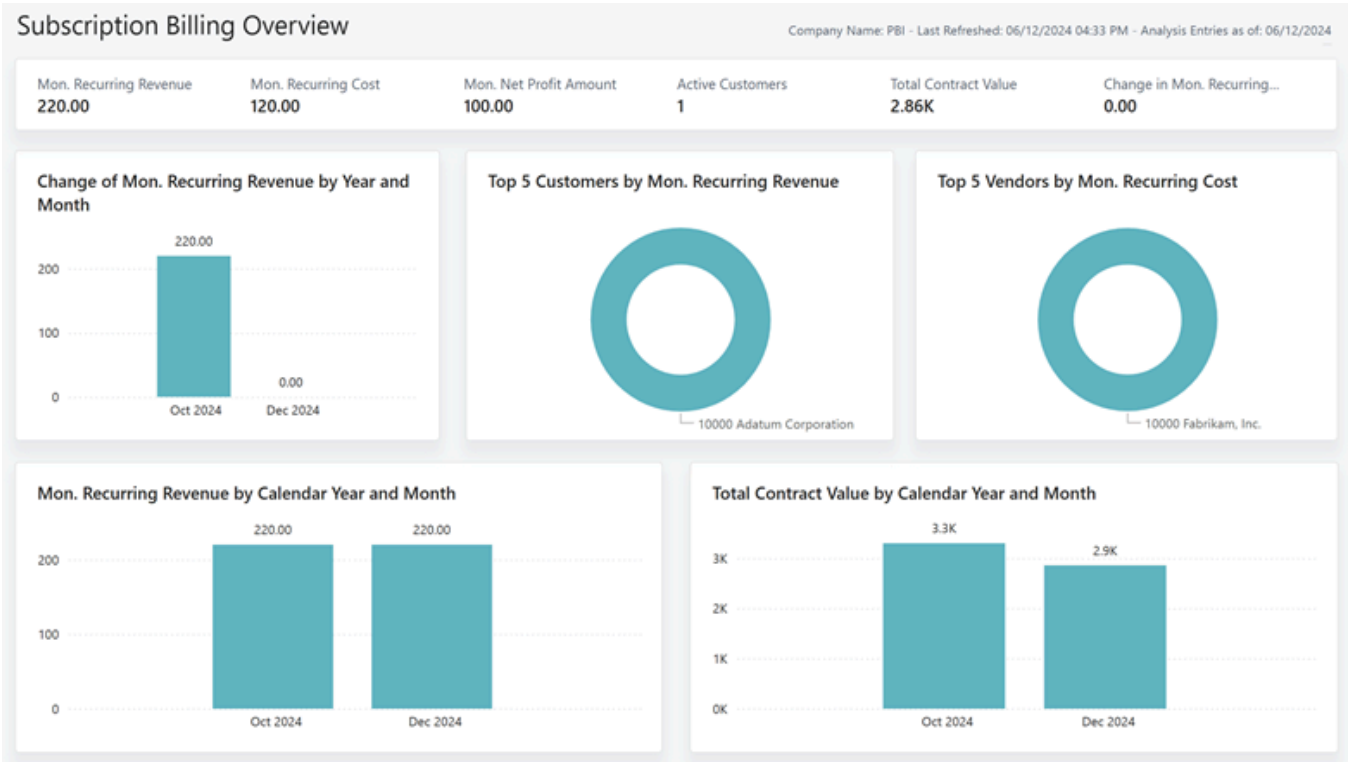
Business value

The new Power BI app for subscription billing data analysis gives you comprehensive insights into your business. With detailed reports and key performance indicators (KPIs), you can monitor critical metrics like monthly recurring revenue and net monthly recurring profit, so you can make informed decisions.

The app's granular insights into revenue by item, customer, and salesperson help you optimize your sales and marketing efforts. Tracking customer and vendor deferrals helps you manage cash flow. This app enhances your ability to grow your subscription business and improve your bottom line.

Feature details

A new Power BI app helps you analyze your subscription billing data. The 26.2 update releases the source code for the Power BI app.



The app contains reports that provide both overview and detailed information, such as:

- Subscription Overview
- Revenue Year-Over-Year
- Revenue Analysis
- Revenue Development
- Revenue by Item
- Revenue by Customer
- Revenue by Salesperson
- Total Contract Value
- Year-Over-Year Total
- Contract Value Analysis
- Customer Deferrals Vendor

To help you track important metrics for your subscription business, the semantic model for the report includes KPIs such as:

- Monthly Recurring Revenue
- Monthly Recurring Cost
- Net Monthly Recurring Profit
- MRR Churn
- MRR Downgrade
- MRR New
- MRR Upgrade
- MRR Change Usage Based Billing
- MRR Overall Change

- Active Customers
- Total Contract Value
- Revenue Forecast
- Customer Deferrals
- Vendor Deferrals

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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

Check total purchase amounts on documents

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

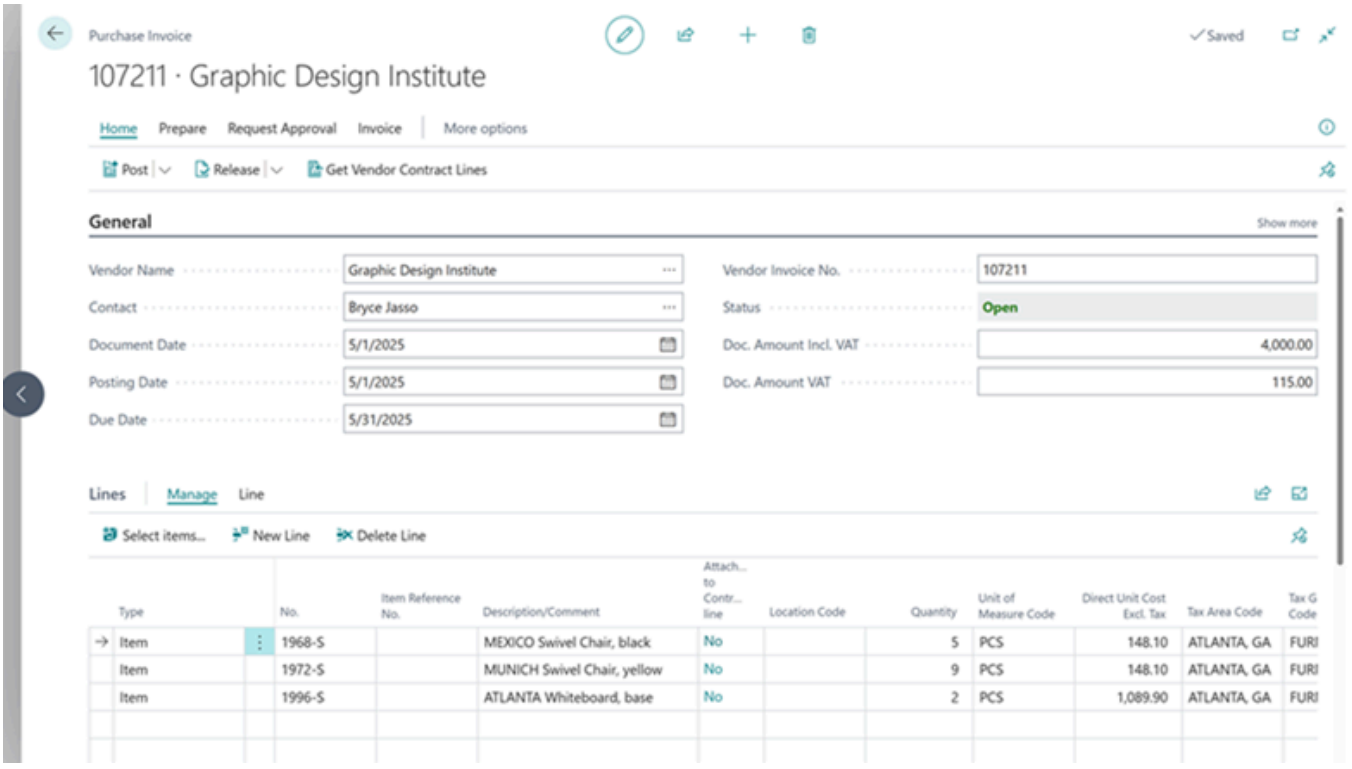
Business value

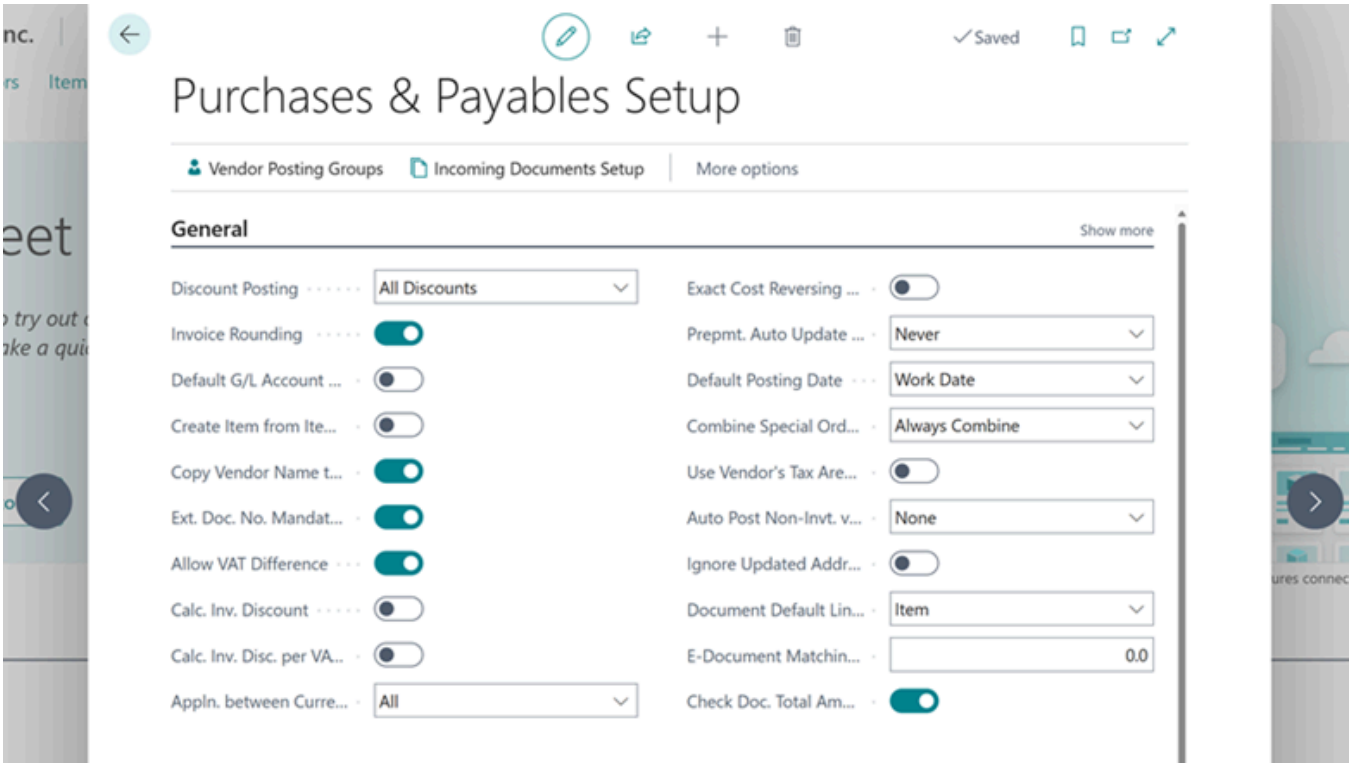
This feature helps you ensure that all line items are accurate and match the external invoice. It reduces human errors in accounts payable processes.

Feature details

Previously, this feature was part of the check purchase amounts functionality in the Netherlands localization. As part of the delocalization process, this feature is now global and available to everyone.

When you set up the feature, select **Check Doc. Total Amounts**. If you don't activate the feature, there's no change. When you activate the feature, the **Doc. Amount Incl. VAT** and **Doc. Amount VAT** fields appear on the **Purchase Invoice** and **Purchase Credit Memo** pages. You must fill in these fields before you can post the documents. Business Central checks whether the amount including VAT and the VAT amount on the purchase document match the total amount of the purchase lines when you try to post the document.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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Additional resources

Check amounts on purchase invoices and credit memos (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Require Intrastat classifications on documents

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

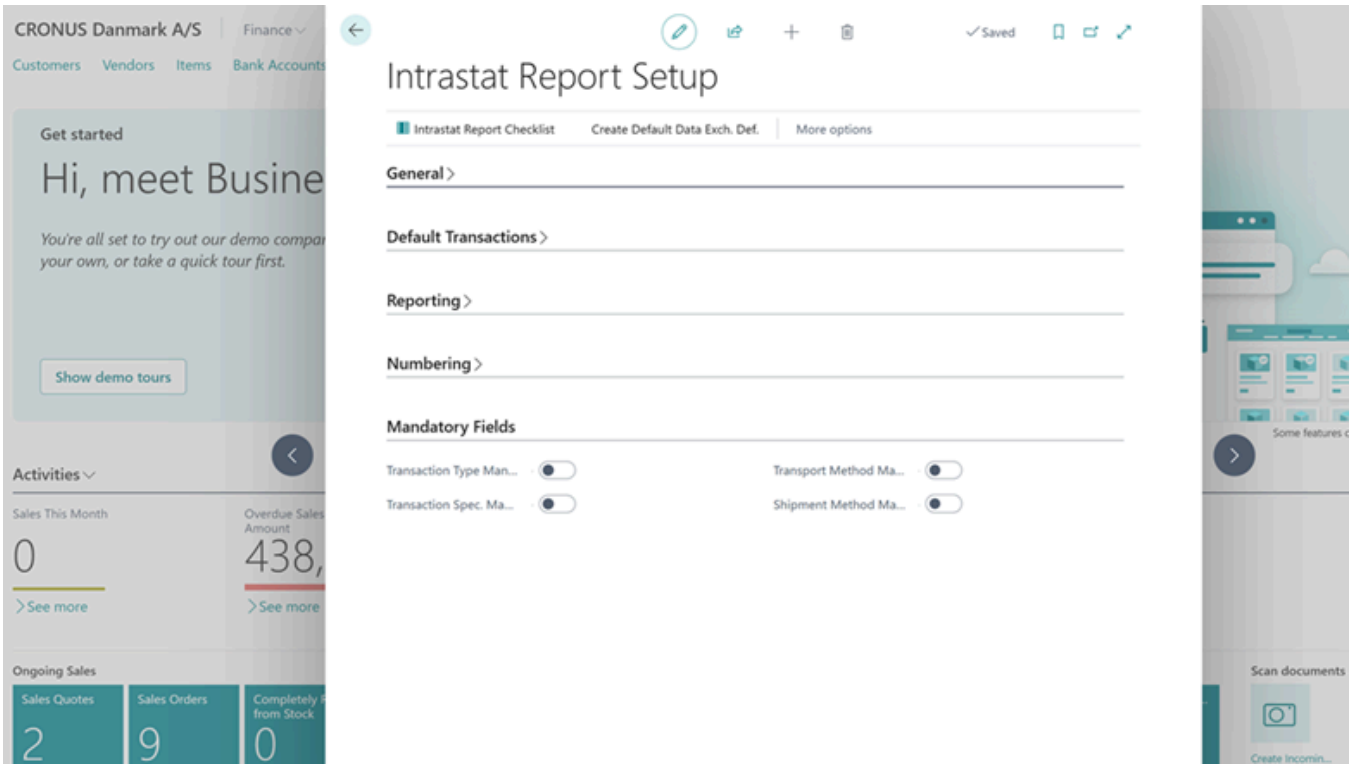
This feature makes Intrastat reporting more efficient by letting you set one or more required classification values for specific document types. Multiple required fields lower the risk of missing important information, so Intrastat reports are complete and accurate. This feature simplifies the reporting process, saves time, and reduces errors.

Feature details

The **Intrastat Report Setup** page now includes the following setup fields:

- Transaction Type Mandatory
- Transaction Spec. Mandatory
- Transport Method Mandatory
- Shipment Method Mandatory

Fill in these fields on purchase or sales documents based on your selections when the transaction is a sale or purchase between two different EU countries. This requirement prevents users from posting documents without this important information. It reduces the risk of missing details and ensures complete and accurate Intrastat reports.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

learn.microsoft (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Governance and administration

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 gives administrators more tools for managing environments, apps, and data migrations. With these tools, administrators can solve customer needs and handle a variety of administrative scenarios.

New features in Business Central improve security, flexibility, and partner management for customers with multiple environments. Administrators can assign partner access to specific environments, which simplifies control and compliance. Customer-managed encryption keys enhance data protection and help businesses meet privacy standards. Extended update windows give administrators more flexibility to schedule upgrades. A unified interface for managing per-tenant extensions (PTEs) and AppSource apps streamlines deployment across environments and saves time. IPv6 supports connectivity, ensures seamless service, and enhances data security.

Note: The author created this article with assistance from AI. Learn more

Add support for MultiSubnetFailover

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

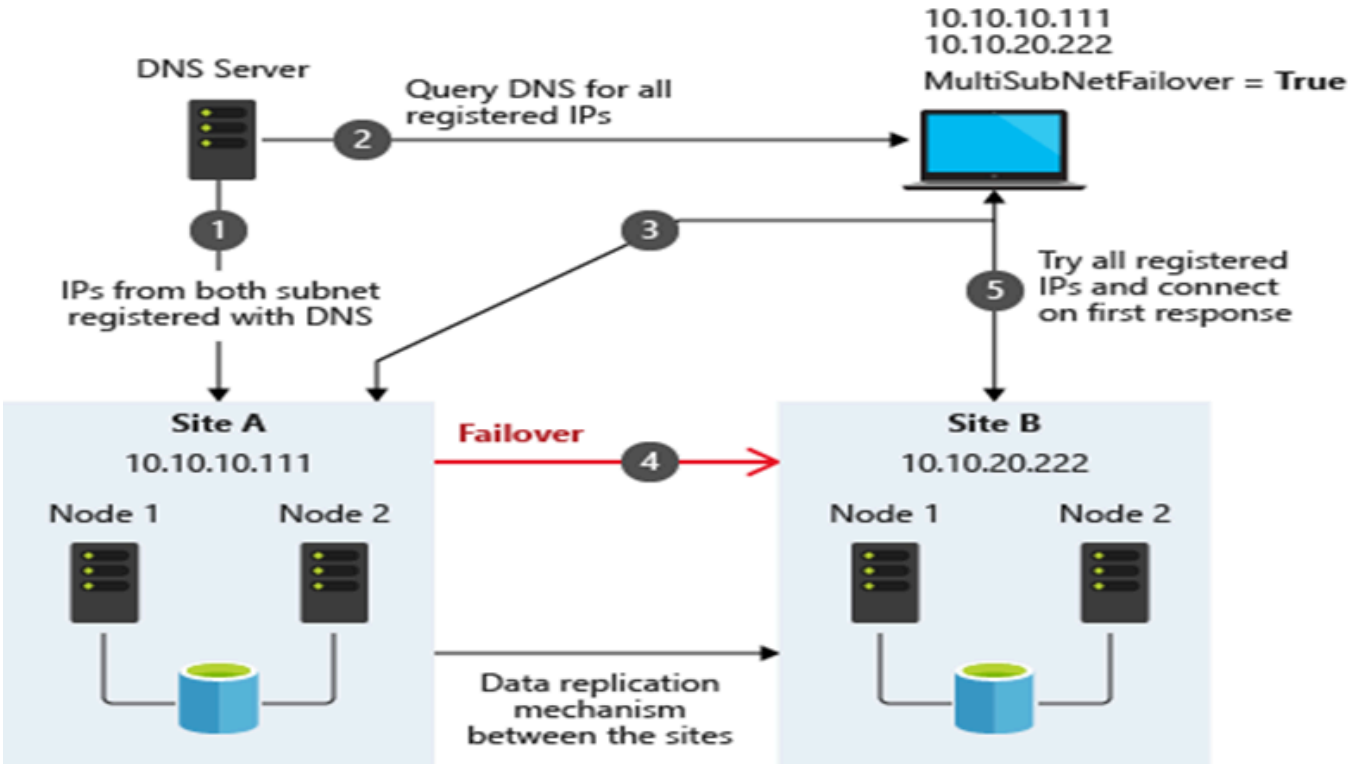
For on-premises customers who run the database with high availability features, failover operations are faster. This improvement reduces downtime during failovers and makes the system more available for users.

Feature details

The **MultiSubnetFailover** feature enables faster failover for all Availability Groups (AGs) or Failover Cluster Instances (FCIs) in SQL Server 2012 or later versions. This feature significantly reduces failover time for single-subnet and multi-subnet Always On topologies.

In this release wave, we added a new server setting, **EnableSqlMultiSubnetFailover**. When an administrator sets this value to true, the server enables the **MultiSubnetFailover** feature on connections from the server to the database. When you enable this setting, the system ensures faster failover operations for databases with high availability features. Users benefit from improved system availability.

For more information about the **MultiSubnetFailover** feature in SQL Server 2012, see SQL Server Multi-Subnet Clustering.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Database settings (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Enhanced index troubleshooting

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

The enhanced Database Missing Indexes page gives you deeper insights to help you optimize database performance. With new metrics, businesses can see opportunities to reduce query costs and improve system efficiency. These improvements lead to faster operations and a better user experience. These enhancements bring clear benefits, including better resource usage and cost savings.

Feature details

Use the **Database Missing Indexes** page to find ways to improve database performance by adding indexes.

This release adds new metrics to help you understand the benefits of adding indexes:

- **Seeks**: Shows the number of seeks from queries that could use the suggested index.
- **Scans**: Shows the number of scans from queries that could use the suggested index.
- **Average Total Cost**: Displays the average cost of queries that the suggested index can lower.
- **Average Impact**: Displays the average percentage reduction in query costs when you add the suggested index.
- **Estimated Benefit**: Calculates the potential benefit of adding the suggested index with this formula: (seeks + scans) × (average total cost) × (average impact).

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Missing indexes in Business Central databases (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Link to Power Platform to use Copilot Studio messages

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 1, 2025	✔ Apr 1, 2025

Business value

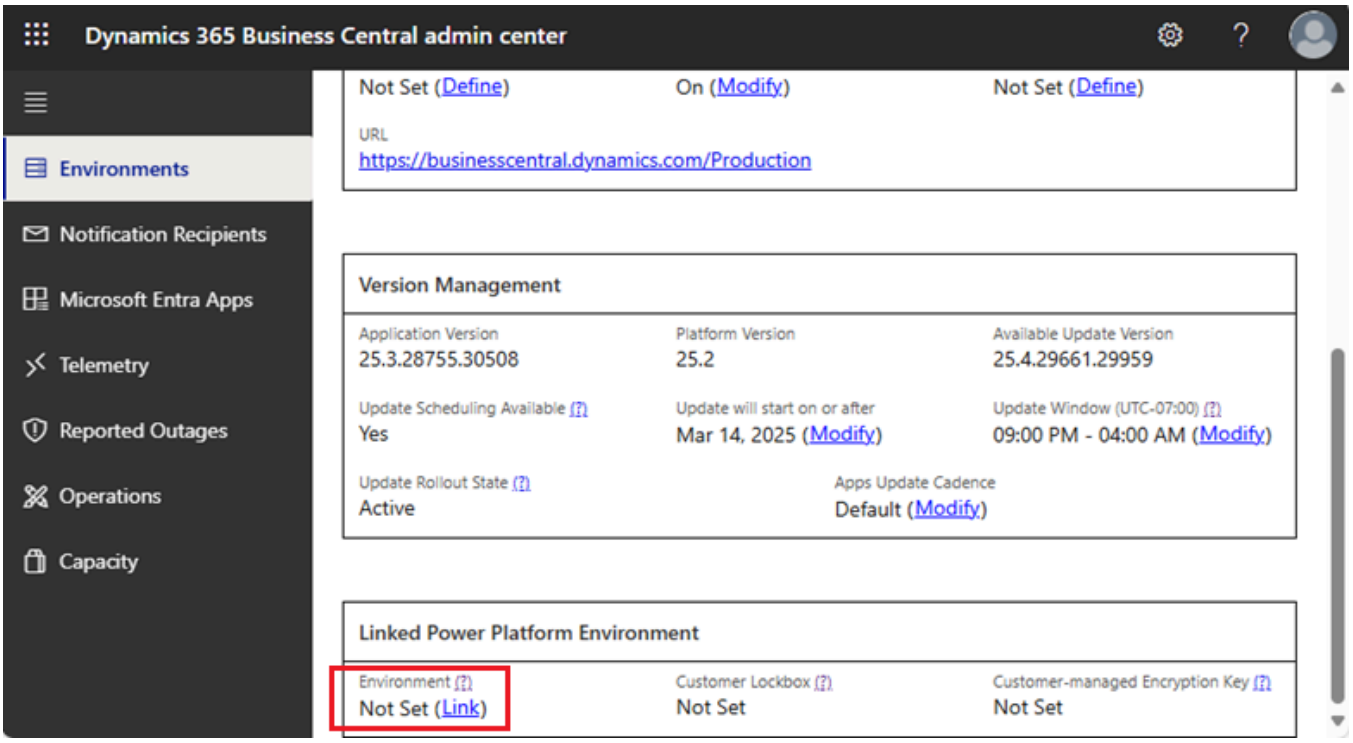
Link your Business Central and Power Platform environments to use Copilot Studio messages. With AI-driven automation, you get greater efficiency and stronger customer relationships.

Feature details

This release wave expands Business Central with powerful Copilot features and tools that boost user creativity and save time. For example, the Sales Order Agent helps small and medium business organizations improve efficiency and customer relations by automating the process of capturing sales quotes and orders using AI.

Some Copilot and agent capabilities, like the Sales Order Agent, charge for using Microsoft Copilot Studio messages. This feature introduces a consumption-based billing model for select capabilities, including the Sales Order Agent and AI features built with Development Tools for Copilot for Business Central.

To use these features, link the Business Central environment to a Power Platform environment from the Business Central admin center.



When you link the environments, the Business Central environment can use Microsoft Copilot Studio messages from any prepaid message capacity that you assign to the Power Platform environment. It also uses the billing policy for pay-as-you-go billing through an Azure subscription.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Linked Power Platform environment (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Manage environment updates more flexibly

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 1, 2024	✔ Apr 30, 2025

Business value

With extended periods for major releases and optional minor updates, administrators get more flexibility to update environments in a way that suits their needs. Businesses get more time to prepare for updates and plan them for less busy periods.

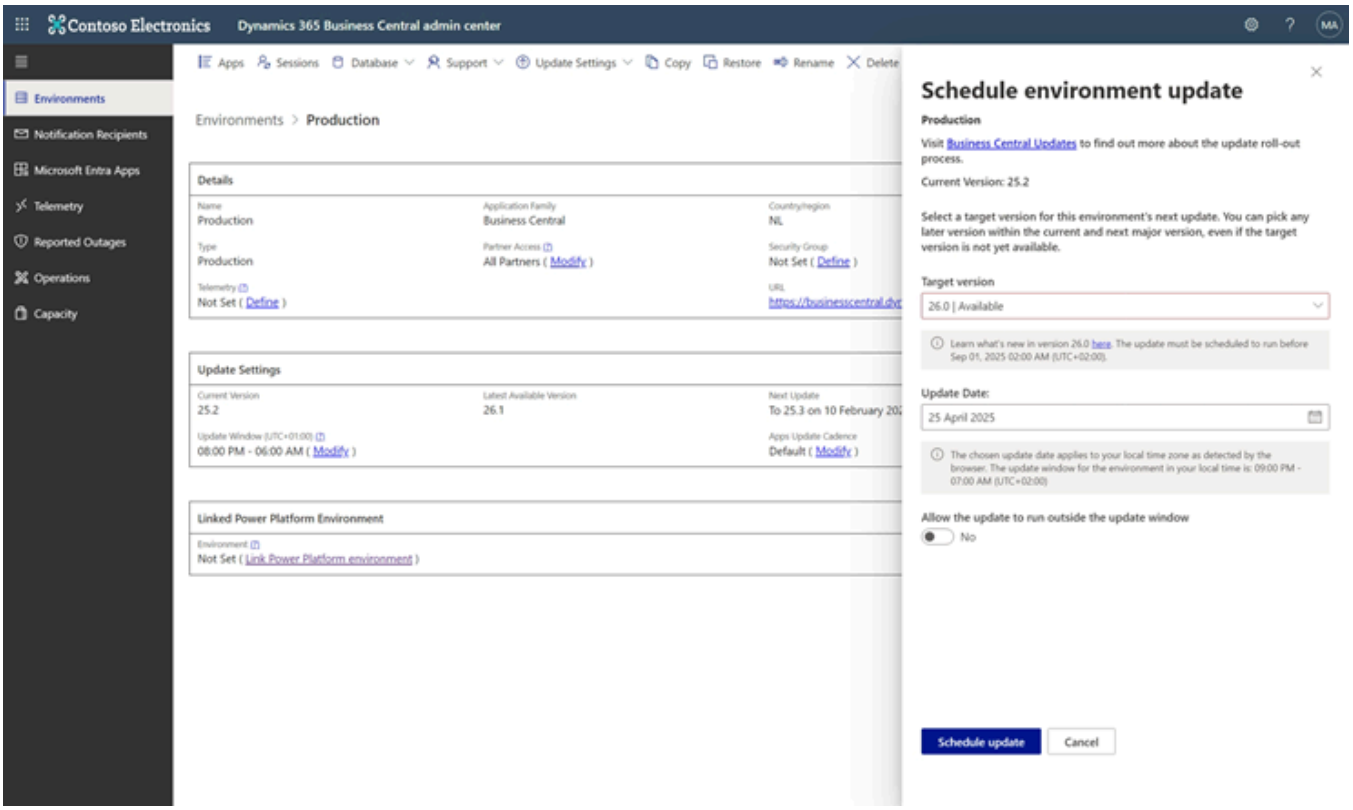
Feature details

Previously, the update policies for major and minor updates were relatively rigid. This release introduces the following changes that give you more flexibility:

- **Five-month update periods for major updates**: This change gives you 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 make sure all apps work with the update. Customers with specific testing and preparation requirements have more time to meet those requirements.

- **Optional minor updates**: This change lets administrators choose when to implement minor updates. Administrators can choose whether to implement minor updates. The default behavior of environments receiving updates every month doesn't change. Instead, administrators can pick any later version as the target version to schedule an update for. This choice skips intermediate versions.

As part of these changes, the grace period after the update period for the next major update is one month. As before, the update runs and you can't postpone it to a later date during this grace period. The update is forced by uninstalling incompatible extensions when the grace period ends.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Update period (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Support IPv6 for enhanced security and scalability

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ May 31, 2025

Business value

By adopting IPv6 in Business Central, you get uninterrupted service, improved security, and scalability as the number of internet-connected devices grows and IPv4 addresses become scarce.

Feature details

The supply of IPv4 addresses is limited and will eventually run out. Starting in this release wave, 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. This update also prepares your environments for the future as the world moves toward widespread IPv6 adoption.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Update sandbox environments to preview versions

09/18/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Sep 1, 2025

Business value

When this feature is available, you can update your sandbox environments to a preview version. You can test updates with your own data and installed extensions. This feature reduces risks, improves testing accuracy, and makes sure customizations integrate smoothly. With this feature, you make better decisions and experience smoother transitions.

Feature details

For each major Dynamics 365 Business Central update, Microsoft organizes a public preview starting a month before the release of the update. With the public preview, customers and partners can test and prepare for new functionality and other product changes by using a sandbox environment. Until now, you couldn't update a sandbox environment to a preview version. This limitation made it difficult to test the next major version with your own data and extensions.

With this feature, you can update a sandbox environment to the preview version. Customers and partners can now:

- Find and fix potential issues that environment data or installed extensions cause before updating their production environments.
- Test new functionality and the update operation itself with their own data, so they get a more accurate picture of how the update works in their environments.
- Validate that installed apps and integrations continue to work seamlessly with the new version, so you can take more time to make any required changes before updating production environments.
- Prepare more effectively. When a preview environment closely resembles a production environment, you can start user readiness activities earlier, such as product training and change communication.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Prepare for major updates with preview environments (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Reporting and data analysis

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 world, data is an invaluable resource. It forms 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 turn complex information into actionable intelligence. These advances reveal hidden patterns and trends, and they find correlations that earlier methods missed. The critical insights that data analysis provides empower organizations to optimize their strategies, enhance customer experiences, and identify potential risks. With these insights, organizations gain unprecedented understanding of their operations and environments. They can innovate in ways that once seemed impossible.

As data continues to fuel innovation and drive transformative advancements, harnessing its potential is essential for staying competitive. For small and medium-sized businesses, data helps shape a more efficient and sustainable future.

Our reporting strategy focuses on 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. With flexible self-service capabilities, you can easily access and use your data for maximum value.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Access report and request metadata in Word layouts

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

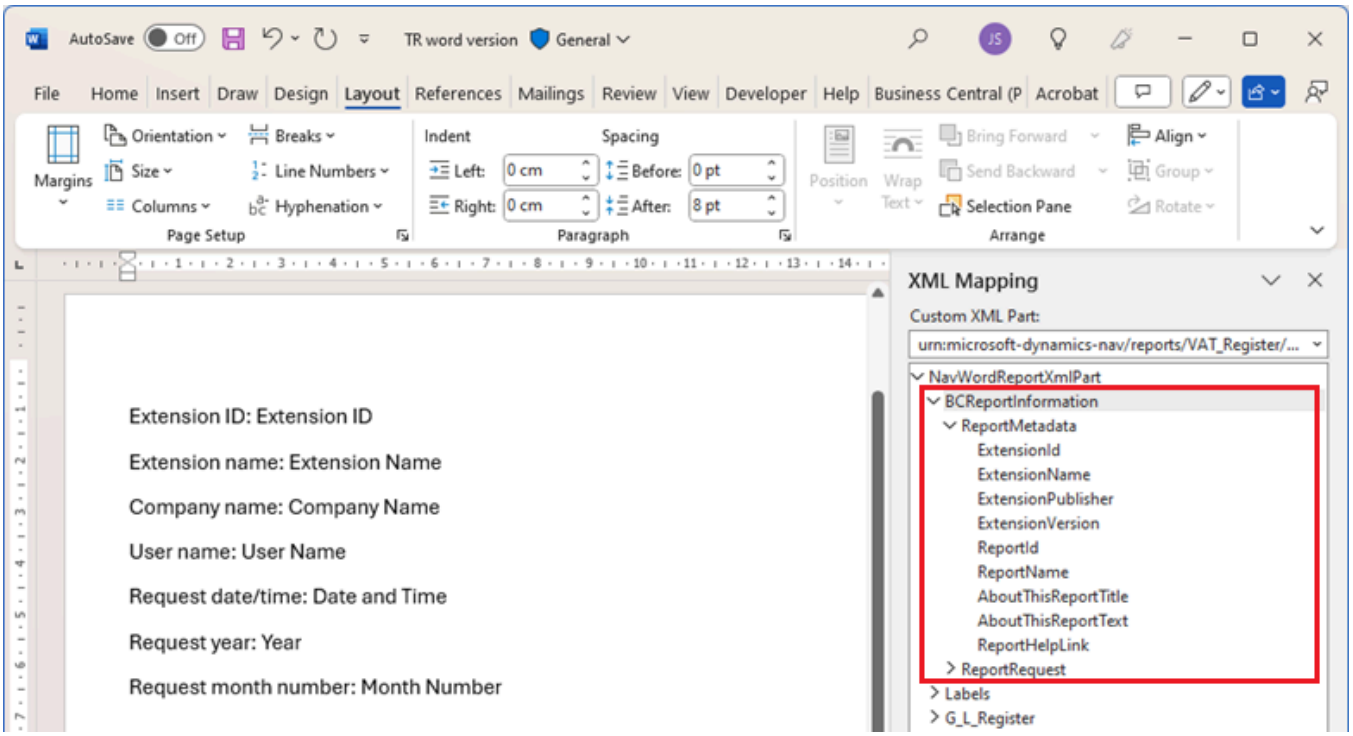
Business value

Similar to Excel layouts, you can now access report and request metadata in a Word layout without the need to encode this information in the report dataset. This enhancement makes report datasets easier to understand and removes tedious work for AL developers who create datasets for reports.

Feature details

Word layouts now include two types of metadata:

- **ReportMetadata**: This metadata type gives you information from the report object, like the object ID and report name. You always find this information in the same format and place in the data picker area.
- **ReportRequest**: This metadata type holds information about the report request, such as the company name, user name, and the date and time of the request.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Using system dataitems in Word Layouts (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Add fields from related tables in analysis mode

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Jun 6, 2025	✔ Jun 6, 2025

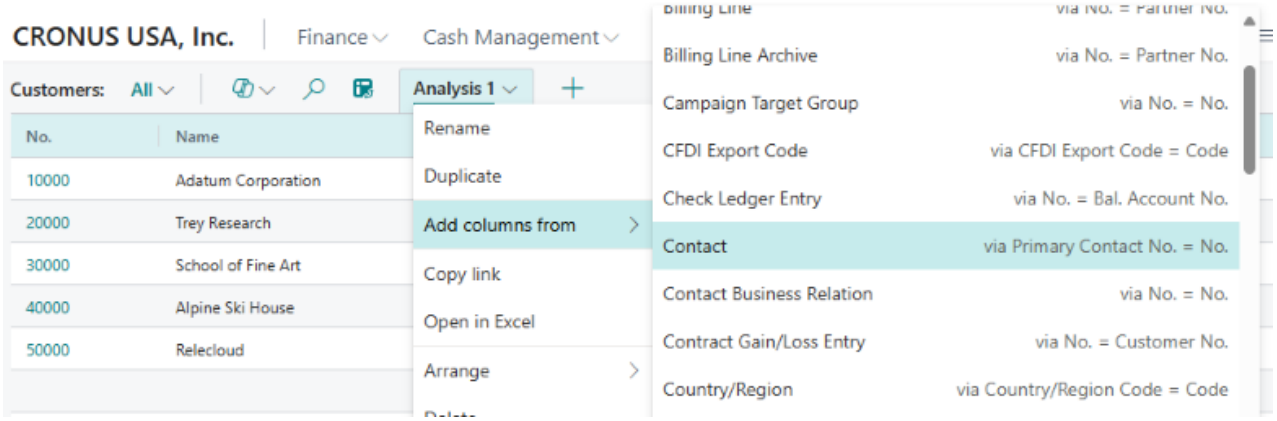
Business value

Analysis mode is a powerful experience that lets you create and analyze data views easily. You can also use Copilot and natural language to create views. This release lets you add fields from related tables to an analysis mode tab, including grouping by these fields for advanced data analysis.

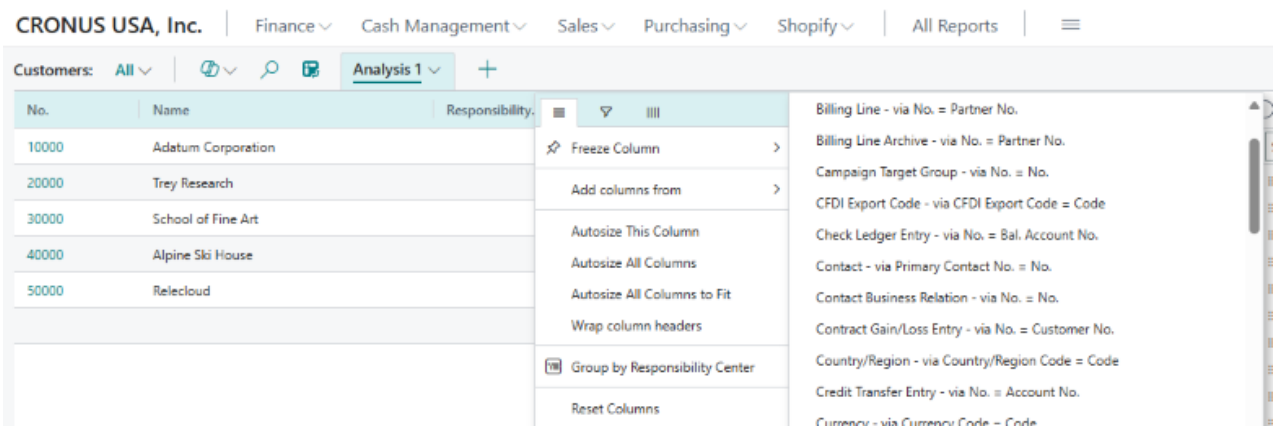
Feature details

You can add fields from related tables in analysis mode tabs in two ways:

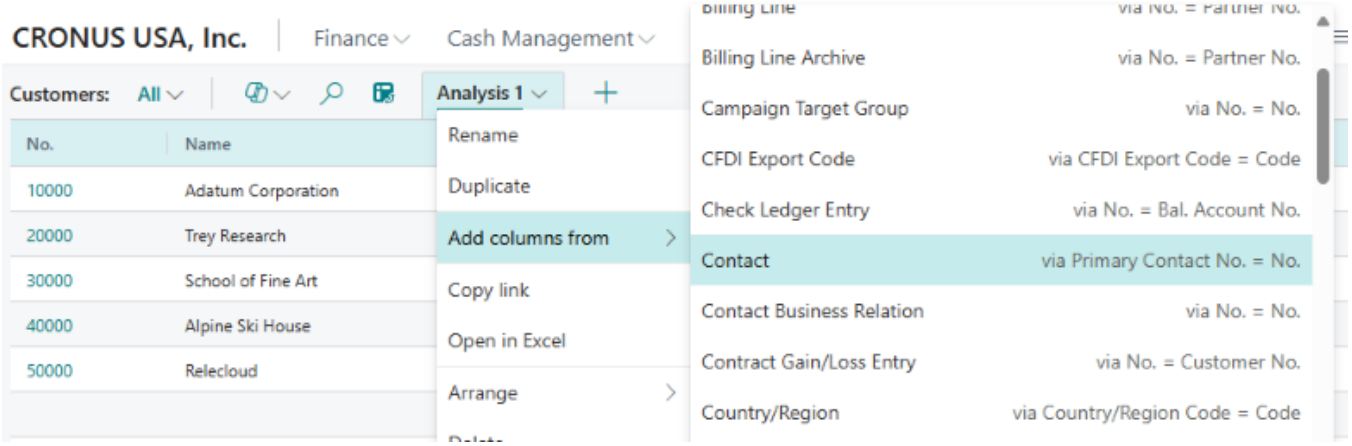
- From the context menu **Add columns from** on an analysis mode tab. This inserts the fields as new columns at the end of the view.



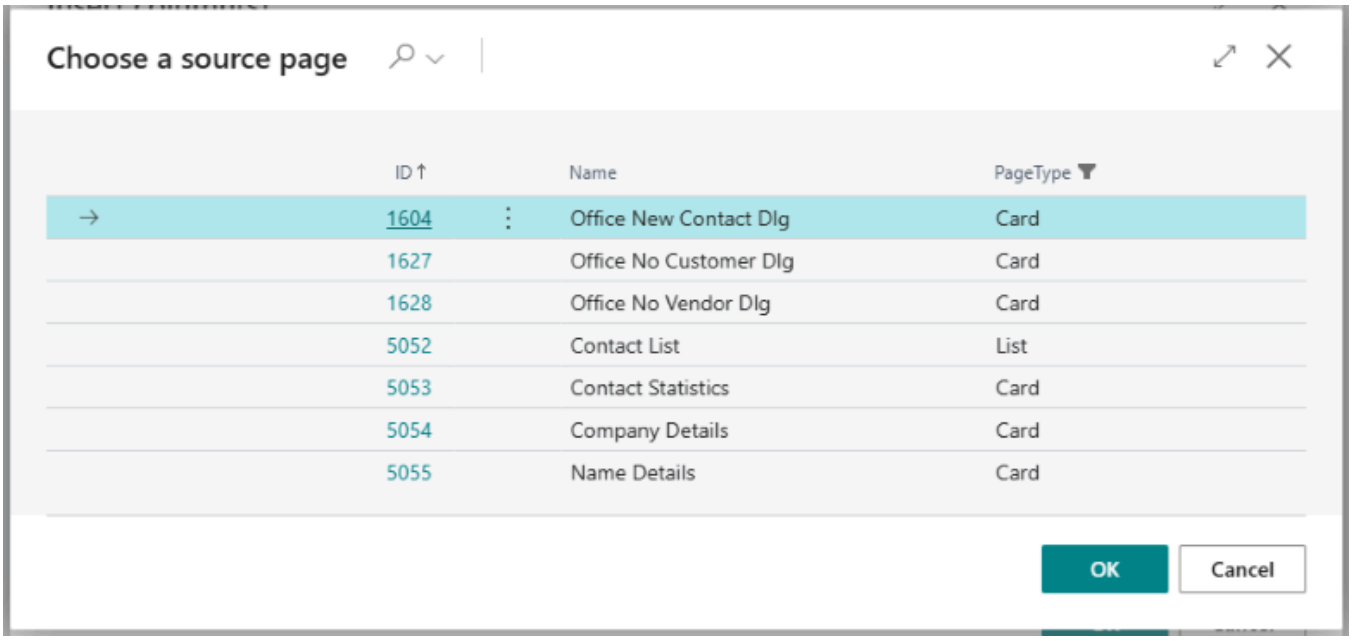
- From the context menu **Add columns from** on an analysis mode column. This inserts the fields as new columns to the right.



In both cases, select the related table to choose fields from. If there is more than one relation to the target table, the context menus show `via <relation>` after the table name. For example, in an analysis mode tab on the **Customer** list, you can add fields from the **Contact** table via the relation "Primary Contact No. := No.", where the **No. of the Contact** matches the **Primary Contact No.** on the customer.

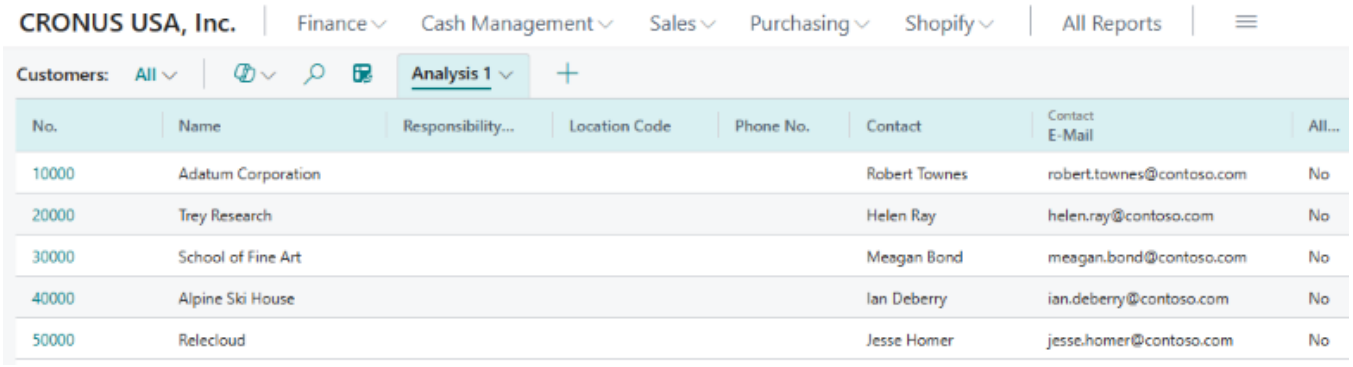


After you select the table, a dialog appears to choose columns. The dialog shows the source table name and number, as well as the fields in the table. You can only select fields that have already been added to one or more pages. Use the **Show available fields from** option to select a page, which then populates the available table fields.



You can add multiple fields at once using multiselect. User-defined views are personal and reside in the tenant database.

The following example shows how to add the **Email** field from the **Contact** table as a column, using the **Contact List** page to select fields. Notice the smaller **Contact** prefix above the **E-Mail** caption, indicating that this column comes from a related table.



> **Note**
>
> Starting with Business Central version 26.2, analysis mode allows you to add fields from related tables to your analysis view. Because this feature is a UX feature shipping in a minor release, it needs to be enabled for existing, upgrading customers. The feature is enabled with the feature key **Add fields from related tables in analysis mode**. Learn more in Add fields from related tables in analysis mode feature key. In addition, users must have the **Add Related Fields** permission set to use it.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Add fields from related tables (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Enhance reports with PDF post-processing capabilities

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

As a developer, you can create more comprehensive and secure reports by appending multiple documents, embedding extra files, and setting admin and user passwords. This capability not only saves time but also ensures that the final documents meet specific business requirements. By adding value and improving overall efficiency, this feature empowers businesses to deliver more detailed and protected reports to their stakeholders.

Feature details

Many developers request the ability to perform post-processing on PDF documents from reports.

In this release, an AL developer can:

1. Append a list of PDF documents.
2. Attach a list of documents to embed in the PDF.
3. Set admin and user passwords.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Attach files, append, and protect report PDFs in AL (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use enhanced analytics for finance

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

Improvements in reporting and analytics for finance help your business track new key performance indicators (KPIs) and scenarios with customizable Excel layouts. You can tailor many finance reports to your needs, and enriched datasets provide more comprehensive analyses.

Feature details

You get better reporting and analytics for finance with the following Excel reports:

- Trial Balance Previous Year
- Trial Balance
- Trial Balance by Period
- Trial Balance Budget
- Consolidated Trial Balance
- Aged Accounts Receivables
- Aged Accounts Payables
- Fixed Asset Details
- Fixed Asset Projected

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Financial analytics (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use enhanced analytics for inventory

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

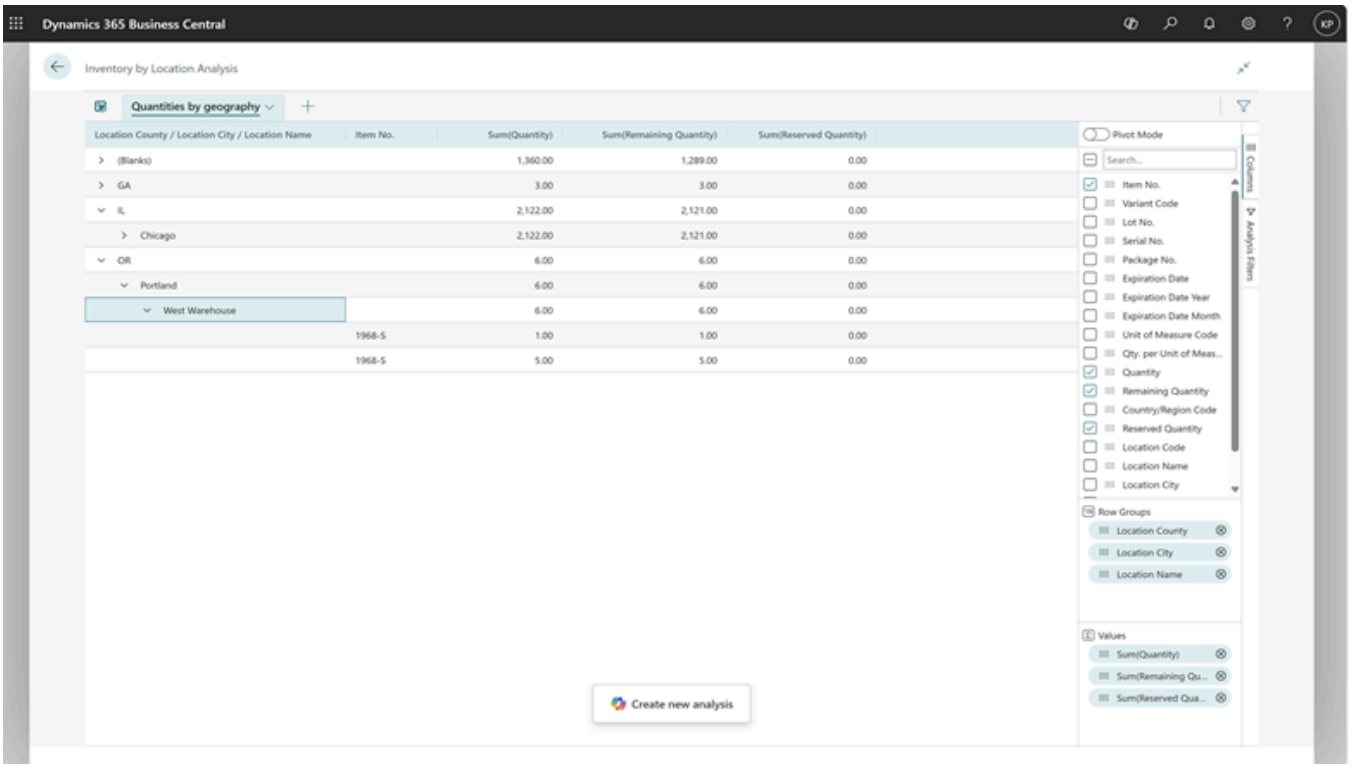
The improvements in reporting and analytics for inventory help your business track new key performance indicators (KPIs) and scenarios. New capabilities for data analysis give you the ability to design different analyses on inventory data without a developer.

Feature details

We've improved reporting and analytics for the inventory area. The **Inventory by Location Analysis** query combines inventory data with relevant master data tables to create a geographic hierarchy of region, country, city, and location. You can use this query to analyze an overview of item quantity, remaining quantity, and reserved quantity across inventory locations.

The following list pages include more fields to make data analysis easier:

- Item ledger entries
- Value ledger entries



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Inventory analytics (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use enhanced analytics for manufacturing (updated Power BI app)

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Jun 15, 2025

Business value

The improvements in reporting and analytics for the manufacturing area help your business track new key performance indicators (KPIs) and scenarios in Power BI.

Feature details

We've greatly improved reporting and analytics for manufacturing in Power BI by adding new reports:

- **Work Center Statistics** report shows the work center scrap percentage. It also lists work center output and work center scrap values.
- **Machine Center Statistics** report shows the machine center scrap percentage. It also lists machine center output and machine center scrap values.
- **Prod Order List** report shows total actual cost with variances to expected and standard costs. It also shows quantities, document numbers, source numbers, and production order routing number.
- **Prod Order Routing Gantt** report shows routing line timelines as operation durations.
- **Prod Order WIP** report shows WIP value over time. It also lists production order level details such as beginning balance value, consumption, capacity, output, and ending balance value.
- **Production Overview** report focuses on current or unfinished production orders.

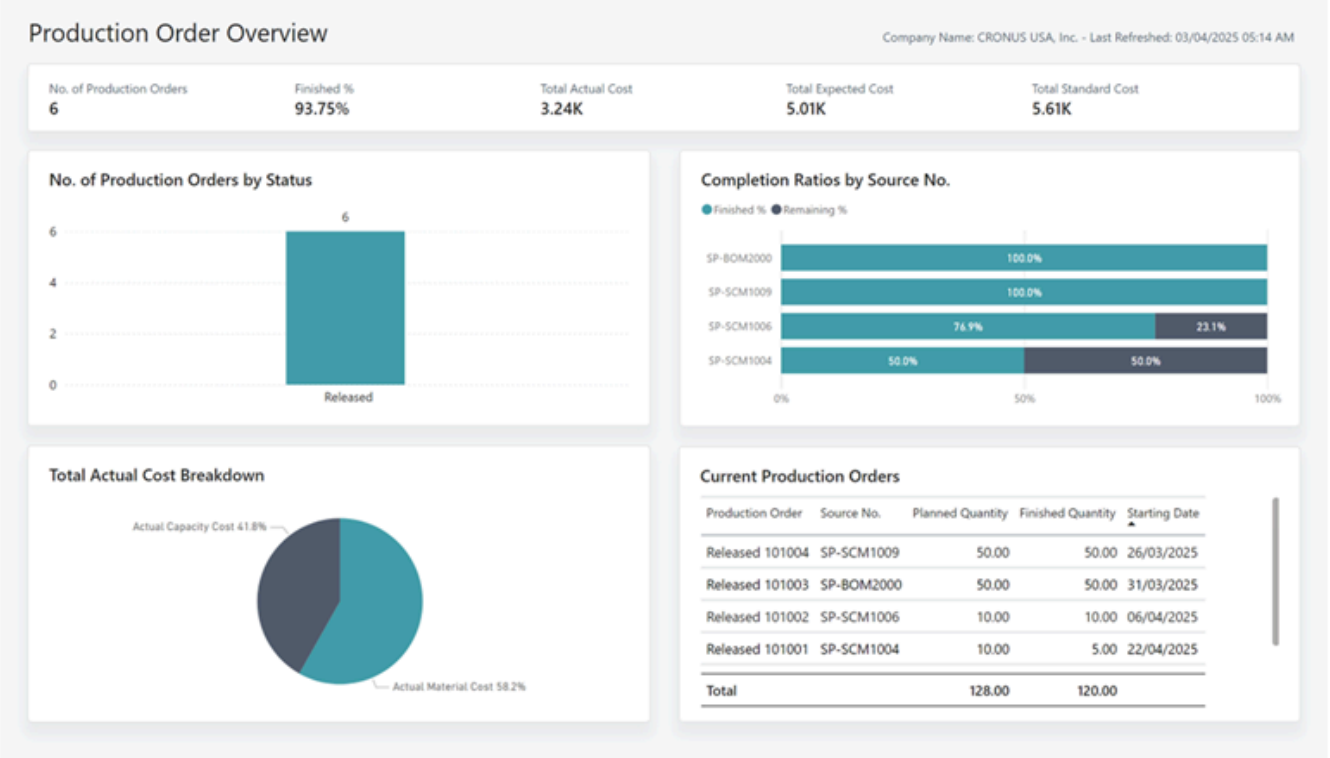
We also updated some existing reports:

- **Current Utilization** report is deprecated.
- We're deprecating **Historical Utilization**.
- We updated the visual layout for **Work Center Load**. We added a **Work Center Load Details** matrix that breaks down work center statistics by work center, source number, and production order.

- We renamed **Allocated Hours** to **Allocated Time** and updated its visual layout:
  - You now see allocated time by work center, source number, work center type, and production order status.
  - The **Allocated Time Details** matrix shows allocated time by source number and production order.
- We updated the visual layout for **Expected Capacity Need**:
  - You see expected capacity need by work center, machine center, and source number.
  - The **Expected Capacity Need Variance** matrix shows production order expected capacity need versus production order actual capacity need, and the deviation as a percentage.
- **Finished Production Order Breakdown** section shows the total actual cost and variances to the expected and standard costs. Visual layout updates include:
  - A stacked bar chart that breaks down actual costs by source number, with cost components as segments.
  - A breakdown of finished production orders that shows planned and finished quantities, along with actual cost components for each production order.
- **Consumption Variance** section shows material cost and variances to the expected and standard material costs. Visual layout updates include:
  - Bar charts that show expected and standard material cost deviation percentages by source number.
  - A Consumption Variance Details matrix that lists actual, expected, and standard material costs, along with variances for each production order.
- **Capacity Variance** section shows capacity cost and variances to the expected and standard capacity costs. Visual layout updates include:
  - A bar chart that shows expected capacity cost deviation percentages by source number.
  - Capacity Variance Details matrix lists the standard and expected capacity cost variances, and the production order capacity need variance.
- **Average Production Times** has visual layout updates:
  - You see the average production time per finished quantity by work center and by source number.
  - Average Production Time Details matrix lists actual time used, finished quantity, and average production time per unit by source number and production order.
- **Released Production Orders** highlights total actual cost with variances to expected and standard costs. Visual layout updates:
  - You see the number of production orders by source number as a bar chart.
  - Completion Ratio pie chart shows the relationship between finished quantity and remaining quantity.
  - Released Production Order Details list key details about released production orders, such as starting, ending, and due dates, planned versus finished quantities, and document number, source number, and production order routing number.

- **Production Scrap** section highlights production order scrap percentages and lists production order finished and scrap quantities. Visual layout updates include:
  - A line chart that shows scrap quantity trends over time.
  - A central card that lists work and machine center scrap key performance indicators (KPIs).
  - A bar chart that shows scrap percentage by production order.
  - A bar chart that shows scrap quantity by scrap code.
  - A comparative bar chart that shows scrap quantity versus expected scrap quantity by source number.

In the version 26.2 update, we release the source code for the Manufacturing Power BI app.



Released Production Orders

Company Name: CRONUS USA, Inc. - Last Refreshed: 03/04/2025 05:14 AM

Total Actual Cost
3.24K

Expected Cost	Total Standard Cost
5.01K	5.61K
-35%	-42%

No. of Production Orders by Source No.



Completion Ratios by Source No.



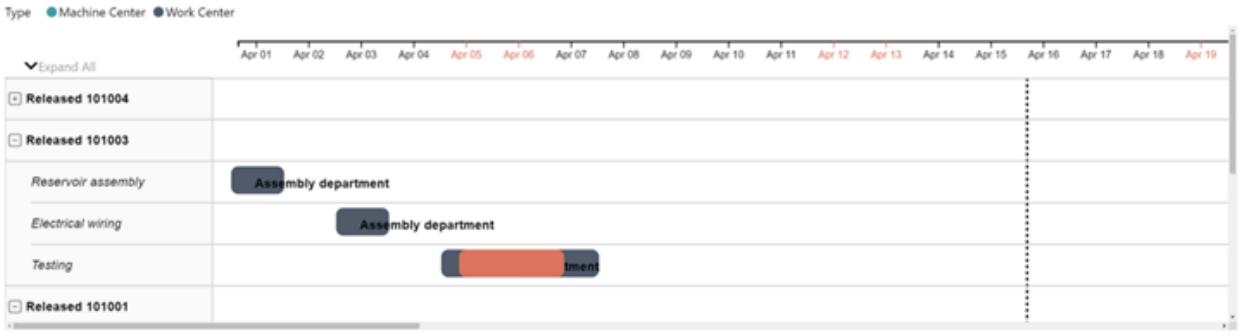
Released Production Order Details

Production Order	Description	Source No.	Routing No.	Starting Date	Ending Date	Due Date	Planned Quantity	Finished Quantity	Variance Quantity	Remaining %	Finished %
Released 101004	Airpot	SP-SCM1009	SP-SCM1009-SERIAL	26/03/2025	08/04/2025	09/04/2025	50.00	50.00	0.00		100.00%
Released 101002	AutoDripLite	SP-SCM1006		06/04/2025	06/04/2025	07/04/2025	10.00	10.00	0.00		100.00%
Released 101003	Reservoir Assembly	SP-BOM2000	SP-BOM2000	31/03/2025	07/04/2025	08/04/2025	50.00	50.00	0.00		100.00%
Released 101006	Reservoir Assembly	SP-BOM2000	SP-BOM2000	27/05/2025	03/06/2025	04/06/2025	5.00	5.00	0.00		100.00%
Released 101001	AutoDrip	SP-SCM1004	SP-SCM1004	22/04/2025	29/04/2025	30/04/2025	10.00	5.00	-5.00	50.00%	50.00%
Released 101005	AutoDripLite	SP-SCM1006		12/06/2025	12/06/2025	13/06/2025	3.00		-3.00	100.00%	
Total							128.00	120.00	-8.00	6.25%	93.75%

Production Order Time Line

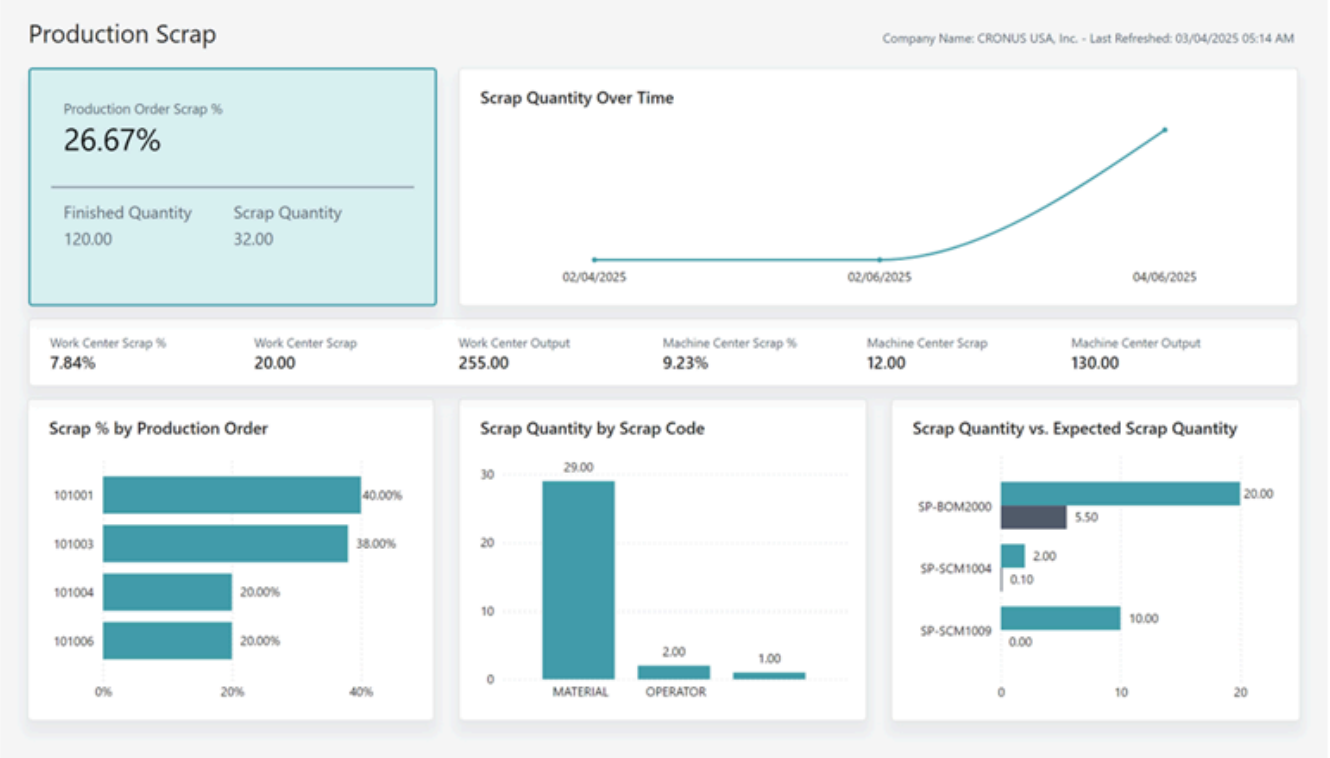
Company Name: CRONUS USA, Inc. - Last Refreshed: 03/04/2025 05:14 AM

Production Time Line



Routing Line Details

Prod Order No.	Routing No.	Operation No.	Work Centre/Machine Centre No.	Starting Date Time	Ending Date Time	Total Duration Hours Measure	Duration Total Days
101004	SP-SCM1009-SERIAL	10	100	26/03/2025 15:40:00	28/03/2025 16:00:00	48.33	2.01
101004	SP-SCM1009-SERIAL	20	110	31/03/2025 15:40:00	02/04/2025 16:00:00	48.33	2.01
101003	SP-BOM2000	10	100	31/03/2025 15:45:00	01/04/2025 16:00:00	24.25	1.01
Total						411.17	17.13



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

learn.microsoft (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use enhanced analytics for projects

08/07/2025

Expand table

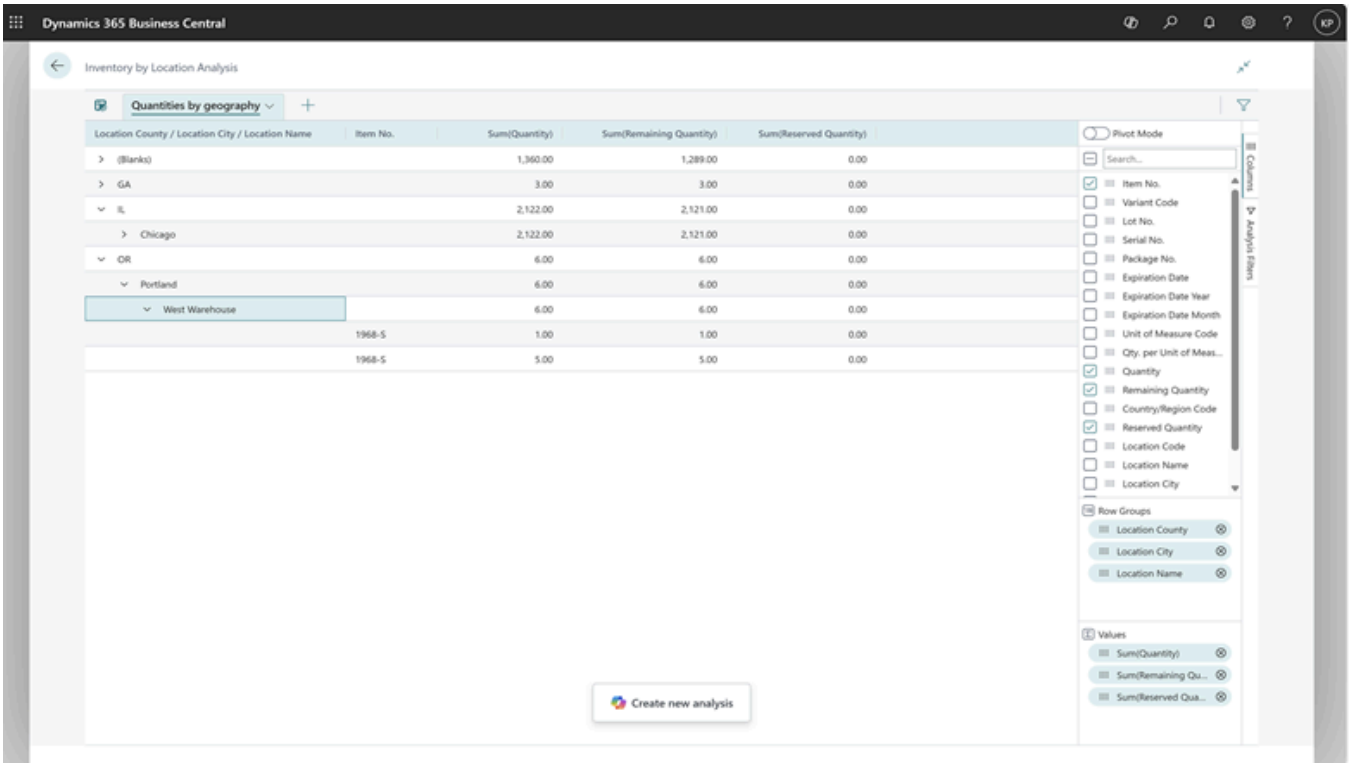
Enabled for	Public preview	General availability
Users, automatically	-	✔ Jun 15, 2025

Business value

The improvements in reporting and analytics for the project area help your business track new key performance indicators (KPIs) and scenarios in Power BI. New capabilities for data analysis let you design different analyses on project data without a developer.

Feature details

Reporting and analytics for projects are improved with the new *Project Planning Analysis* feature. This feature simplifies ad-hoc analysis of projects through analysis mode.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

learn.microsoft (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use enhanced analytics for purchasing

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Jun 15, 2025

Business value

The improvements in reporting and analytics for purchasing help your business track new KPIs and scenarios in Power BI. New capabilities for data analysis enable you to design different analyses on purchasing data without a developer. Customizable Excel layouts for several purchasing reports let you tailor them to your needs, while enriched datasets provide more comprehensive analyses.

Feature details

We've significantly improved reporting and analytics for purchasing. The new *Purchase Order Performance Analysis* query makes it easy to perform ad-hoc analyses of purchase orders with analysis mode.

We enhanced the following list pages with more fields to make data analysis easier:

- Purchase orders
- Purchase return shipments
- Purchase credit memos
- Purchase invoices

The following Excel reports are now generally available:

- Vendor Top List
- Aged Accounts Payables

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

learn.microsoft (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use enhanced analytics for sales

10/16/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Jun 15, 2025

Business value

Improvements in reporting and analytics for the sales area help your business track new KPIs and scenarios in Power BI. New enhanced possibilities in data analysis allow you to create mini reports. Customizable Excel layouts for many finance reports let you tailor them to your needs. Enriched datasets provide more comprehensive analysis.

Feature details

We significantly improved reporting and analytics for sales.

For the Power BI app for Sales, we added new reports and expanded the capabilities of existing reports. The following new reports give you more insights into your sales processes:

- Sales Demographics
- Sales Decomposition (with AI-driven insights)
- Key Sales Influencers (with AI-driven insights)
- Opportunity Overview
- Sales Quote Overview
- Return Order Overview

For existing analyses, we updated the following reports with ways to dig deeper into your sales data:

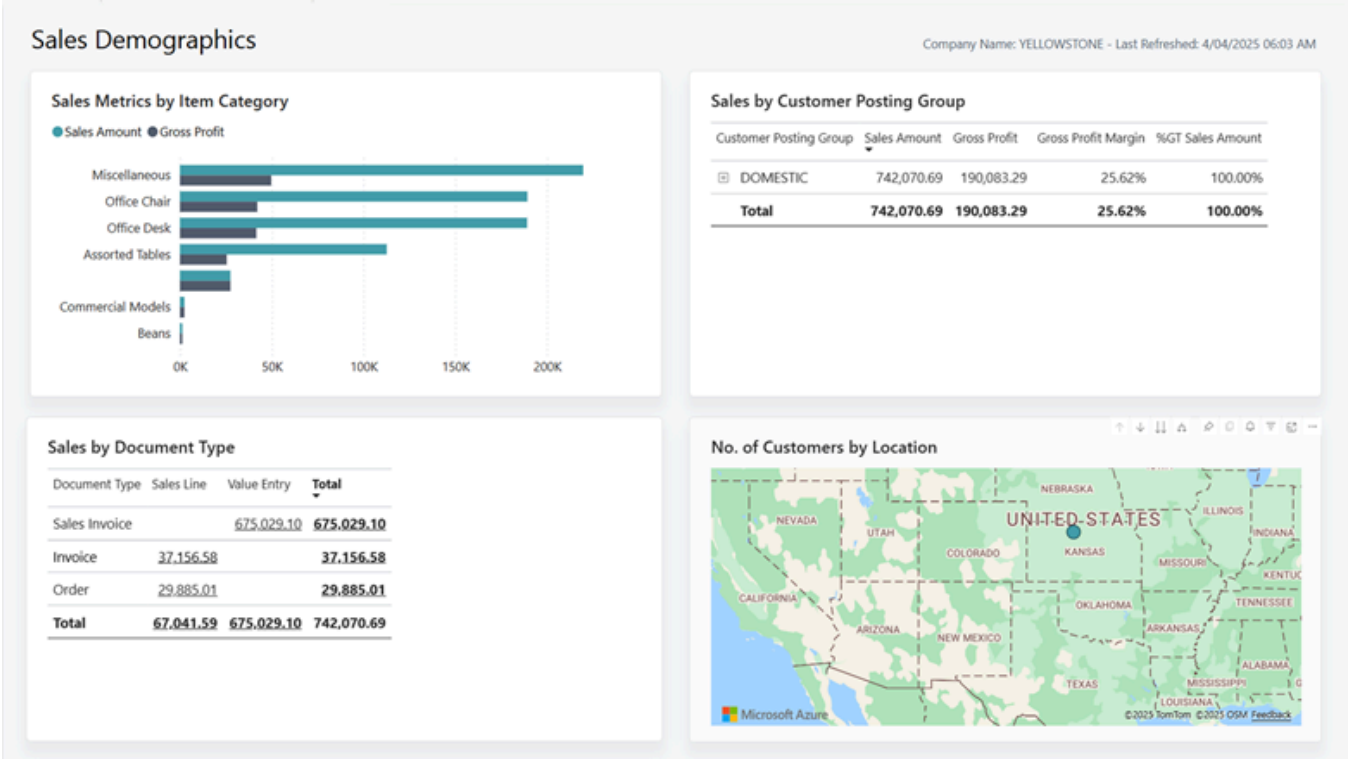
- The **Month-To-Date** report filters data to the current month.
- The **Sales by Item** report includes new **Ribbon Chart for Sales by Item Category Over Time** and new **Scatter Chart for Profitability by Item Category** charts.
- The **Sales by Customer Page** includes a new Azure map visual for **Sales Amount by Location**, a **Customer Bar Chart with Gross Profit Pareto Analysis by Customer**, and an updated **Sales by Customer Details** visual to include **Pareto Cumulative Gross Profit** fields.

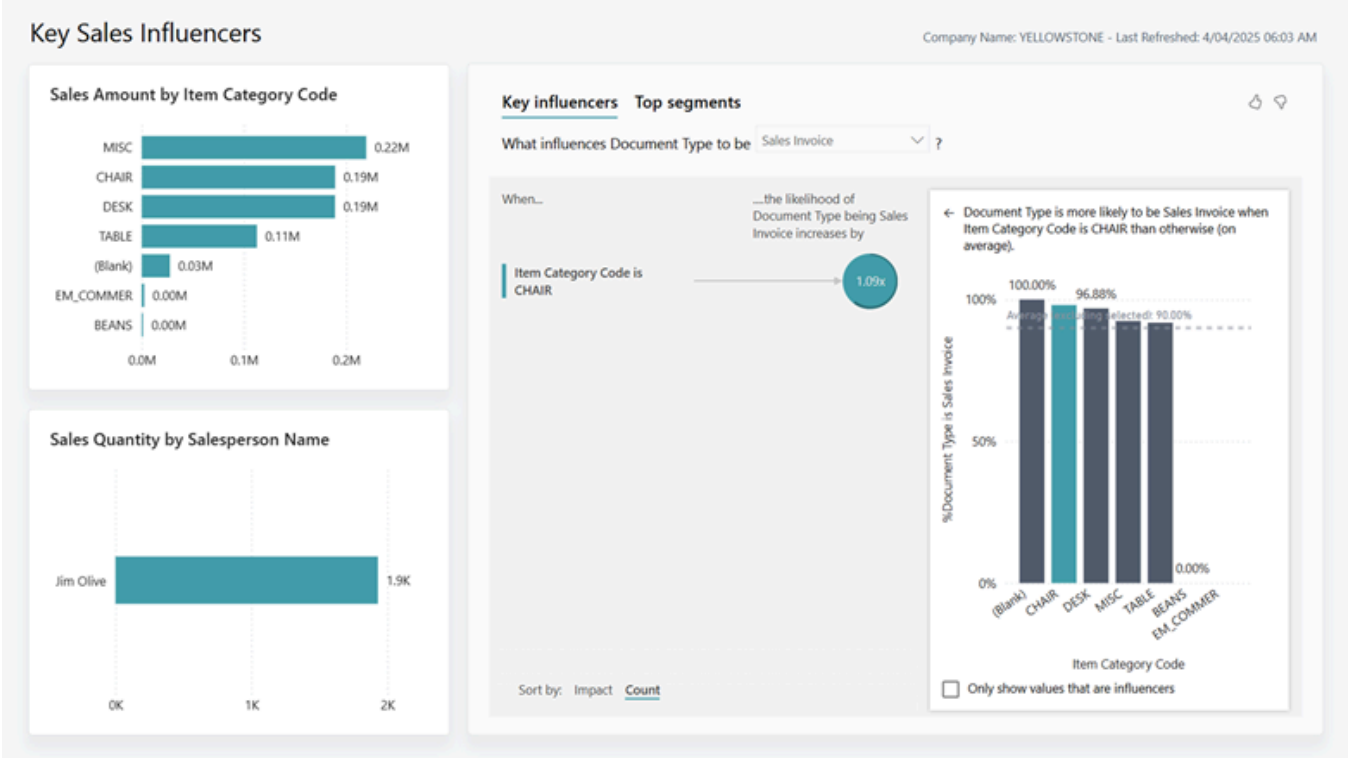
- The **Sales by Salesperson** report now includes new **Estimated Opportunity Value** and **Scatter Chart for Profitability by Salesperson** pie charts.
- The **Sales by Location** report includes a new Azure Map for **Sales Amount by Customer Location**.

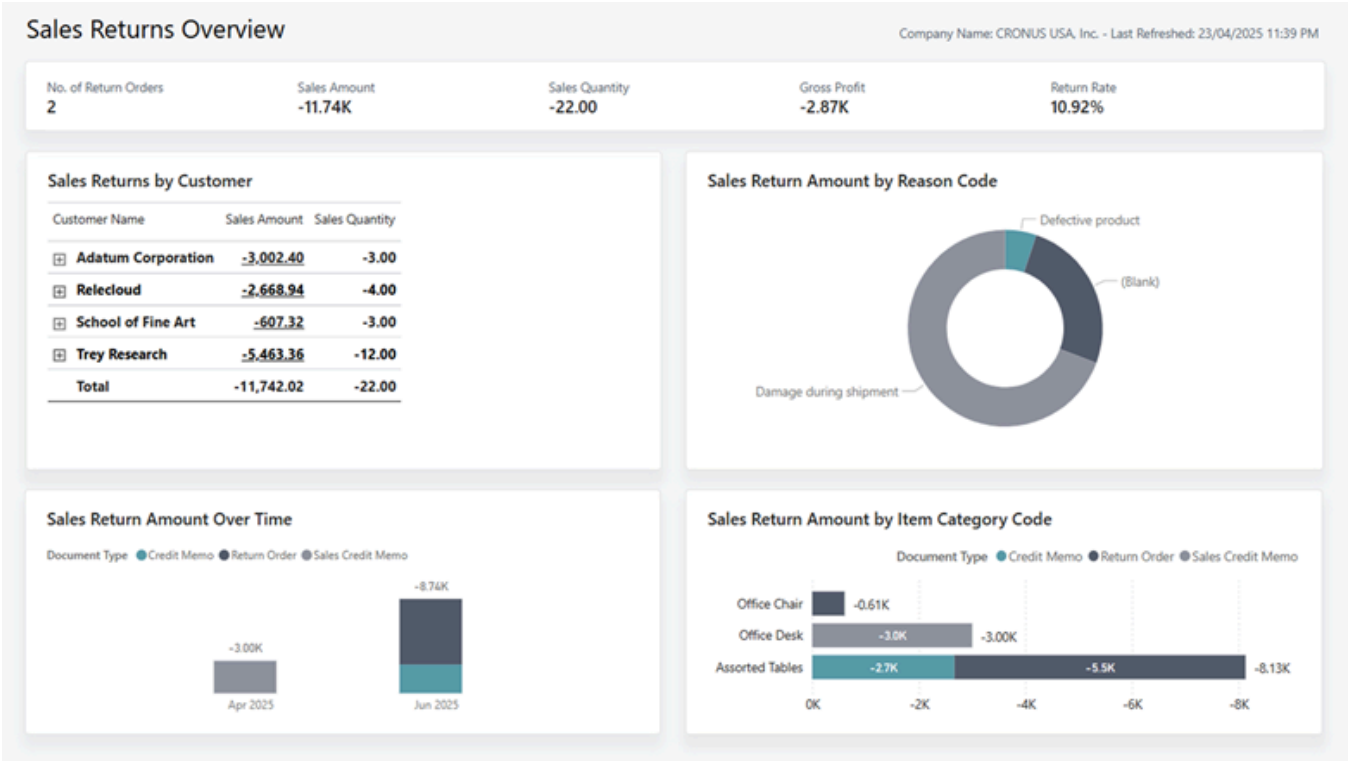
To support on-the-fly analyses, the new *Sales Order Analysis Query* makes ad-hoc analysis of sales orders easy with analysis mode. The following list pages have more fields to make data analysis easier:

- Sales Orders
- Sales Return Shipments
- Sales Credit Memos

Also, the **Aged Accounts Receivables Excel** report is now generally available.







Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Power BI Sales app (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use enhanced Excel reports for sustainability

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Jun 15, 2025

Business value

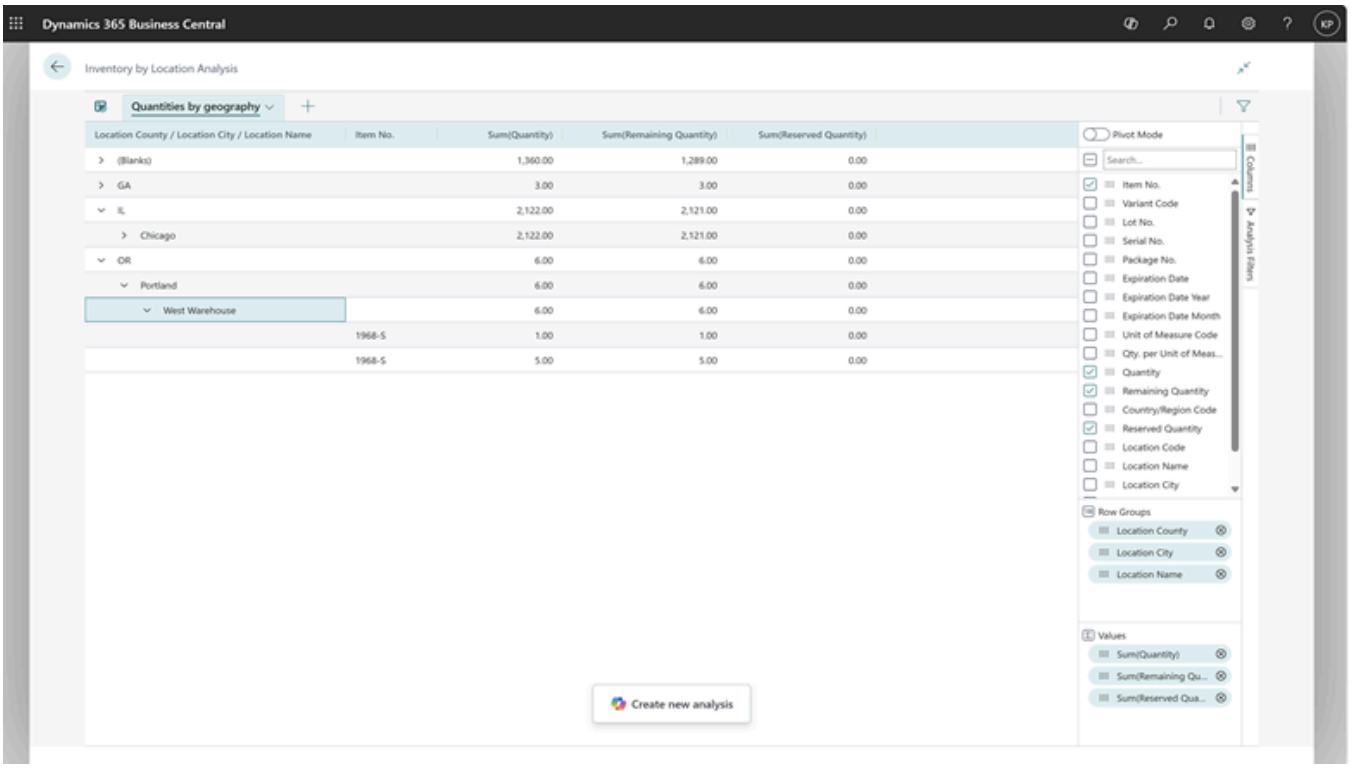
The improvements in reporting and analytics for sustainability help your business analyze sustainability scenarios with Excel.

Feature details

We improved reporting and analytics for sustainability.

The following Excel reports have new layouts that work well both for print and for pivot analysis in Excel.

- Emission By Category
- Emission Per Facility
- Total Emissions



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

learn.microsoft (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use enhanced Financial Reporting capabilities

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

The no-code Financial Reporting feature gives finance departments important benefits by enabling self-service financial reporting and statements without developer help. The enhancements boost productivity by letting report viewers hide empty rows. Report owners can document usage, write introductory and closing paragraphs, and save and run reports with Excel templates. Administrators can monitor required permissions and access telemetry for report usage and lifecycle events.

Overall, these improvements streamline financial reporting processes. They save time and resources while improving accuracy and accessibility.

Feature details

The Financial Reporting feature is enhanced with capabilities for report viewers, report owners, and administrators.

Financial report viewers can:

- Hide empty rows when they view a financial report.
- Print a financial report in portrait mode.
- Use an accounting format where negative numbers are formatted with parentheses instead of a minus sign when they run a financial report.

Financial report owners can:

- Document the use of report definitions by using an internal description field.
- Write introduction and closing paragraphs for their reports.
- Save their Excel templates in Business Central.
- Run a financial report by using a saved Excel template.

- Use a new Month-to-Date column type.
- Find financial reports that use a column or row definition.
- Use an accounting format where negative numbers are formatted with parentheses instead of a minus sign.
- Open financial reporting when they create a new G/L account.

Administrators can:

- Check the documentation to see which permissions you need to run or edit financial reports.
- Check the documentation to see how to set up auditing for changes to report definitions.
- Get telemetry on the use of financial reports and lifecycle events.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Primary capabilities of financial reporting (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Validate report layouts for errors as an admin

08/07/2025

Expand table

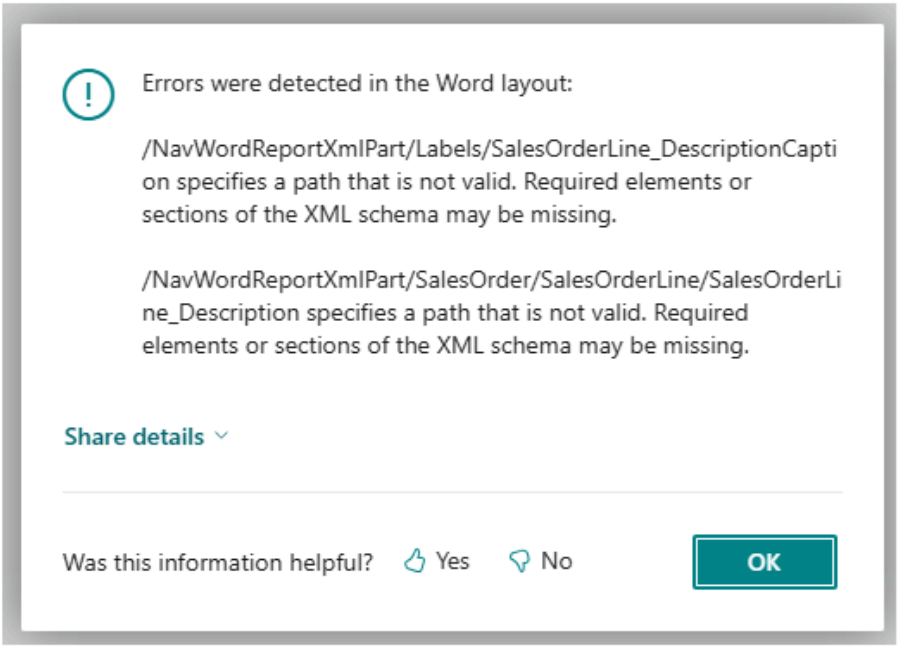
Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

With the new **Validate Layout** action on the **Report Layouts** page, you can validate report layouts and quickly find errors. This feature reduces the need for developers and lowers support requests, saving time and costs. It makes sure reports are accurate and reliable, so data integrity stays strong and users trust the reporting process.

Feature details

In previous releases, if a report layout had errors, a developer needed to analyze the errors and possibly create a support request to understand the issue. Now, the new **Validate Layout** action on the **Report Layouts** page enables administrators to validate layouts and get a list of errors.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Get started creating report layouts (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Service and platform

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 the new service and platform improvements, users see fewer interruptions. Business Central generally feels faster, and web services and certain scenarios are noticeably quicker. We continue to invest in the fundamentals of our service, with a focus on performance, stability, resource governance, security, and compliance. This focus lets Business Central grow in scale along with our customers' needs.

The new full-text search on lists, drill-downs, and look-ups gives you faster, more accurate access to key data. It focuses only on relevant columns for quicker, targeted results. This improvement boosts productivity and enhances user satisfaction by reducing search time and delivering precise, actionable information. You still have the flexibility to enable the previous search method when needed.

The improved job queue flow keeps the job order (FIFO) and adds a priority system in job queue categories. This system makes sure that high-priority tasks go first. Reduced locking during concurrent warehouse postings lowers bottlenecks. This reduction lets operations run more smoothly in high-traffic environments. Automated performance testing in AL-Go for GitHub helps developers find and fix performance issues earlier. This testing step makes reliability and overall system performance better.

Note: The author created this article with assistance from AI. Learn more

Calculate values only for visible FlowFields

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

The **Calculate only visible FlowFields** feature improves system performance by calculating values only for FlowFields that pages display. It reduces unnecessary computations, so pages load faster and efficiency improves. When you enable this feature, you optimize resource usage for a more responsive and streamlined user experience. This change boosts performance and helps manage system resources more effectively, so your business operations benefit.

Feature details

When you add a FlowField to a page or page extension and set the Visible property to **false**, the FlowField doesn't appear on the page. However, the AL runtime still calculates the value, which leads to unnecessary computations and performance issues. As an administrator, you can change this behavior by enabling the **Calculate only visible FlowFields** feature on the **Feature Management** page. When enabled, the AL runtime calculates values only for FlowFields that are visible on pages.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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Additional resources

When are FlowFields calculated (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Supply chain management

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Supply chain management in Business Central offers a range of features, from procurement and production to distribution and logistics. These features help businesses streamline their operations and improve efficiency.

Business Central provides tools for managing the entire supply chain, including inventory management, order processing, and demand forecasting. Businesses can create and manage purchase orders, track inventory levels, and ensure timely delivery of products to customers. Business Central supports various supply chain methodologies, so businesses can choose the approach that best suits their operations.

A key benefit of using Business Central for supply chain management is its integration with other Microsoft products, such as Power BI and Microsoft Teams. These integrations give businesses deeper insights into their supply chain data, help their people collaborate more effectively, and support good decisions based on real-time information.

The investments for the supply chain management area focus on quality management and subcontracting.

Note: The author created this article with assistance from AI. Learn more

Achieve greater accuracy in manufacturing costing

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

The system accurately calculates standard costs for produced items with specific variants or locations by using stock-keeping units (SKUs). This improvement makes costs more precise when you assign production bills of material (BOMs) and routes to SKUs. You can also include noninventory items in production cost calculations, so you get a more complete view of cost shares.

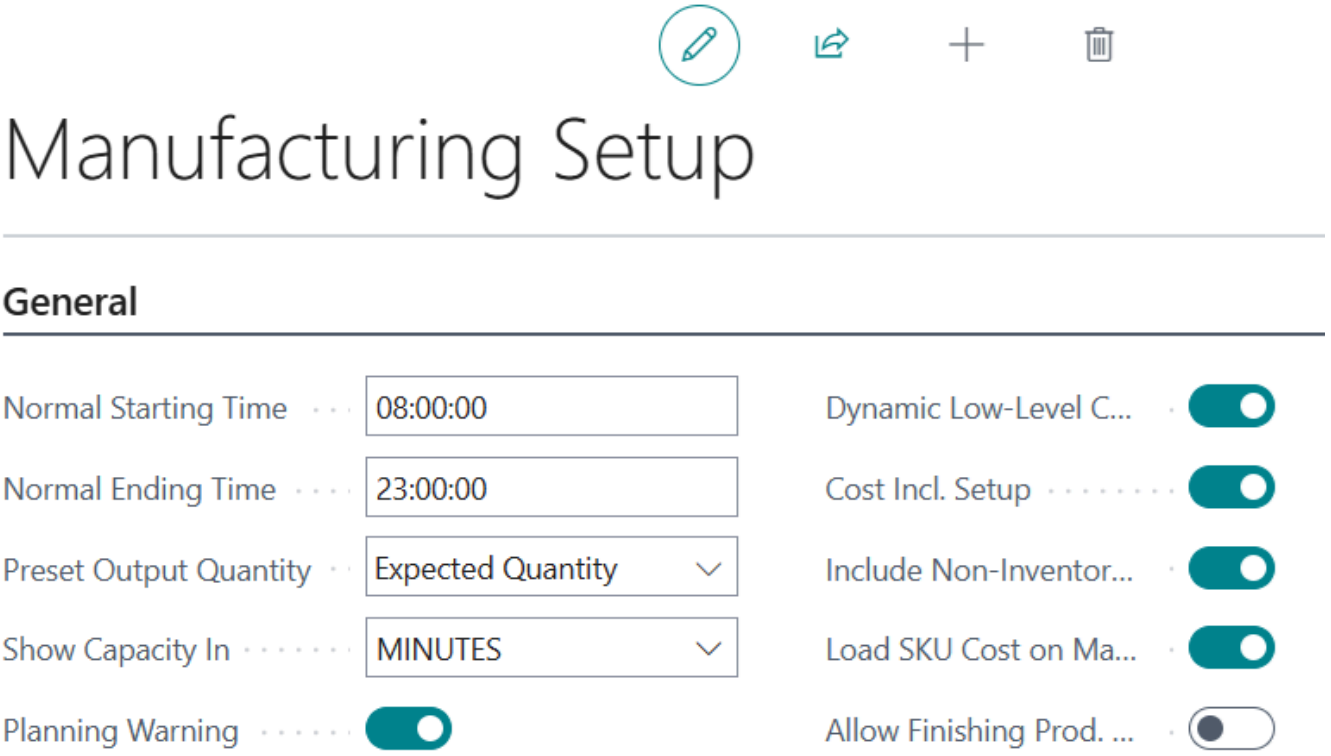
Feature details

Include noninventory costs in finished goods

With this release, you can include noninventory items in the cost of produced items for both actual and standard cost scenarios.

Setup

To start using this feature, go to the **Manufacturing Setup** page and turn on the **Include Non-Inventory Items to Produced Items** toggle.



When you turn on this feature, the cost of non-inventory items is part of the cost of produced items. The cost appears as an extra value entry that relates to the item ledger entry of the type **Output**. You must also configure the corresponding balancing accounts.

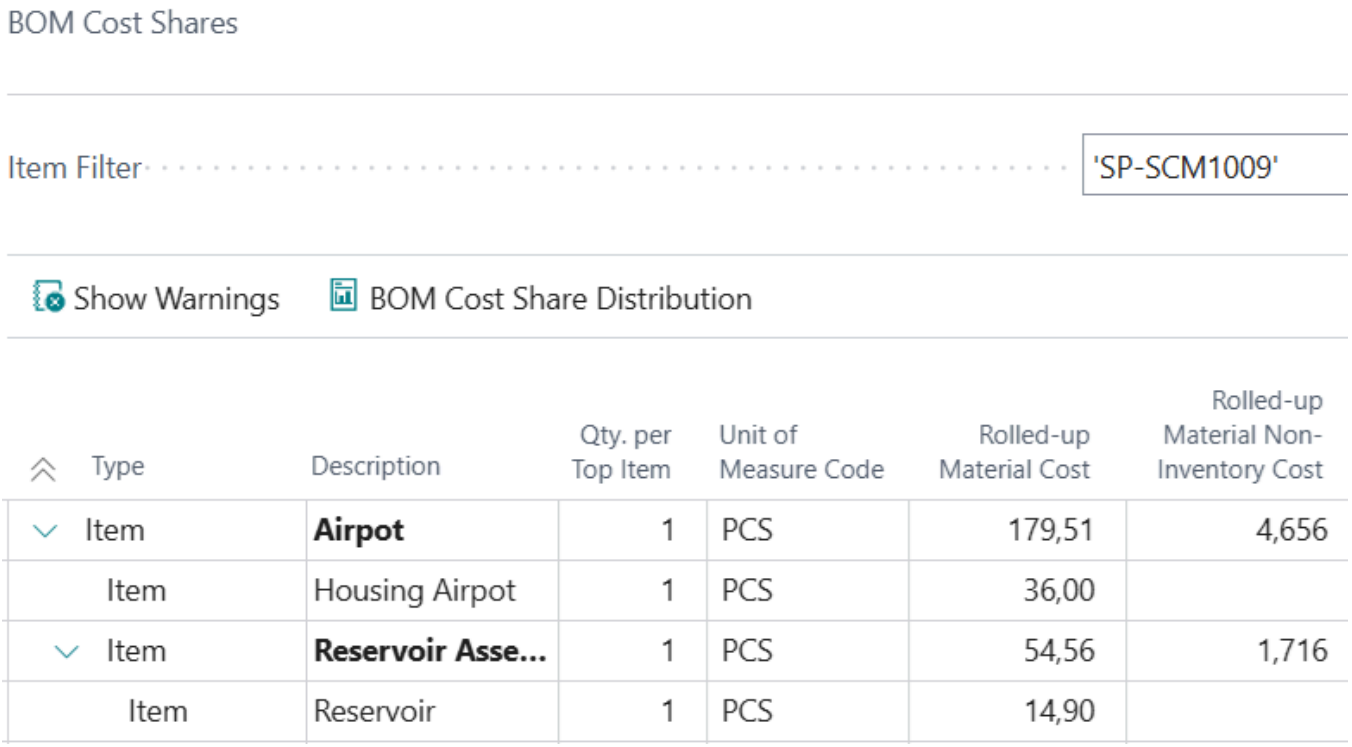
The following table shows the relationship between the new types of inventory value entries and the accounts and balancing accounts in the general ledger.

Expand table

Item Ledger Entry Type	Value Entry Type	Variance Type	Expected Cost	Account	Balancing Account	Comment
(Production) Output	Direct Cost - Non Inventory		No	Inventory	**Direct Cost Non-Inventory Applied Account**	Similar to item indirect cost
(Production) Output	Variance	Capacity Overhead	No	Inventory	**Material Non-Inventory Variance Account**	Similar to other variance accounts

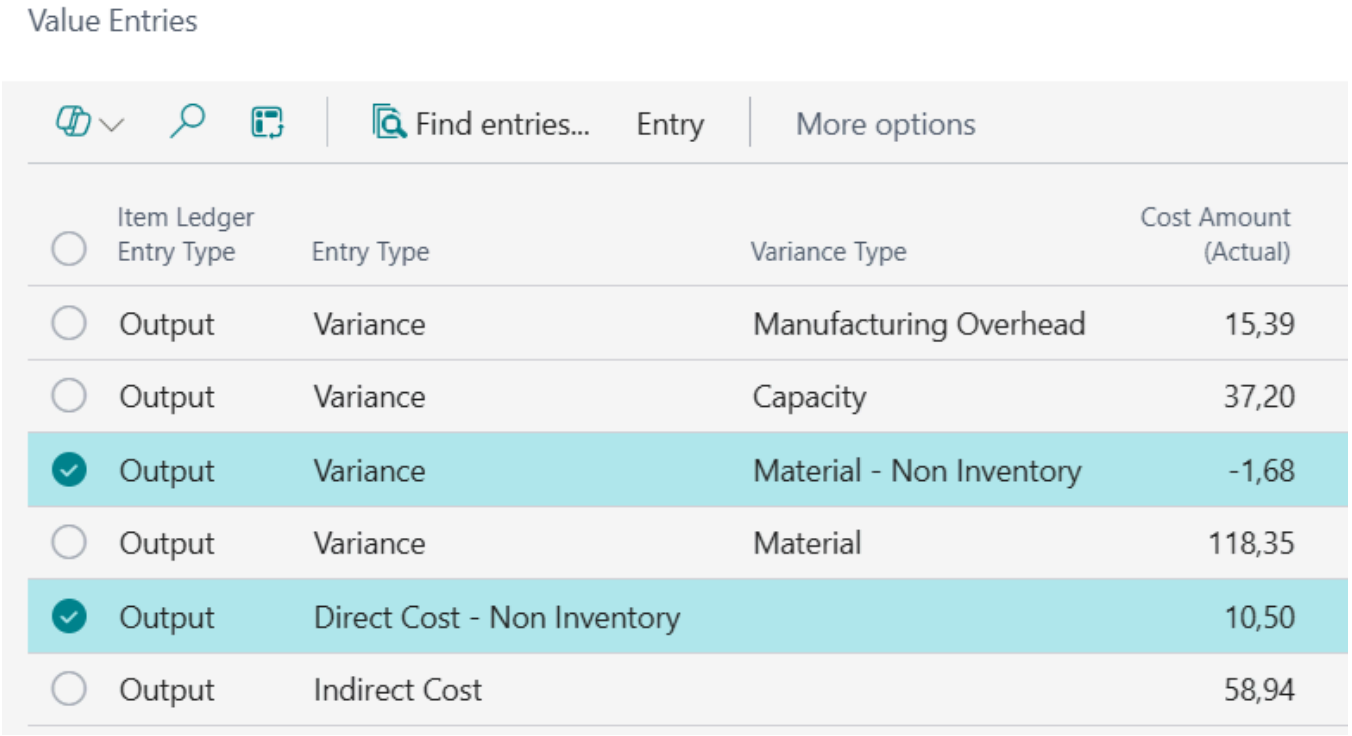
Use

You can explore the effect of non-inventory items on the cost of produced items on the **BOM Cost Shares** page, where you can use the **Rolled-up Material Non-Inventory Cost** and **Single-level Material Non-Inventory Cost** fields.



Type	Description	Qty. per Top Item	Unit of Measure Code	Rolled-up Material Cost	Rolled-up Material Non-Inventory Cost
Item	**Airpot**	1	PCS	179,51	4,656
Item	Housing Airpot	1	PCS	36,00	
Item	**Reservoir Asse...**	1	PCS	54,56	1,716
Item	Reservoir	1	PCS	14,90	

After you post, you can find the amounts in the value entries and general ledger entries.



Item Ledger Entry Type	Entry Type	Variance Type	Cost Amount (Actual)
Output	Variance	Manufacturing Overhead	15,39
Output	Variance	Capacity	37,20
Output	Variance	Material - Non Inventory	-1,68
Output	Variance	Material	118,35
Output	Direct Cost - Non Inventory		10,50
Output	Indirect Cost		58,94

> **Note**
>
> These changes don't affect assembly orders. You can consume the non-inventory items without impacting the cost of the assembled item.

Use standard cost from versions for production output

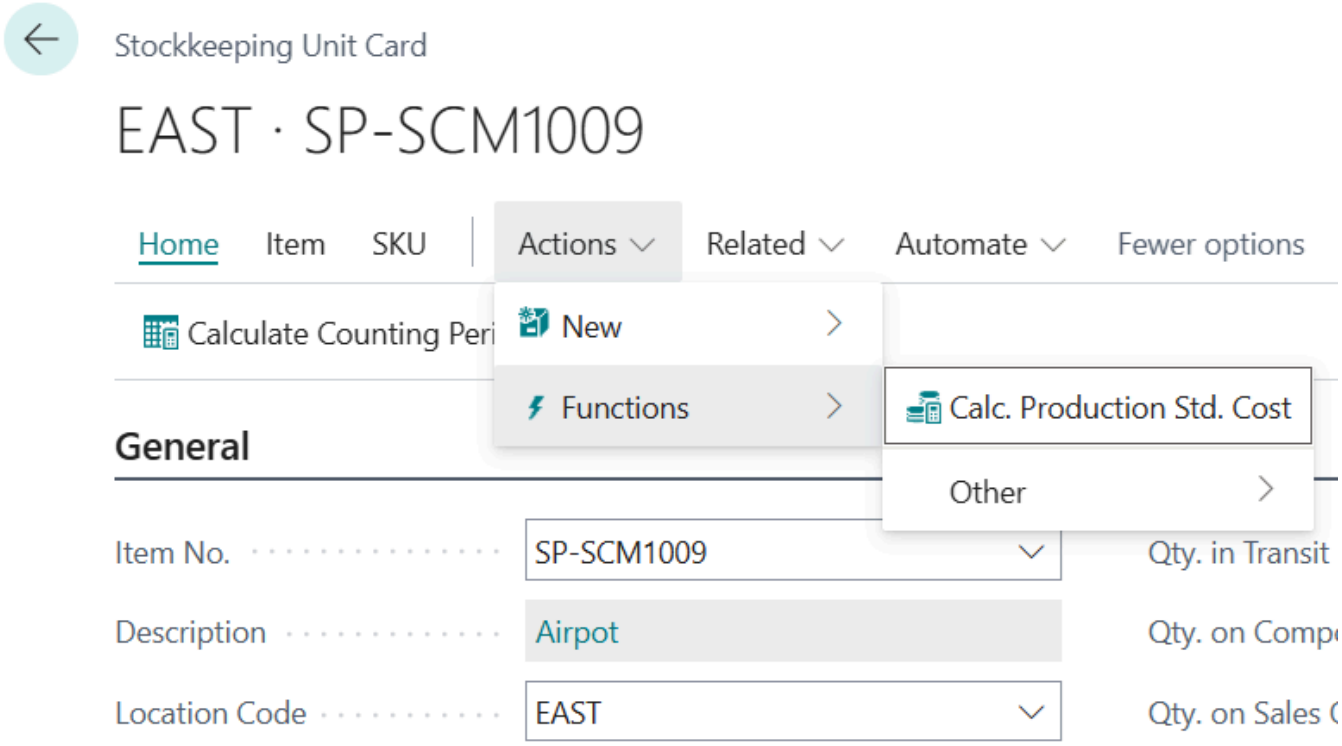
Define a production BOM or routing in the version. This setup is useful when a version represents a different variant that requires a different set of components or a different location with other production equipment. These changes can affect cost.

Setup

To turn on this feature, go to the **Manufacturing Setup** page and select the **Load SKU Cost on Manufacturing** toggle.

Usage

Use the **Calc. Production Std. Cost** action in the **Stockkeeping Unit Card** page to calculate the standard cost.



The action fills in these fields:

- **Single-level Material Cost**
- **Single-level Capacity Cost**
- **Single-level Material Non-Inventory Cost**
- **Single-level Subcontracted Cost**
- **Single-level Manufacturing Overhead Cost**
- **Single-level Capacity Overhead Cost**
- **Rolled-up Material Cost**
- **Rolled-up Capacity Cost**
- **Rolled-up Material Non-Inventory Cost**

- **Rolled-up Subcontracted Cost**
- **Rolled-up Manufacturing Overhead Cost**
- **Rolled-up Capacity Overhead Cost**

> ⓘ Note
>
> - For subassemblies, the system uses information from item cards.
> - The standard cost worksheet doesn't support stockkeeping units.

When you post the output for an item that has a stockkeeping unit, the standard cost uses information from the stockkeeping unit.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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Additional resources

learn.microsoft (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Add more columns to various pages to gain more insight

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

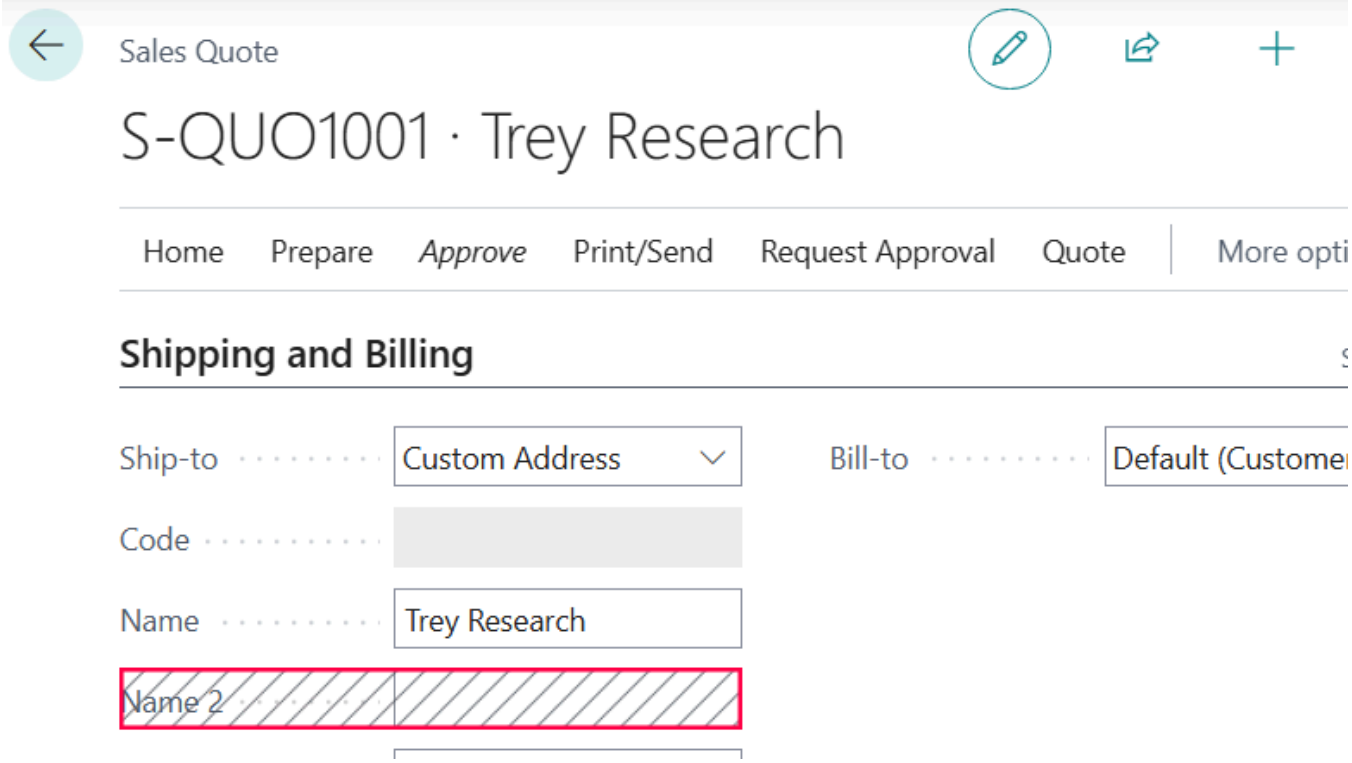
Business value

Different businesses and users need different information to complete business processes. Personalization is a powerful tool that lets people tailor the information that pages contain by dragging fields or columns from a list to the page. Based on feedback from our community, we've added more fields and columns to choose from on several pages.

Feature details

Ship-to Name 2 field

You can add the **Name 2** field to pages for all sales, service, projects, purchase drafts, and posted and archived documents.

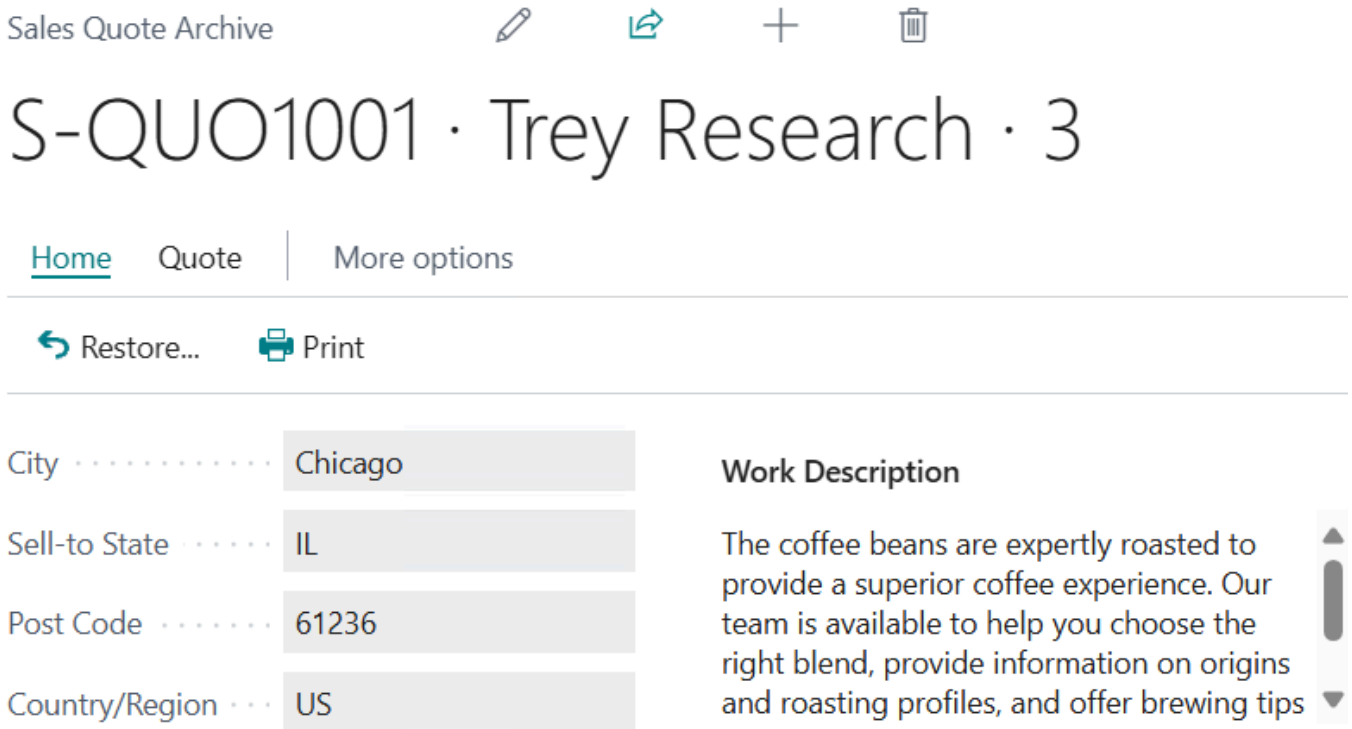


Thanks to the community for valuable contributions to Microsoft's open source BusinessCentralApps repo on GitHub.

Work Description field

The **Work description** field is on the **Sales Quote Archive** and the **Sales Order Archive** pages. The field shows up by default.

The **Work Description** field contains information for the archive and restore process, and the procedure for copying documents.



Thanks to our community for your valuable contributions to Microsoft's open source BusinessCentralApps repo on GitHub.

Description 2 field

Add the **Description 2** field to simulated, planned, firm planned, released, and finished production orders.

Routing Link Code field

Add the **Routing Link Code** field to the **Routing Versions Lines**, **Routing Lines**, and **Prod. Order Component** pages. The field shows up by default.

Location Code field

The **Location Code** field is visible by default on the **Prod. Order Components** and **Planning Components** pages.

Capacity Ledger Entries page

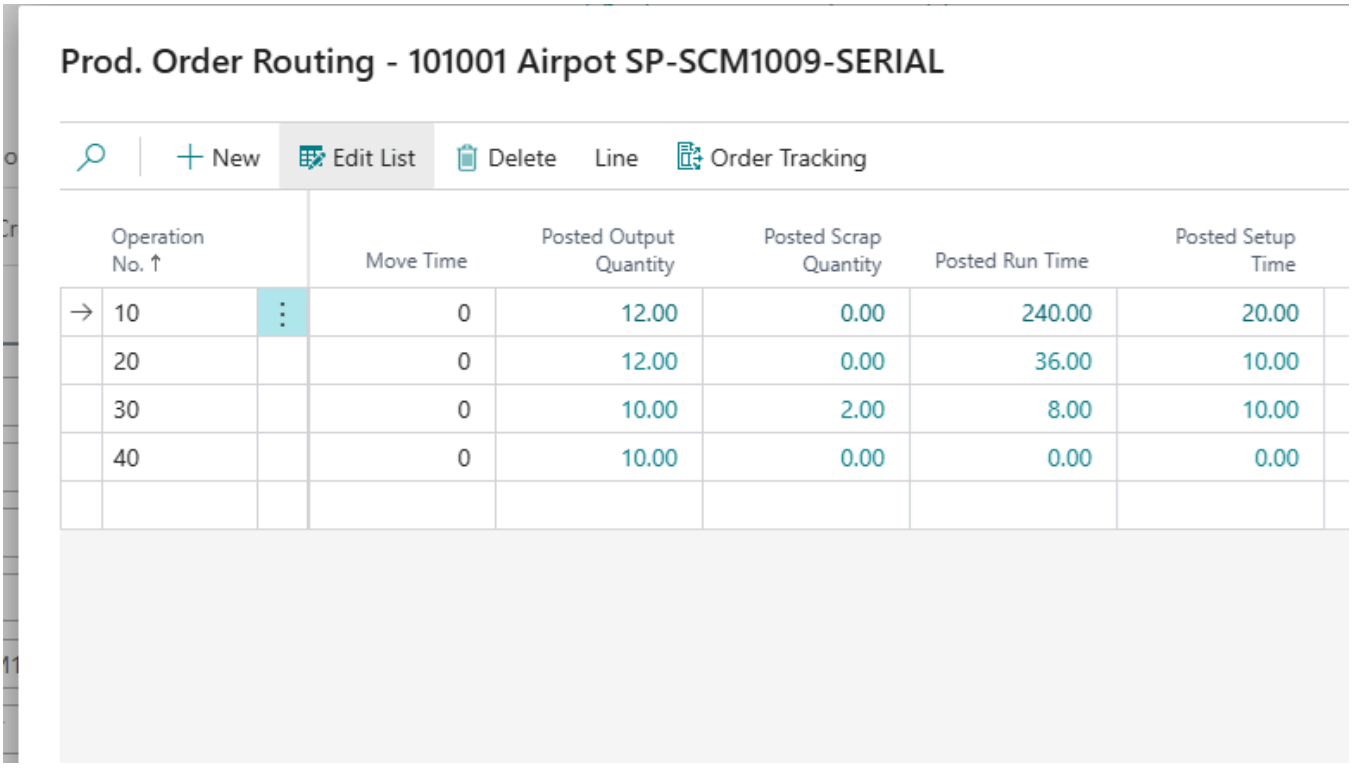
Add the **Order Line No.** and **Cap. Unit of Measure Code** fields to the **Capacity Ledger Entries** page.

Prod. Order Capacity Need page

Add the **Concurrent Capacities**, **Status**, **Efficiency**, **Needed Time**, **Needed Time (ms)**, **Operation No.**, **Routing No.**, and **Work Center No.** fields to the **Prod. Order Capacity Need** page.

Prod. Order Routing page

You can add the **Posted Output Quantity**, **Posted Scrap Quantity**, **Posted Run Time**, and **Posted Setup Time** FlowFields to the **Prod. Order Routing** page.



Operation No. ↑	Move Time	Posted Output Quantity	Posted Scrap Quantity	Posted Run Time	Posted Setup Time
10	0	12.00	0.00	240.00	20.00
20	0	12.00	0.00	36.00	10.00
30	0	10.00	2.00	8.00	10.00
40	0	10.00	0.00	0.00	0.00

Prod. BOM Version List page

The **Status**, **Unit of Measure Code**, and **Starting Date** fields are on the **Prod. BOM Version List** page. The page shows these fields by default.

Routing Version List page

The **Status** and **Starting Date** fields are on the **Routing Version List** page. The page shows these fields by default.

Service Quote Lines page

The **Item Reference No.** field is on the **Service Quote Lines** page. The page shows this field if at least one item reference exists.

Customer No. field

You can add the **Customer No.** field to the **Posted Purchase Invoice**, **Posted Sales Credit Memo**, **Posted Sales Invoice**, and **Posted Sales Shipment** pages.

Thanks to our community for valuable contributions to Microsoft's open source BusinessCentralApps repo on GitHub.

Vendor No. field

You can add the **Vendor No.** field to the **Posted Purchase Credit Memo** and **Posted Purchase Invoice** pages.

Thanks to our community for valuable contributions to Microsoft's open source BusinessCentralApps repo on GitHub.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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

Add unit cost in subscription lines

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

Effective cost control starts with accurate data. To evaluate profit, you need unit costs on subscription lines so you can compare revenue.

Feature details

Subscription Billing supports unit costs for subscription lines, starting with the sales process. The subscriptions display unit costs, and the billing proposal and document lines you create include these costs. In a usage data scenario, unit costs come from actual costs based on the usage data your supplier provides.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Align Subscription Billing with standard user experience and terminology

10/16/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

We're making it easier to work with Subscription Billing by updating the terminology we use for its features in the product and documentation.

Feature details

Subscription Billing is a subscription-oriented module that also supports other valuable scenarios. Before this release, the module's broad and multipurpose applications and scenarios caused complexity in the underlying objects and user-facing elements. This release simplifies the user and developer experiences by focusing on the subscription-based nature of the module.

Generally, we rename objects and user experience elements, such as captions, from "Service" to "Subscription." For example, the "Service Object" entity is now the "Subscription" entity. This change improves the user experience, clarifies the documentation, and makes terminology more consistent across the application.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Overview of subscription billing (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Allow multiple people to post inventory at the same time

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 1, 2025	✔ Apr 1, 2025

Business value

Multiple users can post to inventory at the same time. However, some limitations exist. General ledger postings are still sequential. Business Central applies transactions to one open item ledger entry at a time. This limitation means that, unlike service items, two or more users can't post to the same inventoriable item at the same time.

Feature details

By dynamically assigning entry numbers, the system avoids locking the inventory ledger tables. When the system avoids locking these tables, multiple users or sessions can post to inventory at the same time. This capability supports dependent scenarios, such as posting transfer orders or sales orders concurrently.

This feature supports *inventory posting*. Often, inventory posting includes an associated general ledger posting, which doesn't support concurrency. Therefore, when you post two item journals at the same time, one journal waits for the other to finish. This behavior applies only if you turn on the **Automatic Cost Posting** toggle on the **Inventory Setup** page. Similarly, when you post an outgoing entry for an item, the system updates the remaining amount on an incoming entry. This update prevents two users from posting to the same inventoriable item at the same time.

You can turn on or turn off the feature on the Feature Management page. You don't need to upgrade. The feature is off by default for backward compatibility and so partners can test their extensions before they turn it on.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Allow workers to post transactions at the same time (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Avoid document number errors when you post project journals

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

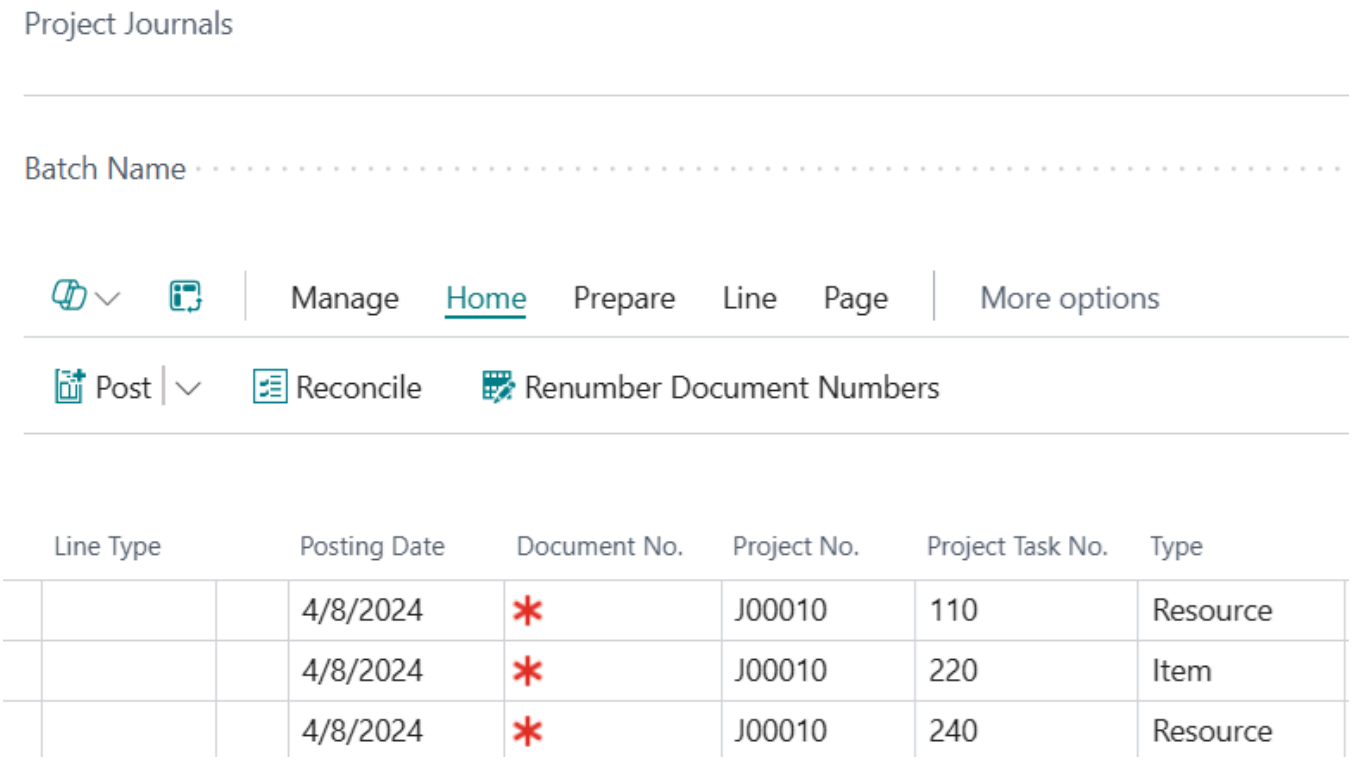
Business value

Business Central reduces or removes friction when you work with documents and journals. If you use a number series for project journal batches, you can't post the journal if the document numbers aren't in consecutive order. To avoid getting stuck, you can fix errors related to the order of document numbers when you post project journals.

Feature details

On the **Project Journals** page, you can edit the **Document No.** field. You can enter different document numbers for journal lines or use the same document number for related journal lines.

If you specify a number series in the **No. Series** field on the project journal batch, you must enter document numbers for individual or grouped lines in sequential order when you post a project journal. If the document numbers aren't in sequential order, you can't post the journal. To fix this issue, use the **Renumber Document Numbers** action on the **Project Journals** page before posting the journal. If you group related journal lines by document number before using this action, the lines stay grouped but might get a different document number.



The **Renumber Document Numbers** action also works on filtered views.

We thank our community for their valuable contributions to Microsoft's open source BusinessCentralApps repo on GitHub.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Avoid document number errors when you post project journals (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Block items or variants from production output

08/07/2025

Expand table

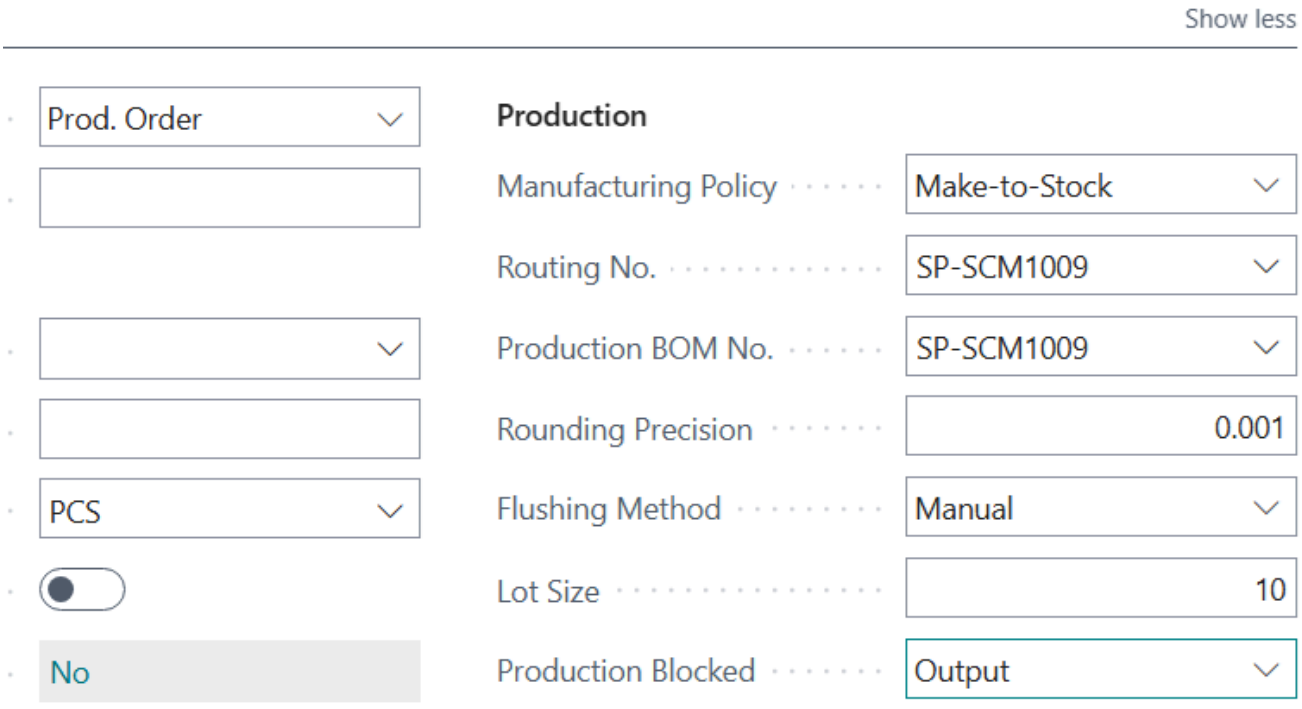
Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

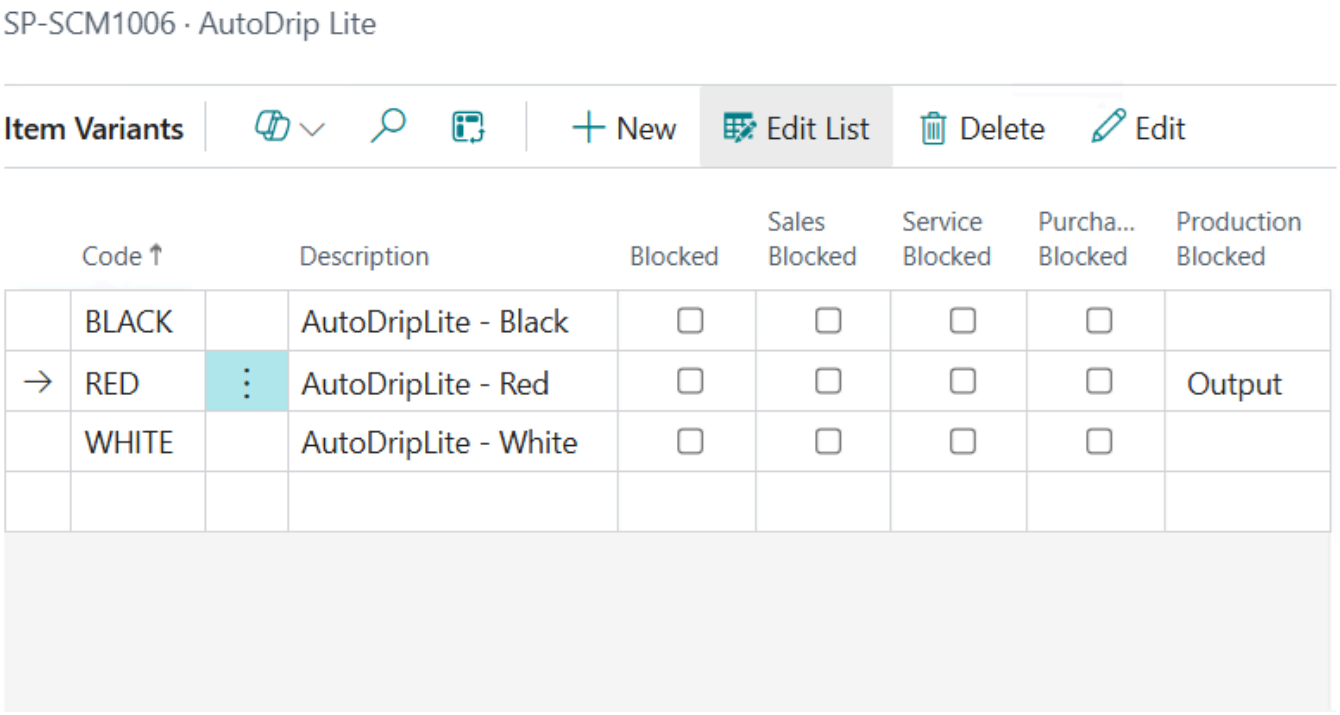
Business value

Business Central gives you full control over the materials you use in production. You can prevent specific items and item variants from being used as production output. For example, blocking items is useful if you want to restrict replenishment because you started to produce another model, but you still want to sell the remaining stock.

Feature details

You can block an item or an item variant from being used for production output. To block an item or variant from being used for production, turn on the **Production Blocked** toggle on the **Item Card**, **Item Variants**, and **Item Variant Card** pages. Set this field on the **Item Template** page to have Business Central copy your setting to new items created from the template.



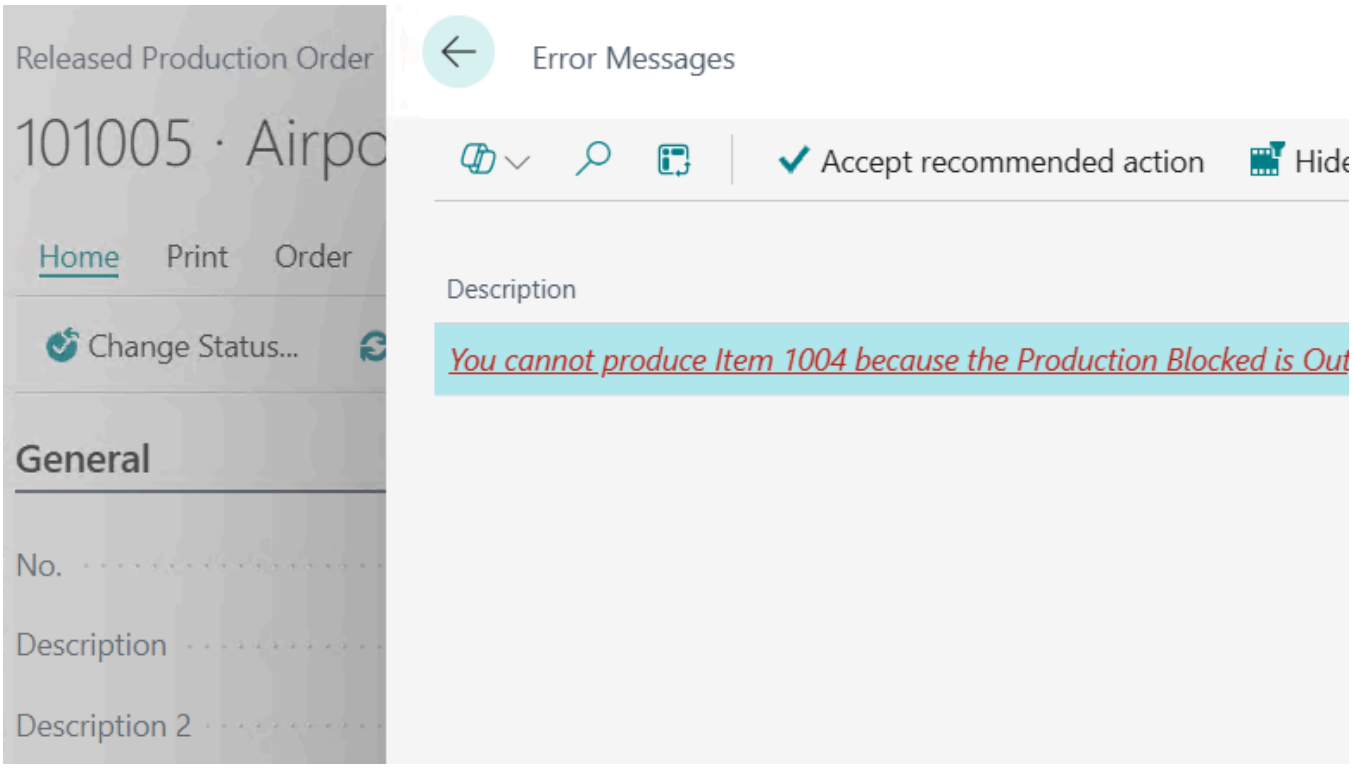


When you block an item or an item variant for production, you can't select it on the following pages:

- Production order header (all statuses)
- Production order lines

Additionally, if a production order includes blocked items or item variants, you can't use the following actions:

- Post output in the output journal or production journal
- Refresh the production order
- Replan the production order
- Calculate subcontracts in the subcontracting worksheet. This action skips blocked items.



> **Note**
>
> You can still have lines in the requisition and planning worksheet, but you can't carry out the action or create the production order. If you production-block an item, change the replenishment method to to exclude the item from planning.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Block items or item variants from use in sales, purchasing, service, and production (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Cancel production orders that have consumption

08/07/2025

Expand table

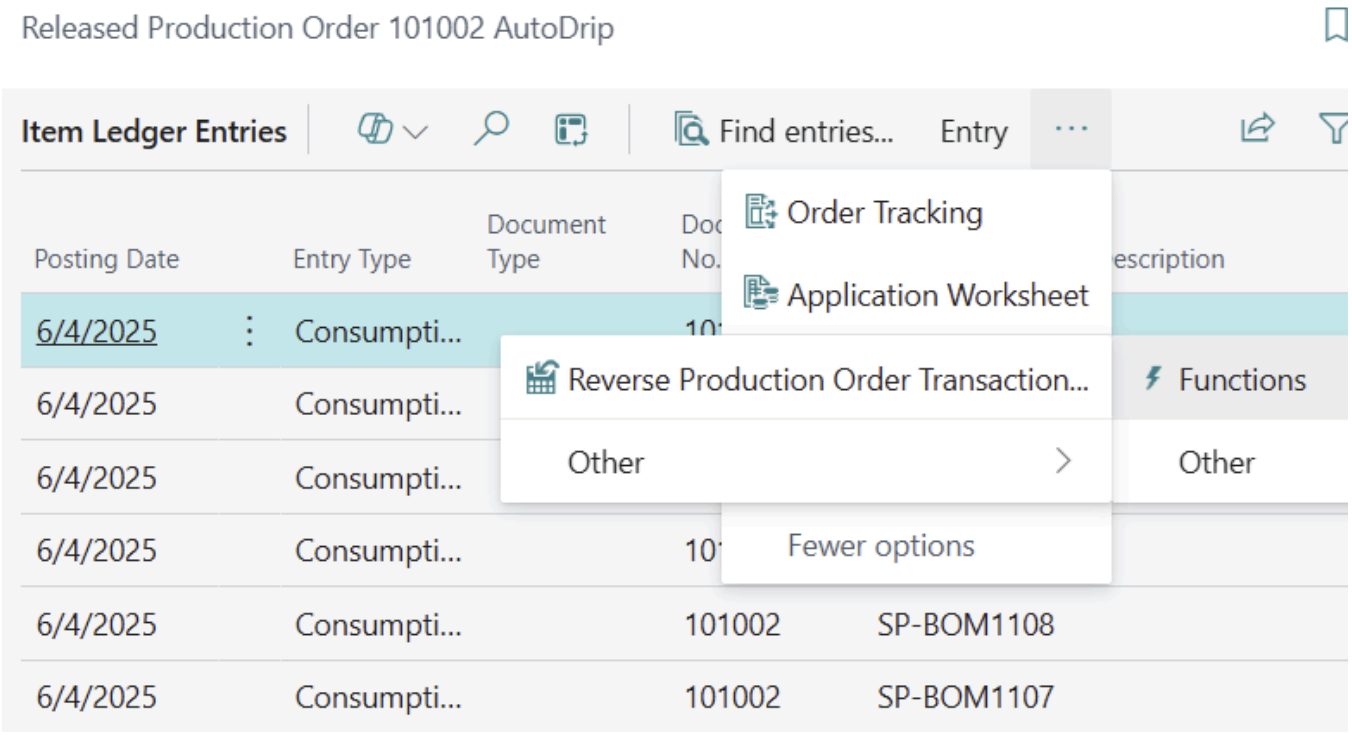
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

Even when production doesn't go as planned, you need to keep your inventory, cost, and financial records accurate. Now, it's easier to revert consumption or output transactions, return unused raw materials, and correct mistakes in your reported operations. For actual scrap occurrences, Business Central provides a process that lets you close orders and write off accumulated WIP.

Feature details

When you mistakenly post production transactions, you probably want to cancel the transactions. In some cases, you also want to close the order. From the **Released Production Order** page, you can open the **Item Ledger entries** or **Capacity Ledger entries** pages. Use the **Reverse Production Order Transaction** action to reverse the transactions.



- For item ledger entries of the **Consumption** type, the action creates item journal lines of the **Consumption** type. The action copies values from the original transaction. It uses the opposite sign in the **Quantity** field. It applies to the original entry and posts the item journal.
- For item ledger entries of the types **Output** or **Capacity** entries, the action creates item journal lines of the type **Output**. For the lines, the action copies values from the original transaction, uses the opposite sign in the **Quantity**, **Scrap Quantity**, **Setup Time**, and **Run time** fields, applies to the original entry (only for item ledger entries), and posts the item journal. The action also removes the **Finished** status from the related production routing line.

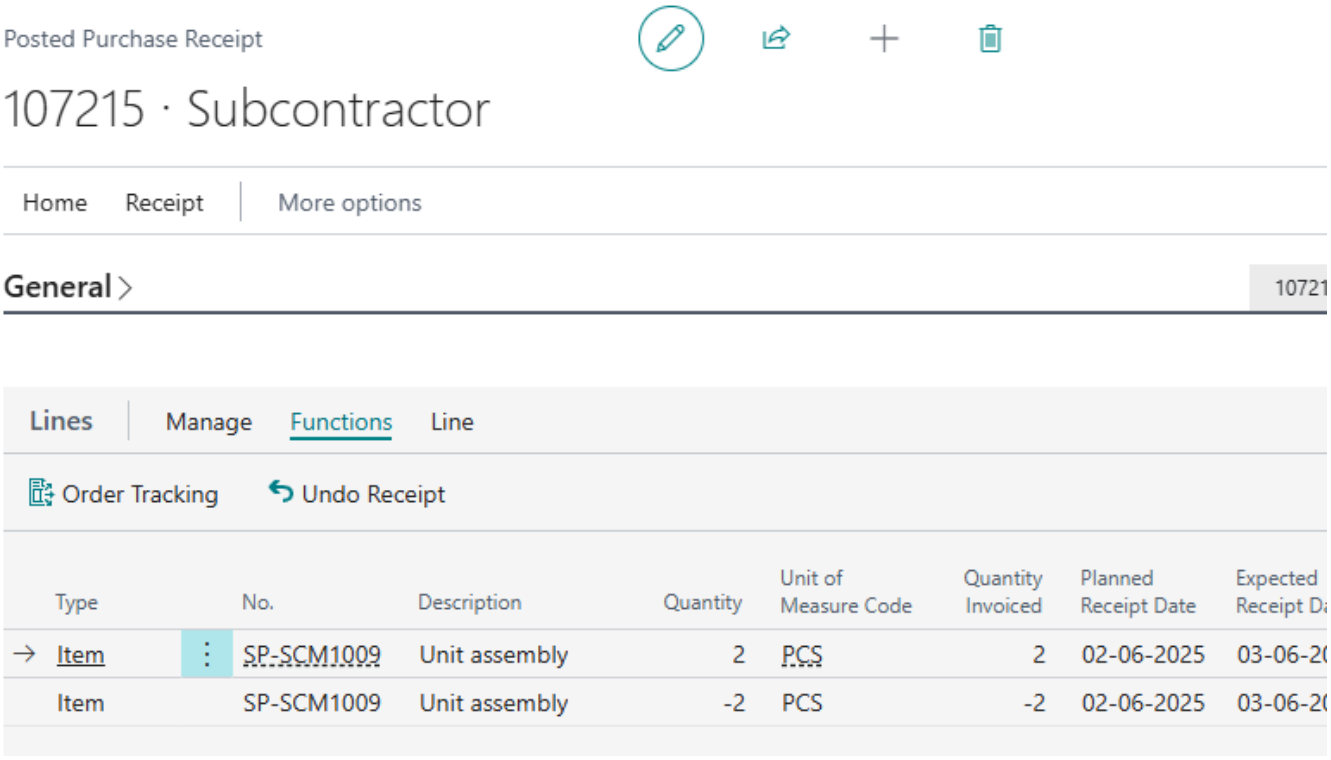
The system enables the **Reverse Production Order Transaction** action only for entries that are related to the production order. The action uses the original posting date.

The system doesn't support the action under the following conditions:

- The output entry is already applied to an outbound transaction.
- Consumption or output involves warehouse handling. Bins are supported.
- Entries are created through subcontracting purchase orders. You can undo receipt in the **Posted Purchase Receipt** page.

You can undo subcontracting receipts before you post them as invoiced. To undo subcontracting receipts, go to the posted purchase receipt, select the line, and choose **Undo**. This action creates an identical line with the opposite sign in the **Quantity** field, along with the capacity ledger entry. If the canceled receipt line links to the last routing operation, the undo

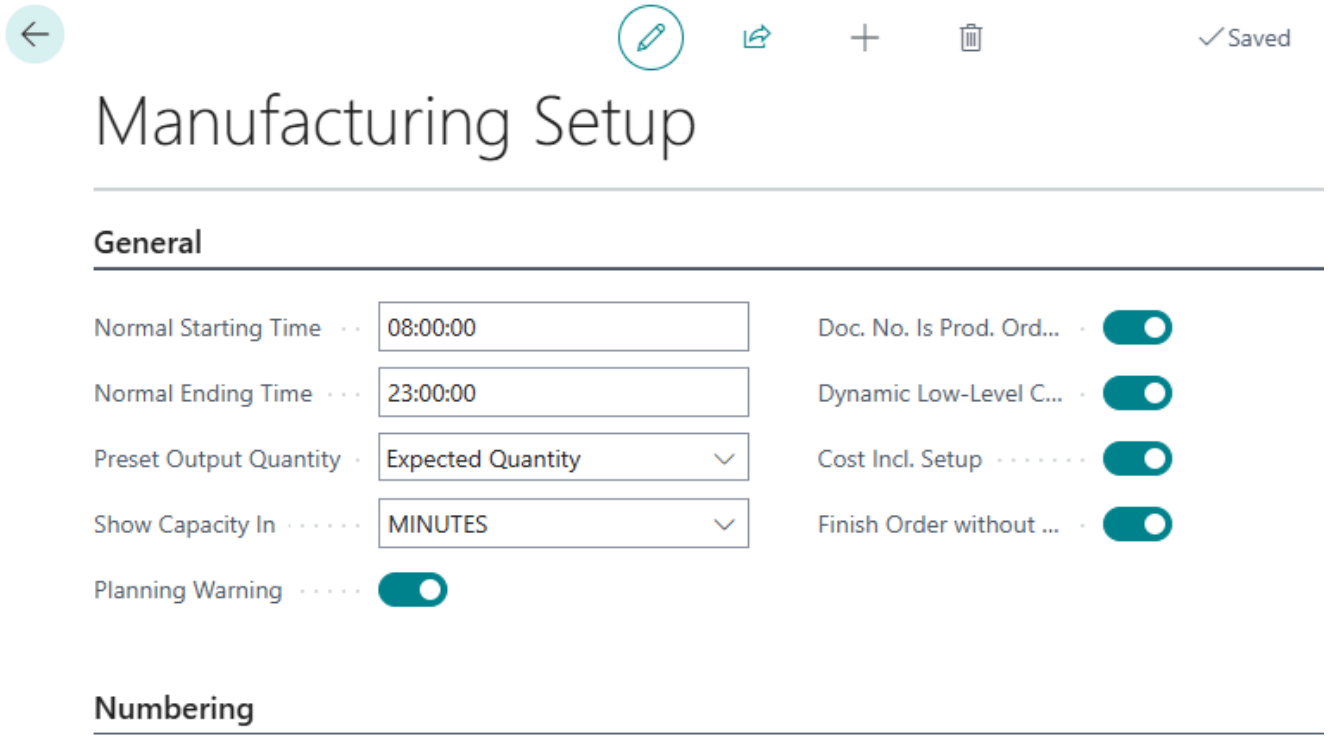
action also creates the item ledger entry of the type **Output**. You can't reverse a receipt if it's invoiced or if the production order is finished.



> **Note**
>
> If posting a subcontracting receipt consumes components because of the flushing method, the undo action doesn't revert the consumption transactions. To reverse these transactions, use an output journal or the new **Reverse Production Order Transaction** action.

When you correct (revert) the records, you can change the status of the production order to **Finished**. The following steps and setting apply to scenarios where the system can't allocate accumulated WIP because of actual scrap.

Set up the process by activating the **Finish Order Without Output** toggle in the **Manufacturing Setup** page.

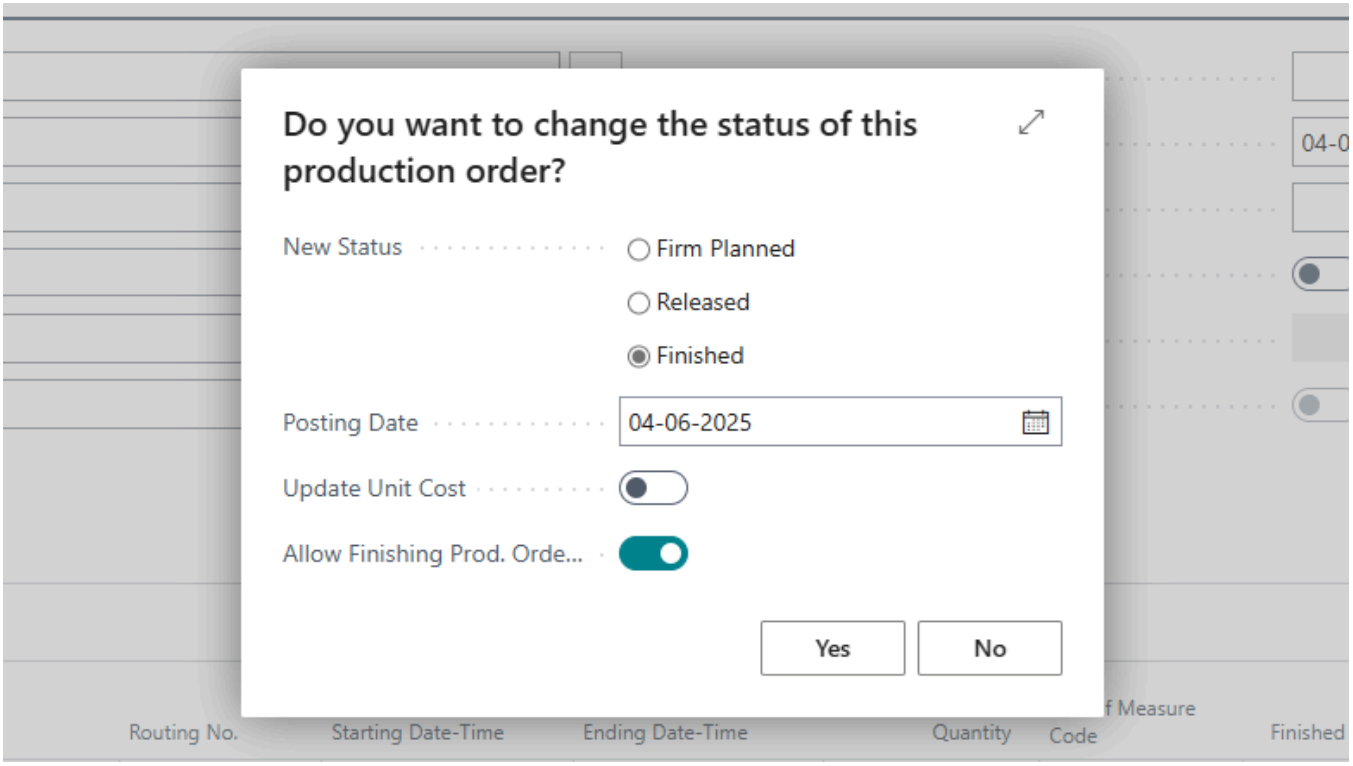


> **Note**
>
> After you turn on the toggle, you can't turn it off. However, you can choose whether to write off WIP for each order.

When you change the status of a released production order that has consumption or capacity ledger entries but no output, turn on the **Allow Finishing Prod. Order with no output** toggle on the **Change production order status** page.

The system posts the accumulated WIP amounts to your inventory adjustment account. Enter the **Inventory Adjustment Account** on the **General Posting Setup** page for the entry that the system defines by:

- The **Gen. Bus. Posting Group** field on the production order.
- The **Gen. Prod. Posting Group** field on the produced item.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Cancel production orders that have consumption (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Combine service shipments on a single service invoice

08/07/2025

Expand table

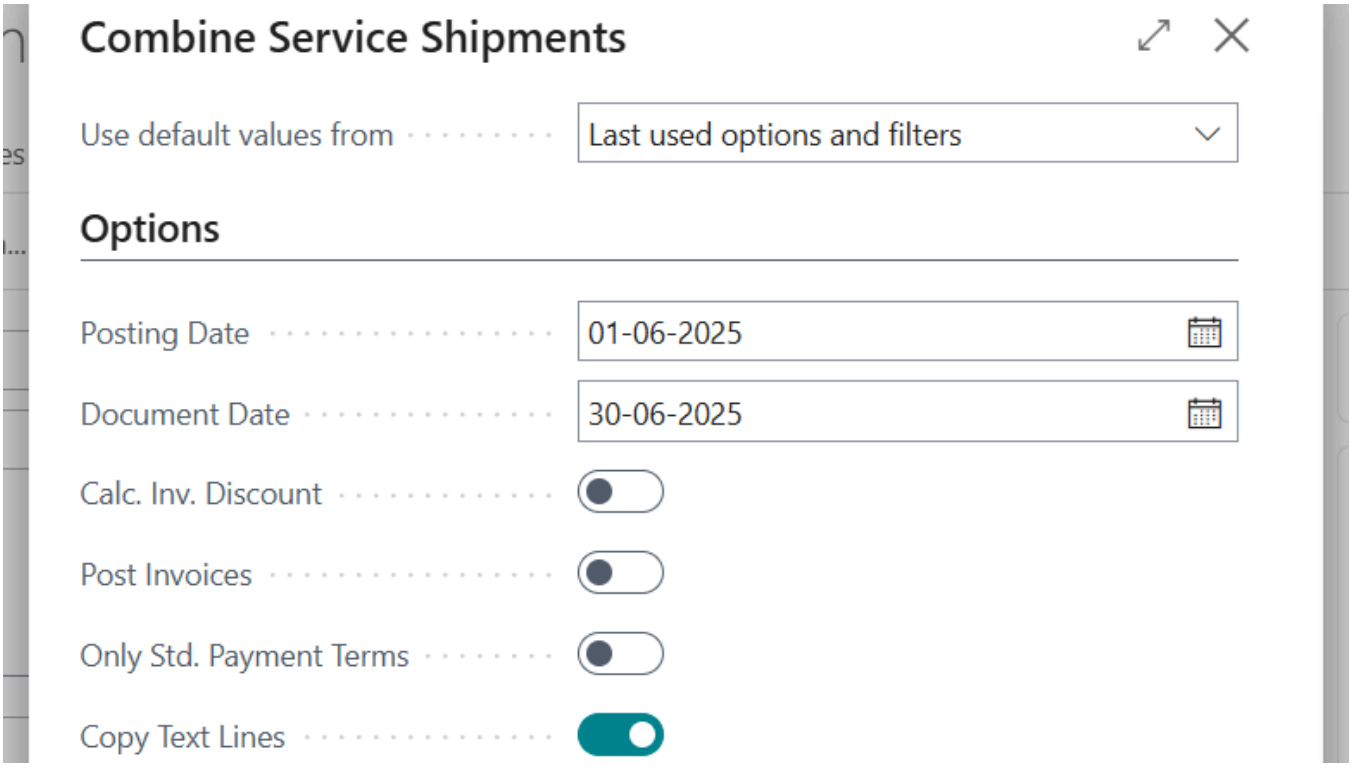
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

With the new **Combine Service Shipment** task, you can gather all the service shipments that aren't invoiced into one invoice or into multiple service invoices.

Feature details

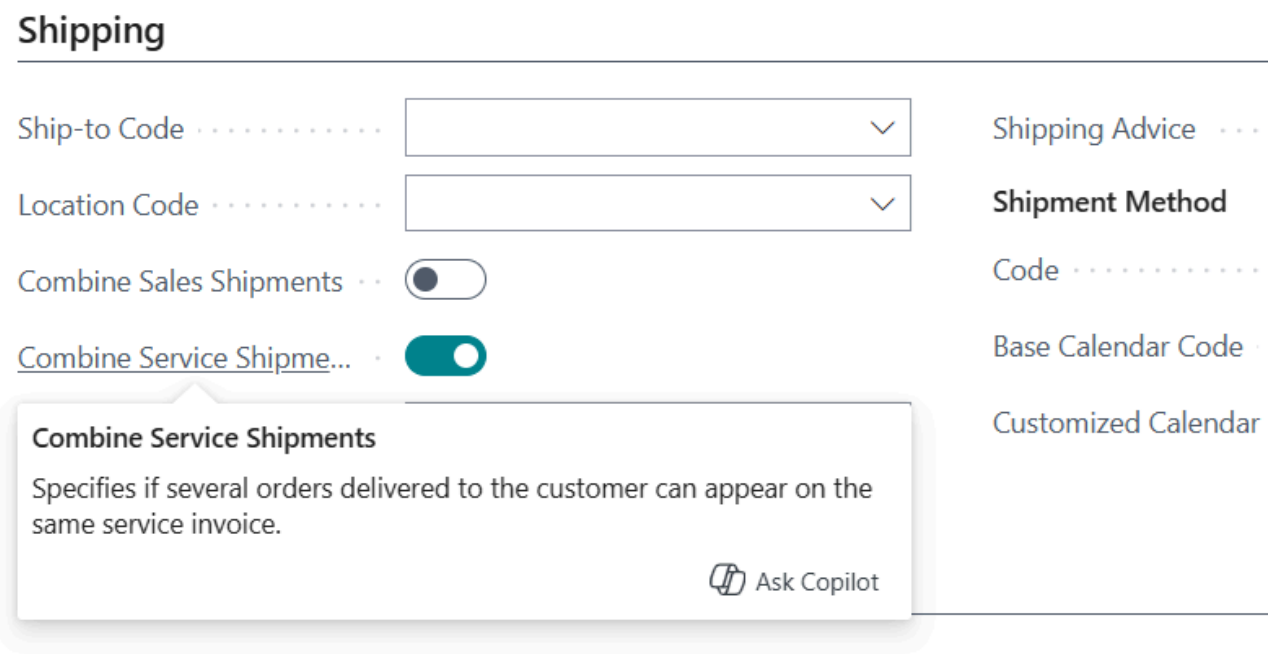
The service and sales invoicing flows are more aligned. The new **Combine Service Shipment** action gathers all uninvoiced shipments into one or more invoices. You can create combined invoices for multiple customers, similar to the **Get Shipment Line** action you use when you create an invoice for each customer.



To automatically combine shipments on a single invoice

1. Select the **Tell me** icon, enter **Combine Service Shipments**, and then select the related link. The batch job request page opens.

2. Business Central selects only service orders where you choose **Combine Service Shipments**. The service orders field **Combine Service Shipment** comes from the new **Combine Service Shipment** toggle in the **Customer Card** page. You can also update this field manually.



3. Fill in the fields as described in the following table.

Expand table

Field Name	Description	Required?
Posting Date	Enter the posting date for the invoices that the batch job creates.	Yes
Document Date	Enter the document date for the invoices that the batch job creates.	Yes
Calc. Inv. Discount	Calculate invoice discounts automatically. If you select the **Calc. Inv. Discount** checkbox on the **Sales & Receivables Setup** page, the system always calculates the amounts automatically.	No
Post Invoices	Post invoices immediately.	No
Only Std. Payment Terms	Only include shipments with standard payment terms. If you select this option, you must manually invoice all other shipments.	No
Copy Text Lines	Copy the manually added text on the shipment lines to the invoice. The system always copies automatically inserted standard or	No

Field Name	Description	Required?
	extended texts.	

4. Select **OK**.

> **Note**
>
> - You must manually post the invoices if you don't select the **Post Invoices** checkbox on the batch job.
> - The task doesn't mark the shipments that it retrieves. The task always creates new combined shipments. To repeat the task, delete the existing invoices.
> - You can't post a service invoice that contains lines from orders linked to contracts and ad hoc orders. Create separate invoices.

Good to know

When you combine shipments on an invoice and post the invoice, you create a posted service invoice for the invoiced lines. The system updates the **Quantity Invoiced** field on the original service order based on the invoiced quantity.

When you invoice shipments in this way, the orders remain even if they're fully shipped and invoiced. You can delete these orders manually or use the **Delete Invoiced Service Order** task to delete them in bulk.

1. Select the **Tell me** icon, enter **Delete Invoiced Service Orders**, and select the link.
2. In the **No.** filter field, specify which service orders to delete. To delete all invoiced service orders, leave the field blank.
3. Select **OK**.

Thanks to our community for their valuable contributions to Microsoft's open source BusinessCentralApps repo on GitHub.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

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Additional resources

Combine shipments on a single invoice (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Create demo data for Subscription Billing with demo data tool

08/07/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Apr 1, 2025

Business value

With the Contoso demo data tool, you can now get demonstration data for the Subscription Billing module. This feature saves you time when setting up use cases, especially during evaluation.

Feature details

We considered various aspects of the Subscription Billing module's use cases when we created the Contoso demo data. For example, we included items with the subscription option, subscription packages, and G/L accounts for deferrals. Additionally, as usual for Contoso demo data, you can distinguish between creating only setup data and creating extra transaction data.

The Contoso demo data tool can now create the following types of demo and setup data for the Subscription Billing module:

Setup data in the following tables

- G/L Account
- Source Code
- Source Code Setup
- General Posting Setup
- Item Template
- Price Update Template
- Subscription Contract Setup
- Subscription Contract Type
- Billing Template

Master data for the following tables

- Item
- Item Vendor
- Item Unit of Measure
- Item Reference
- Usage Data Supplier
- Usage Data Supp. Reference
- Generic Import Settings
- Sub. Package Line Template
- Subscription Package
- Subscription Package Line
- Item Subscription Package

Transactional data for the following tables

- Usage Data Billing
- Usage Data Blob
- Usage Data Import
- Usage Data Supp. Subscription
- Usage Data Generic Import
- Customer Subscription Contract
- Subscription Header
- Subscription Line
- Cust. Sub. Contract Line
- Vendor Subscription Contract
- Vend. Sub. Contract Line

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Create subscription contract lines manually

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

Easily start with simple subscription scenarios in Subscription Billing. When you create subscription contract lines manually, you can easily start with the Subscription Billing module.

Feature details

You can now manually add a line to a subscription contract.

The Subscription Billing module in Dynamics 365 Business Central is feature rich and supports numerous use cases. Consequently, the module offers many entry points. One of the simplest ways to get started is to set up a subscription contract for a customer, enter one line, and generate an invoice. When you manually add a line to a subscription contract, you make it easier for users to start using the module for subscription scenarios.

You can add subscription contract lines based on items and G/L accounts. In both cases, the system needs extra information to continue processing. You enter this information manually in the line. The system automatically creates the rest.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Enable overpicking for production orders

08/07/2025

Expand table

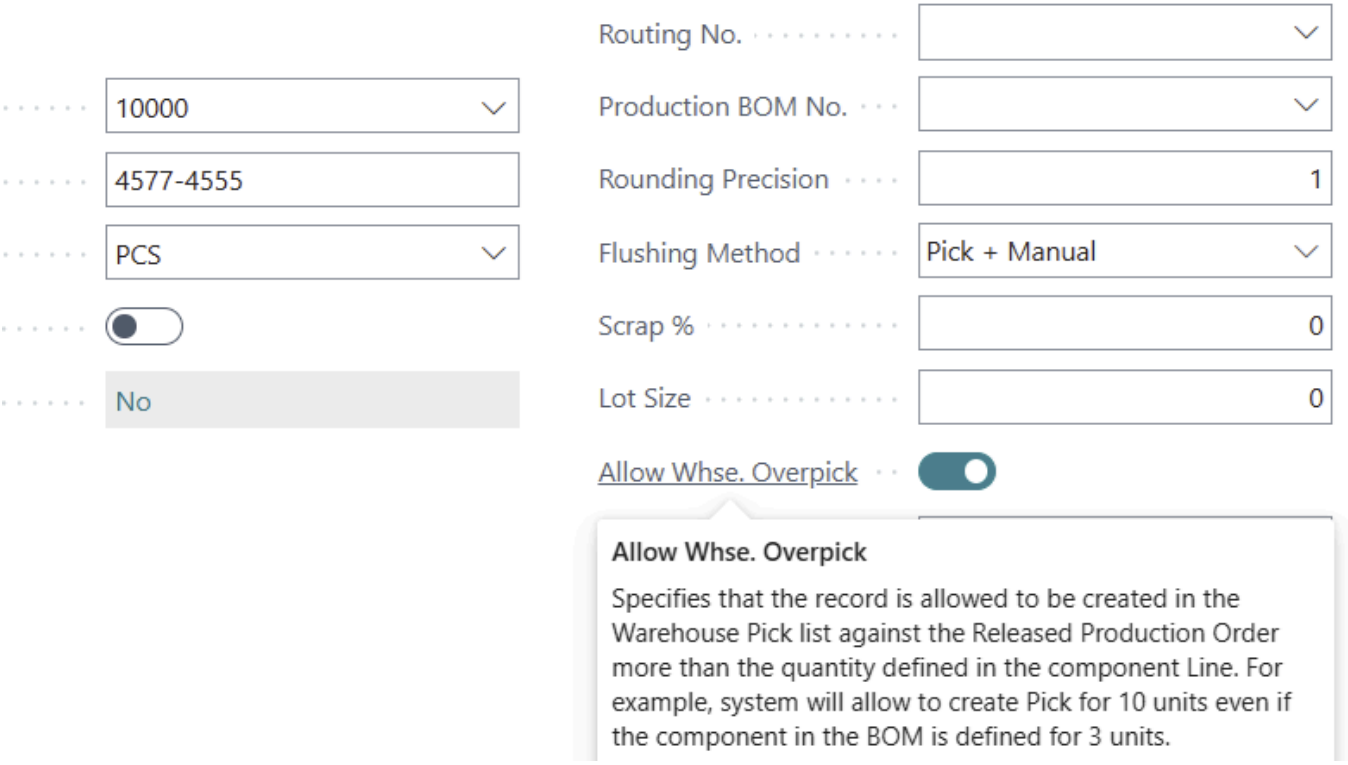
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

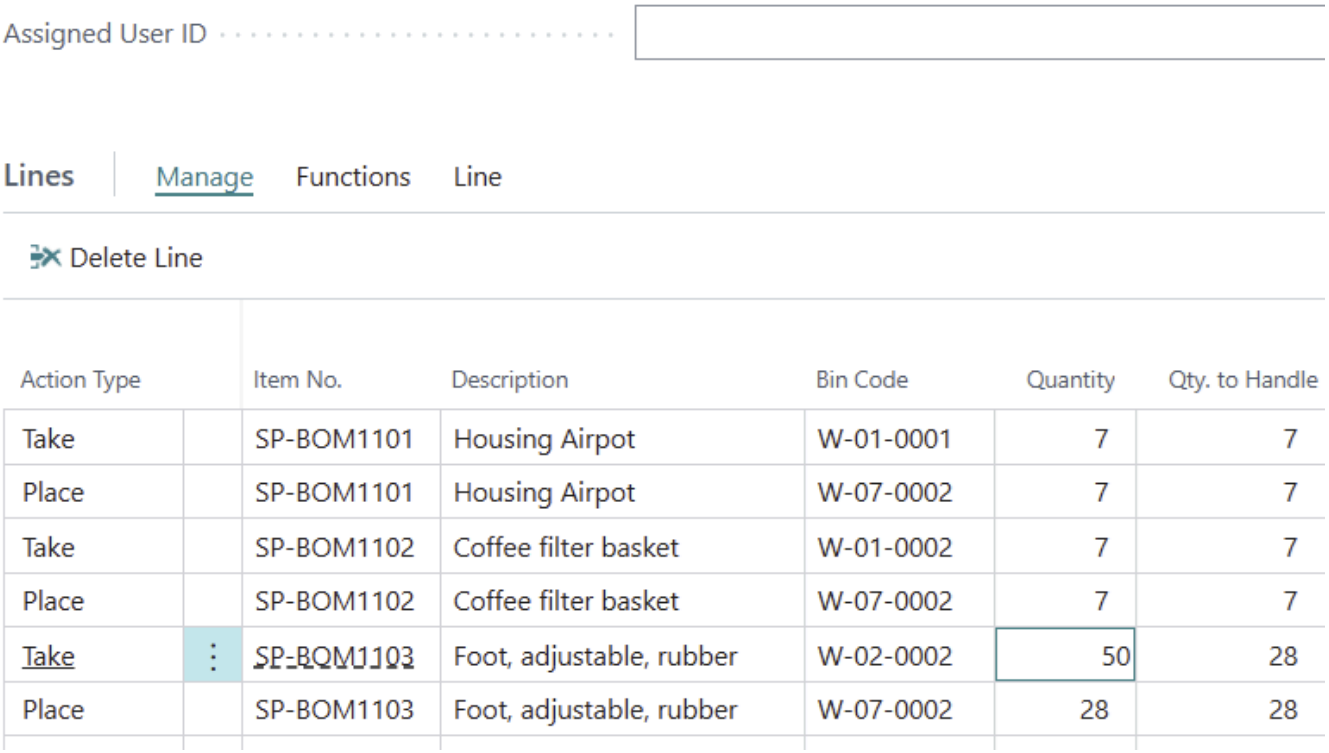
With this feature, you can pick more raw materials than the production order initially requires. This capability is useful in several scenarios. You can pick an entire pallet or box, use what you need, and return the excess to inventory. You can also post consumption for additionally picked components.

Feature details

To start using this feature, turn on the **Allow Whse. Overpick** toggle in the **Item Card** to specify that items are eligible for overpicking. Activate the same setting in the item template to ensure that all items you create based on the template have the setting.



In the warehouse pick that you create for a production order, change the value in the **Quantity** field for the **Take** line.



To return excess items to the warehouse, use the **Movement worksheet** and the **Get Bin Content** action.

To post extra consumption, either increase the value in the **Quantity Per** field on the **Production Order Components** page or enter the required quantity directly on the **Consumption Journal** or **Production Journal** pages. If the new quantity in the journal is less than or equal to the quantity picked, you can post consumption.

This process applies only to warehouse picks for production orders. It doesn't support inventory picks and movements. It also doesn't support warehouse picks for other source documents.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Pick for production, assembly, or projects in basic warehouse configurations (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Experience improved usability in manufacturing

08/07/2025

Expand table

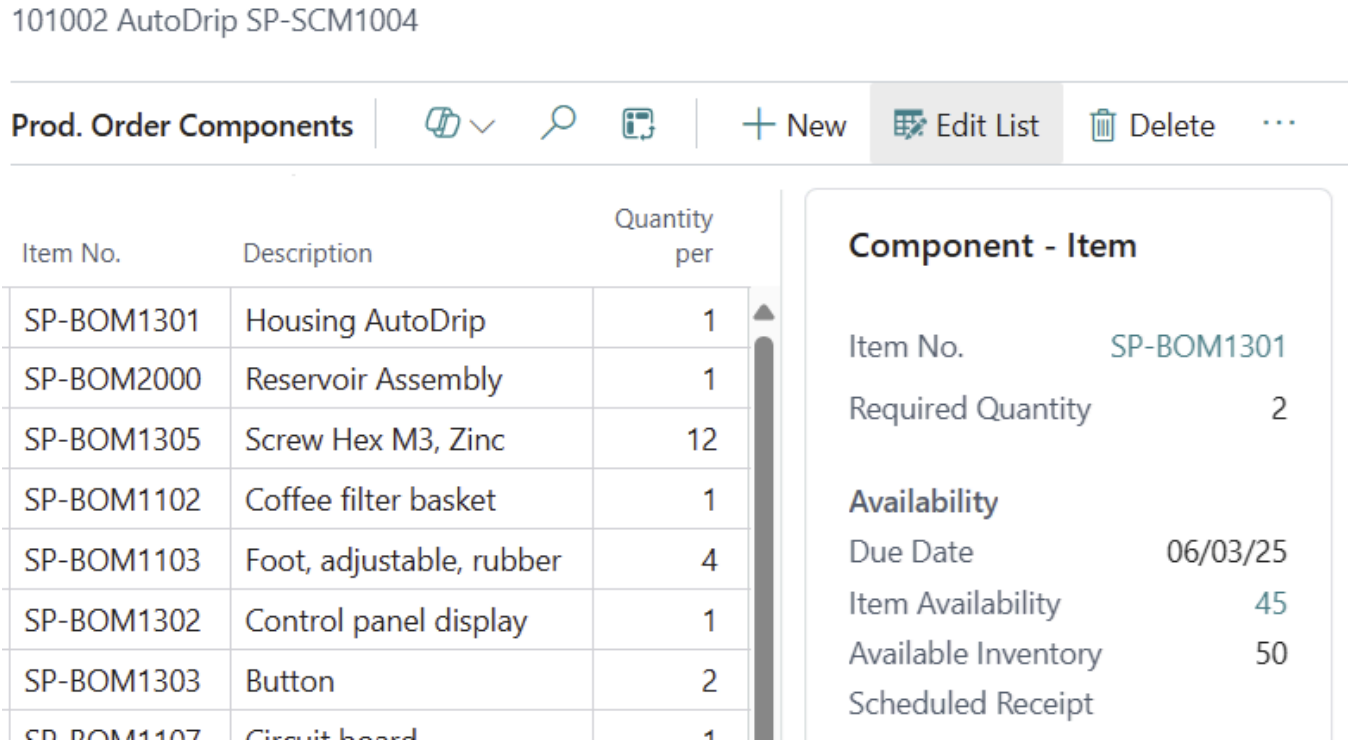
Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

You get more done when processes are easy. We improved the usability in several areas within manufacturing. Now, you can access information faster. We added fields, actions, and FactBoxes to several pages. Confirmation dialogs help you avoid mistakes when you process production BOMs and routings, and when you print in bulk.

Feature details

The **Component – Item** FactBox on the **Production Order Component** page shows information about an item and its availability when you view or edit the list of components in a production order.

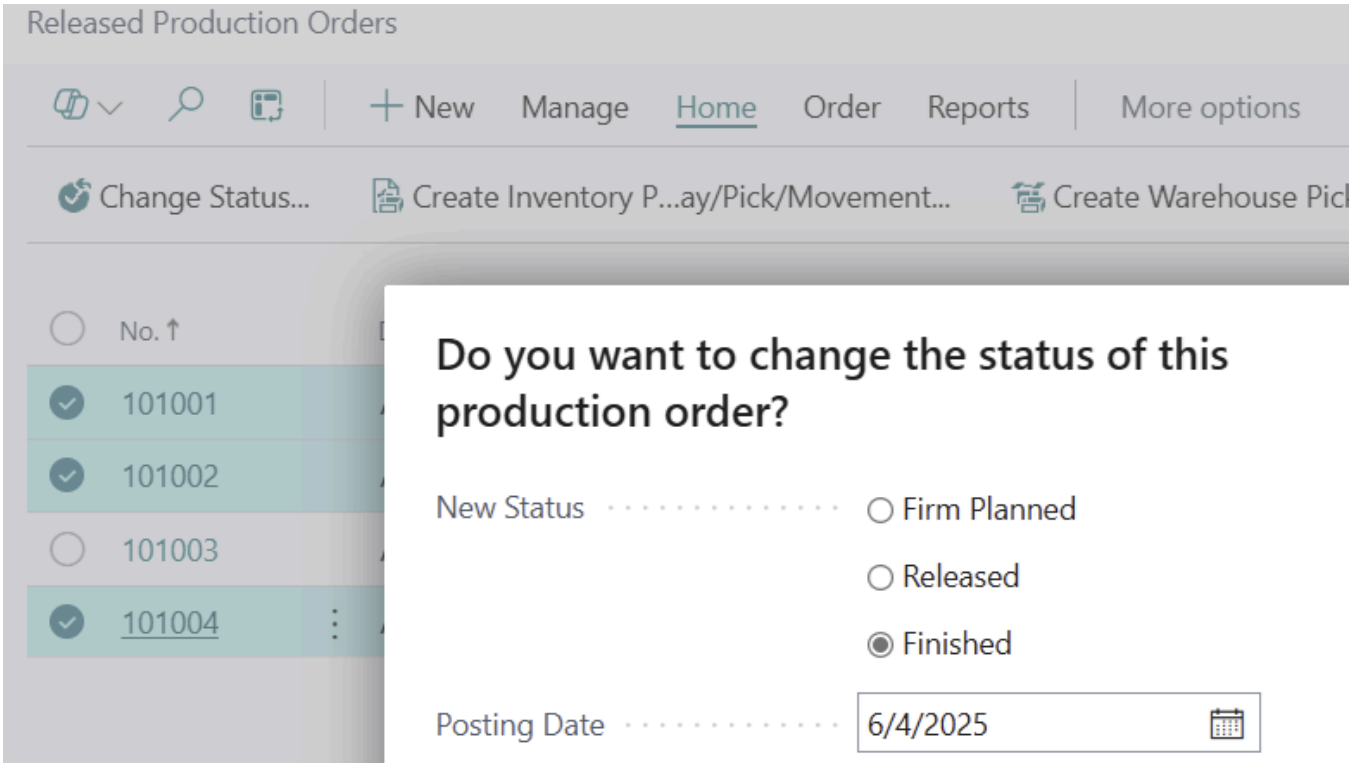


Change production order statuses in bulk

Use the **Change Production Order Status** page to change the status of multiple orders at the same time. You can now use this capability on list pages for the following types of orders:

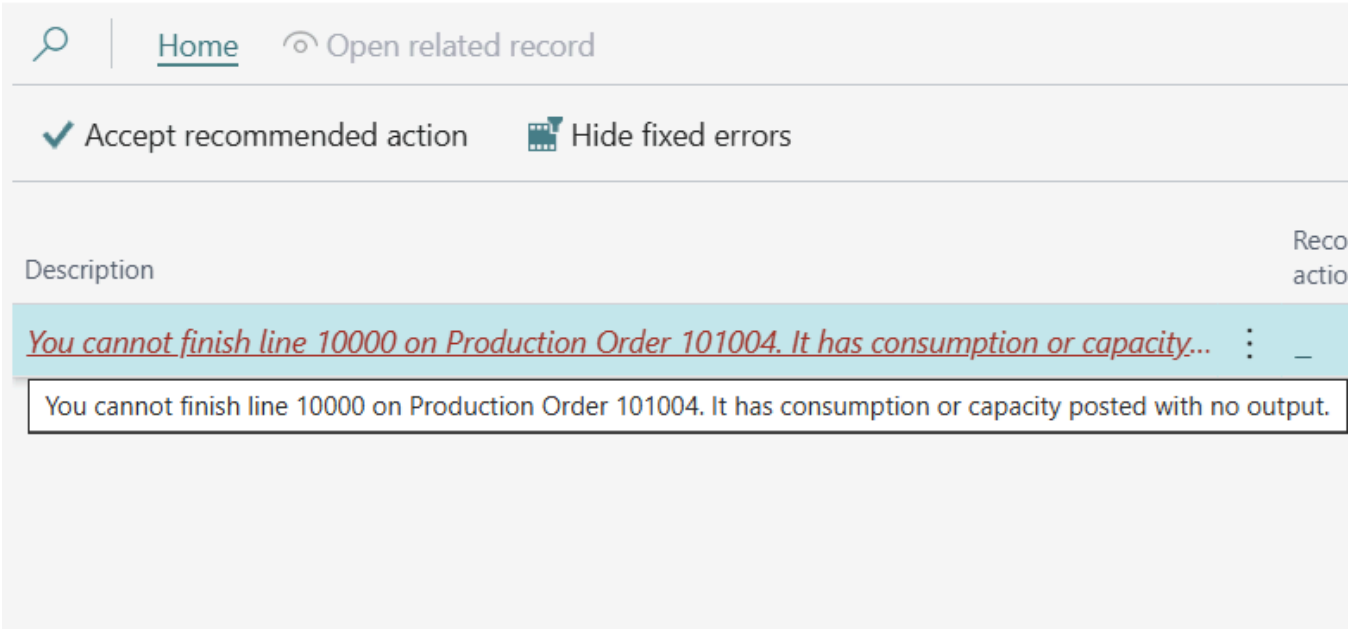
- Simulated production orders
- Planned production orders
- Firm planned production orders
- Released production orders

Select one or more production orders, and select **Change Status**.



> **Note**
>
> A confirmation dialog with extra questions appears for each order. If there are multiple orders with partial output or consumption, confirm each one.

If the status of orders can't change, the system skips those orders. The **Error Message** page shows the skipped orders and the reasons.

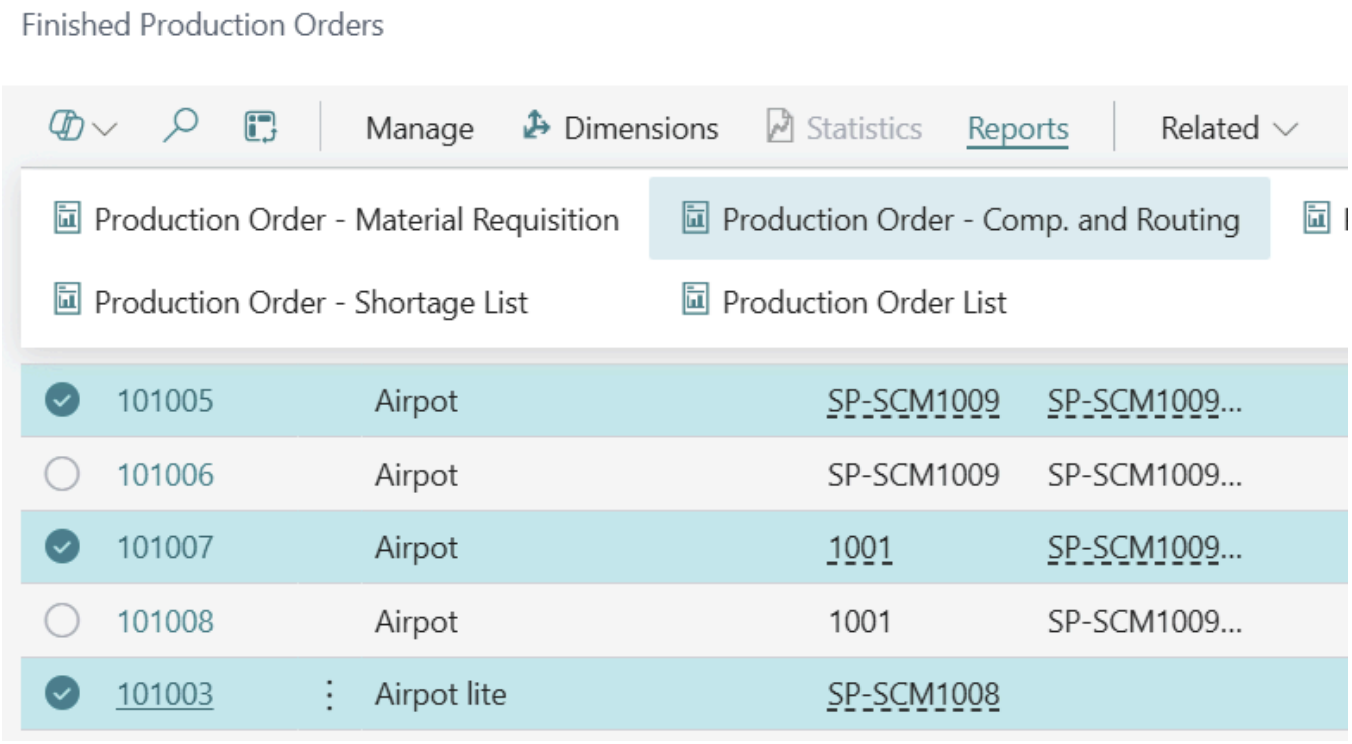


Print the Production Order - Comp. and Routing report for selected orders.

Select one or more orders, and choose **Production Order - Comp. and Routing** to run the report. The **Print** and **Preview** actions show details for the selected orders.

You can run the report on the following pages:

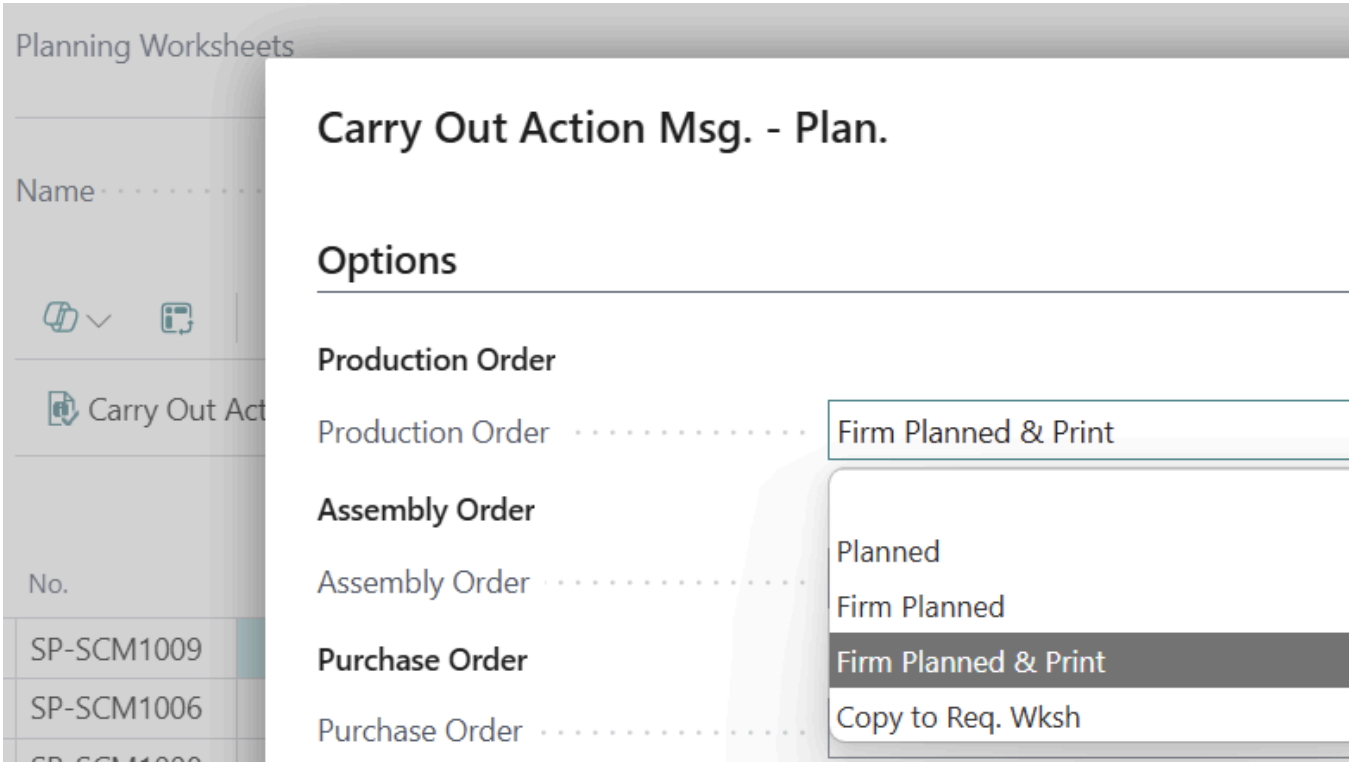
- Planned Production Orders
- Firm Planned Production Orders
- Released Production Orders



> **Note**
>
> The report uses **Marked** records that you select. The report request page doesn't show these types of filters, so it looks like no filters are applied.

Print multiple production orders that you create from a planning worksheet

When you process lines in a planning worksheet, you can print more than one firm planned order.

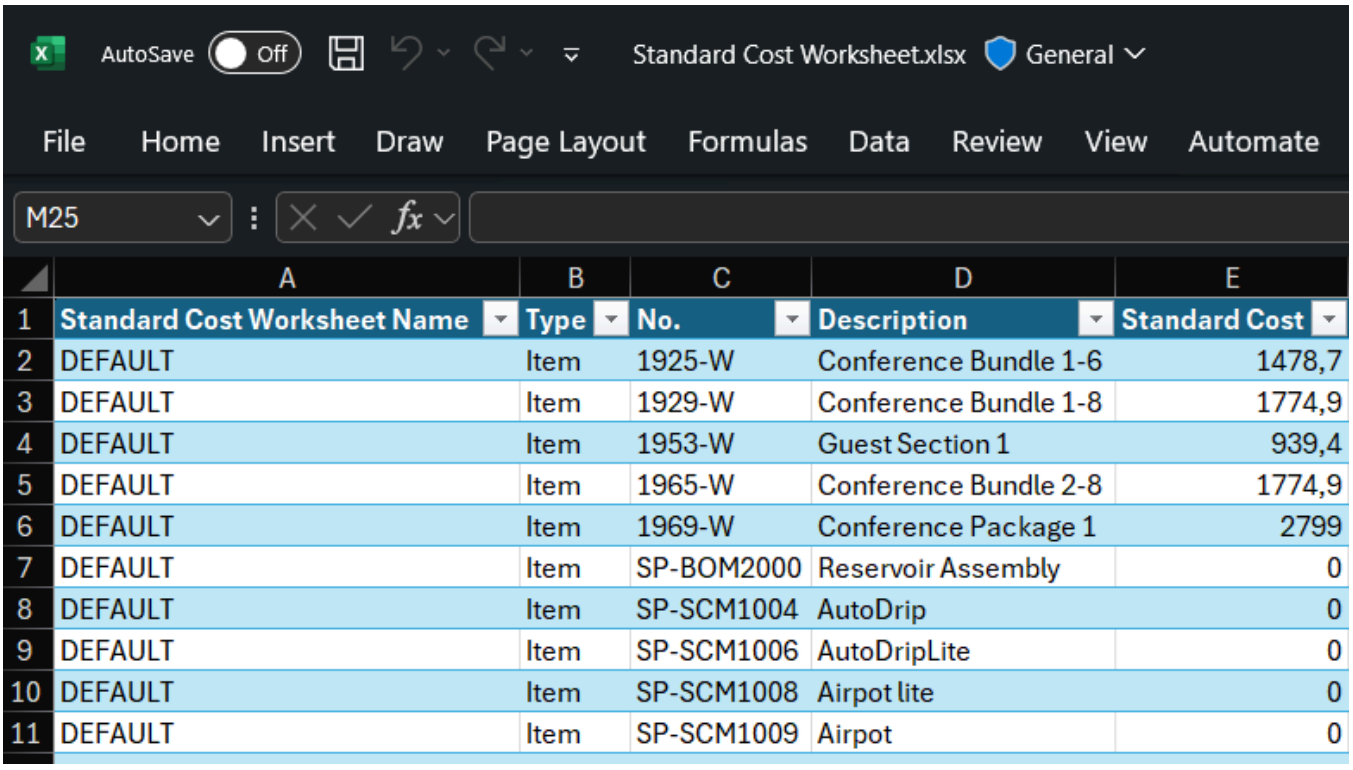


> **Tip**
>
> - On the **Report Selection - Production Order** page, use the **Prod. Order** option to choose which report to print. The default report is **99000762 Prod. Order - Job Card**.
> - If your production orders don't have routing lines or you want a more compact report, switch to the **5500 Prod. Order Comp. and Routing** report.

Thanks to our community for their contributions to Microsoft's open source BusinessCentralApps repo on GitHub.

Edit in Excel on the Standard Cost Worksheet page

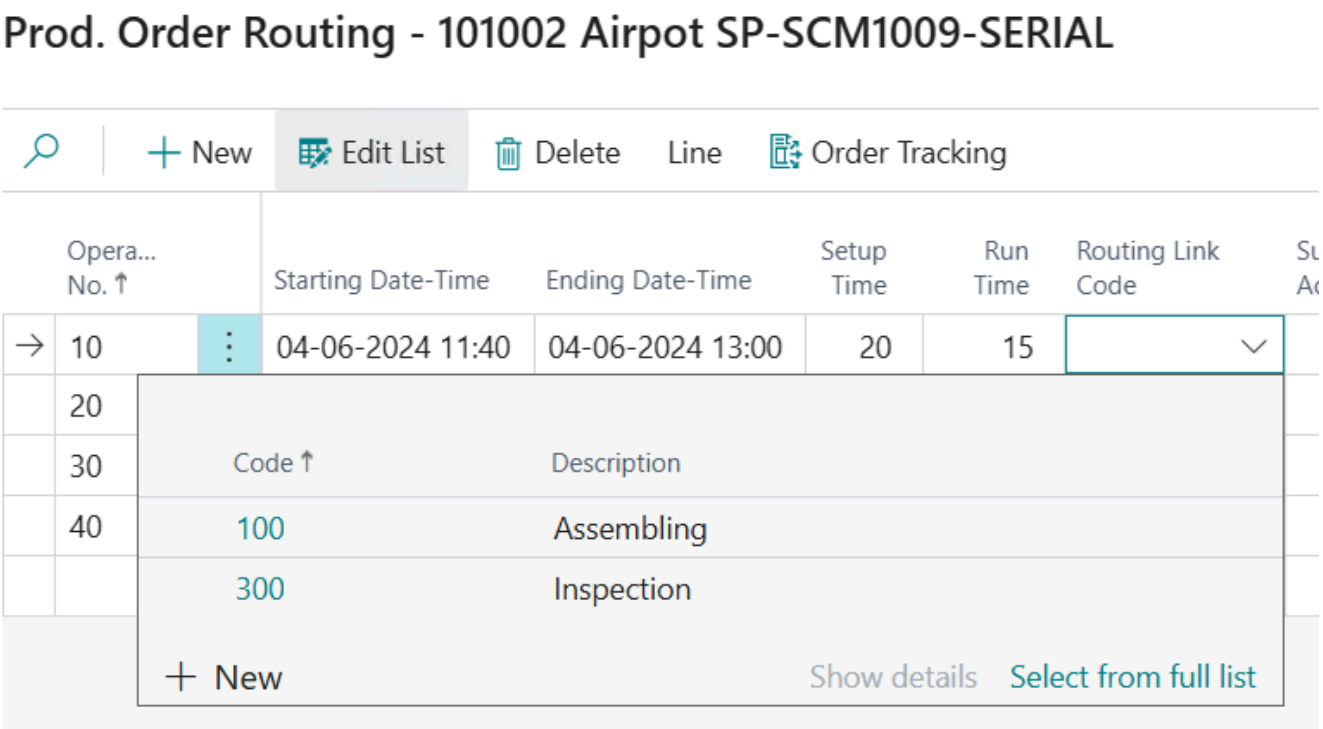
The **Edit in Excel** feature in Business Central is popular because it provides a fast way to enter data. You can now use the **Edit in Excel** action on the **Standard Cost Worksheet** page.



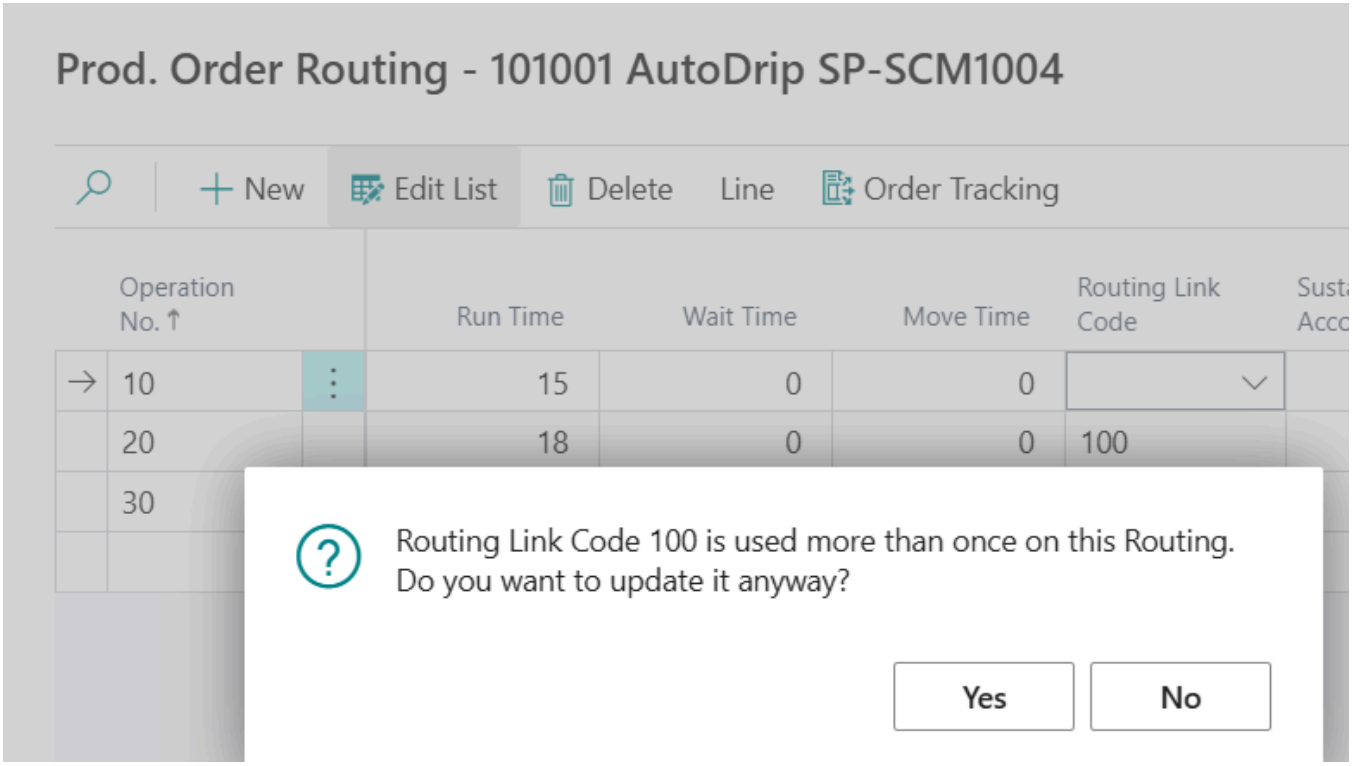
	A	B	C	D	E
1	Standard Cost Worksheet Name	Type	No.	Description	Standard Cost
2	DEFAULT	Item	1925-W	Conference Bundle 1-6	1478,7
3	DEFAULT	Item	1929-W	Conference Bundle 1-8	1774,9
4	DEFAULT	Item	1953-W	Guest Section 1	939,4
5	DEFAULT	Item	1965-W	Conference Bundle 2-8	1774,9
6	DEFAULT	Item	1969-W	Conference Package 1	2799
7	DEFAULT	Item	SP-BOM2000	Reservoir Assembly	0
8	DEFAULT	Item	SP-SCM1004	AutoDrip	0
9	DEFAULT	Item	SP-SCM1006	AutoDripLite	0
10	DEFAULT	Item	SP-SCM1008	Airpot lite	0
11	DEFAULT	Item	SP-SCM1009	Airpot	0

Edit routing link code in the production routing lines page

You might find that the original routing isn't feasible anymore and you want to adjust it. You can edit the **Routing link code** field so you can add new routing steps and make sure that components link to the routing steps.



A warning appears if you select the same routing link code for more than one routing line.



Default general business posting group for assembly and production orders

Set the general posting group for new production orders in the **Default General Business Posting Group** field on the **Manufacturing Setup** page. Make sure to update the entries on the **General posting setup** page. For assembly orders, set the posting group on the **Assembly Setup** page.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Handle production output with warehouse put-aways

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

In this release, you can use warehouse put-aways for production outputs. With this capability, you can use the same warehouse process for production outputs and other receipts. Using the same process simplifies your work because you don't need to switch between different types of documents. This capability is especially valuable for advanced configurations where Directed Put-Away and Pick is enabled, because inventory put-away documents aren't available.

Feature details

Set-up instructions

To enable this feature, open the **Location Card** page. In the **Prod Output Whse Handling** field, select **Warehouse Put-away**.

> **Note**
>
> For locations where Directed Put-away and Pick is enabled, you can make the field editable and allow selection of **No warehouse handling** or **Warehouse put-away**. You can't select the **Inventory Put-away** option.
>
> If released production orders exist for the location, you can't activate warehouse put-away.

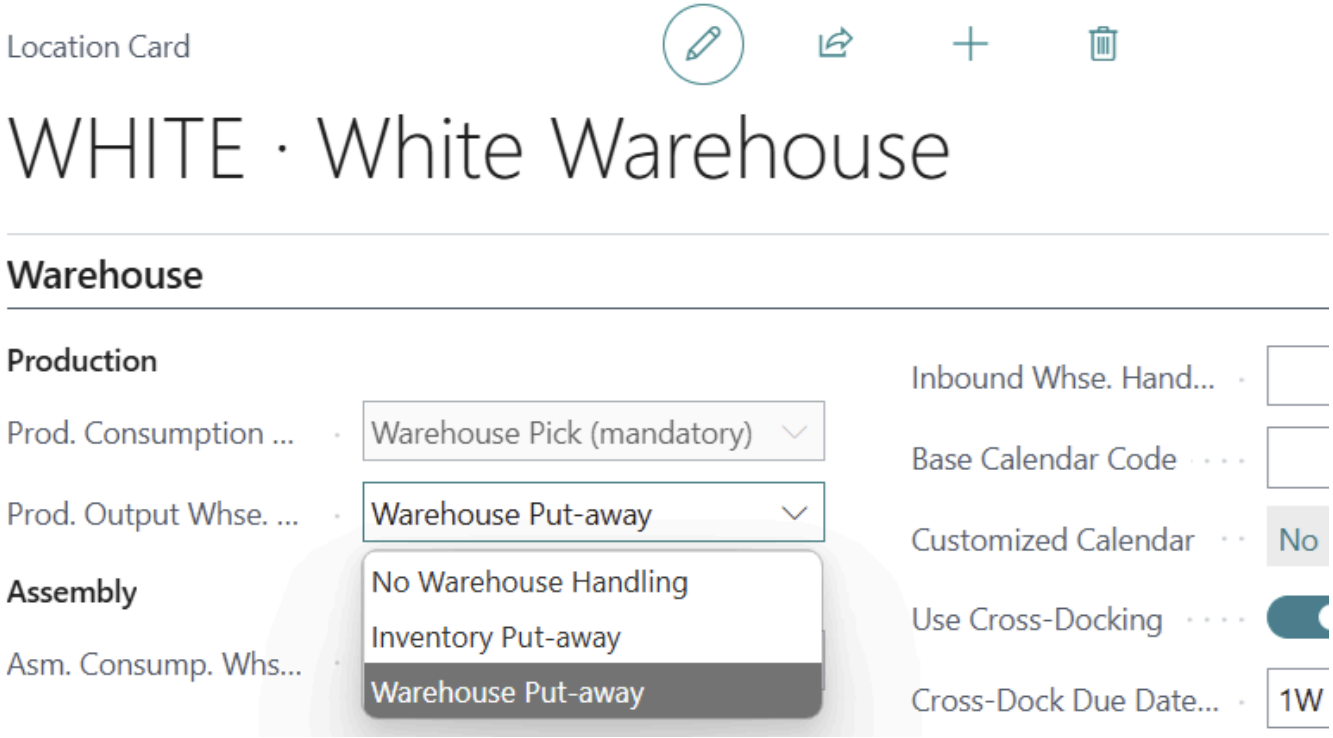
Use case

When you post production output for a location where the **Prod Output Whse Handling** field is set to **Warehouse Put-away**, the system either automatically creates the warehouse put-away

document or you need to use the **Warehouse Put-Away Worksheet** page. This behavior depends on the setting in the **Location Card** page.

If you delete a warehouse put-away, you can manually create a new warehouse put-away by using the **Create warehouse put-away** action on the **Release Product Order** or **Finished Prod Order** pages.

> **Note**
>
> You can't use production order lines with different locations when the **Prod Output Whse Handling** field is set to **Warehouse Put-away**. To resolve this issue, use different production orders.
>
> You can't cancel output if there are outstanding or completed put-aways.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Put away assembly and production output in advanced warehouse configurations (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Manage document attachments in manufacturing

08/07/2025

Expand table

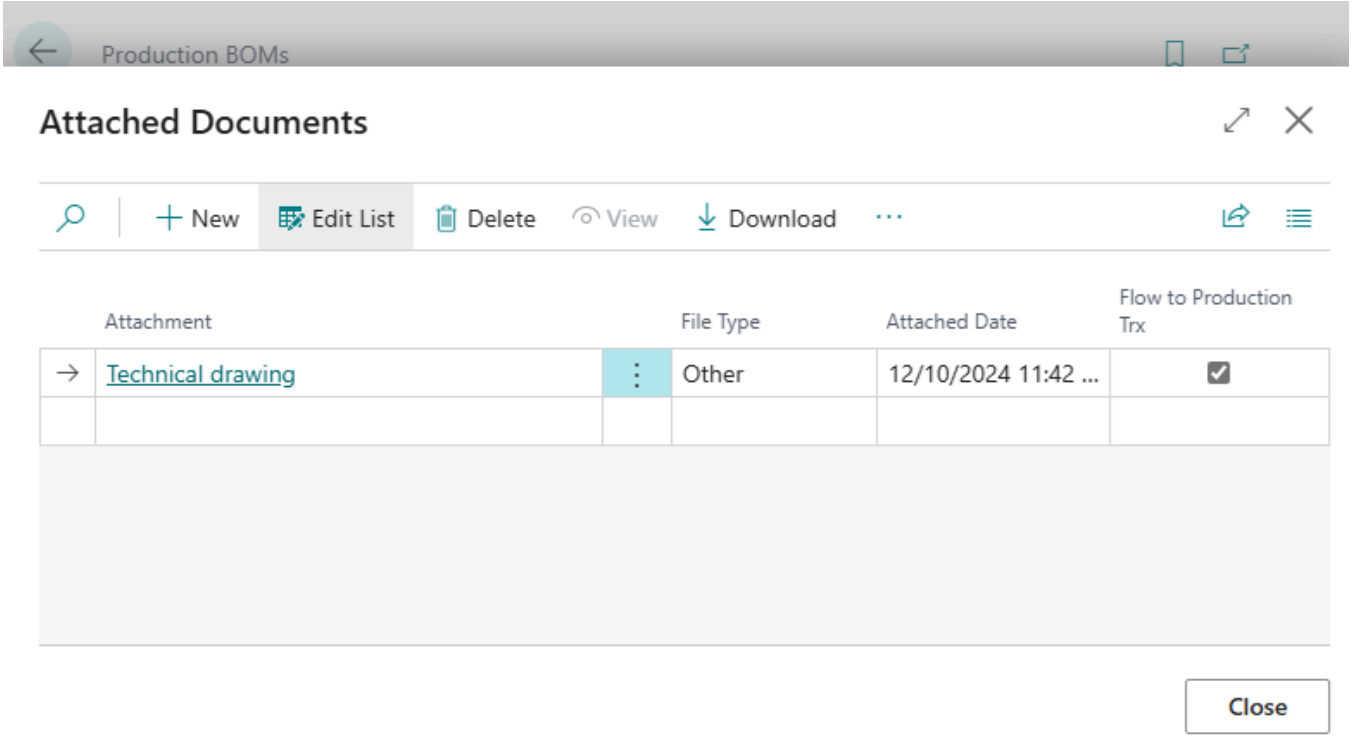
Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

Digitalize document management for manufacturing-related documents, such as drawings or inspection reports, by attaching these documents directly to production bills of materials, routings, and orders. Access important documentation on the go to keep the production flow efficient.

Feature details

You can access document attachments on pages related to manufacturing. You can find the **Document Attachment FactBox** in many places, such as:

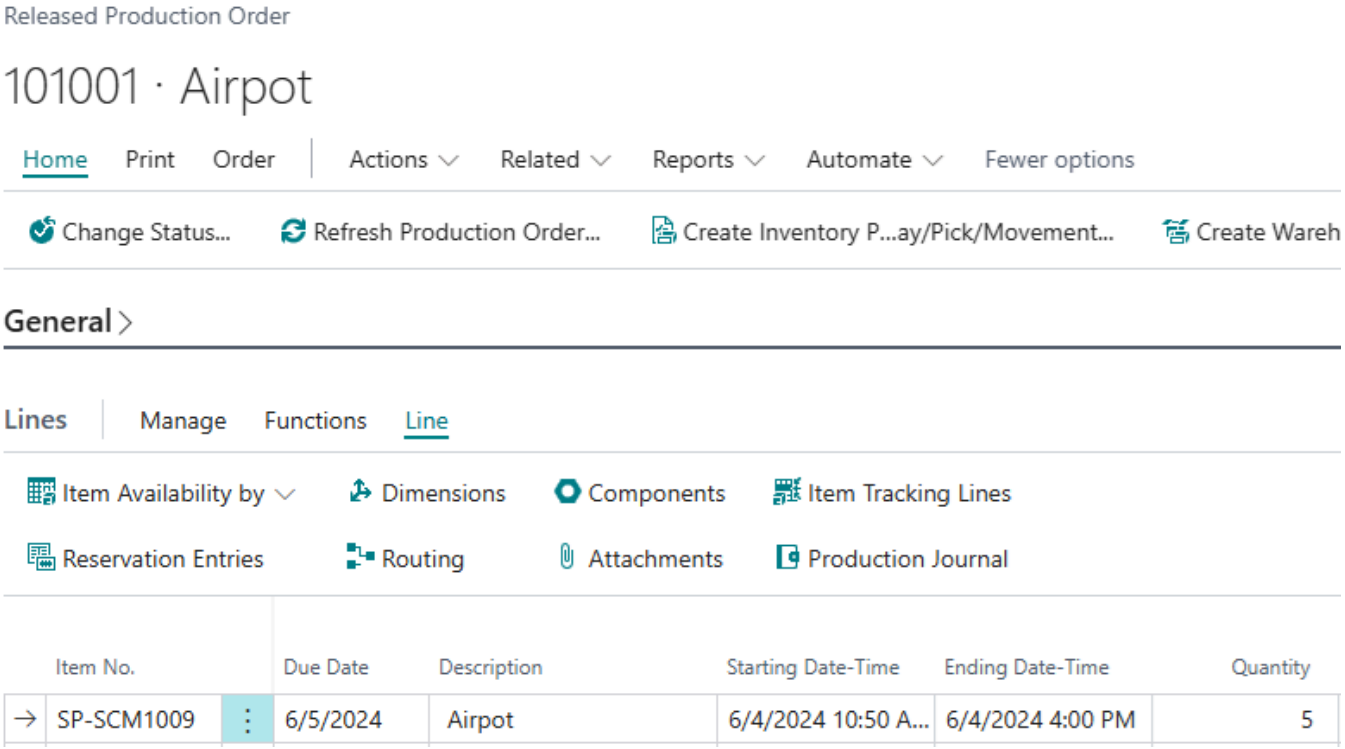


- **Production BOM** (page 99000786)

- **Production BOMs** (page 99000787)
- **Routing** (page 99000766)
- **Routing List** (page 99000764)
- **Simulated Production Order** (page 99000912)
- **Simulated Production Orders** (page 9323)
- **Planned Production Order** (page 99000813)
- **Planned Production Orders** (page 9324)
- **Firm Planned Prod. Order** (page 99000829)
- **Firm Planned Prod. Orders** (page 9325)
- **Released Production Order** (page 99000831)
- **Released Production Orders** (page 9326)
- **Finished Production Order** (page 99000867)
- **Finished Production Orders** (page 9327)
- **Production Order List** (page 99000815)

You can also select the **Attachment** action to go to document attachments from lines on the following pages:

- **Simulated Prod. Order Lines** (page 99000913)
- **Planned Prod. Order Lines** (page 99000814)
- **Firm Planned Prod. Order Lines** (page 99000830)
- **Released Prod. Order Lines** (page 99000832)
- **Finished Prod. Order Lines** (page 99000868)



Use the new **Flow to Production Trx** toggle in the **Attached Documents** page to control how documents attached to items, production BOMs, or routings flow to production order lines.

> **Note**
>
> The system doesn't support attachments on the component level. It also doesn't support attachments on production BOM versions or routing versions.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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Omit warehouse pick for manual flushing methods

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

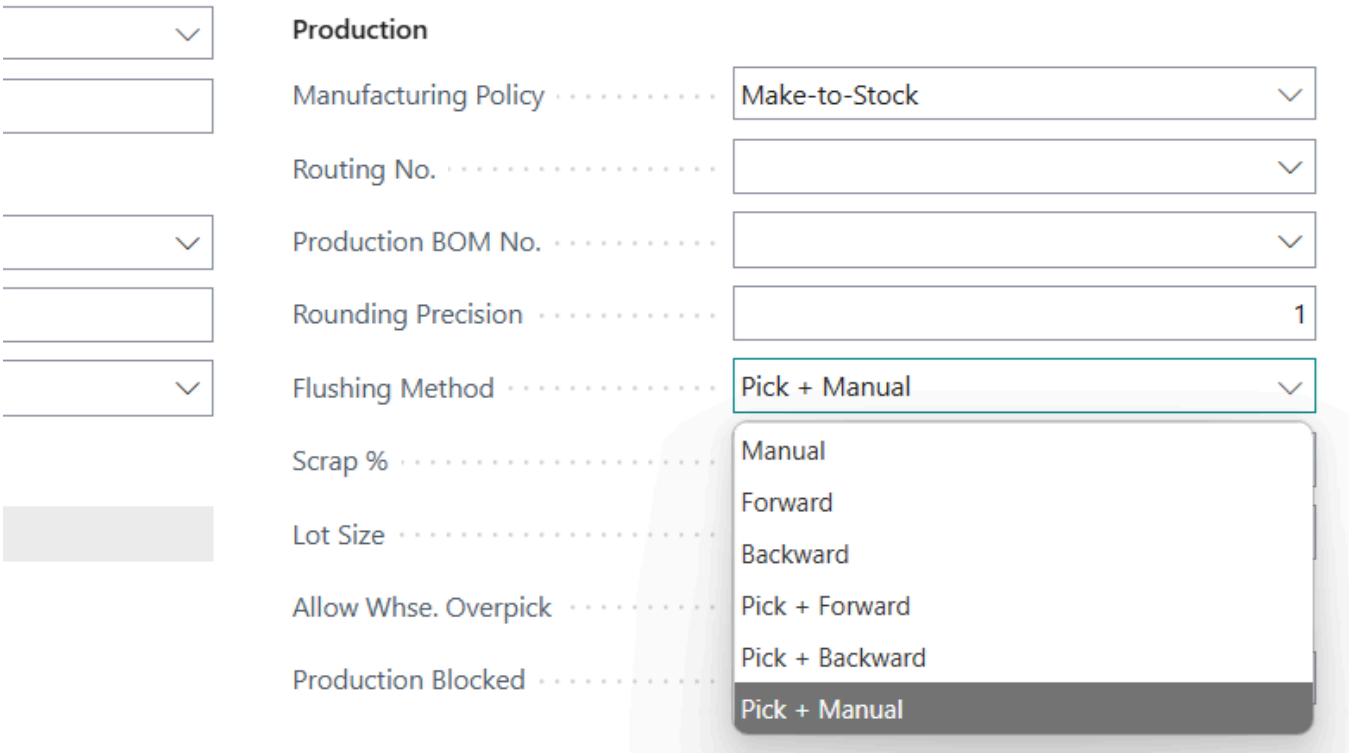
You can manually consume items without picking them, in addition to the existing options of picking and flushing items or only flushing items. This method gives you more flexibility and control over warehouse operations.

Feature details

We're adding the **Pick+Manual** flushing method to the existing flushing method options. The available methods are:

- Manual
- Backward
- Forward
- Pick+Backward
- Pick+Forward

With these methods, you can ignore the **Prod. Consumption Whse. Handling** setting on the **Location Card** page for each item, stockkeeping unit, or production order component line. Automatic flushing methods, like **Backward** and **Forward**, typically skip warehouse or inventory picks. This skipping behavior is useful for components that you store in the shop floor zone because of their nature, so there's no need to pick them. However, these components might require manual posting of consumption because the consumed quantity can vary or the components require item tracking.



Technical details

To start using this feature, go to the **Feature Management** page and turn on **Feature Update: 'Manual' flushing method without requiring pick**. This update upgrades existing records from the **Manual** flushing method to the **Pick+Manual** flushing method.

The new **Pick+Manual** option is available right away and works correctly whether you enable the feature key or not. It requires picking if consumption happens at a location where warehouse handling is enabled.

The feature key applies only to the **Manual** option and starts data upgrades. To keep your original flow, the feature key converts all items that use the **Manual** option to the **Pick+Manual** option to match the original picking requirement.

If you don't enable the feature key, both the **Manual** and **Pick+Manual** options require picking because of the original behavior. When you enable the feature key, the **Manual** option doesn't require picking.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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Additional resources

Flushing methods (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Print barcodes from production orders

08/07/2025

Expand table

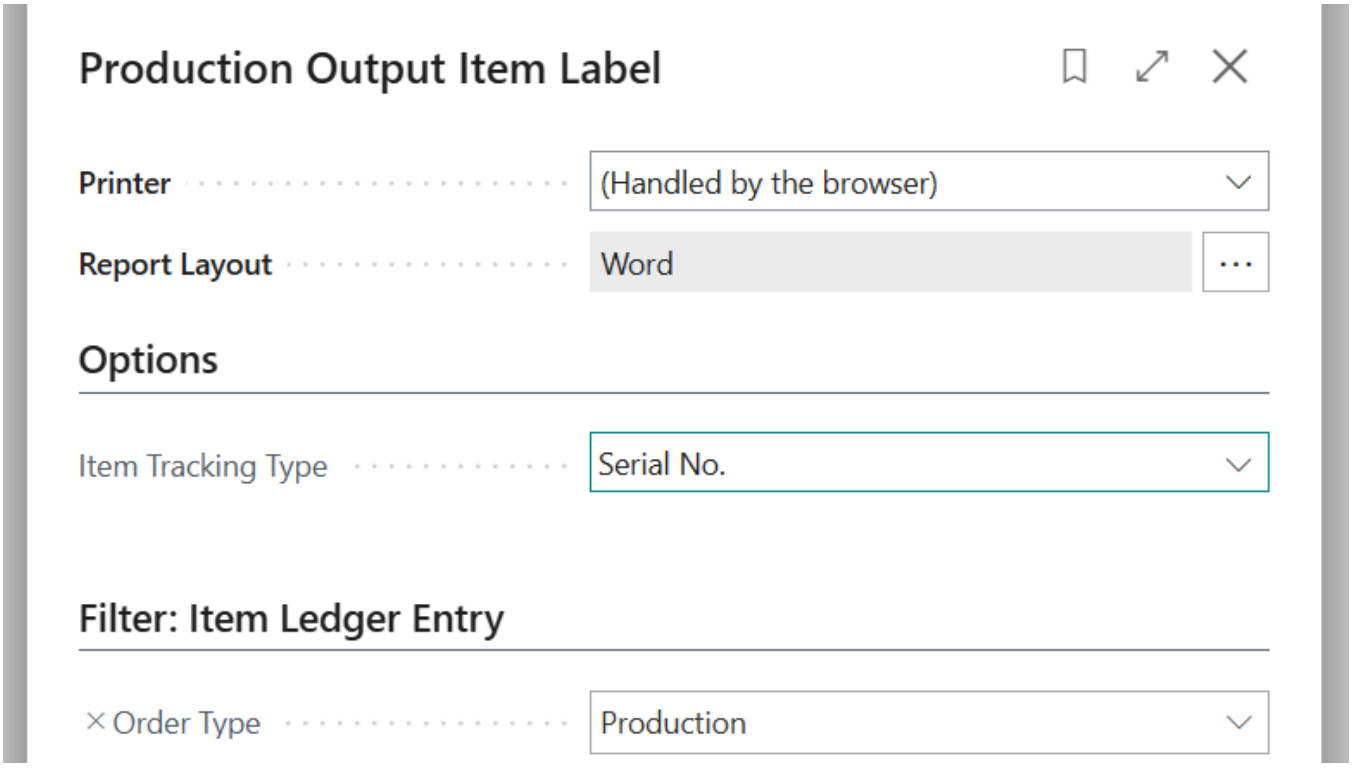
Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

Production companies are always looking for ways to streamline production processes. To simplify the process of tracking finished goods, Business Central offers a **Print Label** action on released and finished production orders. With this action, you can print 1D and 2D barcodes to track the items on the orders, directly from the orders.

Feature details

The **Print Label** action is available on the **Released Production Order** and **Finished Production Order** pages. The action prints a report that includes the **Item No.**, **Description**, **Unit of Measure**, and 1D and 2D barcode information from the orders. On the request page, you can also specify whether to print the **Lot No.**, **Serial No.**, or **Package No.** as barcodes.



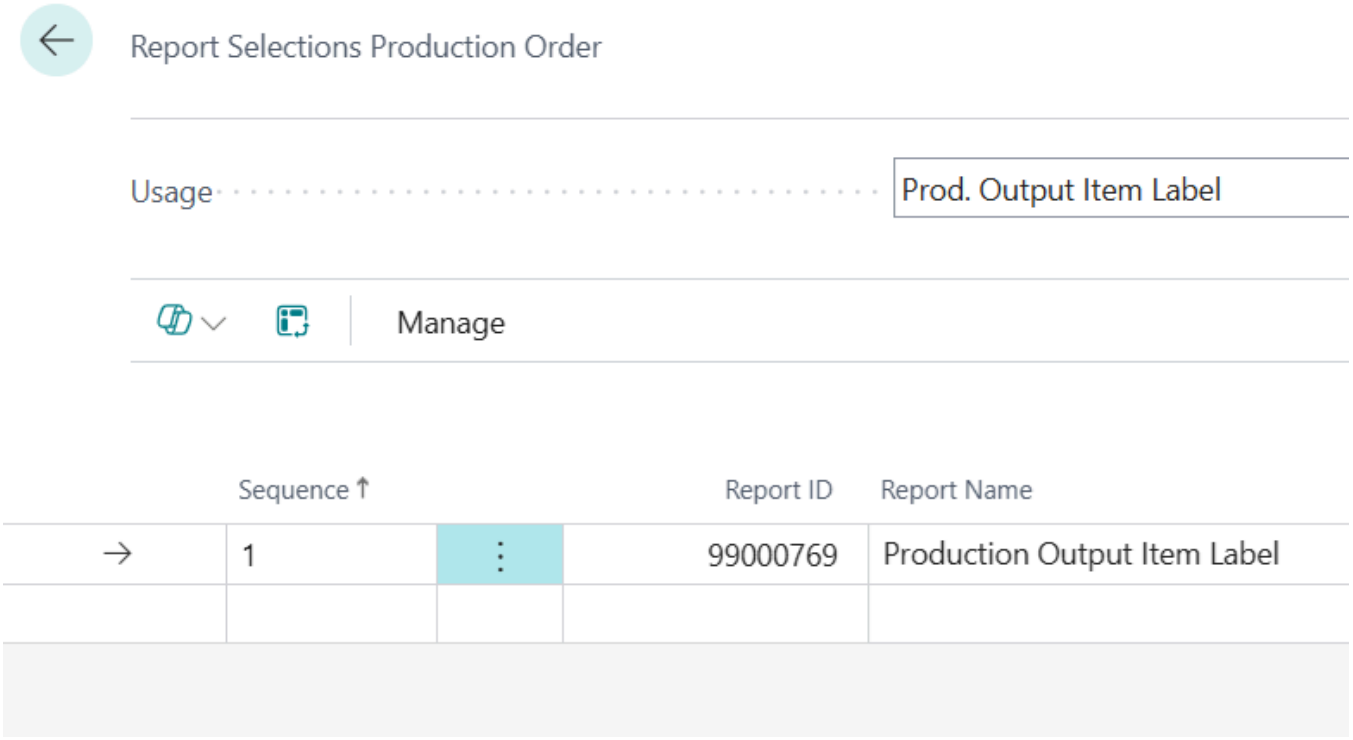
Airpot, 1001, PCS





> **Note**
>
> Some printers and barcode or QR code formats require a specific implementation. You might need to upload a different Word template.
>
> To print Word documents on your device, check with your equipment supplier.

If you decide to clone the report to create your own customized version, you can easily connect the report by using the new **Prod. Output Item Label** selection on the **Report Selection Production Order** page.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Track items with serial, lot, and package numbers (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Receive project items with receipts or put-aways

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

Business Central enables advanced warehouse handling of purchase orders that link to projects. Save time by using warehouse receipts or inventory put-aways to receive and register usage of items for projects.

Feature details

Maintaining a steady supply of items, services, and expenses is an important aspect of running successful projects. You can use inventory quantities or make project-specific purchases. Use the following methods to receive items:

- Post receipt and consumption from the order line.
- Post receipt and consumption from an inventory put-away document.
- Post receipt and consumption from a warehouse receipt document.

Post receipt and consumption from an inventory put-away document

When you set up your location to require processing put-aways but not receipts, use an **Inventory Put-away** document to record and post put-away and receipt information for your purchase orders.

You can create an inventory put-away in three ways:

- Create the inventory put-away directly from the purchase order by choosing the **Create Inventory Put-away/Pick** action.
- Use the **Create Inventory Put-away/Pick/Movement** batch job to create inventory put-aways for several source documents at the same time.

- Create the put-away in two steps by releasing the purchase orders to make the items available to put away. You can create the inventory put-away based on the source document on the **Inventory Put-away** page.

> ⓘ **Note**
>
> If bins are mandatory for the location, make sure that the **Bin Code** is in the purchase order lines.

Post the inventory put-away

1. On the **Inventory Put-aways** page, open a put-away document.
2. Enter the quantity to put away in the **Qty. to Handle** field.
3. Choose **Post** after you put the items away.

When you complete these steps, you post the receipt for the source document lines that you put away. For each line, there are two item ledger entries: one entry is for receipt, and one entry immediately writes off the received quantity for the project.

You don't create any project ledger entries until you post the invoice.

If the location uses bins, posting also creates warehouse entries to post the bin quantity changes.

Post receipt and consumption from a warehouse receipt document

When items arrive at a warehouse that's set up to process warehouse receipts, you must get the lines from the released purchase order that the receipt belongs to.

You can create a warehouse receipt in two ways:

- **Push** - Work through the receipt in a push fashion. Choose **Create Warehouse Receipt** on the **Purchase Order** page to create a warehouse receipt for a source document.
- **Pull** - Use **Release** on the **Purchase Order** page to release the document to the warehouse. A warehouse employee creates a warehouse receipt for one or more released source documents.

If you use bins, the system suggests the default bin. You can accept the default bin or specify the bin for the items.

Post the warehouse receipt

1. On the **Warehouse Receipts** page, open the warehouse receipt.
2. The **Qty. to Receive** field shows the quantity outstanding for each line. Change the quantity if needed.
3. Choose **Post** after you receive the items.

When you complete these steps, you post the receipt of the source document lines. For each receipt line, there are two item ledger entries. One entry is for the receipt, and the other entry immediately writes off the received quantity for the project.

There are no project ledger entries until you post the invoice.

If the location uses bins, posting also creates warehouse entries to post the bin quantity changes.

> ⓘ **Note**
>
> The system doesn't create warehouse put-away documents, even if your warehouse processes require both receipt and warehouse put-away.

Good to know

Return orders don't support locations with directed put-away and pick. You need to undo consumption through a project journal, and then create a return order for items in inventory.

If you create purchase documents before the update, you can post them directly. To use warehouse handling, reopen and release the purchase orders again.

You can't edit the **No.**, **Variant Code**, **Project No.**, and **Project Task No.** fields on purchase lines if warehouse receipts or inventory put-aways exist.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Manage project supplies (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Reopen finished production orders

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

When you complete a production order and set its status to **Finished** status, you might discover a mistake. For example, consumption might be missing or the item tracking information might be incorrect for the goods you produced. You can now reopen the finished order to make adjustments so that your inventory and cost transactions are correct.

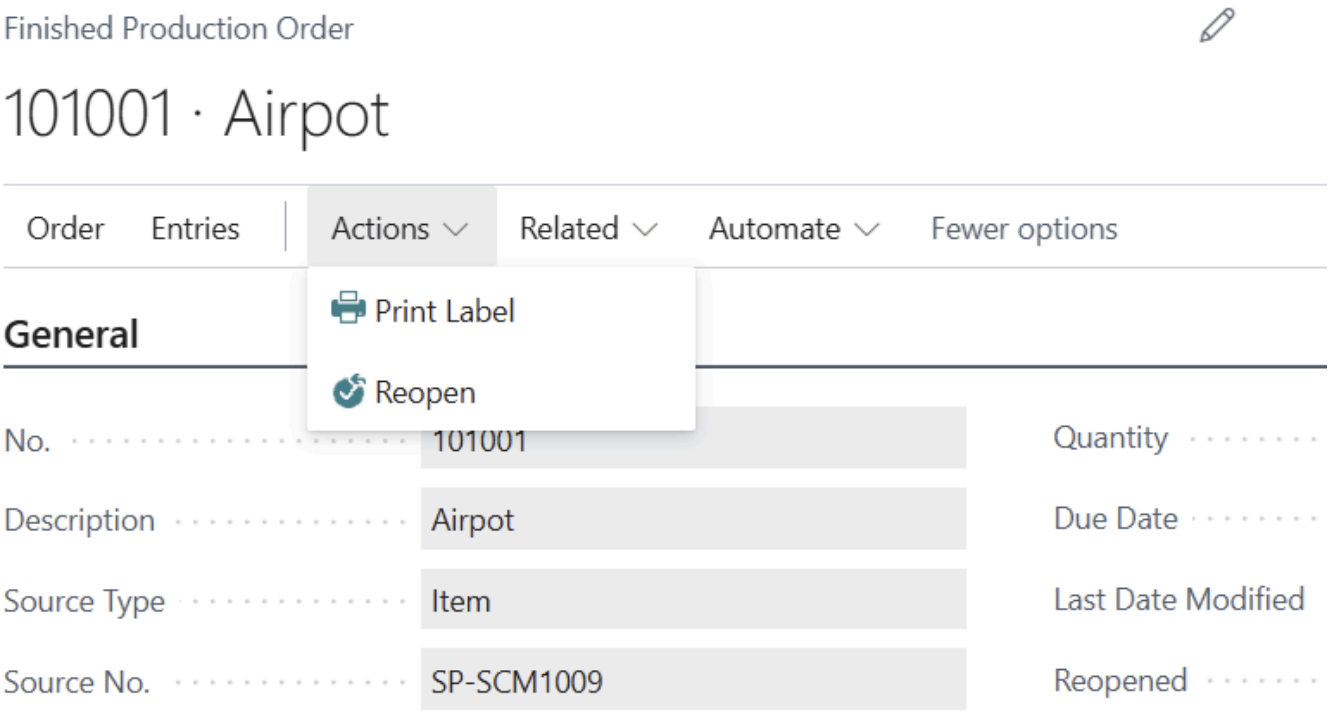
Feature details

You can easily reopen a finished production order to correct a mistake. However, to protect your data, the system enforces some restrictions:

- You can reopen a finished production order only once.
- You can reopen a finished production order only if the order doesn't have output. If the order doesn't have output, the system writes off the cost WIP to your inventory adjustment account.

To reopen a production order, use the following steps:

1. On the **Finished Production Orders** page, select the order that you want to edit.
2. Select **Reopen**.
3. In the **Do you want to reopen the production order?** confirmation dialog, select **Yes**.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Cancel production orders that have consumption (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Reschedule production orders within a safety lead time

08/07/2025

Expand table

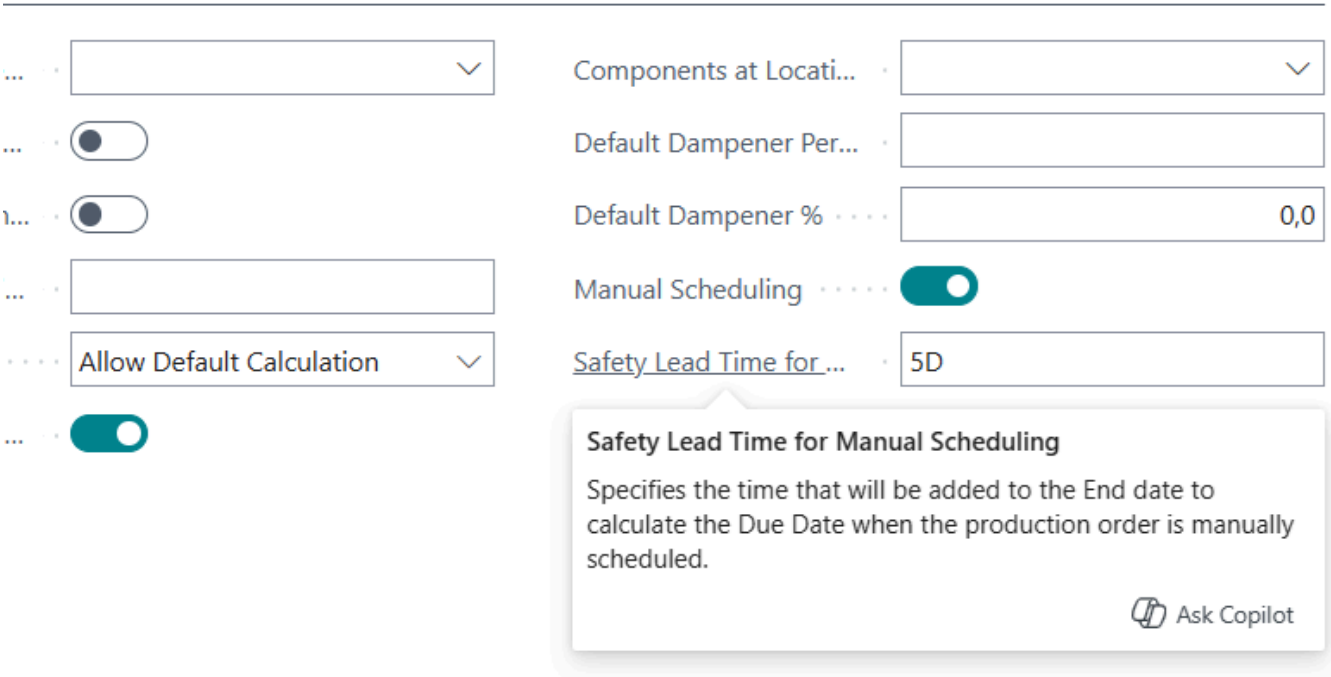
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

Manufacturing is a dynamic environment where changes happen. To make sure production finishes on time, configure a safety lead time and start production earlier. Safety lead times cover situations when production takes longer than expected. They also cover situations when you need the finished goods sooner than the original due date.

Feature details

To start using this feature, go to the **Manufacturing Setup** page and turn on the **Manual Scheduling** toggle. Optionally, enter a value in the **Safety Lead time for manual scheduling** field to add a buffer that includes orders you reschedule manually.



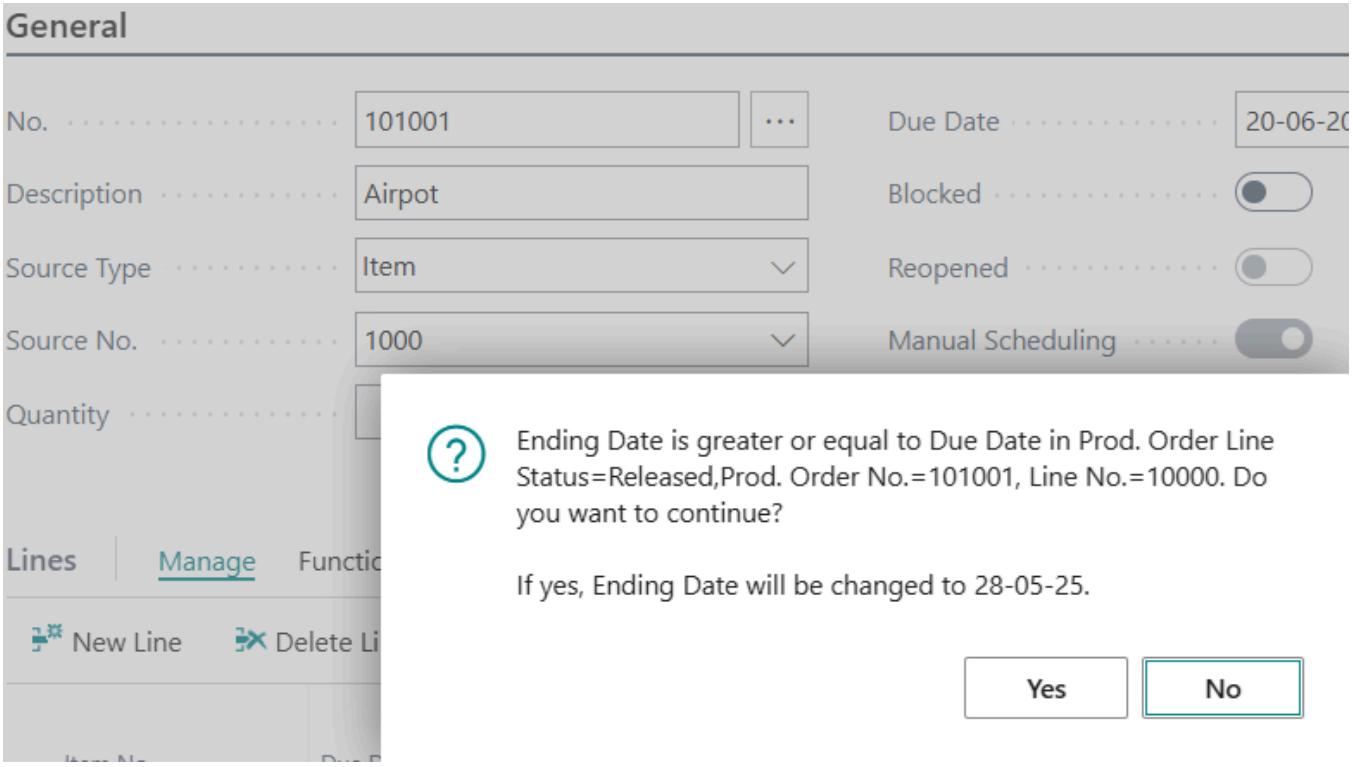
When you create a production order manually or with the planning engine, the order includes a buffer between the **Due Date** and **Ending date**. The following fields define the buffer, listed from highest to lowest priority:

- The **Safety Lead Time** field on the **Stockkeeping Unit Card** page.
- The **Safety Lead Time** field on the **Item Card** page.
- The **Default Safety Lead Time** field on the **Manufacturing Setup** page.

When you create an order, you can change the due date and end date by doing the following steps:

- Move the due date to the current moment or to a future date.
- Change the end date directly or change the starting date to update the end date.

A confirmation dialog appears if the end date plus the value in **Safety lead time for manual adjustments** is greater than or equal to the new due date.



The **Manual Scheduling** field on the production order shows whether you manually adjusted the dates.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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Additional resources

Reschedule production orders within a safety lead time (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Track and rebill quantity changes in subscriptions

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

Subscription Billing now supports rebilling in scenarios where the quantity changes after you invoice the customer. Rebilling makes it easier to correct subscriptions where quantity changes happen over time.

Feature details

You usually invoice subscriptions that last a medium amount of time up front. When you use this billing method, changes in quantity usually cause rebilling for the current period. Subscription Billing automatically detects these scenarios and marks the subscription contract lines for reconsideration in the next billing cycle.

For medium-term and long-term subscriptions, such as annual subscriptions, the system creates posting documents for the subscription period. The system shows this cycle in the subscription contract lines and subscription lines. Usually, the system doesn't provide usage data if the subscription doesn't change during the period. However, quantity adjustments, such as increases, can happen anytime. When they happen, the system provides new usage data on the next key date. You don't consider this usage data when you create a new contract statement (invoice or credit memo) because the system invoices the subscription contract lines in advance for the entire period. If more usage data becomes available after you send the initial invoice, you can rebill the difference.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use Edit in Excel on output, consumption, and item journals

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Apr 1, 2025

Business value

The **Edit in Excel** feature in Business Central is popular because it provides a fast way to enter data. For example, you can use templates for journals and quickly do bulk edits. You can use this feature to speed up data entry on item journals and include item tracking details such as lot, serial, package number, warranty, and expiration dates. You can also edit item tracking details in consumption and output journals.

Feature details

To let users enter serial, lot, and package data directly on journal lines, enable the feature on item journal batches. Set up the feature with the following steps:

1. Open the **Item Journal Templates** page.
2. Select a template of the type Item, Consumption, or Output.
3. Select **Batches** to open a list of item journal batches.
4. Select **New** to create a new batch, and then turn on the **Item Tracking on Lines** toggle.

Repeat these steps for all templates where you want to use this capability.

After you set up the feature, start using it.

1. Depending on what you want to do, open the **Item Journals**, **Consumption Journals**, or **Output Journals** pages.
2. In the **Batch Name** field, select the batch that you enabled the **Item Tracking on Lines** toggle for.
3. Select the **Edit in Excel** action.
4. In Excel, fill in columns such as **Serial No.**, **Lot No.**, **Package No.**, **Expiration Date**, and **Warranty Date**.
5. When you're done, select **Publish** to send your changes to Business Central.

> **Note**
>
> Business Central validates the published data. To accept item tracking data, the item must have the **Item Tracking Code** field populated.

For more information, see Edit in Excel.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

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Tell us what you think

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Additional resources

Use Edit in Excel on output, consumption, and item journals (docs)

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Use enhanced customer document layout for service management

08/07/2025

Expand table

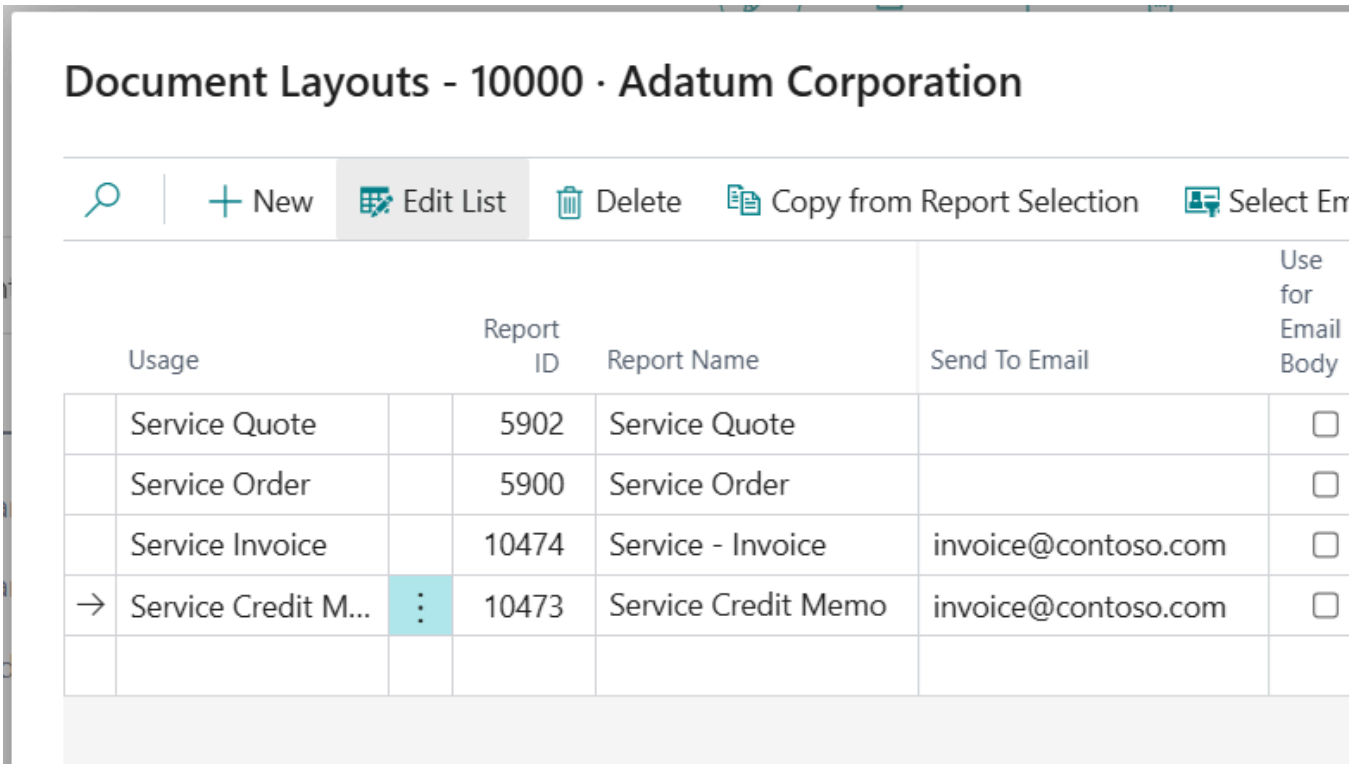
Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

Businesses work with many customer and vendor contacts who handle different areas of operation. For example, these contacts might include accountants, purchasers, and warehouse staff. Because these contacts have different interests, you likely want to generate and send different types of documents to each group. When you set up specific contacts for specific documents, you save time sending documents to different customer or vendor contacts. For example, you can send service invoices to accountant contacts and service orders to your customers' purchasers.

Feature details

You can now populate the **Document Layouts** page for vendors and customers based on settings on the **Report Selection** page. To send specific documents to specific company contacts, choose the company contacts to use for specific document layouts.



The **Document Layouts** page for a customer now contains usage options for service quotes, orders, invoices, and credit memos.

Thanks to the community for valuable contributions to Microsoft's open source BusinessCentralApps repo on GitHub.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Send service documents to the right people (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use streamlined product design tools in manufacturing

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

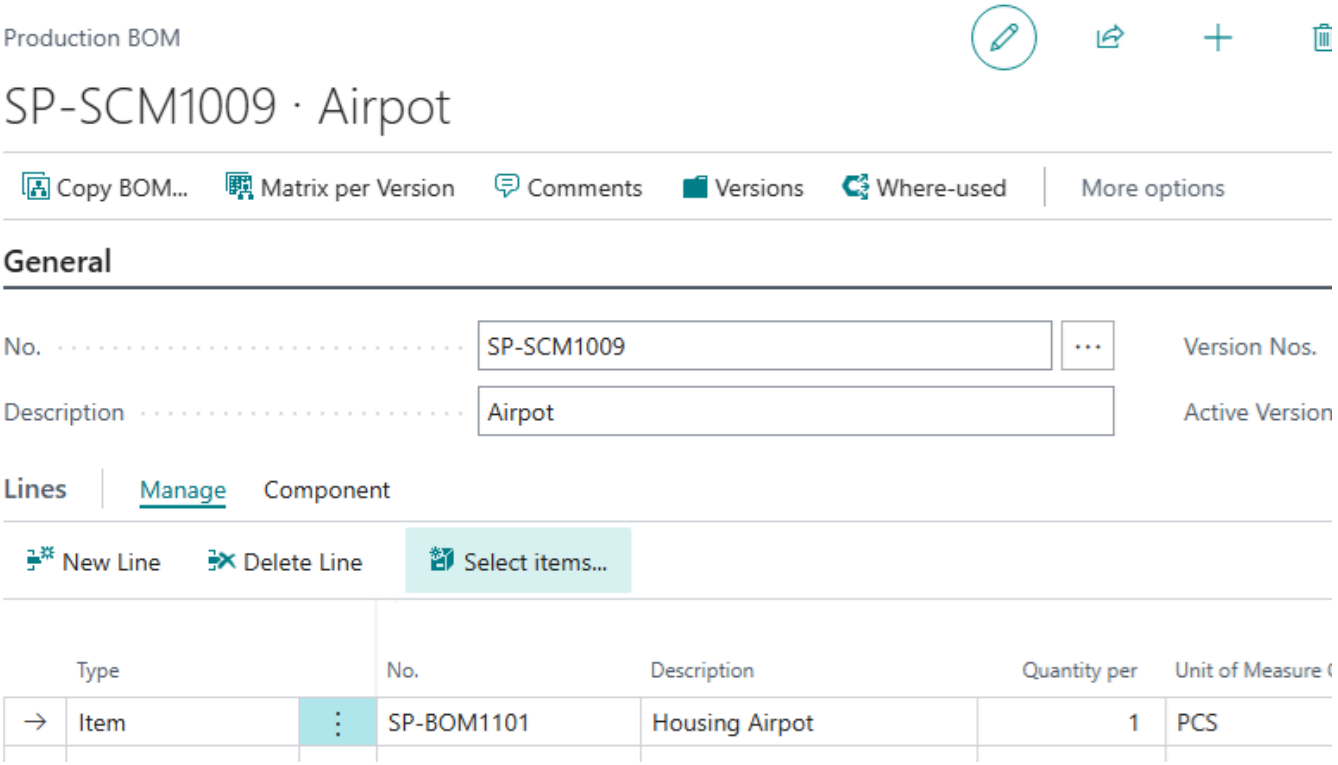
Business value

In manufacturing, product design transforms raw materials into finished goods. Production bill of materials (production BOM) and production routing are key concepts in manufacturing. A production BOM lists all components required to produce a product, so you can ensure accurate assembly and resource planning. Production routing shows you what to do with those components to get a finished product or subassembly.

Manufacturing is a dynamic environment where changes happen. Whether it's a new component that improves product quality or a change to a supplier, you need to manage updates efficiently so you don't disrupt production. BOM versions help you manage updates efficiently. We added several capabilities that improve the product design stage.

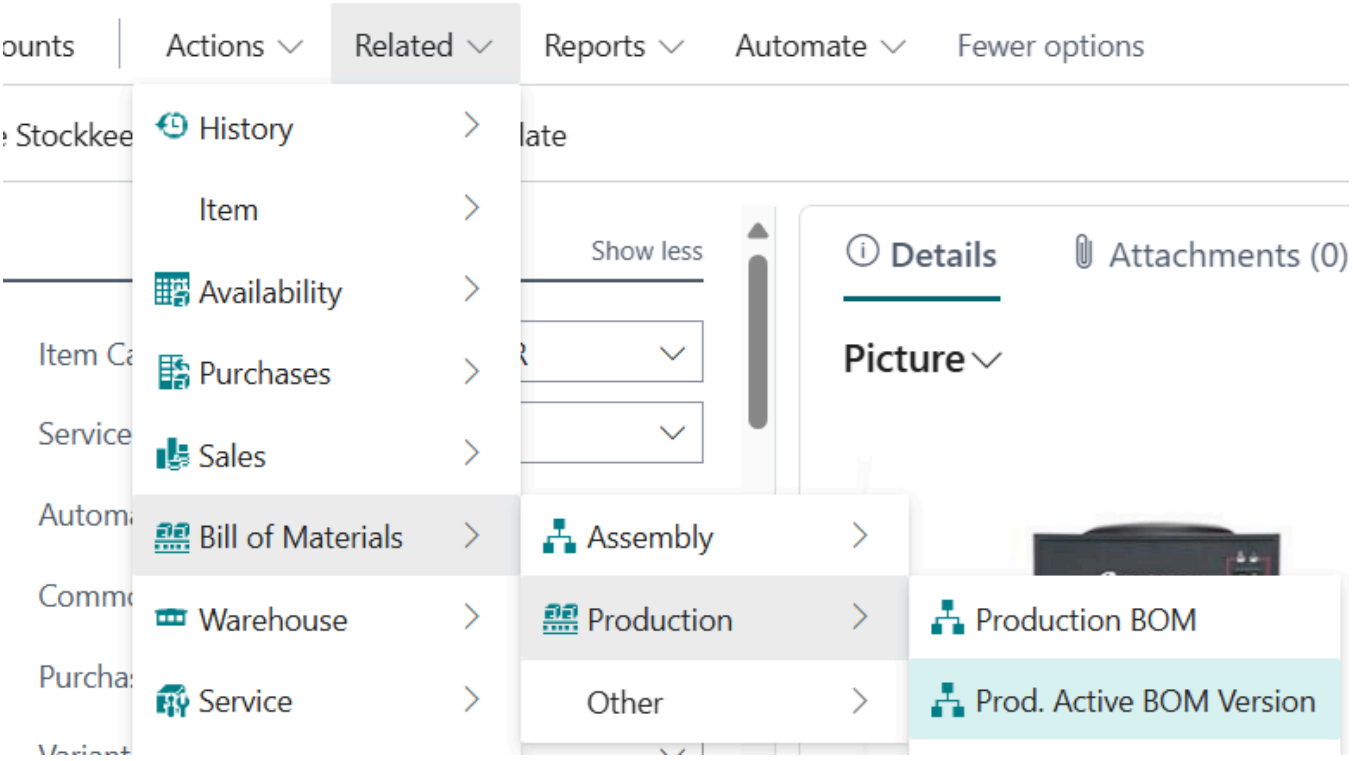
Feature details

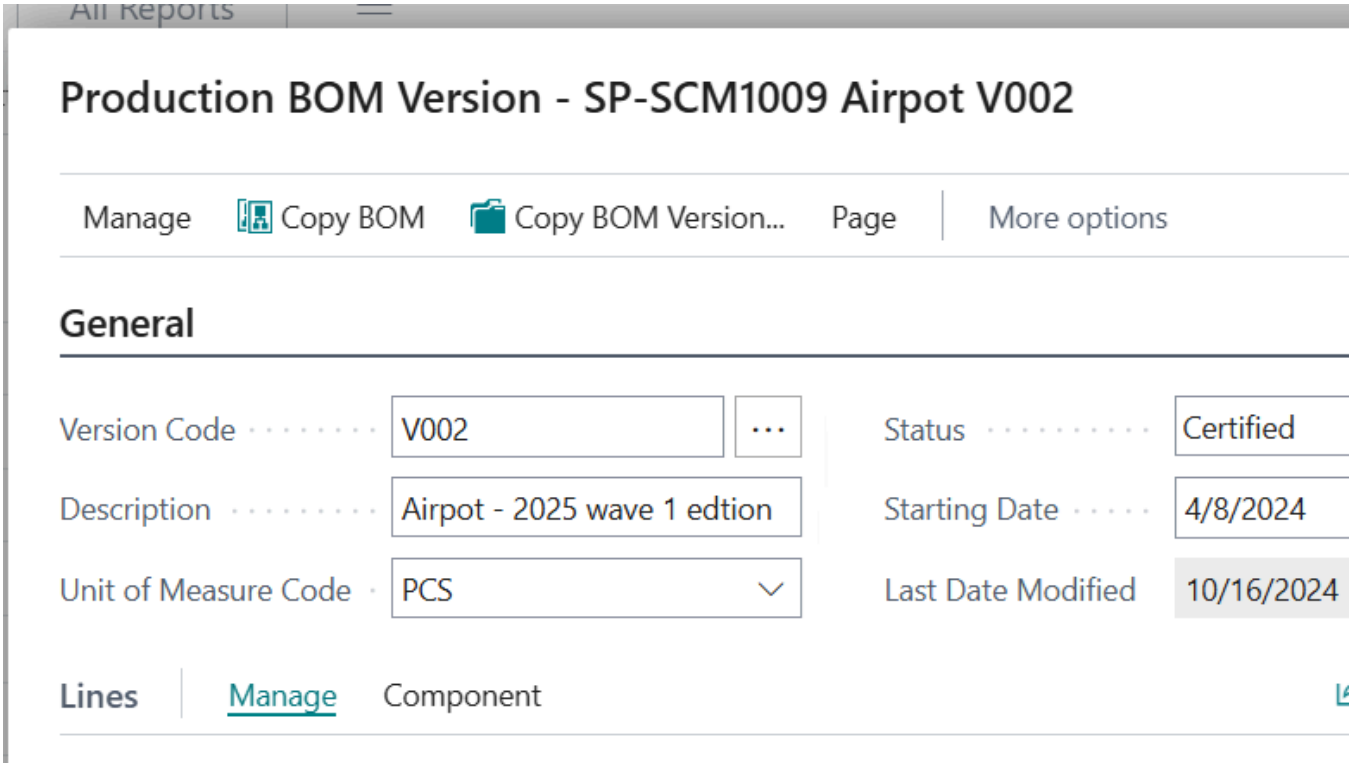
You can save a step by adding multiple items to the production BOM or production order components. When you work with a production BOM or production BOM version, or when you edit components in a planning worksheet or production order, use the **Select items** action to select and add multiple items.



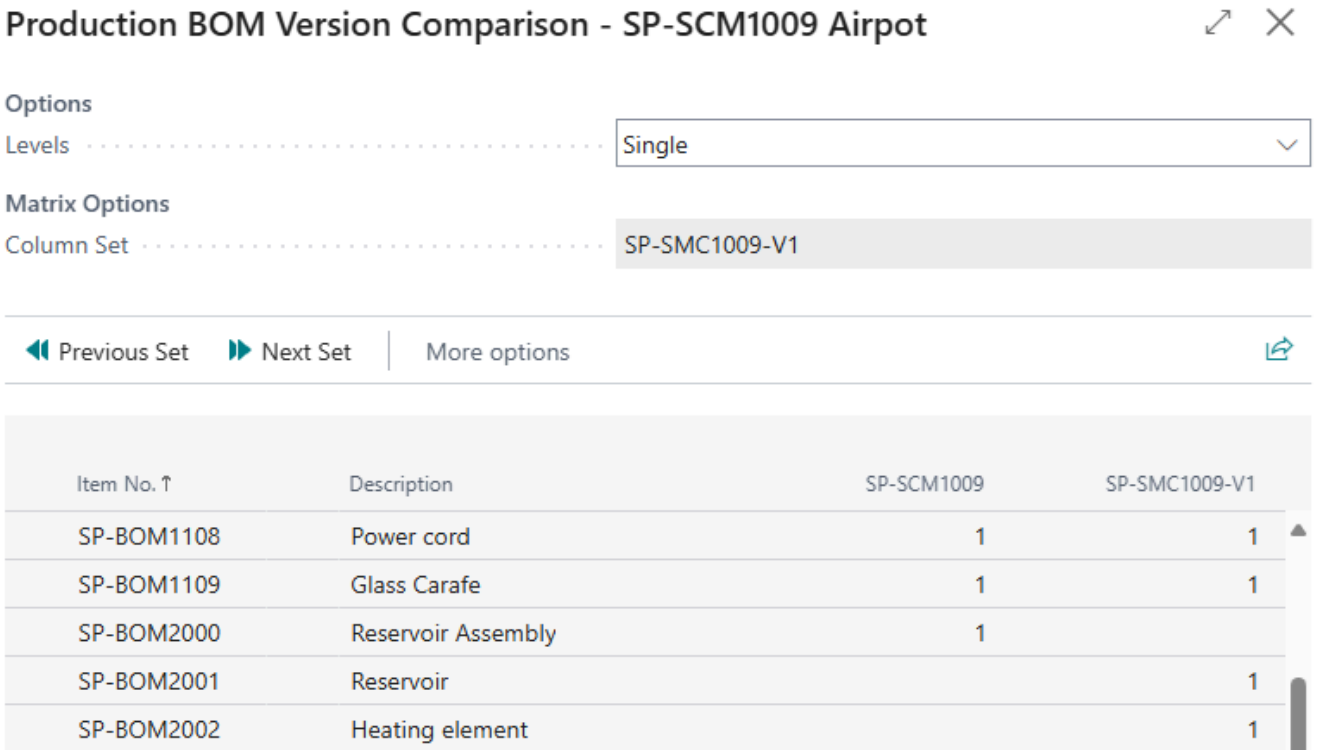
Use the **Edit in Excel** action on production BOM lines and production BOM version lines. The **Edit in Excel** feature in Business Central is popular because it provides a fast way to enter data. You can now use the **Edit in Excel** action to edit lines on the **Production BOM** and **Production BOM Version** pages.

Go to an active production BOM version from the **Item Card** page or **Items** list page. Sometimes, companies need to adjust a production BOM. Instead of creating a new production BOM, update the current production BOM by creating a version. When you create a version, you keep the original production BOM for reference and use the new version in production. The starting date and status fields define which version to use. In this release, you can easily go to the certified BOM or the BOM version that's valid on the work date by selecting the **Prod. Active BOM Version** action.





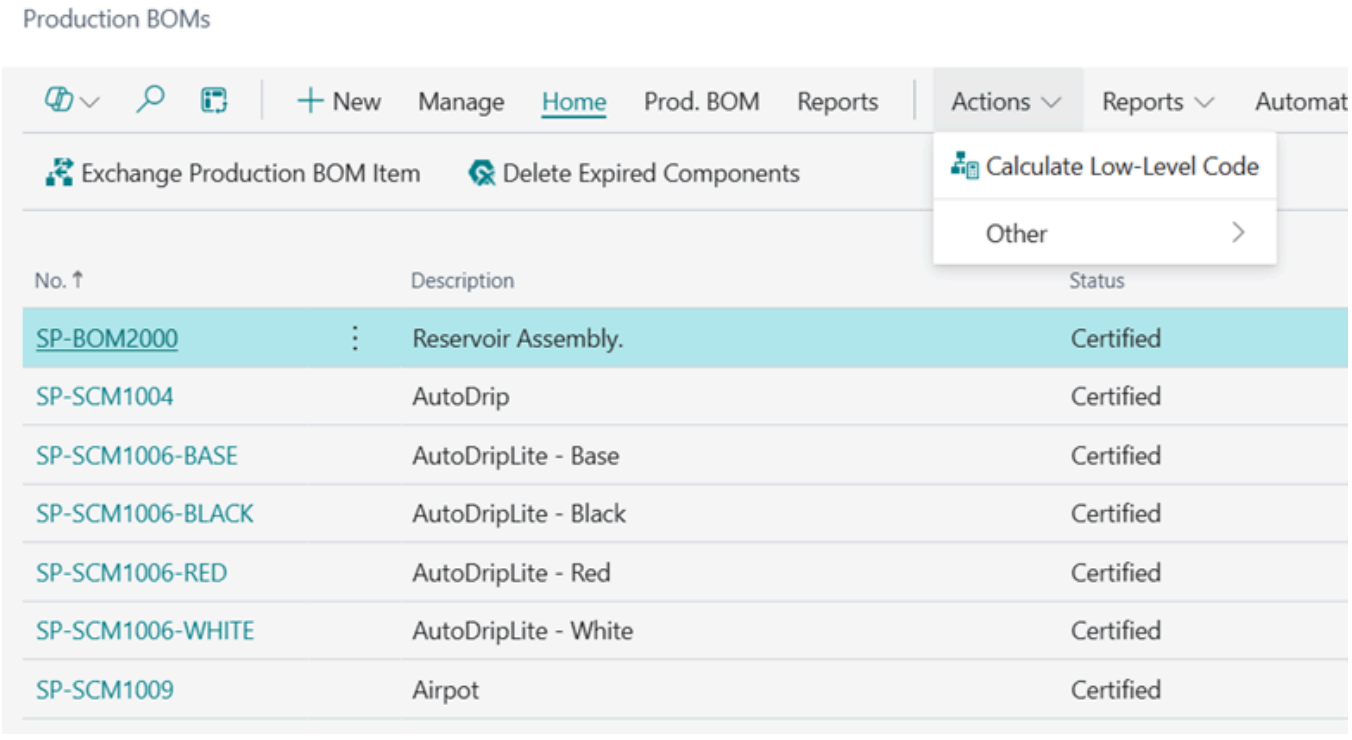
The BOM version matrix page shows the original BOM as a baseline. Use the **Production BOM Version Comparison** page to see a list of all production BOM versions, items, and the quantity for each item. Use the matrix to compare different production BOM versions for the used items in each version. The matrix includes the original BOM as the first column. This feature gives you clear visibility of all BOM versions and their quantities.



The **Production BOM Version Comparison** page is easier to use and replaces the **Prod. BOM Matrix per Version** page.

Remove items that you don't need anymore on the **Exchange Production BOM** page. The **Exchange Production BOM** page has a new feature that lets you remove specific items or production BOMs that you don't need anymore in production BOMs or certified production BOM versions.

You can start the **Calculate Low-Level Code** task right from the list of production BOMs. Low-level codes determine the sequence for planning materials during MRP runs.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Create production BOMs (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Sustainability Management

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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 align with customer feedback and evolving regulatory demands, we continuously expand key parts of the Sustainability Management capabilities in Business Central.

Collect sustainability data

- Capture environmental data with sustainability journals and purchase documents, either manually or through formulas.
- Monitor emissions, water usage, and waste intensity across companies, countries, regions, or facilities. You can also purchase carbon credits directly within Business Central.
- Import emission factors from external sources through open APIs to ensure accurate and reliable calculations.
- Use Copilot to help estimate your carbon footprint, even when the system doesn't yet have emission factors.

Track your progress

- Use the modern Sustainability Role Center to access all sustainability data and key performance indicators (KPIs) in one place.
- Set baselines and targets, and track your progress with scorecards and goal management tools.

Gain insights and simplify reporting

- Access built-in reports, Excel-based reporting, embedded Power BI dashboards, and analysis views tailored to your sustainability data.
- Use financial reports to compare sustainability entries with statistical or general ledger data.
- Report on various greenhouse gases in CO_2 equivalents, as well as water and waste metrics.
- Customize reports to focus on the sustainability indicators that matter most to your business.
- Meet regulatory requirements by reporting in line with the Corporate Sustainability Reporting Directive (CSRD) and other standards through integration with **External ESG**

Reporting.

- Calculate and report data required for Carbon Border Adjustment Mechanism (CBAM) and extended producer responsibility (EPR) compliance.

Enhance brand reputation

- Use the integrated sustainability features in Business Central to enable full value chain tracking of Scope 3 emissions across all operations.
- Add carbon footprint data on product invoices to promote transparency and accountability.

These capabilities provide a comprehensive approach to sustainability management. They help you measure, analyze, and report your environmental impact with confidence and efficiency.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Capture sustainability data with general journals

08/07/2025

Expand table

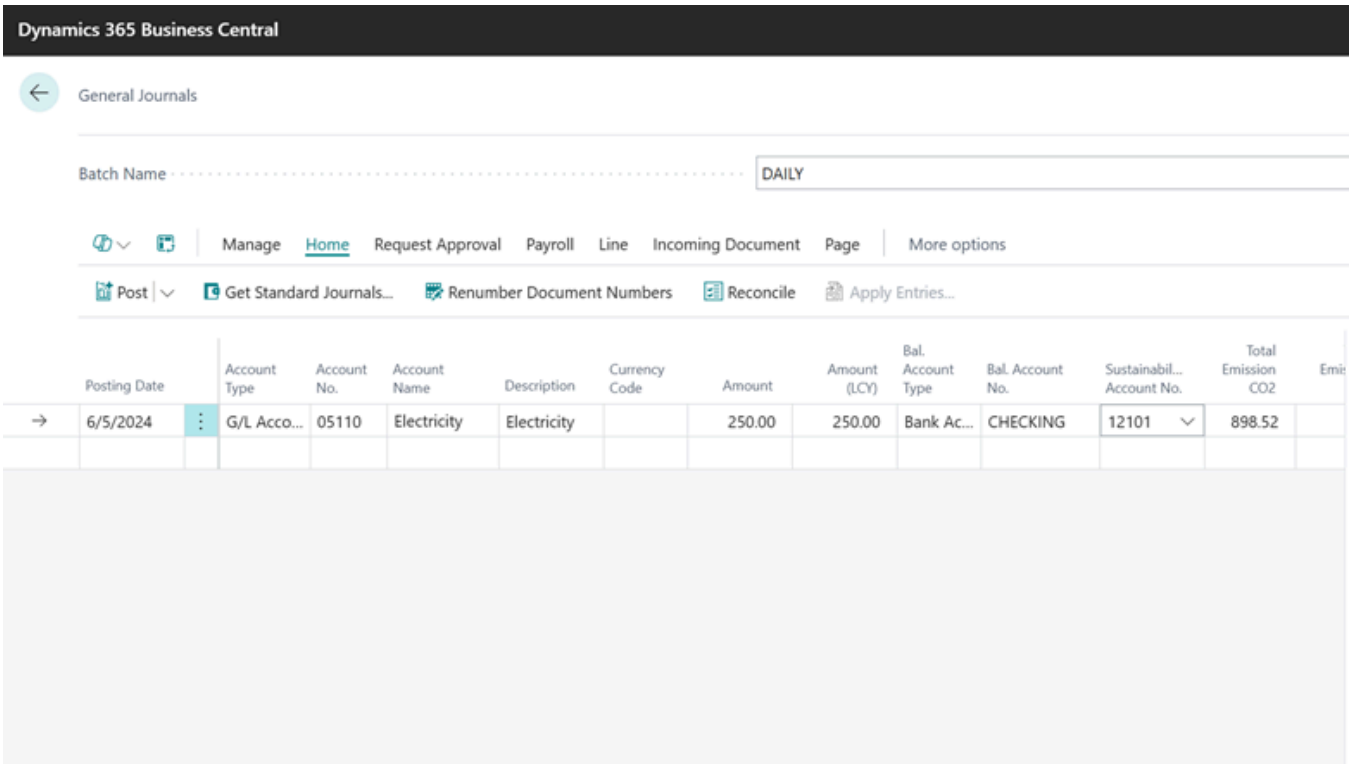
Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

When businesses record greenhouse gases with general journals, they can track and reduce their carbon footprint and use double materiality more effectively. By integrating environmental data with financial records, companies can identify high-emission activities. They can make informed sustainability decisions and enhance their corporate responsibility. This proactive approach not only meets regulatory requirements but also attracts eco-conscious customers. It strengthens brand reputation and can lead to cost savings through more efficient resource management.

Feature details

If your financial data includes emission details, post both types of data in a single line on the **General Journals** page. Open a general journal and add the usual financial details. Then select the sustainability account and enter the emission amounts you track for each account in the **Total Emission CO2**, **Total Emission CH4**, and **Total Emission N2O** fields. On the **General Ledger Entries** page, use the **Find entries** action to easily find the related sustainability entry. You can also view this information on the **Posted General Journal** page.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

General journals (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Provide carbon equivalent data for sales based on Scope 3 automation

> **Important**
>
> **Some of the functionality described in this release plan has 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	✔ Apr 1, 2025	Jan 2026

Business value

Sustainability Scope 3 value chain process automation uses standard ERP processes to streamline the collection, calculation, and reporting of indirect emissions data across the upstream and downstream corporate value chain. These processes improve accuracy, efficiency, and compliance with sustainability goals. Scope 3 emissions are important for accurate tracking because they represent the majority of emissions, influence business decisions, and align with many regulations.

Measuring Scope 3 emissions is also complex because it requires data from multiple sources. For example, you need information from vendors and internal operations such as transfers and manufacturing. This feature gives you flexibility by enabling you to provide accurate emissions information for the items you sell.

Feature details

Business Central calculates item emissions using values in **Sustainability Value Entries**, which currently use only the **Average** method. The solution uses these values to add the calculated, read-only **CO2e per Unit** and **Total CO2e** fields on lines in sales documents. This release doesn't extend document reports to include the additional CO2e emission values.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Sustainability value chain in sales (docs)

Note: The author created this article with assistance from AI. Learn more

Last updated on 11/18/2025

Specify default sustainability values for various entities

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

You can improve sustainability tracking by setting up inbound emissions for each item, resource, and general ledger account. You can also set up inbound emissions for internal operations, such as work centers, machine centers, and transfer journals. This setup helps you accurately track and report your company's environmental impact.

Feature details

A new **Default Sust. Account** field is available in the following tables:

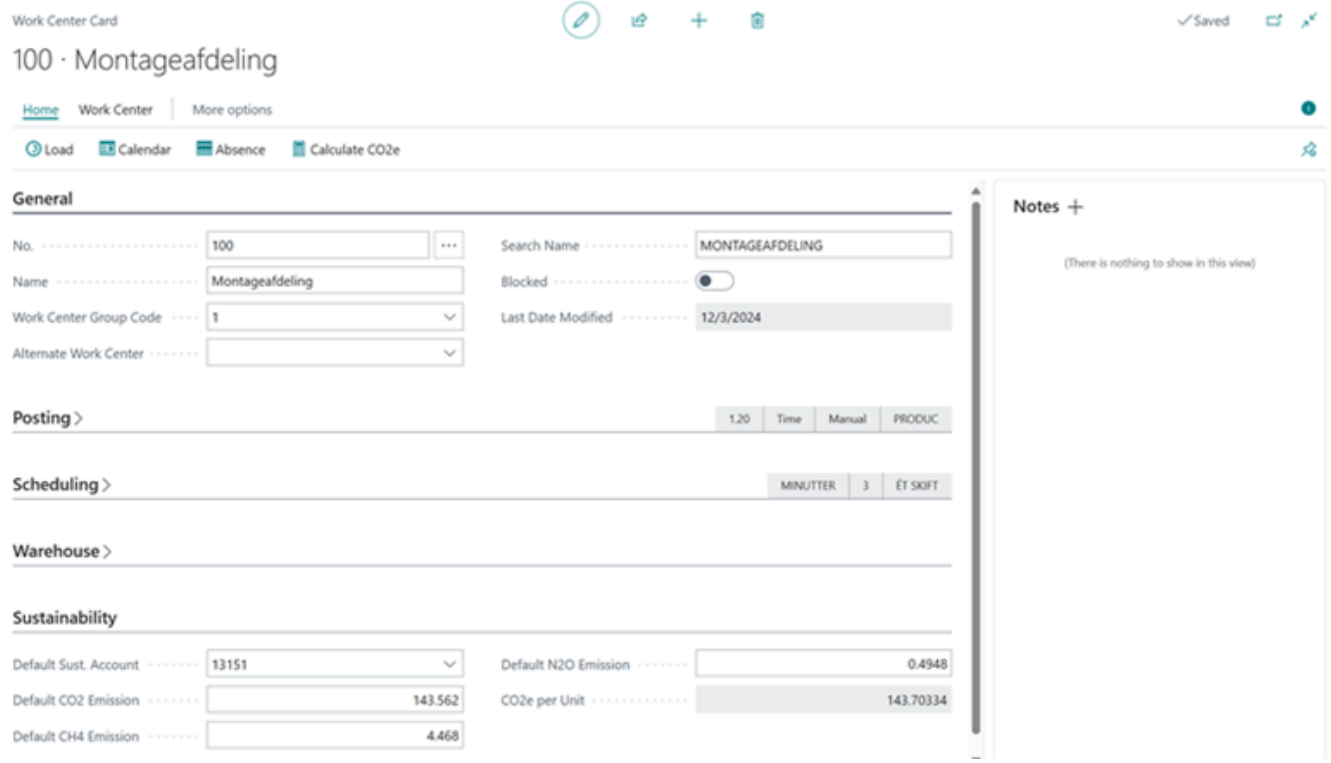
- G/L Account
- Item
- Item Category
- Resource
- Work Center
- Machine Center

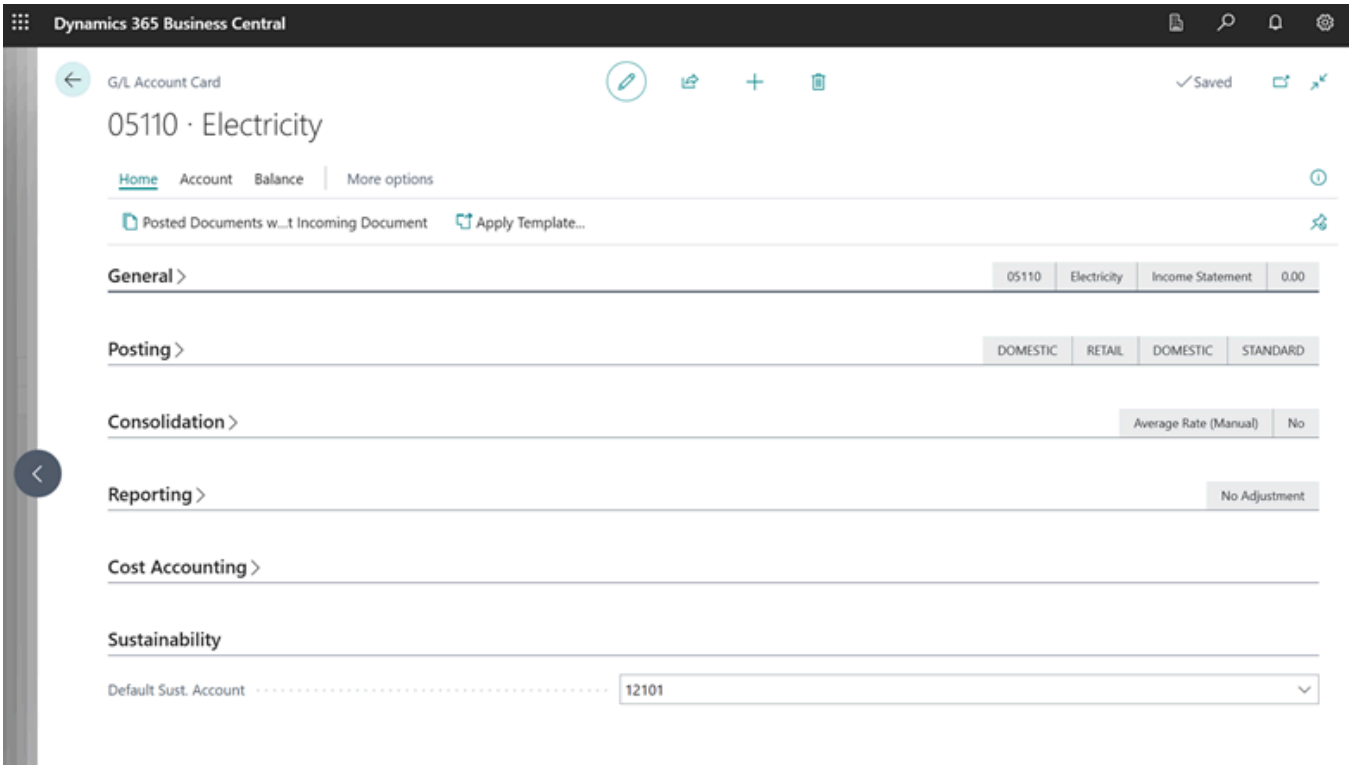
When you enter a value in the **Default Sust. Account** field on the **Item Category** page, the items you assign to that category inherit the value.

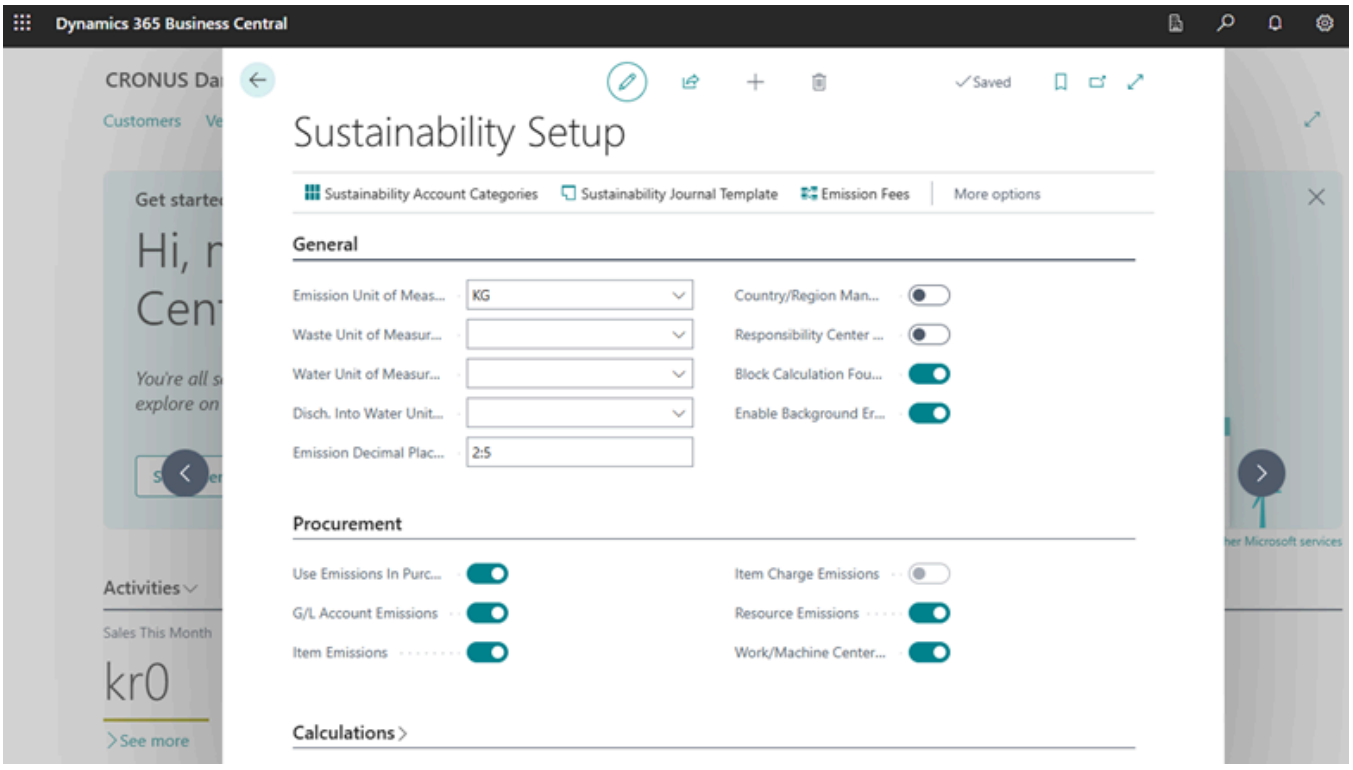
The **Item**, **Resource**, **Work Center**, and **Machine Center** pages include new **Default CO2 Emission**, **Default CH4 Emission**, and **Default N2O Emission** fields. To set these values, go to the **Item** card. When you set **Purchase** in the **Replenishment System** field for an item, you can edit these emission values. Otherwise, Business Central calculates the values. If you enter values in these fields and change the selection in the **Replenishment System** field, a message warns you that the change removes the values in the emission fields.

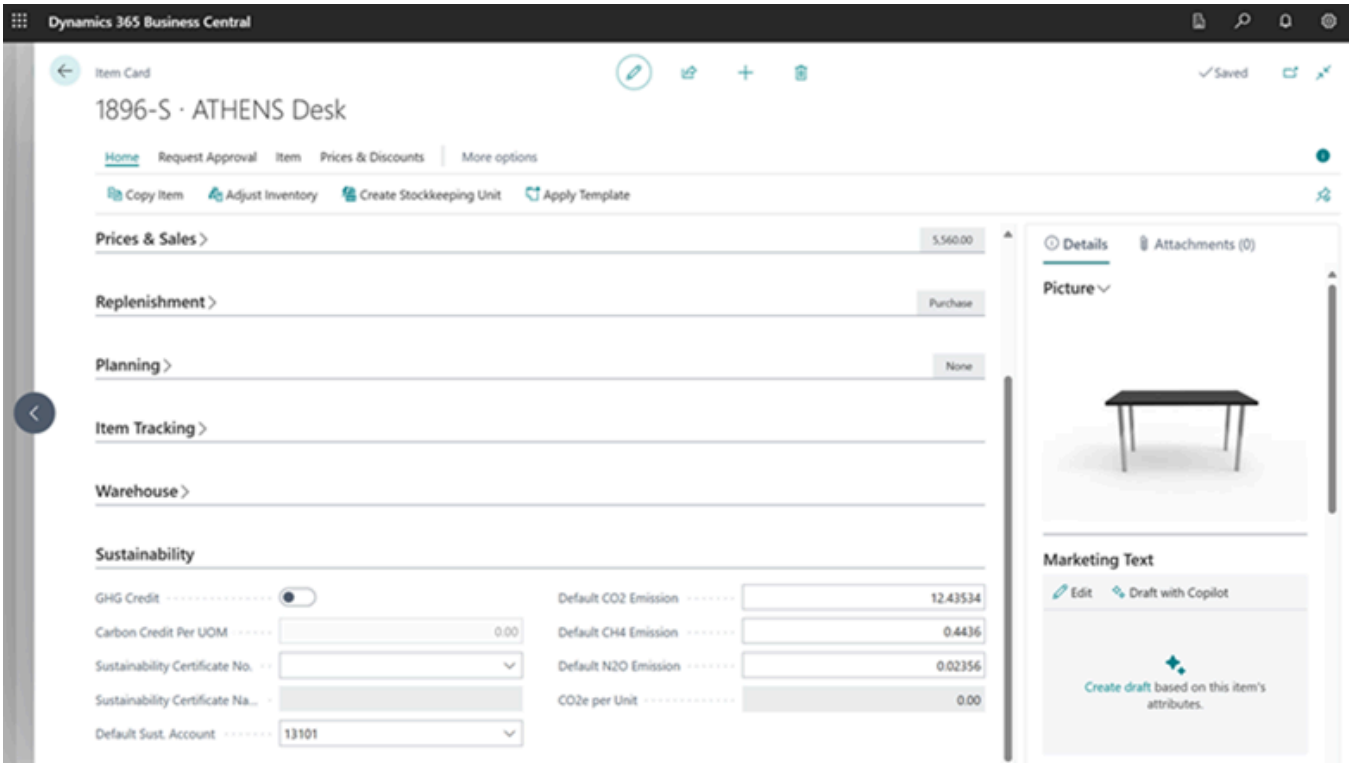
To use these fields, enable them on the **Sustainability Setup** page. This configuration step reduces clutter for businesses that don't want to use these fields.

When you enter a value in the **Default Sust. Account** field and work with purchase documents or general journals, the value transfers to the related **Sustainability Account** and **Emission Amount** fields.









Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Default data for sustainability (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Start value chain in purchase process for Scope 3 in sustainability

08/07/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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	✅ Apr 1, 2025	Jan 2026

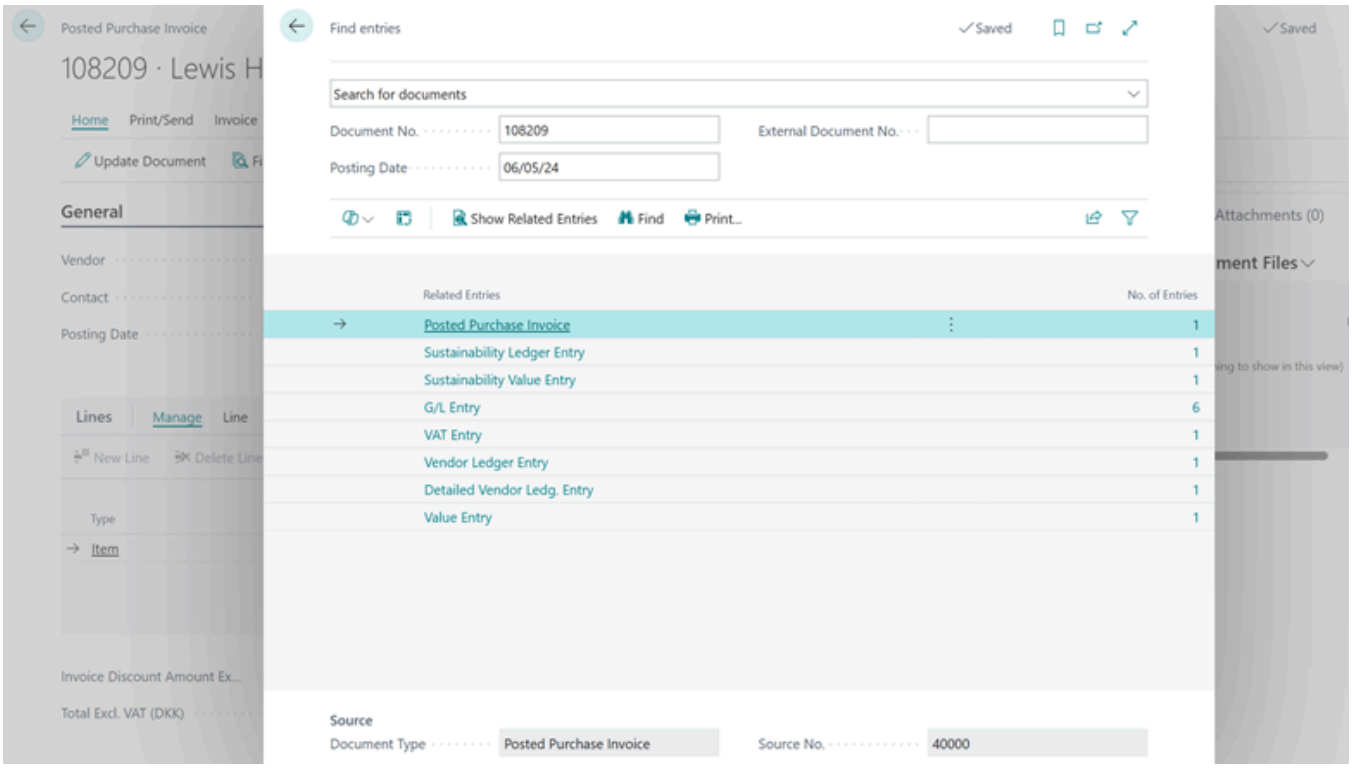
Business value

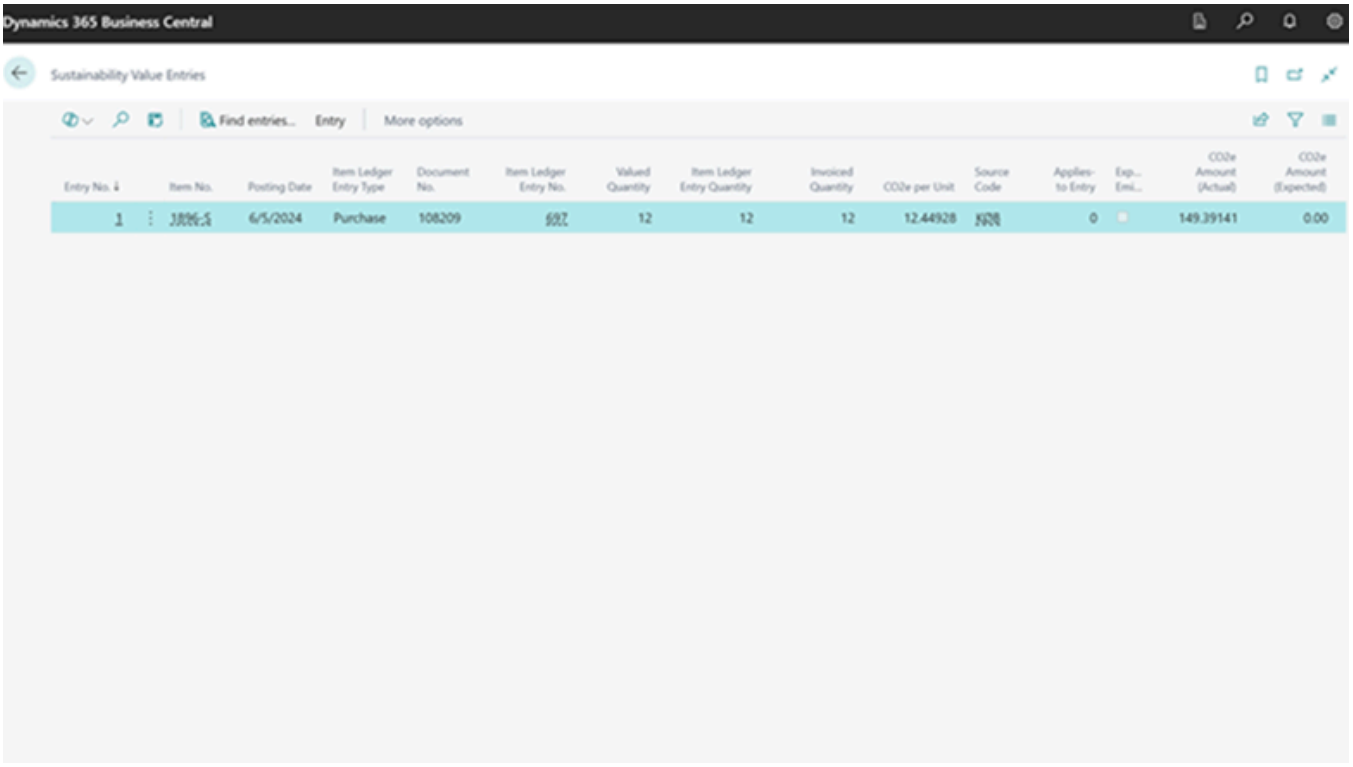
Sustainability Scope 3 value chain process automation uses standard ERP processes to streamline the collection, calculation, and reporting of indirect emissions data across a company's upstream and downstream value chain. These processes improve accuracy, efficiency, and compliance with sustainability goals. This feature gives you flexibility by letting you track emissions from the purchase process and start the final emission calculation.

Feature details

Scope 3 emissions are important for accurate tracking because they make up most emissions. They affect business decisions and match many regulations. Scope 3 emissions are also the most complex to measure because they need data from many sources. For example, you need data from vendors and internal operations such as transfers and manufacturing.

When you post emission values with purchase invoices, Business Central creates a sustainability ledger entry. It also creates a new sustainability value entry that references the item ledger entry with the same item ledger entry type. This entry records details related to the calculated **CO2e Amount**. This entry starts the emission valuation process. Business Central tracks all emission changes through other processes. This feature in purchase documents currently applies only to items. It doesn't support item charges for adding extra emissions. This release supports only the **Average** model of emission calculation.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Sustainability value chain overview (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use enhanced analytics for Sustainability

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Jun 1, 2025

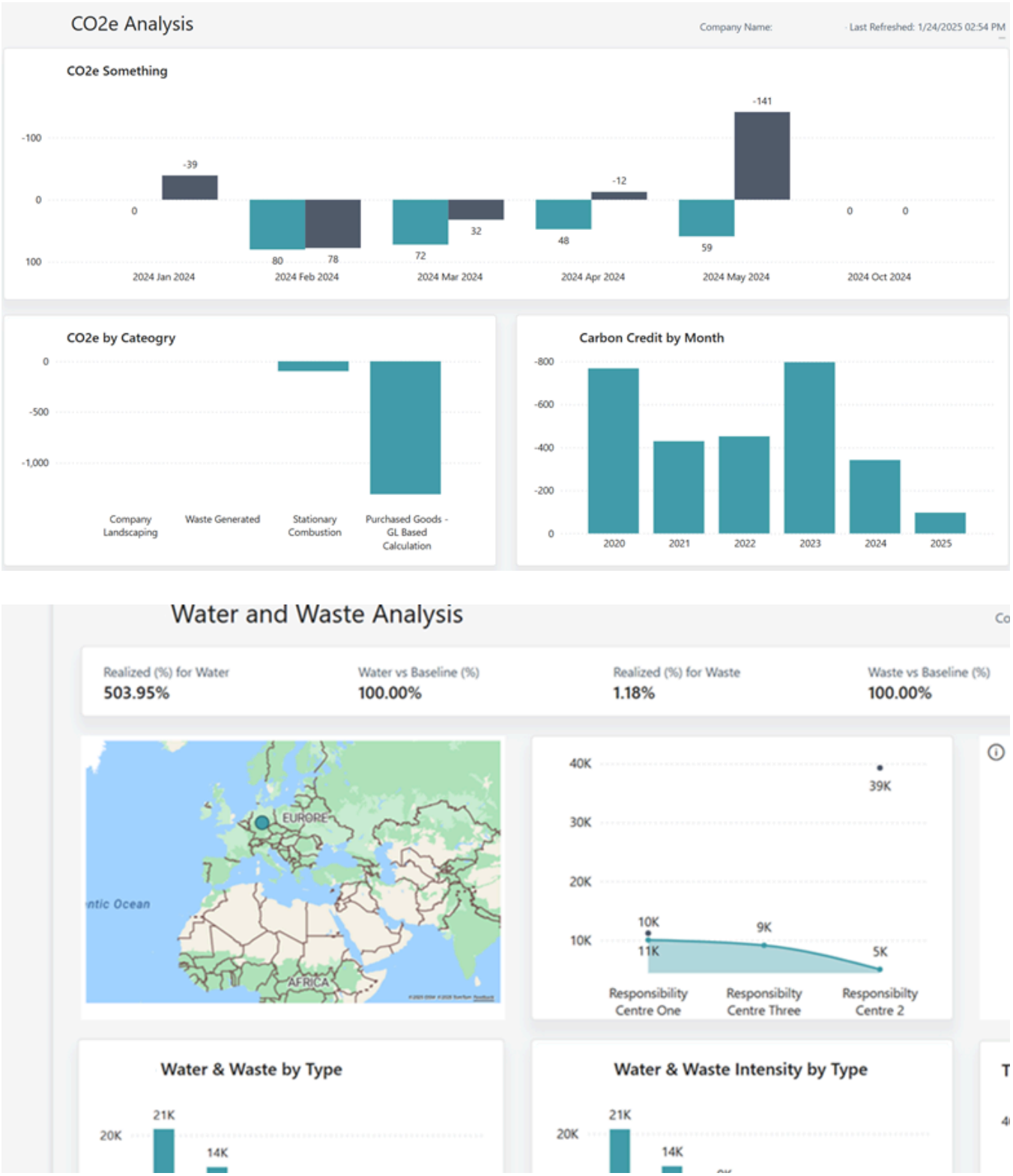
Business value

The improvements in reporting and analytics for Sustainability help your business track new key performance indicators (KPIs) and scenarios in Power BI. Comprehensive documentation and teaching tips help you fully leverage these new features.

Feature details

We've greatly improved reporting and analytics for our sustainability features. In addition to the three existing reports with the Excel layout, you get new tools for Power BI and data analysis.

- Track new KPIs and scenarios in the updated Power BI Sustainability app, such as emissions by category and scope, CO2e analysis, journey to net-zero carbon, realized vs. baseline vs. target, water and waste analysis, and more.
- Track new KPIs and scenarios related to social and governance factors, such as gender or age distribution, qualifications, and more.
- Access teaching tips and documentation for all reports.
- Learn more in the new Sustainability analytics section in the documentation.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

learn.microsoft (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Use refreshed demo data for Sustainability

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

The demonstration data is updated so you can easily test and demo new features in Sustainability.

Feature details

The following features are available in the Sustainability Demo Data tool:

- Sustainability features in purchase documents.
- A vendor and an item related to carbon credits.
- A purchase invoice with sustainability information and carbon credits.
- Details for carbon fee and CO2 equivalent calculations.
- Statistical accounts and journal for social and governance.
- A scorecard and goals.
- An ESG example in financial reports.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use sustainability Scope 3 value chain for assembly and transfers

> **Important**
>
> **Some of the functionality described in this release plan has 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	✔ Apr 1, 2025	Jan 2026

Business value

Sustainability Scope 3 value chain process automation uses standard ERP processes to streamline how you collect, calculate, and report indirect emissions data across your company's upstream and downstream value chain. This process improves accuracy, efficiency, and compliance with sustainability goals. Scope 3 emissions are important for accurate tracking because they make up most emissions, influence business decisions, and align with many regulations.

You measure Scope 3 emissions through data from multiple sources, such as vendors, and information from internal operations like transfers and manufacturing. This feature gives you more flexibility by letting you track emissions in the assembly and transfer processes and automatically calculate new emissions in both downstream and upstream inventory activities.

Feature details

This feature calculates CO2e for regular transferred items and assembly items. It uses initial emissions data from purchase documents and adds emissions from transfer processes or assembly order processes.

To make the calculation easier, the **CO2e per Unit** and **Total CO2e** fields are available on the **Transfer Orders** and **Assembly Orders** pages. For **Transfer Orders**, you can increase these values only for transferred items. For **Assembly Orders**, Business Central uses emissions from consumed items and resources to calculate the total CO2e emissions for the assembled item.

Business Central uses the **Average** method on the **Sustainability Value Entries** page to calculate these values. With each posting, Business Central adds new values to the **Sustainability Value Entry** that relate to the specific transaction. To prevent double posting for the same emissions, the entries post only to the **Sustainability Value Entry**. They don't post to the **Sustainability Ledger Entry**. These entries relate only to the item emission valuation.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Sustainability value chain in transfers (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Last updated on 11/13/2025

Use sustainability Scope 3 value chain in manufacturing

08/07/2025

> **Important**
>
> **Some of the functionality described in this release plan has 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	✔ Apr 1, 2025	Jan 2026

Business value

Sustainability Scope 3 value chain process automation uses standard ERP processes to streamline how you collect, calculate, and report indirect emissions data across your company's upstream and downstream value chain. This automation improves accuracy, efficiency, and compliance with sustainability goals. Scope 3 emissions are important for accurate tracking because they make up most emissions, influence business decisions, and align with many regulations.

Scope 3 emissions are also the most complex to measure because they require data from many sources. For example, you need data from vendors and internal operations such as transfers and manufacturing. This feature gives you more control by letting you track emissions in the manufacturing process and automatically calculate new emissions in both downstream and upstream activities related to your inventory.

Feature details

With this feature, you can calculate CO2e for finished goods by using raw material emissions data from purchase documents and adding emissions from manufacturing processes.

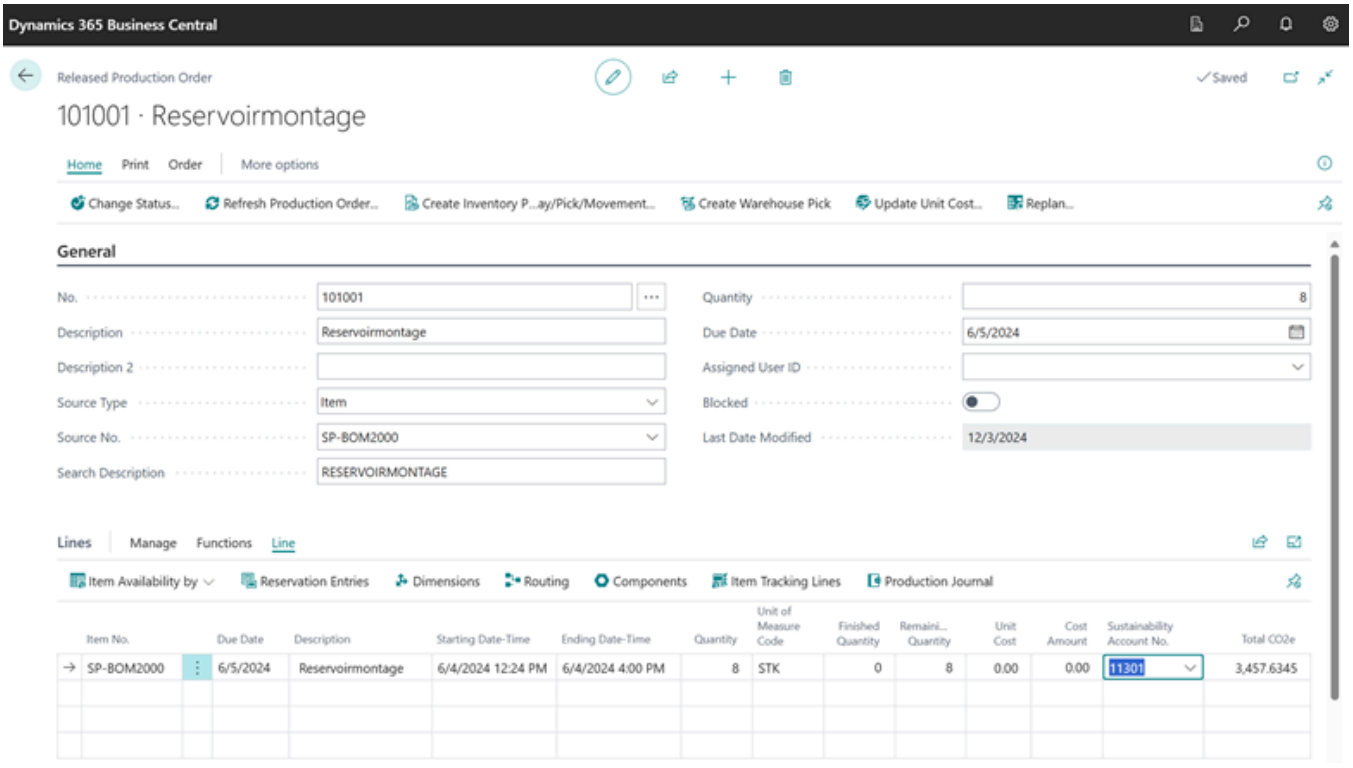
To help you collect this data, the new **CO2e per Unit** and **Total CO2e** fields are available on the following pages:

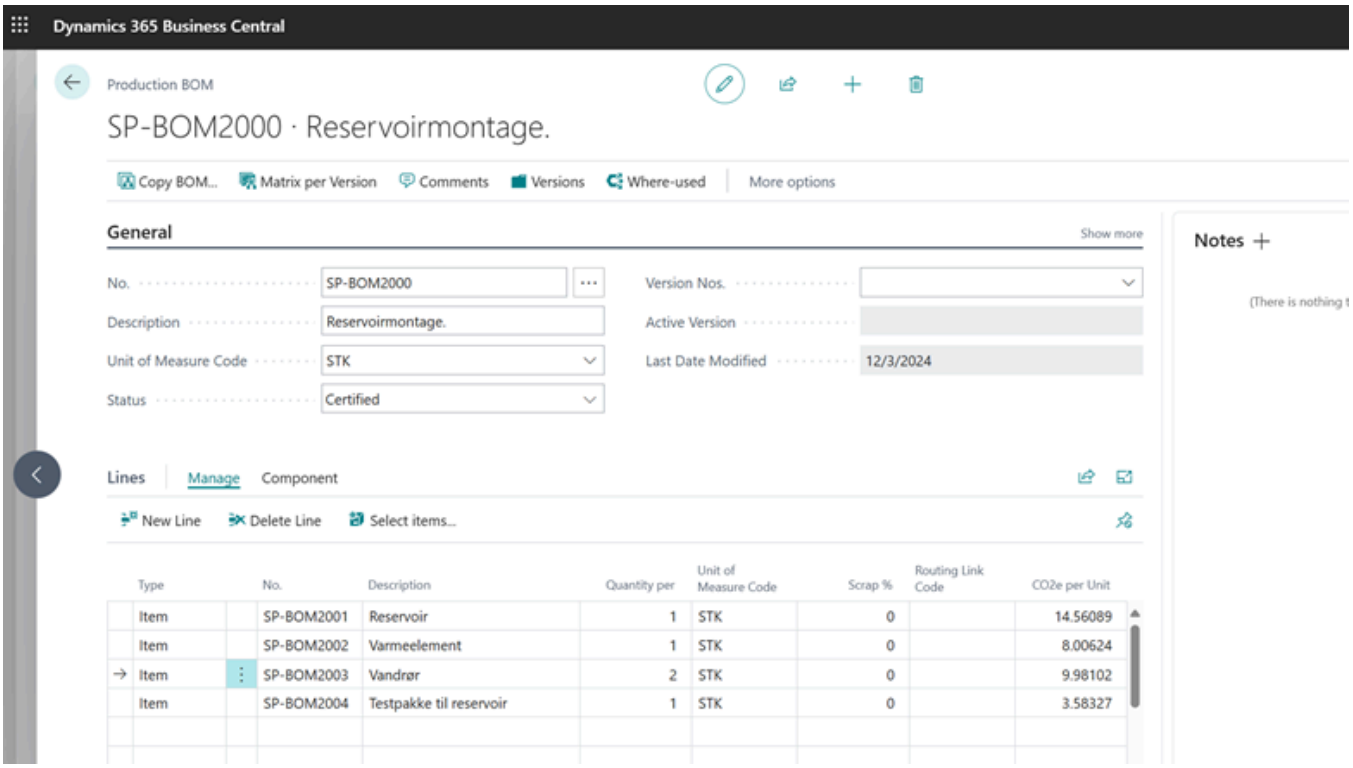
- Production BOM
- Routing
- Components
- Operations
- Production Order Lines
- Consumption
- Output Journals

On the **Production BOM** page, these fields get their values from the emission details of items. On the **Routing** page, they come from the emission details on the **Work** and **Machine Centers** pages.

The system calculates these fields by using the **Average** method on the **Sustainability Value Entries** page. When you run the **Refresh Production Order** action, you can see the calculated values on the production order. Each time you post, Business Central adds new values to the **Sustainability Value Entry** page for the finished goods. These values come from the consumption of raw materials and the output of operations.

The consumption and output entries create a **Sustainability Value Entry** that links to the **Item Ledger Entry**. The output entry also connects to the **Capacity Ledger Entry**. To prevent double postings for the same emissions, these entries post only to the **Sustainability Value Entry** and not to the **Sustainability Ledger Entry**. These entries relate only to the item emission valuation.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Tell us what you think

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Additional resources

Sustainability value chain in production (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use the new Out of Scope emission category

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Apr 1, 2025	✔ May 1, 2025

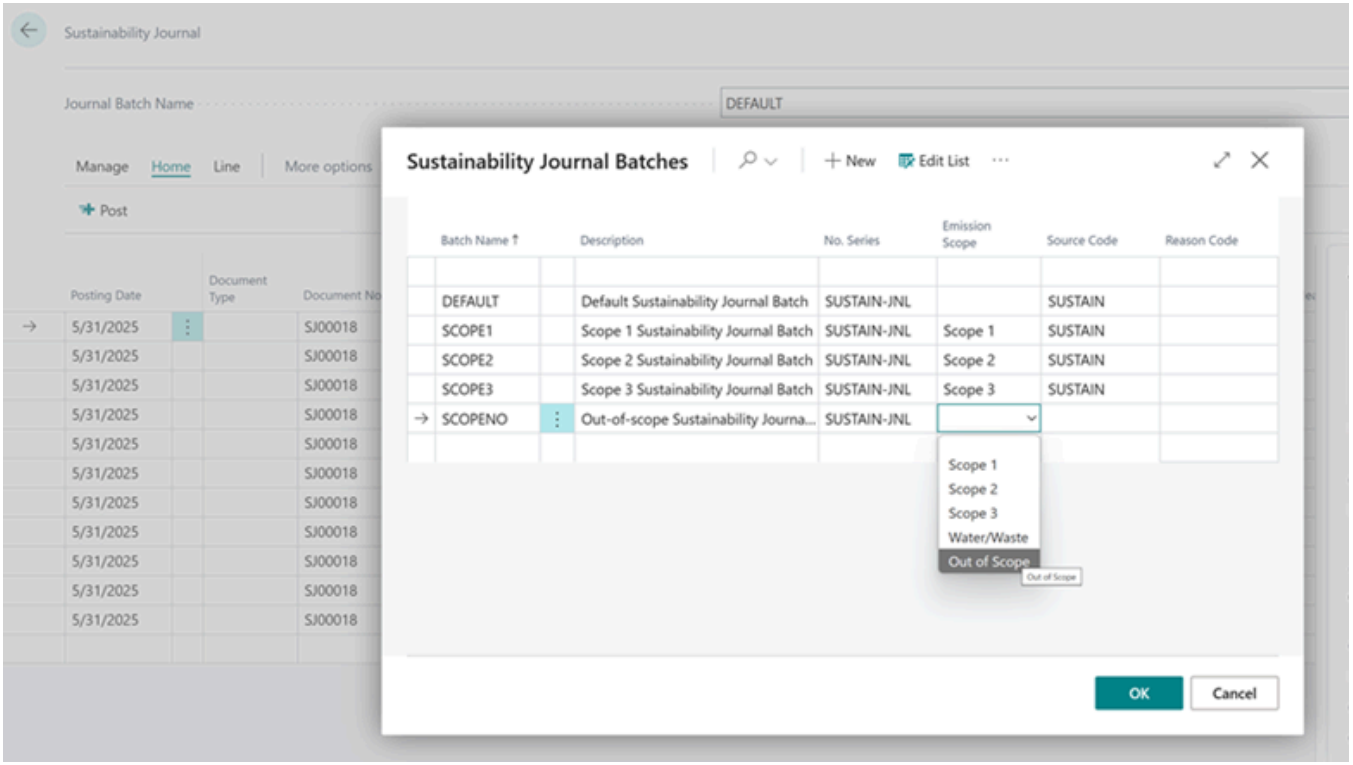
Business value

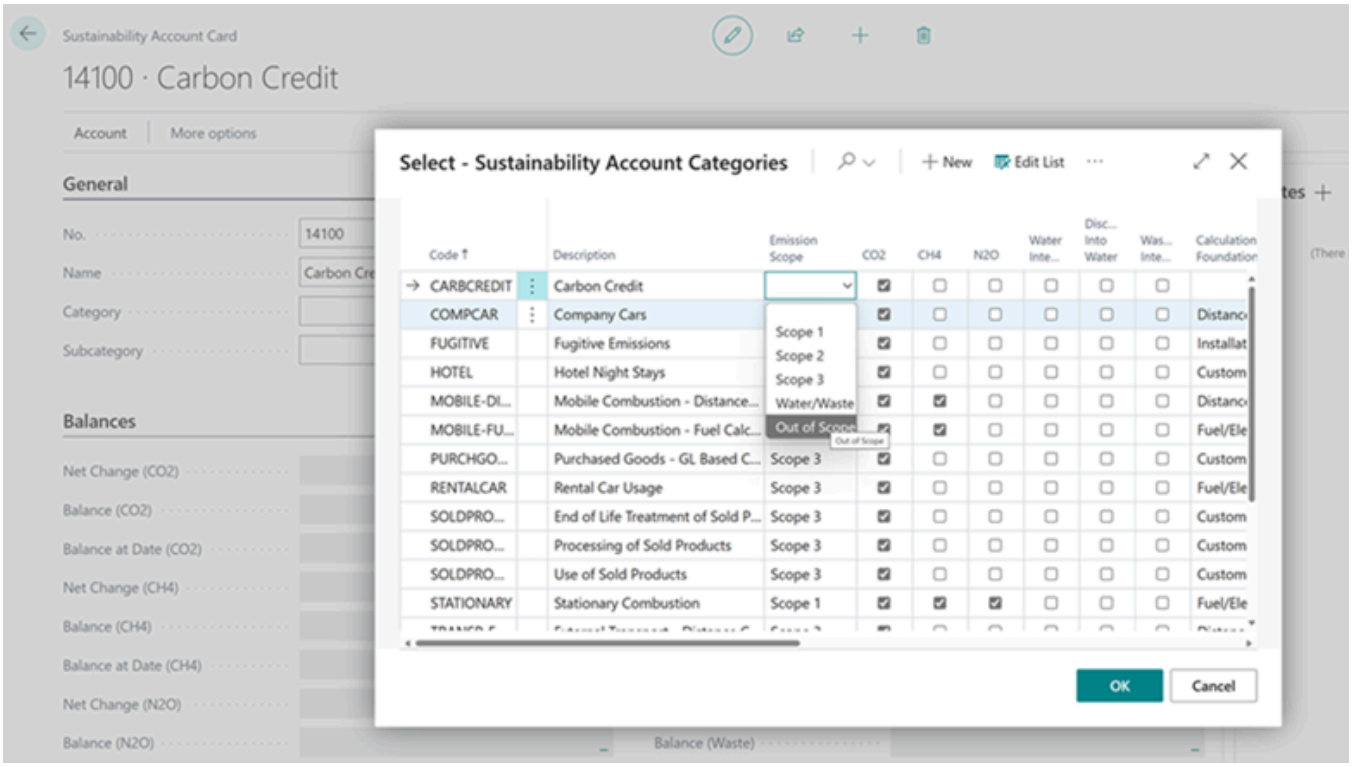
This feature improves productivity by helping you avoid blocks when posting emissions. Use this feature when you want to post emissions but aren't sure which emission scope to use. It's also useful when you need to post a carbon credit that isn't related to a scope.

Feature details

To post emissions without a scope, on the **Sustainability Account Category** page, in the **Emission Scope** field, select **Out of Scope**. Then, assign the account category to a sustainability account or create a new account and assign the category.

Use a sustainability account with this setup on a sustainability journal when you configure the sustainability journal batch to use this emission scope or allow all scopes. After you post the journal, the entries marked as **Out of Scope** are recorded in sustainability ledger entries.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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Additional resources

Chart of sustainability accounts (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use water and waste management with sustainability

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Apr 1, 2025	✔ May 1, 2025

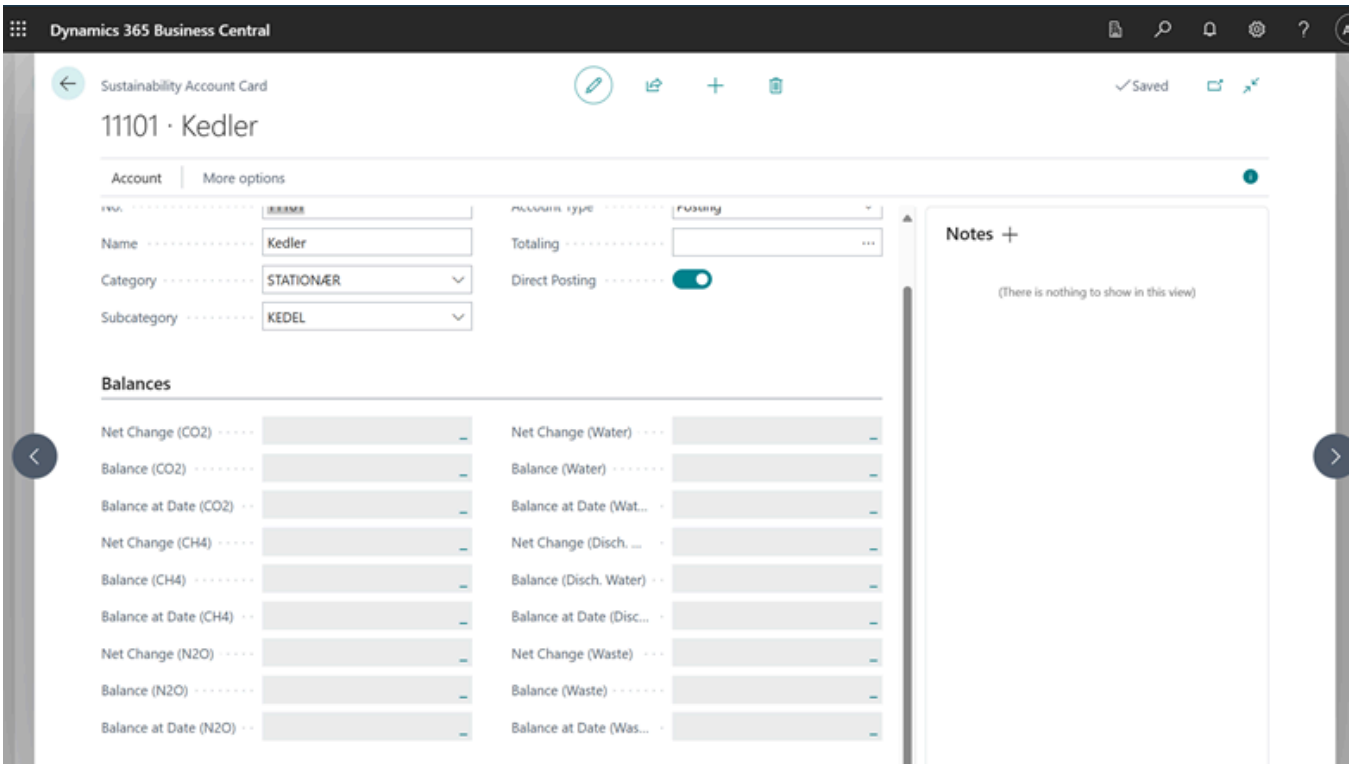
Business value

Track your company's environmental impacts in Business Central. We broadened the measurement capabilities to include water and waste. With these new capabilities, you can better prepare for compliance reporting about specific areas, especially for Corporate Sustainability Reporting Directive (CSRD).

Feature details

Use the **Sustainability Journals** and **Recurring Sustainability Journals** pages to record water and waste intensity data. This data is based on the existing **Chart of Sustainability Accounts** page, but it uses new **Water** and **Waste** emission scopes. Use different account groups, subgroups, and formulas to make it easy to record the collection of water and waste intensity. This feature also uses existing sustainability ledger entries where you record data and use it for reporting. With this feature, you can report both gas emissions and water and waste from a single place.

You can track **Water Intensity**, **Discharged Into Water**, and **Waste Intensity** values by using a **Water/Waste Intensity Type** (Withdrawn, Discharged, Consumed, Recycled, Generated, Disposed, Recovered) and a **Water Type** (Surface water, Sea water, Ground water, Third party water, Produced water). You can also extend **Sustainability Goals** to cover water and waste management features.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

Additional resources

Record sustainability entries (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

User experiences

08/14/2025

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has 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 you to work with your 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 you need them.

Each release includes enhancements to usability, accessibility, performance, and reliability. In this release wave, we boost efficiency when you work with actions across selections in lists of records and when you view summarized data to help you easily fix data entry mistakes.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Adjust the FactBox pane width

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

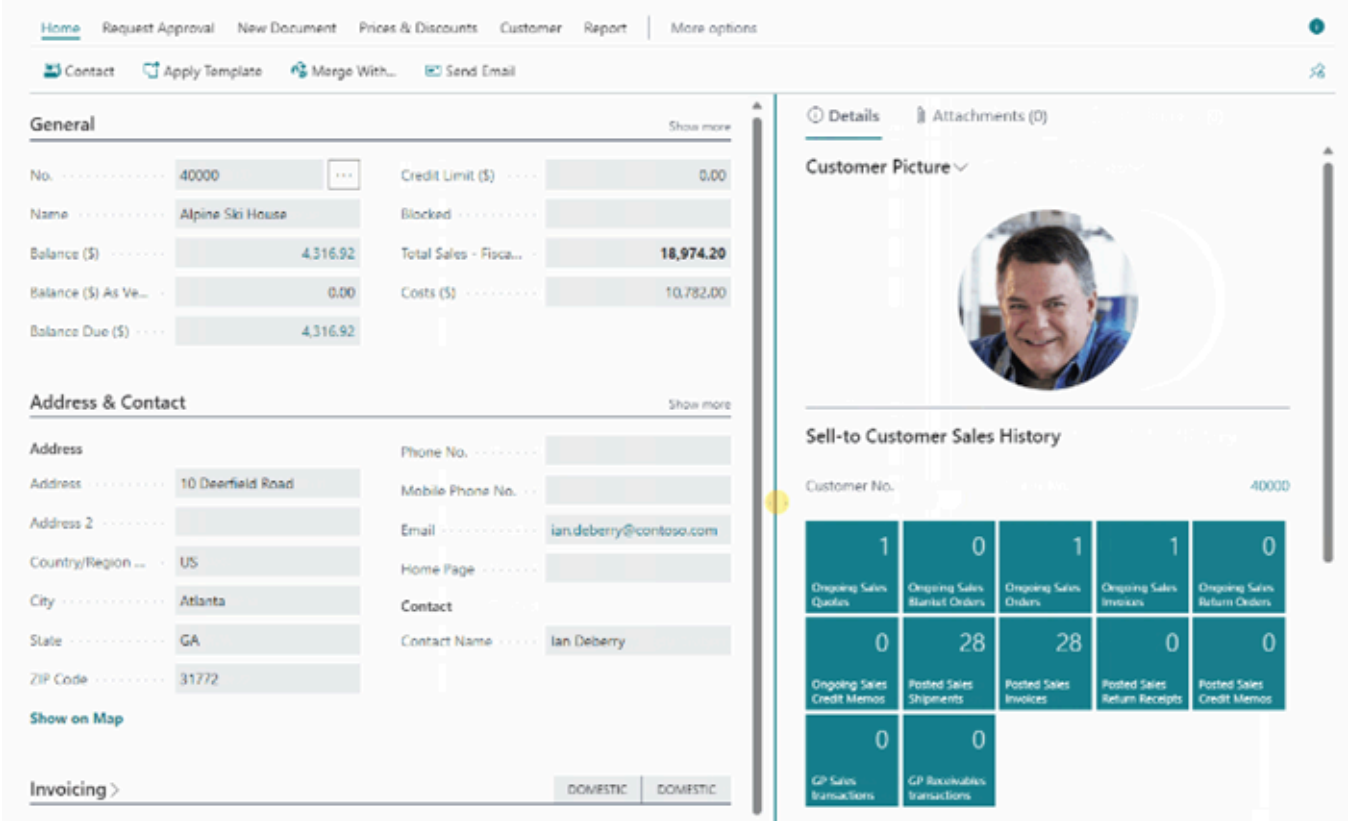
Business value

Customers want to work optimally with Business Central, even when they need extra room for the information on the FactBox pane. You can resize the FactBox pane to see the details more clearly.

Feature details

The user experience in Business Central now lets you resize the FactBox pane on all pages and page types that support the FactBox pane. With this feature, you can:

- Resize the FactBox pane within certain proportions, so the main part of the page stays visible.
- See the content in the FactBox pane reflow smoothly to fill the available space.
- Have the browser remember the size of the FactBox for each user and page, just like with other lightweight adjustments.
- Double-click the divider to reset the size of the FactBox pane to default.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

Hide or resize a FactBox (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Optimize screen estate usage on the web

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Apr 7, 2025	✔ Apr 22, 2025

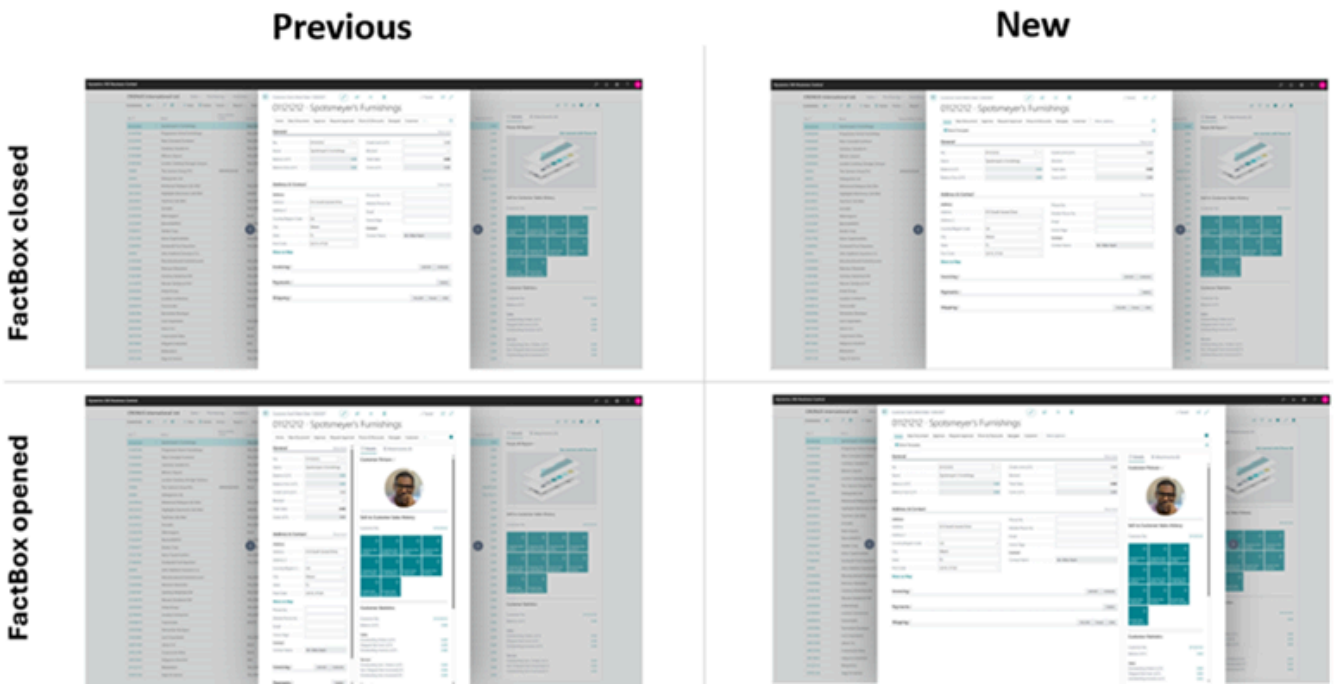
Business value

Work optimally with the Business Central web client on modern devices that have large screens or large external monitors. This feature ensures that the application uses the screen efficiently, even when pages appear in different modes. You get the most productivity and efficiency in the web client.

Feature details

This feature optimizes screen space in the Business Central web client. It includes:

- Optimized default page size in narrow mode.
- Improved sizing and animation of the FactBox pane in narrow mode. The FactBox pane adds to the page width. When you expand or collapse the FactBox pane, the main content area width stays the same.
- Better proportions between field labels and values in narrow mode.
- An option to resize the FactBox pane and remember your choice for each page and mode. The Allow adjusting FactBox pane width feature provides this capability.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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

Preview PDF attachments directly in web client

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Apr 1, 2025

Business value

When you can easily work with attachments, report outputs, or incoming documents, you stay productive and focused on your work. This capability saves you time and effort.

Feature details

With this feature, you can open PDF attachments directly in the Business Central web client without downloading them first. The feature shows files in preview mode with a specialized viewer experience. This experience is similar to the print preview feature. You can always download a PDF file from the viewer.

This feature works automatically across all areas of Business Central, including ISV code. However, extension developers need to add support for this feature. Two new AL methods capture this behavior. These methods follow the pattern of the File.Download method:

- File.ViewFromStream – for Business Central online
- File.View – for Business Central on-premises

Various areas of Business Central use this feature. These areas include document attachments and incoming documents.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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.

Additional resources

File.ViewFromStream Method (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Use user interface enhancements for better experience

08/07/2025

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Apr 1, 2025	✔ Apr 7, 2025

Business value

As a Business Central user, you interact with the web client every day. Enhancements and improvements to the UI give you more flexibility and productivity. With these enhancements, you can manage your tasks and complete them more efficiently.

Feature details

We continuously improve the experience by adding new features, adjusting the visual style to match modern design principles, and responding to user feedback. This feature introduces the following enhancements:

- Updated the FactBox pane with a new layout that has rounded corners.
- Updated the Power BI embedded experience with adjusted controls and appearance.
- Updated Role Explorer and Report Explorer to display page and report descriptions as extended teaching tooltips.
- Added an option to Role Explorer and Report Explorer to open pages and reports in a separate window without closing the Explorer.
- Updated the Search field in the environment and company picker with a search icon and instructional text.
- Added a divider between system and application actions in context menus on lists.
- Refreshed the icon for prompt guides in chat with Copilot.

For more information about customizing the user interface and staying productive, see Work with Business Central.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

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 .

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Plan and prepare for Dynamics 365 Customer Insights - Data in 2025 release wave 1

09/12/2025

> **Important**
>
> The 2025 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2025 to September 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/2025W1/CustomerInsightsData

Dynamics 365 Customer Insights - Data unifies customer data from various data sources and enriches it with Microsoft's unique data assets. It creates comprehensive unified profiles, AI-driven predictions, segments, and measures. With unmatched speed to insights, it enables a deep understanding of each customer by providing a holistic, up-to-date view. You can activate this data across channels, departments, and devices to deliver personalized customer experiences at every touchpoint.

In this release, we focus on three key areas:

Copilot and AI innovation: When you use customer insights through copilot chat interfaces in Dynamics 365 applications, your sales and service reps can easily personalize customer interactions. With Microsoft Copilot Studio, you can build autonomous agents, like the sales qualification agent, that make smarter decisions by using customer knowledge from various data sources unified in Customer Insights.

Personalized customer experiences: Use behavioral data from Dynamics 365 Customer Insights - Journeys to create segments, measures, and predictions. This data helps you increase targeting precision and personalization throughout the buyer journey.

Faster time to insights: Use Dynamics 365 Customer Insights to unify data from your Azure or Fabric lakehouse. This approach reduces the need to move or copy data from different systems. It also expands the sources and scenarios you can use with Customer Insights, so you get insights faster than ever.

The solution empowers your teams, copilots, and agents with the latest customer insights from all your data sources. With these insights, they can engage more effectively, make informed decisions, and deliver exceptional, personalized experiences that drive customer satisfaction and business success.

For official product documentation and training for Dynamics 365 Customer Insights - Data, see:

Product overview for Dynamics 365 Customer Insights - Data

Updates to Dynamics 365 Customer Insights - Data 2025 release wave 1

Investment areas



Faster time to insights
Break down data silos and get a complete understanding of your customers with a unified view of data across your organization. Improve your business results in marketing, sales, and service.

Personalized customer experiences
Get a unified customer profile that contains the latest customer interactions so you can personalize each experience. When you respond to customer needs in the moments that matter, you increase the likelihood of conversion through better understanding and real-time capabilities.

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
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Customer Insights - Data.
Product documentation	Find documentation for Customer Insights - Data.
User community	Engage with Customer Insights - Data experts and peers in the community.
Upcoming events	Find and register for in-person and online events.

Helpful links	Description
Product trials	Get started with Customer Insights - Data.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

What's new and planned for Dynamics 365 Customer Insights - Data

10/02/2025

This topic lists features that are planned to release from April 2025 through September 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 2 plan.
- For a list of the next wave's release plans, go to 2025 release wave 2 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.

Faster time to insights

Make informed decisions more rapidly, respond to customer needs in real time, and deliver personalized experiences in the moments that matter.

Expand table

Feature	Enabled for	Public preview	General availability
Filter rows from source data for better processing	Admins, makers, marketers, or analysts, automatically	✅ Jun 13, 2025	Oct 2025

Personalized customer experiences

Grow customer loyalty and eliminate tone-deaf experiences, with every interaction personalized and informed by their entire journey across marketing and sales.

Expand table

Feature	Enabled for	Public preview	General availability
Export your data to Azure Data Lake Storage	Admins, makers, marketers, or analysts, automatically	-	Sep 2025

* You are able to opt into some features as part of early access on February 3, 2025, 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 information on data residency in Dynamics 365 and Power Platform, visit the Microsoft Dynamics 365 and Power Platform data residency documentation. For more information about geo availability, visit the Dynamics 365 and Microsoft Power Platform availability page.

Faster time to insights

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Break down data silos and get a complete understanding of your customers with a unified view of data across your organization. Improve your business results in marketing, sales, and service.

Note: The author created this article with assistance from AI. Learn more

Filter rows from source data for better processing

10/09/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jun 13, 2025	✔ Oct 3, 2025

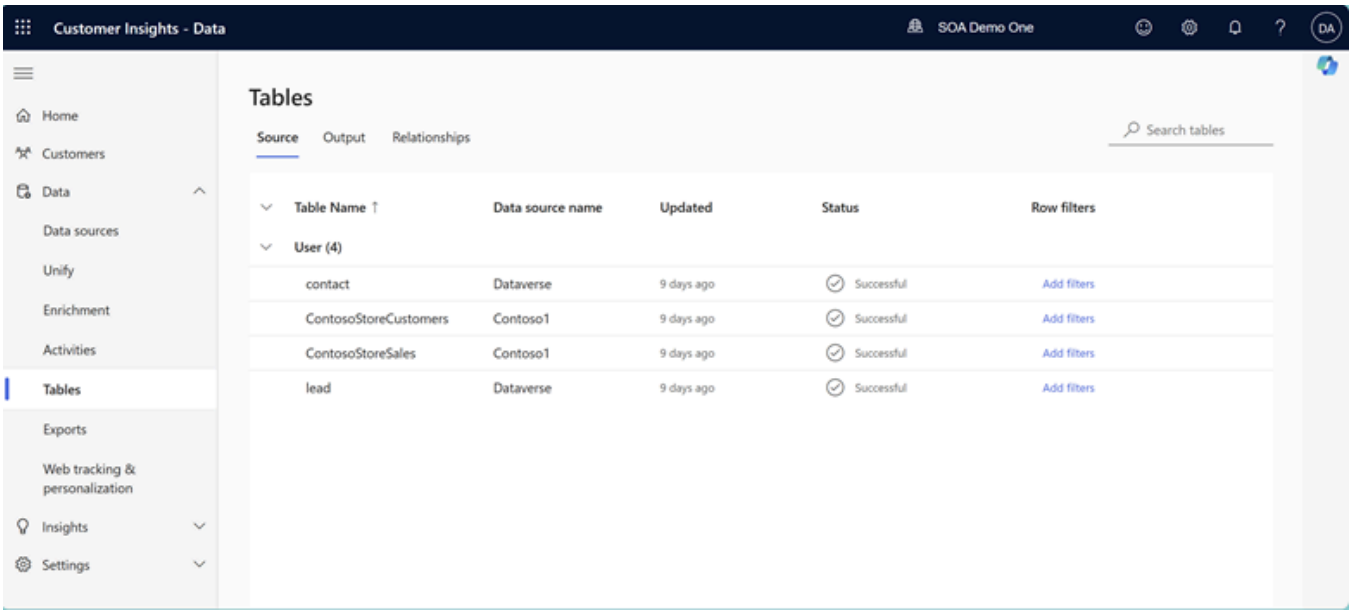
Business value

You can improve the quality of your unified customer profiles and insights by filtering out unwanted rows from your source data directly in Customer Insights - Data. When you remove old or incomplete rows that don't provide value, Customer Insights - Data creates higher quality insights more quickly. You don't need to filter out unwanted data in downstream processes.

Feature details

A common challenge when working with customer source data is dealing with old and obsolete source data that you ingest with the data you want. But preprocessing your source data takes extra time and effort.

With Customer Insights - Data, you can apply row filters directly to any source table you ingest. This filter feature reduces the data scope to just what you need. You apply filters one time on the **Tables** page. The **Tables** page displays source tables on their own tab. This tab separates source tables from the output tables that Customer Insights creates. Select the row filter link next to any table to set the filters you want.



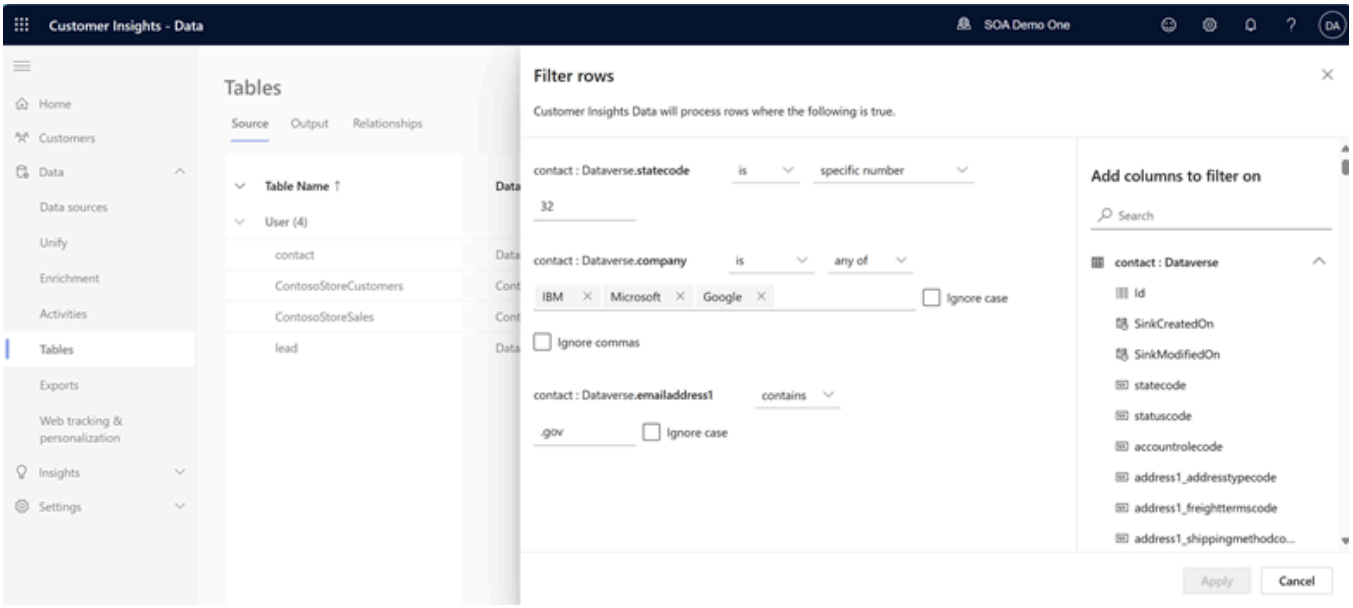
To optimize processing speed, Spark filters data during processing for unification, segments, measures, activities, and models. When you download data from the **Tables** page, you get the full dataset without filters.

This feature offers key benefits:

- **Faster processing**: By removing unwanted rows, the system skips unnecessary data and cuts down processing time.
- **Better output data**: When you remove unnecessary data from the output, you make it easier for consumers to use the data without needing to exclude unwanted data.

Limitation

The condition **Is any of** {list of values} works only for string data.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Filter out unwanted data from your ingested data (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Personalized customer experiences

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Get a unified customer profile that contains the latest customer interactions so you can personalize each experience. When you respond to customer needs in the moments that matter, you increase the likelihood of conversion through better understanding and real-time capabilities.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Export your data to Azure Data Lake Storage

10/09/2025

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Sep 30, 2025

Business value

When you export data to Azure Data Lake storage, you can easily share insights generated in Customer Insights with your organization. Your BI team, analytic workloads, and other stakeholders can use and get value from the generated insights.

Feature details

In this release, you can use Azure Data Lake Storage (ADLS) exports with general availability.

Scenario Sarah unifies her customer data and creates a segment based on requirements from across the organization. Multiple teams at her company use these insights. Each team needs a consistent and reliable mechanism to get updates every day. Sarah configures Customer Insights - Data to automatically export all the insights her teams need each day. Every day, millions of customer data points get unified, activity data is processed, measures are calculated, and customer segments are created. The solution automatically sends the resulting insights to the Azure Data Lake storage that all her teams read from.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Plan and prepare for Dynamics 365 Customer Insights - Journeys in 2025 release wave 1

> **Important**
>
> The 2025 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2025 to September 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/2025W1/CustomerInsightsJourneys

Dynamics 365 Customer Insights - Journeys brings together the worlds of customer experience, generative AI, and marketing automation. It empowers businesses to orchestrate end-to-end, personalized journeys across all touchpoints to strengthen relationships and earn loyalty.

Customers expect each interaction to surpass the previous one. This expectation means you need to continuously improve and refine your approach based on evolving customer needs. Engage customers on the most relevant channel while acknowledging their uniqueness. Always respect their preferences and privacy.

In this release, we focus on three key areas:

Copilot and AI innovation: With this release, Copilot introduces new communication channels that enable innovative customer engagement. These channels offer new opportunities and scenarios for your business. From addressing customer inquiries swiftly to delivering more personalized experiences, you can unlock new engagement channels and drive better business outcomes.

Moments that matters: We bring advanced orchestration capabilities to uplevel your customer journeys. So, each of your interactions is not only timely but also empathetic, acknowledging and valuing the unique experiences and needs of each customer. This approach enables you to build deeper connections, encouraging long-term relationships and customer satisfaction.

Unify sales and marketing: We unify sales and marketing by turbocharging lead generation with new forms and event management capabilities so you can attract and engage potential customers more effectively. Our solution enables you to generate, capture, and nurture high-

quality leads with greater efficiency, seamlessly handing them over to sales to close deals and drive business growth.

Our goal is to empower your teams to create seamless and cohesive customer journeys across channels, where each touchpoint enhances the overall experience, strengthens the relationship with your customers, and ultimately drives business success.

For official product documentation and training for Dynamics 365 Customer Insights - Journeys, see: Customer Insights - Journeys overview | Microsoft Learn

Updates to Dynamics 365 Customer Insights - Journeys 2025 release wave 1

Investment areas



Copilot and agents
Boost your productivity by harnessing the power of generative AI. As your daily assistants, Copilot and agents in Customer Insights enable organizations to rapidly launch personalized, high-impact customer experiences that lead to better business outcomes.

Moments that matter
Understand your customers' expectations, unlock new scenarios, and identify the most effective channels and touchpoints to trigger interactions that successfully engage customers in the moments that matter.

Turbocharge your pipeline
Build a stronger, more efficient pipeline and foster seamless collaboration between your sales and marketing teams to eliminate silos, align efforts, and turn high-quality opportunities into consistent growth and measurable business outcomes.

Unify sales and marketing
Bring your sales and marketing teams closer so they stop working in silos, eliminate execution gaps, and remove redundancies by collaborating to effectively drive more revenue together.

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
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Customer Insights - Journeys.
Product documentation	Find documentation for Customer Insights - Journeys.
User community	Engage with Customer Insights - Journeys experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Customer Insights - Journeys.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Last updated on 10/16/2025

What's new and planned for Dynamics 365 Customer Insights - Journeys

This topic lists features that are planned to release from April 2025 through September 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 2 plan.
- For a list of the next wave's release plans, go to 2025 release wave 2 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 agents

Revolutionize how marketers work and what they can achieve using Copilot, agents, and AI innovation in Customer Insights.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Transform your outreach with Copilot-powered voice conversations	Users by admins, makers, or analysts	✅ May 29, 2025	-	✅ Oct 10, 2025

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
Prevent duplicate emails to shared email addresses	Admins, makers, marketers, or analysts, automatically	-	-	✔ Sep 15, 2025
Streamline form filling and event registration with form prefill	Admins, makers, marketers, or analysts, automatically	✔ Sep 13, 2024	-	✔ Apr 15, 2025
Understand customer inflows and exits at every journey step	Admins, makers, marketers, or analysts, automatically	✔ Dec 20, 2024	-	✔ May 31, 2025
Orchestrate journeys using any marketing interaction	Admins, makers, marketers, or analysts, automatically	-	-	✔ Jul 8, 2025
Personalize messages and make journey decisions based on web interactions	Admins, makers, marketers, or analysts, automatically	✔ Dec 17, 2024	-	✔ Apr 16, 2025
Respect quiet times, engage based on location and time zones	Admins, makers, marketers, or analysts, automatically	✔ May 12, 2025	-	✔ Jul 1, 2025
Pause and resume journeys to handle unplanned events	Admins, makers, marketers, or analysts, automatically	✔ Jun 17, 2025	-	✔ Jul 31, 2025
Tailor follow-up strategies by reacting to multiple customer actions at once	Admins, makers, marketers, or analysts, automatically	✔ May 9, 2025	-	✔ Jul 8, 2025
Get insights on email engagement with heatmap analytics	Admins, makers, marketers, or analysts, automatically	✔ Oct 1, 2024	-	✔ Jun 2, 2025
Automate scalable journey creation with the journey API	Users by admins, makers, or analysts	✔ Sep 12, 2025	-	✔ Oct 10, 2025

Turbocharge your pipeline

Generate leads and nurture prospects with personalized experiences to build a high-quality pipeline that drives consistent growth.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Simplify forms by filtering choices based on previous answers	Admins, makers, marketers, or analysts, automatically	-	-	✔ Sep 12, 2025

Unify sales and marketing

Accelerate revenue and increase lifetime value through seamless experiences that unify sales and marketing.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Maximize event capacity with waitlist registrations	Admins, makers, marketers, or analysts, automatically	✔ Mar 27, 2025	-	✔ Jul 21, 2025
Collect extra customer info without updating your data model	Admins, makers, marketers, or analysts, automatically	✔ Mar 21, 2025	-	✔ Sep 13, 2025
Generate leads that link to an existing contact	Admins, makers, marketers, or analysts, automatically	✔ Dec 13, 2024	-	✔ Sep 12, 2025
Collect extra event attendee information without updating your data model	Admins, makers, marketers, or analysts, automatically	✔ May 19, 2025	-	✔ Sep 8, 2025

* You are able to opt into some features as part of early access on February 3, 2025, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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For information on data residency in Dynamics 365 and Power Platform, visit the Microsoft Dynamics 365 and Power Platform data residency documentation. For more information about geo availability, visit the Dynamics 365 and Microsoft Power Platform availability page.

Last updated on 11/13/2025

Copilot and agents

08/14/2025

> **Important**
>
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Boost your productivity by harnessing the power of generative AI. As your daily assistants, Copilot and agents in Customer Insights enable organizations to rapidly launch personalized, high-impact customer experiences that lead to better business outcomes.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Transform your outreach with Copilot-powered voice conversations

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ May 29, 2025	-	✔ Oct 10, 2025

Business value

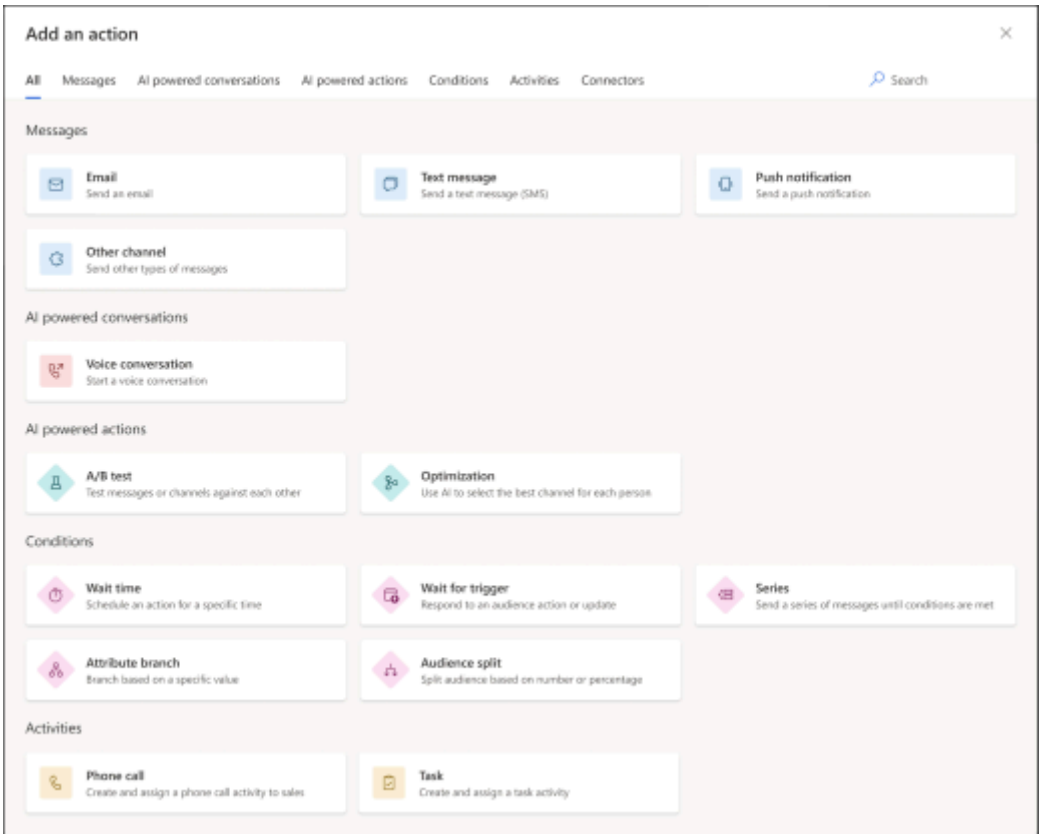
To meet the rising expectations of customers, brands constantly look for new ways to connect so they can stand out among the sea of messages. By integrating Customer Insights - Journeys with Contact Center, you can go beyond traditional marketing tactics by leveraging Copilot Studio agents to deliver meaningful, hyper-personalized experiences that boost customer satisfaction and engagement.

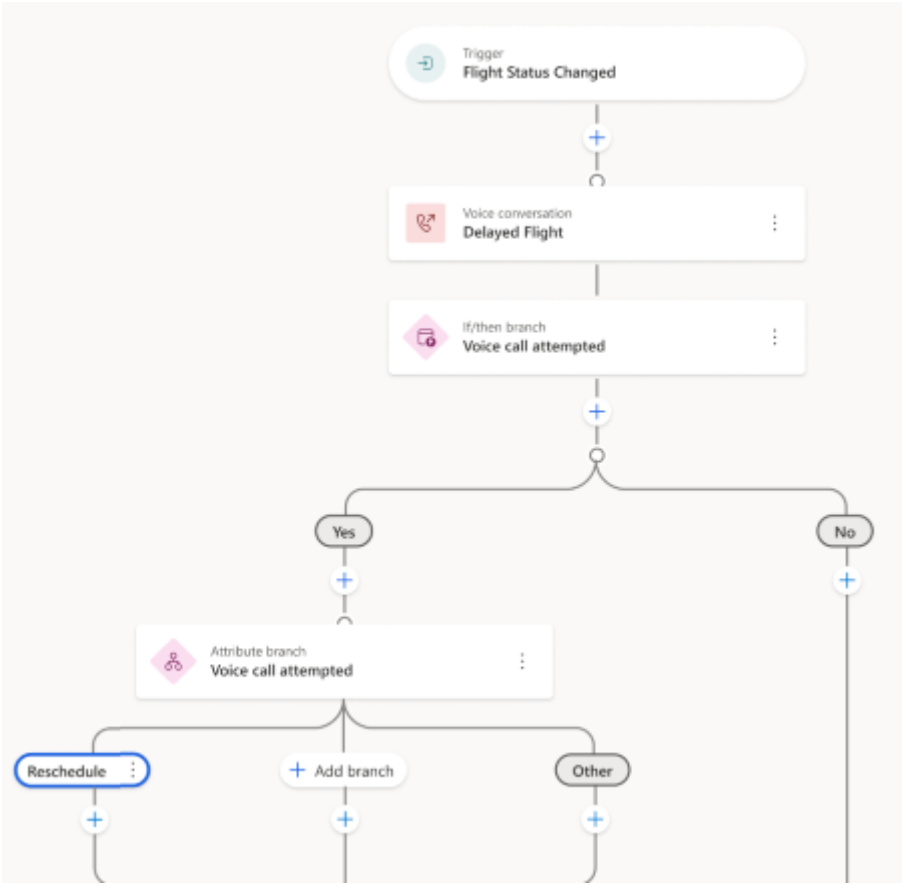
Rather than overwhelming your customers with marketing content and passively waiting for an interaction to trigger the next best step, you can now engage in real-time personalized voice conversations, offering alternative solutions based on ongoing dialog. For example, you can create a Copilot Studio agent that alerts a customer about a product recall, offering them solutions around replacements or a refund. The results of the conversation then drive the next action in the journey, whether that's sending the replacement, issuing the refund, or sending an email because there was no response.

Feature details

With the Copilot-powered voice conversations feature, you can:

- Enable seamless integration with Contact Center Proactive Engagement.
- Manage the audience configuration and compliance profiles for your voice channel.
- Choose a Conversational Voice message in a journey by selecting a Contact Center Proactive Engagement.
- Design your journey to include Conversational Voice messages and react to message outcomes.
- View detailed engagement metrics, such as the number of attempts, outcomes, and specific results for each call interaction in the out-of-the-box journey reporting.
- Access all voice and engagement interaction data in storage and build custom reports using Microsoft Fabric integration.





Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Conversational journeys overview (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Last updated on 11/18/2025

Moments that matter

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Understand your customers' expectations, unlock new scenarios, and identify the most effective channels and touchpoints to trigger interactions that successfully engage customers in the moments that matter.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Automate scalable journey creation with the journey API

10/16/2025

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Sep 12, 2025	-	✔ Oct 10, 2025

Business value

Large-scale organizations often rely on automation to standardize processes and minimize manual, repetitive tasks for their users. When operating globally or with limited headcount, manually creating assets and journeys to address the different variations can be cumbersome, introduce inefficiencies, and ultimately impact business operations.

With the new journey API, you can now automate journey creation by using templates, existing segments, and messages. For example, a team managing global events can programmatically generate hundreds of localized journey variants, each tailored by language, time zone, and audience segment, without manually configuring each one.

This capability enables rapid and repeatable journey creation at scale. It allows teams to confidently deliver consistent customer experiences and reduce time-to-market with timely and relevant communications to customers.

Feature details

The real-time journeys API gives you the flexibility to automate the journey creation process. Systematically generate a series of journeys and workflows by using existing segments and messages. For example:

- Generate variations of a journey in many different languages. Alter the time zone, segment, and message assets each journey uses to match the target language and geography.
- Create and launch a segment-based journey when a specific event occurs, such as when lottery results are posted.
- Generate a series of journeys that support event lifecycle scenarios (invitations, reminders, or confirmations) when you create an event.

Scenario: The Contoso event team is a small group of event planners who organize several major industry events globally in multiple languages. They need to ensure each event proceeds seamlessly, including all touchpoints of the related customer journeys. The real-time journeys API automatically creates these journeys when you set up a new event and replicates them across all languages in which you offer the event, so you don't need to intervene manually.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use the Create Journey From Template API (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Get insights on email engagement with heatmap analytics

09/04/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 1, 2024	-	✔ Jun 2, 2025

Business value

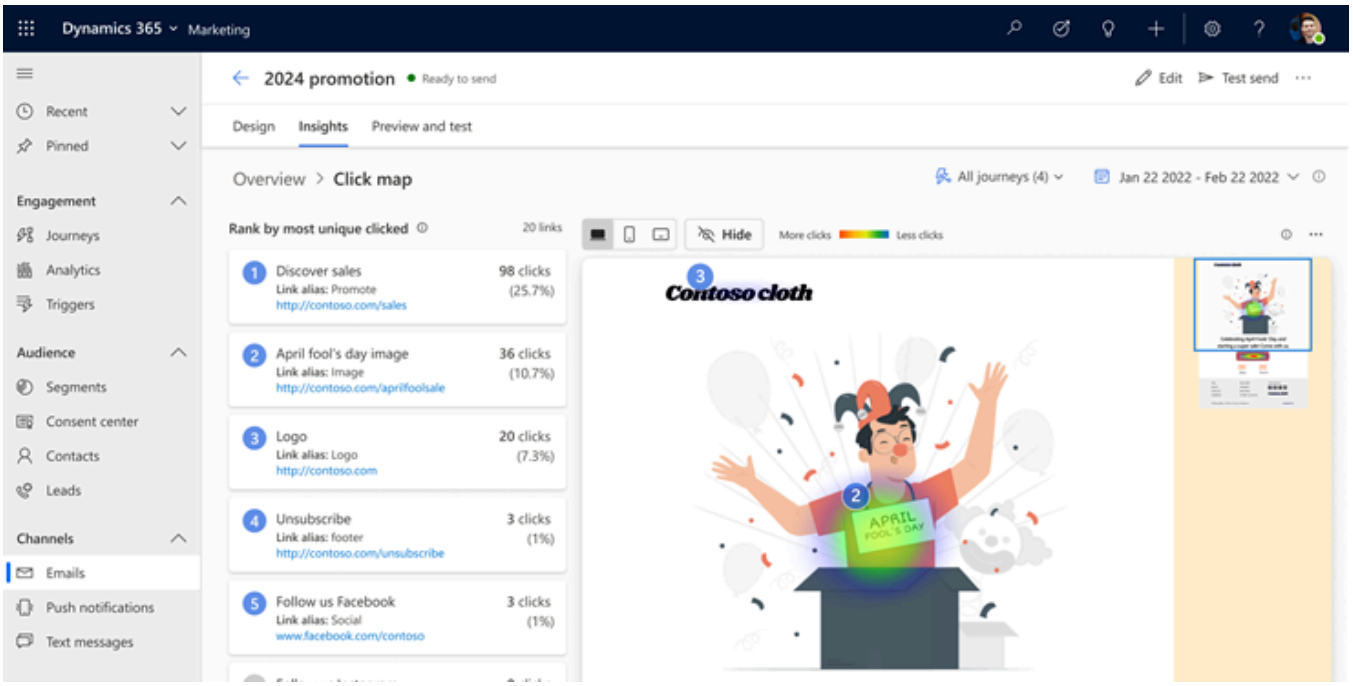
Understanding the effectiveness of email campaigns can be complex, particularly when information and links are abundant. Gaining clarity on which areas or links captivate your audience and drive them to act is crucial for refining the user experience and boosting email performance.

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.

The heatmap also supports email variations. Using these insights, you can understand which email variation engages your audience and use it to personalize and optimize your upcoming campaigns or focus your efforts on the variations that yield the best results, ultimately driving better results for your business.

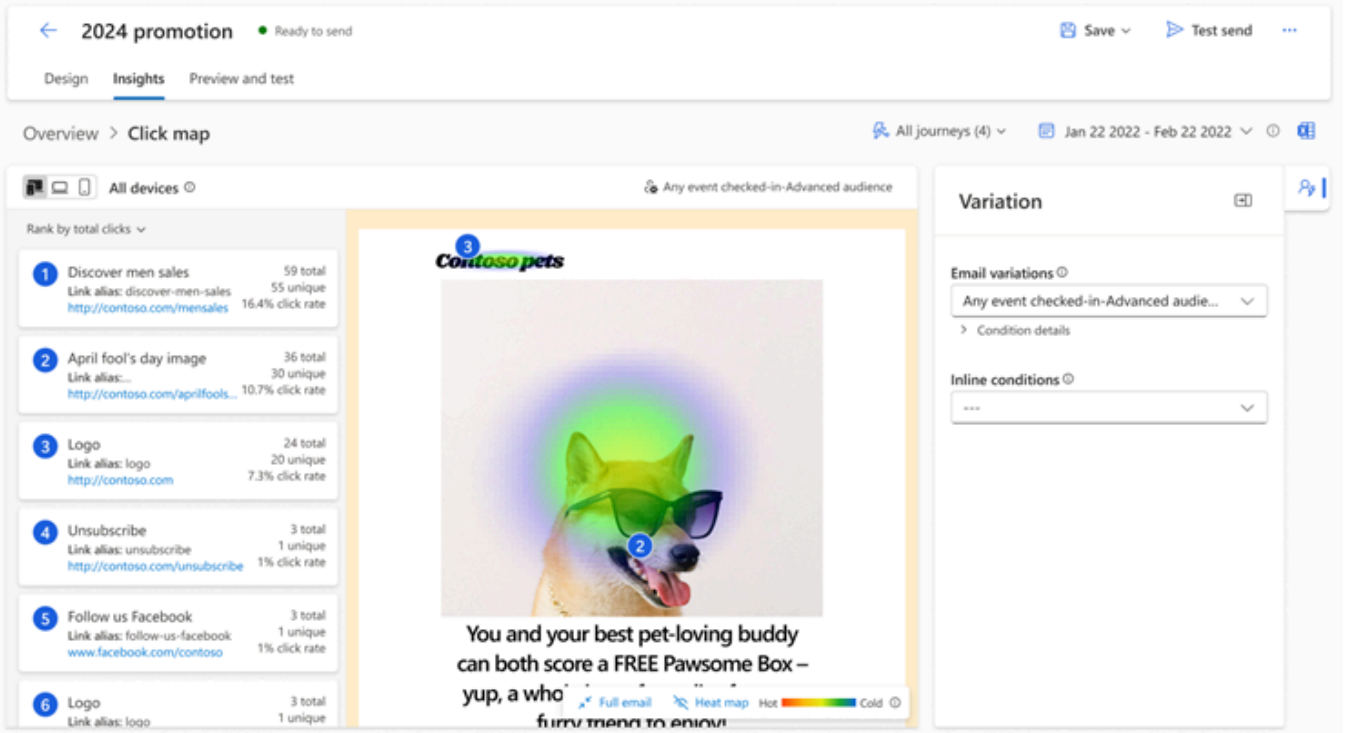
Feature details

Get a deep understanding of customer interactions with actionable insights that help you refine your email strategy. By tweaking content placement, layout, and design, you can boost user engagement.



- Quickly and visually understand engagement based on your email design.
- See which email areas and links get the most and least engagement by viewing the click-through rate (CTR), total clicks, and unique clicks.
- Filter the heatmap based on the email version, journey version, and date.
- Toggle between all devices, desktop, and other devices to visualize results for different devices. (You can view all devices only when the email sections are consistent across devices.)

You can also select the email variation you want to visualize.



Scenario: *Contoso recently launched a new email campaign to promote their latest smartwatch. They crafted three variations of the email, each tailored to different customer segments: VIPs,*

fitness enthusiasts, and casual athletes. By using the heatmap feature, they analyzed the performance of each variation. The heatmap revealed that the "Get Discount" button in the email sent to fitness enthusiasts had the highest click-through rate. Additionally, images showcasing the new watch performed better than lifestyle images. With these insights, Contoso optimized their email content and design, focusing on the elements that drove the most engagement, and offered an extra discount to the low-performing segments. This data-driven approach enabled them to create more effective campaigns and achieve better results.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Additional resources

Email insights (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Orchestrate journeys using any marketing interaction

08/14/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Jul 8, 2025

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 resonates. By engaging customers based on their interactions, you can significantly increase 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

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Create a trigger-based journey (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Pause and resume journeys to handle unplanned events

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jun 17, 2025	-	✔ Jul 31, 2025

Business value

Safeguarding your brand's reputation and customer trust is critical. In the face of unplanned or unforeseen events, such as natural disasters, you might need to pause certain campaigns that could be inappropriate or insensitive. Additionally, you might encounter business or operational reasons for stopping a campaign, such as needing to update some content or experiencing an unexpected call center outage. In these scenarios, it's best to halt customer outreach until you resolve the problem.

Instead of stopping a campaign and adjusting the audience to exclude previously reached customers, you can now pause and resume journeys, making it easy and stress-free to manage unplanned situations.

Feature details

Protect your brand's reputation and maintain customer trust by pausing outreach during unexpected events like natural disasters or periods of national mourning.

- Pause a journey manually to prevent new customers from entering.
- Resume a journey manually so new customers can enter.
- Stop the paused journey if needed.

Scenario example: A national bank is conducting a campaign across the country to contact borrowers who are behind on their mortgage payments and are at risk of foreclosure. When a natural disaster strikes and a state of emergency is declared, continuing this outreach would be seen as insensitive. Previously, the bank had to stop the journey and launch a new journey with an updated audience (to avoid contacting the same customers again) after the situation improved - a process that was both labor-intensive and prone to errors. With the new journey

pause capability, the bank can effortlessly pause the outreach and resume it once conditions allow.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Pause and resume a journey (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Personalize messages and make journey decisions based on web interactions

10/01/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Dec 17, 2024	-	✔ Apr 16, 2025

Business value

With Customer Insights - Journeys, you can 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 extra data about customers' online journeys, you get valuable insights into your customers' preferences and needs and can easily measure your campaign's effectiveness.

Feature details

Trigger and personalize customer experiences 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 by leveraging first-party data, protecting your customer privacy, and complying with data privacy regulations.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Personalize messages, make journey decisions based on web interactions (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Prevent duplicate emails to shared email addresses

10/09/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Sep 15, 2025

Business value

Effective email management is crucial for maintaining strong customer relationships and ensuring your business' 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.

Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Prevent duplicate emails to shared email addresses (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Respect quiet times, engage based on location and time zones

09/11/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ May 12, 2025	-	✔ Jul 1, 2025

Business value

As regulations regarding customer privacy become more stringent, it's crucial to contact customers at times that are most convenient to them and ensure compliance with local legal requirements.

Now in Customer Insights - Journeys, in addition to setting quiet times based on your journey's time zone, you can align quiet times with your customers' time zones and regions. This alignment ensures that customers only receive messages and calls during suitable hours. Aligning interactions with the local time allows you to adhere to local regulations and respect cultural norms and preferences. This approach fosters customer trust and enhances the effectiveness of your outreach strategies.

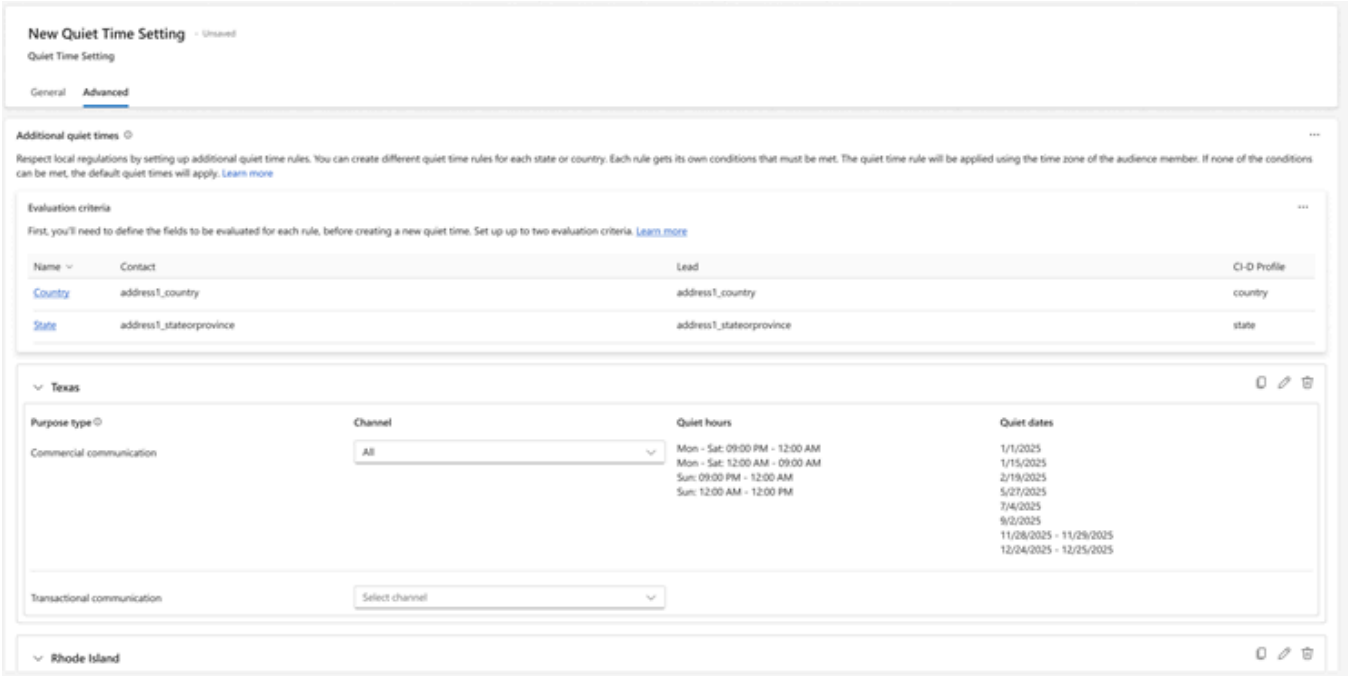
Feature details

With the enhanced quiet time options, you can:

- Ensure adherence to regulations by establishing quiet time rules for different regions or based on your business operation.
- Set the times, days, and dates when you don't contact customers.
- Define the customer's region and time zone.
- Customize quiet time settings for a particular journey. When the journey is activated, interactions are either initiated or queued in accordance with the preset rules and the identified customer's time zone or location.

Scenario example: *Consider the case of a global e-commerce company with customers who are spread across multiple countries. To respect their customers' time and adhere to regional regulations, the company sets quiet times based on their customers' locations. They set up*

different quiet time rules for customers in the United States, Europe, and Asia, ensuring that they comply with each region's specific communication laws. When you activate the journey, the system triggers or queues all promotional interactions based on these preestablished rules and the customer's time zone. For example, a customer in New York receives promotional information during their daytime, increasing the chances of engagement.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Use time zone for quiet times (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Streamline form filling and event registration with form prefill

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 13, 2024	-	✔ Apr 15, 2025

Business value

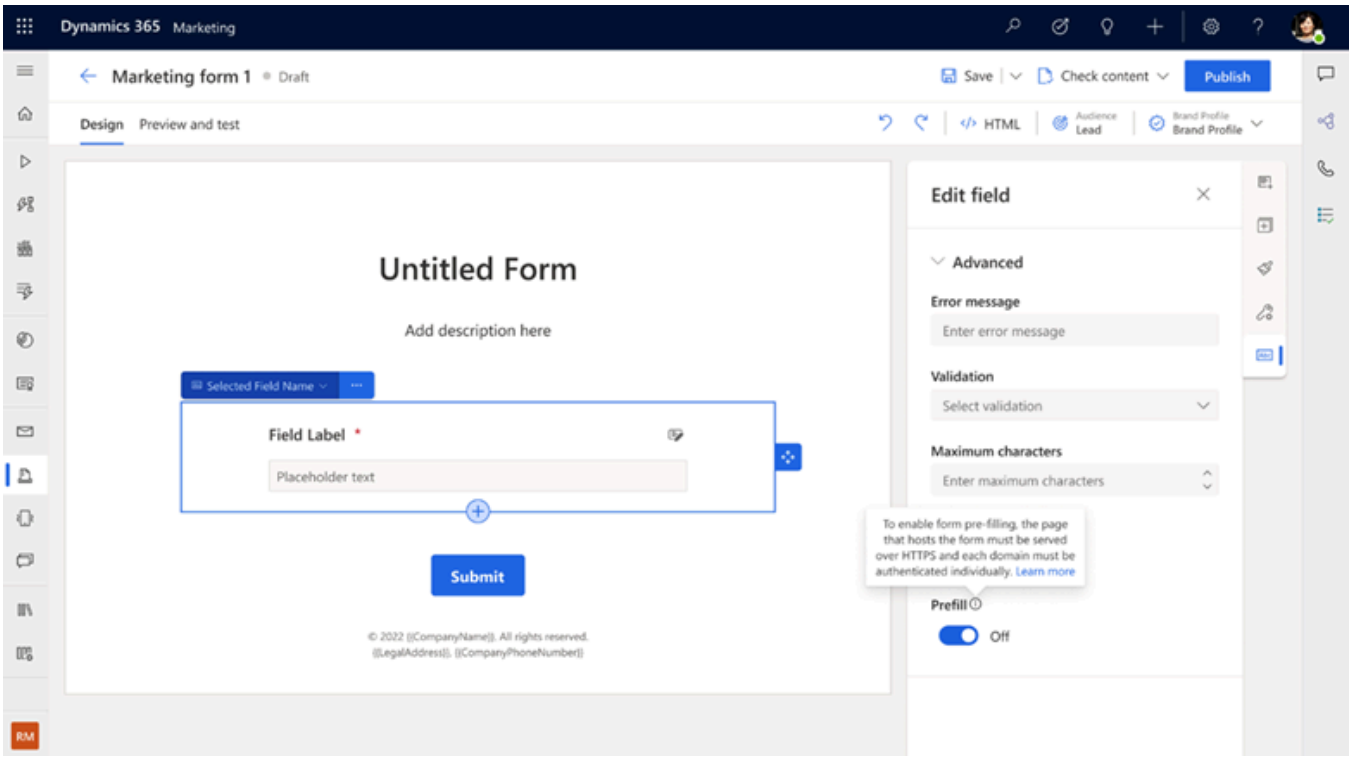
The repetitive task of filling out forms can discourage people from registering for events. Nobody likes to repeat information that they already provided. Imagine loyal customers who attend multiple conferences each year having to input their contact information and preferences every time.

Form prefill in Dynamics 365 Customer Insights eliminates the need to repeatedly request basic details from your customers, reducing redundancy and saving time. This feature not only speeds up the registration process but also allows you to collect customer data more strategically over time.

Feature details

Your customers can now register for upcoming events with minimal effort by simply confirming or updating their prepopulated data. This ease of use enhances the overall customer experience and boosts your conversion rates.

- To have the form automatically filled, your customer needs to open the form from the link sent in the Customer Insights-generated invite email.
- This feature is available for marketing and event registration forms.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Prefill values for forms and event registration (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Tailor follow-up strategies by reacting to multiple customer actions at once

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ May 9, 2025	-	✔ Jul 8, 2025

Business value

By allowing marketers to react to multiple customer actions at the same time, this feature enables faster, more intelligent decision-making within journeys. It reduces the time and effort needed to manage complex branching logic. Marketers can now bring together multiple interaction outcomes into a single decision point. This approach saves operational overhead while increasing precision in how each customer is engaged. It leads to better-targeted messaging, higher engagement rates, and stronger conversion outcomes. Additionally, simplifying journey configuration reduces setup time and ongoing maintenance. With this feature, teams can launch faster and scale efficiently across channels.

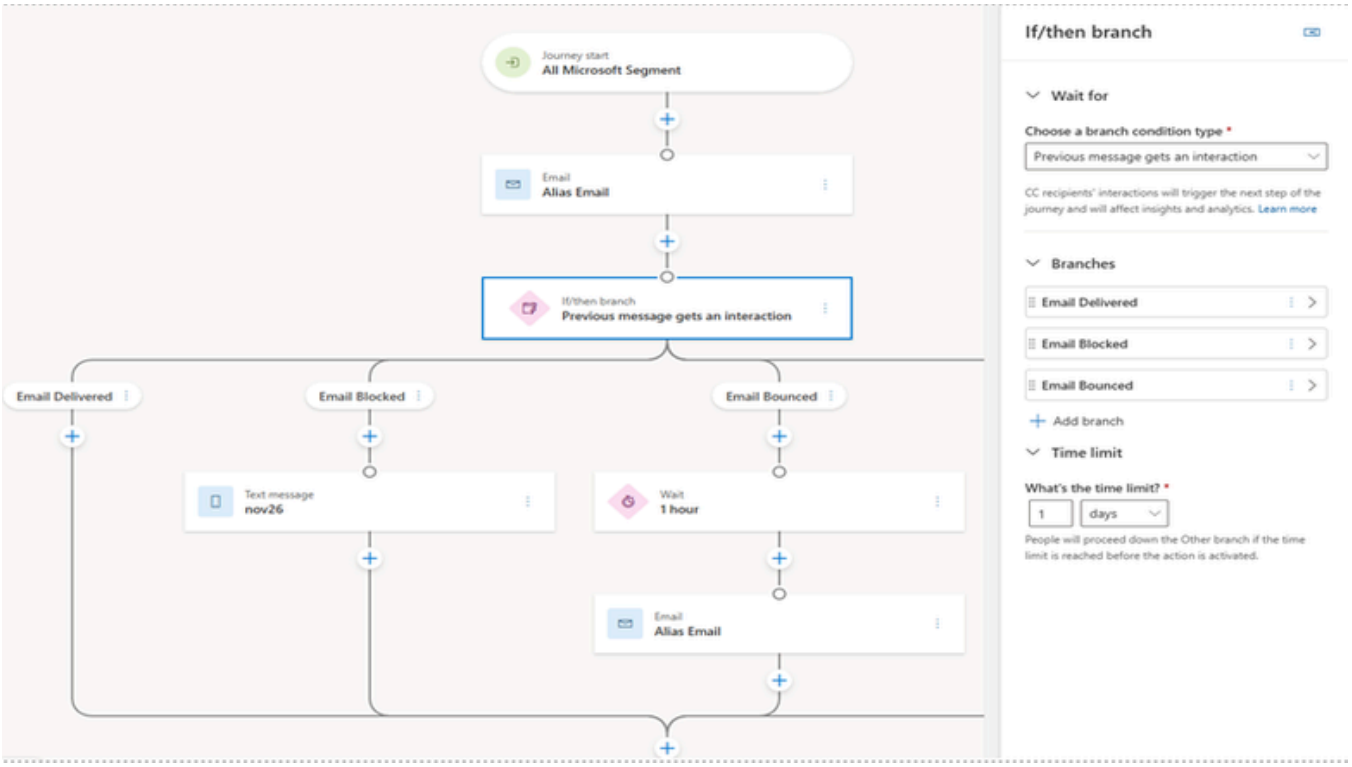
Feature details

This feature enables journey designers to branch on multiple marketing interactions at the same time. After sending a marketing email, marketers can use the **Wait for trigger** tile and select **Previous message gets an interaction**. Then, they can set up multiple interaction triggers—such as Email Opened, Email Blocked, and Email Bounced—within a single branch to define distinct paths in the journey. This feature offers a unified and simplified way to orchestrate diverse customer experiences based on how individuals engage with marketing messages.

All users with access to real-time marketing journeys can use this feature. It requires no extra setup or changes to licensing.

Scenario example: Consider the case of a marketer at Contoso Coffee running an email campaign. If a customer opens the email and clicks a link, they automatically receive a follow-up email offering a personalized discount. However, if the customer only opens the email without clicking the link, they go down a different path in the journey that sends a reminder

email showcasing additional product details. This approach ensures each customer receives communication that reflects their level of engagement, improving both relevance and conversion likelihood.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Tailor follow-up strategies by leveraging multiple customer actions at once (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Understand customer inflows and exits at every journey step

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Dec 20, 2024	-	✔ May 31, 2025

Business value

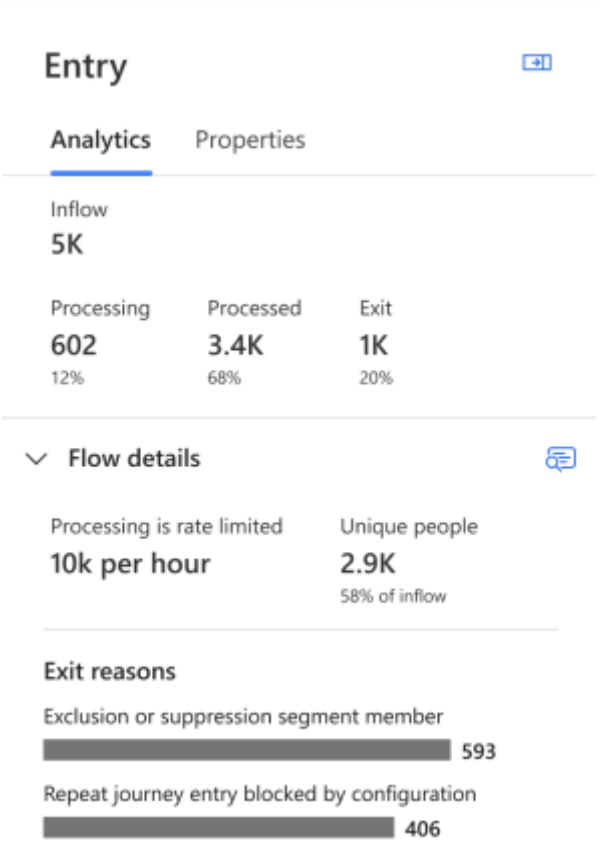
It's critical to understand exactly what happened to each customer who entered and exited your real-time journeys. With improved journey analytics, you gain confidence in the processing of every step in your journey through improved metrics and an increased ability to export data.

For example, if your journey uses exit or exclusion segments, you can see and understand why fewer customers started your journey than were in the entry segment. You can also 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 about what happened in every step of your journey. New exit analytics show why customers might not have started your journey due to exclusion segments or other unmet criteria. They also show where in the journey customers exited early due to exit segments or other exit conditions.

- Get lists of customers who entered and exited each step of the journey. Filter those lists based on how the journey step processes customers.
- 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 differs from 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 who triggered to start your journey didn't reach the first step in your journey.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Journey operational analytics (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Turbocharge your pipeline

08/21/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Build a stronger, more efficient pipeline and foster seamless collaboration between your sales and marketing teams to eliminate silos, align efforts, and turn high-quality opportunities into consistent growth and measurable business outcomes.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Simplify forms by filtering choices based on previous answers

10/02/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Sep 12, 2025

Business value

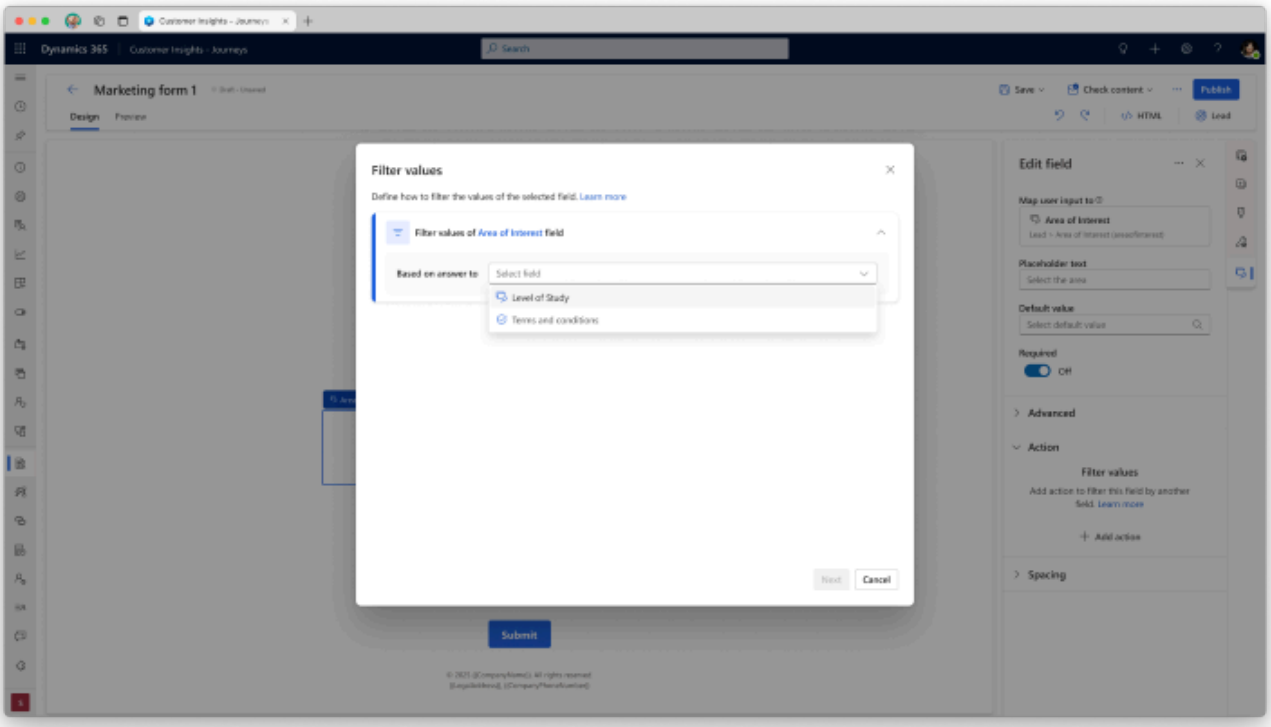
Guiding your customers through a smooth form submission experience is crucial to avoid frustration and abandonment before completion. New form field filtering dynamically adjusts options for one field based on the selection you make in another field, so users see only relevant choices. This feature makes forms simpler to understand and quicker to complete.

For example, when filling out a form requesting a quote, it's crucial to get the right region, country, and city to ensure the lead is routed to the correct seller. Previously, customers had to scroll through a long list of cities, many of which were irrelevant. Now, they only see a list of cities automatically filtered based on the selected country. The result is a faster, more intuitive process that leads to reduced errors and higher quality submissions.

Feature details

Field filtering dynamically filters values of subsequent lookup field values based on the value you select in another field. This feature allows you to set up a relationship between two fields in the Customer Insights - Journeys form editor. After you set up the relationship, a selection in one field filters the other field.

Scenario: Imagine you're managing a form to collect interest about upcoming training classes. Previously, respondents had to sift through a long selection of areas of interest, leading to frustration and incomplete submissions. With field filtering, once a respondent selects their level of study, the list of areas of interest automatically filters to show only the relevant options.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Filter a lookup field value based on an answer in a previous lookup field (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Unify sales and marketing

08/14/2025

> **Important**
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Bring your sales and marketing teams closer so they stop working in silos, eliminate execution gaps, and remove redundancies by collaborating to effectively drive more revenue together.

Community-authored content. This article is written and maintained by experts in our Microsoft Learn community.

Collect extra customer info without updating your data model

09/18/2025

Expand table

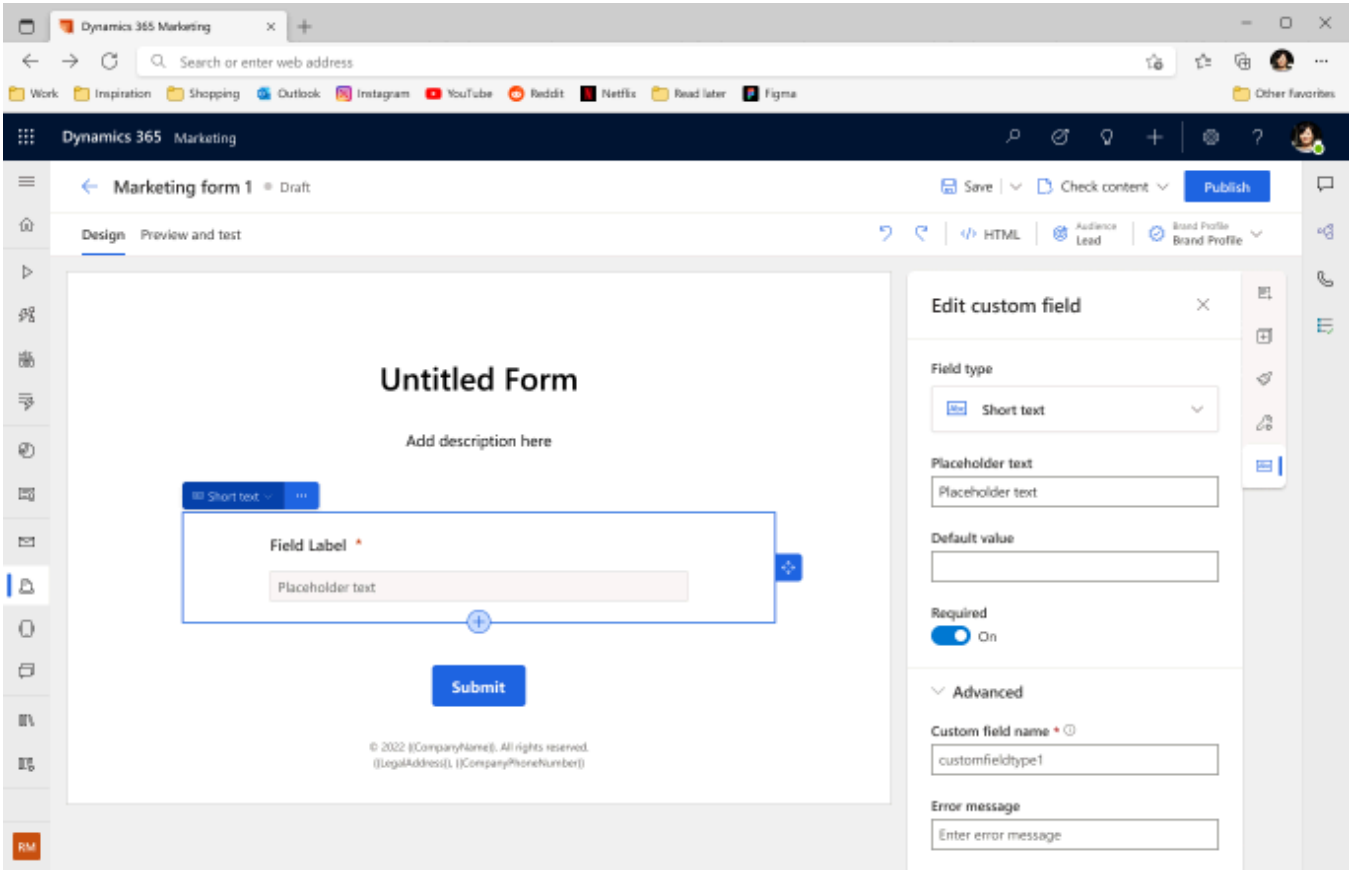
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Mar 21, 2025	-	✔ Sep 13, 2025

Business value

You can easily gather extra information about your customers by creating any kind of question directly in the marketing form editor without needing to create new custom attributes for your lead or contact entity. For example, you can create fields to ask, “How did you hear about our products?” or create contest questions to increase your customer satisfaction and retention.

Feature details

- Use custom fields to capture extra or temporary information in marketing forms, such as questions you can use to personalize email communication or for more detailed orchestration.
- To use custom form fields, drag and drop them from the toolbox to the form canvas, then edit the label and properties.
- The form field answer is stored only as part of the form submission. You can access the value anytime without adding unnecessary data to your records.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Additional resources

Create unmapped fields for marketing forms (docs)

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Collect extra event attendee information without updating your data model

09/11/2025

Expand table

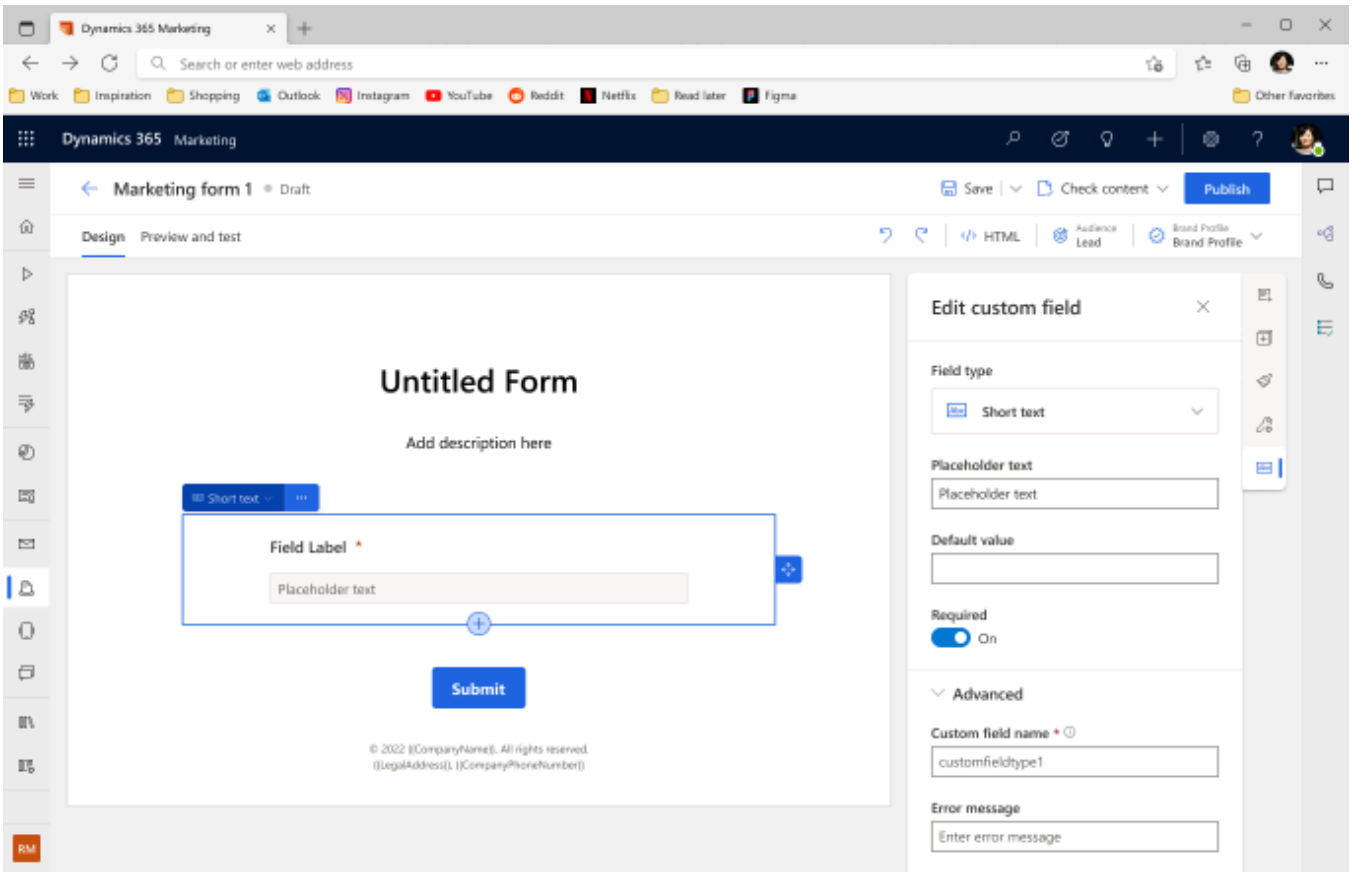
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ May 19, 2025	-	✔ Sep 8, 2025

Business value

You can easily gather extra information about your event attendees by creating any question directly in the form editor without creating new custom attributes for your contact entity. For example, you can create fields to ask, "What is your meal preference?" or "How did you learn about this event?" You can also create contest questions to increase customer engagement and gather valuable insights that help you personalize the attendee experience.

Feature details

- Use custom fields to capture extra or temporary event information, such as meal preferences or answers to contest questions.
- To use custom form fields, drag and drop them from the toolbox to the form canvas. Then, edit the label and properties.
- The form field answer is stored only as part of the form submission. You can access the value anytime without polluting your data.
- To view the answers, use the new enhanced registration table. It combines registration data with answers to custom unmapped fields.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Create unmapped fields for registration forms (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Generate leads that link to an existing contact

09/25/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Dec 13, 2024	-	✔ Sep 12, 2025

Business value

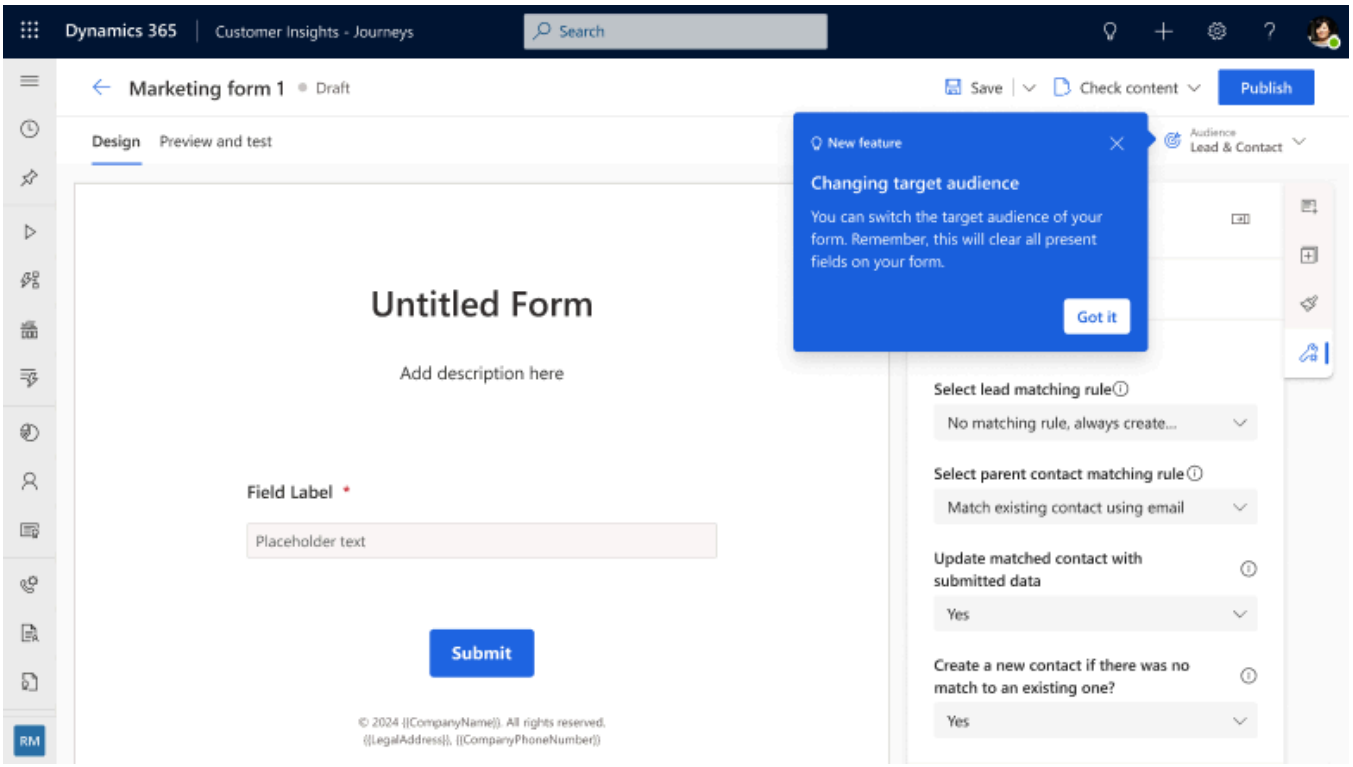
Your business has unique ways of organizing customer data and classifying potential leads. Now, with real-time journey forms, you can manage your contacts and leads more effectively according to your company's established processes. For example, you can recognize existing customers who fill out a lead 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 to update existing contact or lead details and define advanced matching rules to prevent duplicate records. Additionally, you can set defaults so everything is already configured each time you create a new form. With these capabilities, you can 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 the quality of the existing data.
- Preset the default target audience configuration for your forms.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Additional resources

Parent contact for lead (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Maximize event capacity with waitlist registrations

08/07/2025

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Mar 27, 2025	-	✔ Jul 21, 2025

Business value

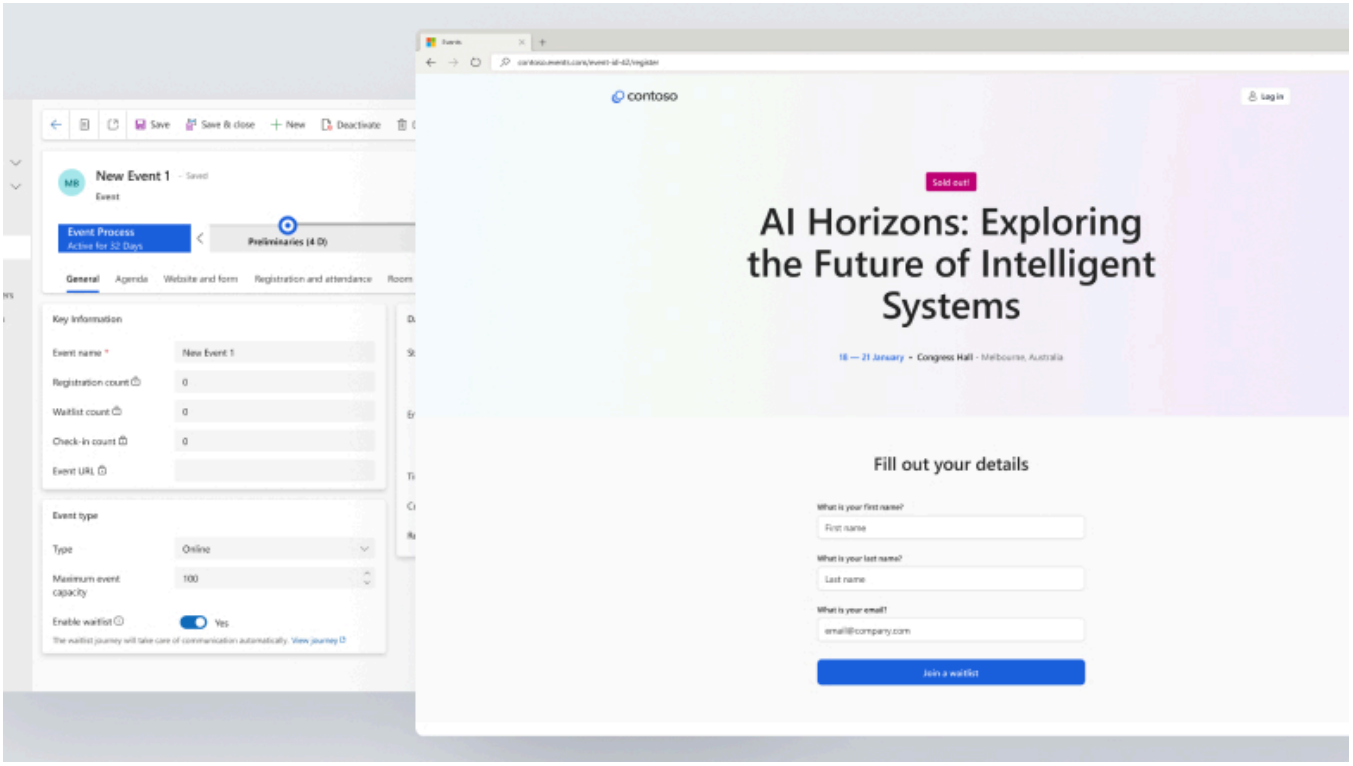
Ensuring marketing events are filled to capacity is crucial for success and return on investment. To encourage a high turnout for marketing events, enable waitlist registrations. This feature ensures spots are filled when registered attendees cancel.

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 either automatically registers the individual next on the waitlist or lets you manually select the replacement from the pool of waitlist registrations. You can save time and easily manage waitlist-related communication with a new set of out-of-the-box triggers, allowing you to send personalized messaging to waitlisted attendees.

Feature details

Event capacity and waitlist registrations include the following features:

- Enable a waitlist for your events 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 relevant event and waitlist registration communication effortlessly with a new set of out-of-the-box triggers.
- Add an out-of-the-box cancellation button to your emails to let uninterested attendees release their spot.



Geographic areas

Visit the Explore Feature Geography report for Microsoft Azure areas where this feature is planned or available.

Language availability

Visit the Explore Feature Language report for information on this feature's availability.

Additional resources

Set up and manage an event waitlist (docs)

ⓘ **Community-authored content.** This article is written and maintained by experts in our Microsoft Learn community.

Dynamics 365 Implementation Portal in 2025 release wave 1

07/15/2025

> **Important**
>
> Some of the functionality described on this release plan has not yet been released. Delivery time may change and projected functionality may not be released (see Microsoft Policy).

> **Note**
>
> Checkout the what's new in the portal. Share your feedback and help us improve.

Overview

The 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, best practices, and guidance for planning, deploying, and adopting Microsoft Dynamics workloads and 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 user experience and design

- New designs aligned with the Admin Center and updated user interface and responsiveness
- Transition to Power Pages Framework

Project functionalities

- Expanded capabilities to improve project analysis and management efficiency
- Integrated AI in Project context for summarization and next best actions
- Support for other Microsoft FastTrack program engagements

Copilots and agents

- The Copilot in the Dynamics 365 Implementation Portal will be expanded to cover more Success by Design scenarios and Telemetry insights, helping users during their implementation and live deployments
- Copilot agents will be leveraged to improve project onboarding, nomination, and project review processes
- Extended knowledge base as source for Copilot, getting users more relevant and contextual information
- Enhanced scenarios for partners and ISVs

Telemetry insights

- General availability of the feature
- Provide enhanced team collaboration functionality for telemetry results
- Extended product coverage, larger dataset and results export capabilities
- Enhanced integration with Power Advisor

Power Platform admin center integration

- Link environments to projects

See also

Dynamics 365 Implementation Portal documentation
Microsoft Dynamics 365 Implementation Guide
Success By Design for Dynamics 365

Deprecations in Dynamics 365 apps

07/15/2025

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

Microsoft Power Platform: 2025 release wave 1 plan

The Microsoft Power Platform release plan for the 2025 release wave 1 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 2025 release wave 1 covers new features for Power Platform releasing from **April 2025** through **September 2025**.

Download the 2025 release wave 1 PDF for Power Platform or select the option at the bottom of the table of contents.

The Dynamics 365 features coming in the 2025 release wave 1 have been summarized in a separate release plan and a downloadable PDF.

The Role-based Copilot offering features coming in the 2025 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

2025 release wave 1 overview

Microsoft Power Platform enables users and organizations to analyze, act on, and automate data to digitally transform their businesses. Microsoft Power Platform today is comprised of: Power BI, Power Apps, Power Pages, Power Automate, Microsoft Copilot Studio, and AI Builder. The 2025 release wave 1 contains hundreds of new features across Power Platform applications, including 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 Apps

Power Apps changes how software solutions are built with the plan designer where makers can provide a business problem, and a set of agents helps them build a Power Platform application. Power Apps are intelligent, powered by a set of extensible agents that support most common tasks like exploring, entering, and summarizing data. Makers can automate common tasks by creating agents from existing apps and deploying them to take care of work autonomously. With integrated ability for users to understand and monitor agent actions, and easy ability to resolve issues when agents hit roadblocks, Power Apps is accelerating the shift to intelligent AI-powered solutions at scale.

Power Pages

Power Pages, part of Microsoft Power Platform, enables businesses to build secure, data-driven portals effortlessly. Recent updates include AI-powered features like Web Agents for multi-platform engagement (email, Teams, WhatsApp), AI-assisted form filling for improved productivity, dynamic list visualizations for better insights, and enhanced governance policies to strengthen security and streamline site deployments.

Power Automate

Power Automate is transforming how enterprises automate complex business processes; through new human in loop experiences such as advanced approvals, AI native capabilities such as generative actions and intelligent document processing. To manage complex automations at scale, use the comprehensive suite of governance, observability and security controls coming to Automation Center and Power Platform Admin Center.

Microsoft Copilot Studio

Microsoft Copilot Studio brings new autonomous agent capabilities, extension of Microsoft 365 Copilot with Custom Agents, new capabilities for the Copilot Studio embedded builder in Microsoft Copilot including support for actions, new enterprise knowledge sources, and the ability to upgrade a declarative agent to a Copilot Studio custom agent to access additional capabilities and new conversational channels for custom agents including WhatsApp and SharePoint.

AI Builder

AI Builder's latest release in Copilot Studio brings the power of advanced automation to routine processes like email handling, document processing, and image management, helping businesses run smarter and more efficiently. AI Builder has multi-modal content processing capability, which allows businesses to handle various data types including text, document, and images within a single natural language instruction. Enhanced Prompt builder tools empower makers to customize AI actions with diverse inputs, expanded data sources from Dataverse, and support for generating multiple content types, including documents.

Microsoft Dataverse

Microsoft Dataverse continues to extend maker experiences by enriching app and agent building capabilities across the platform. Dataverse ensures seamless connectivity to an expanding set of external data sources and converts enterprise data into knowledge to customize and extend agents built in Microsoft Copilot Studio and agent builder in Microsoft

365 Copilot. These investments are aimed at grounding AI-powered experiences with enterprise knowledge across Power Platform.

Governance and administration

Governance and administration continues to provide enhanced tools and insights for Admins to get the most from the Power Platform. In this wave we are focusing on security, easing adoption and governance of Copilot and Agents, and helping enterprises boost the adoption of Power Platform at enterprise scale with a modernized admin center experience and a new admin connector for automating admin tasks.

Key dates for the 2025 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 (go to Microsoft policy).

Here are the key dates for the 2025 release wave 1.

Expand table

Milestone	Date	Description
Release plans available	January 23, 2025	Learn about the new capabilities coming in the 2025 release wave 1 (April 2025 - September 2025) across Microsoft Power Platform, Dynamics 365, Role-based Copilot offerings, and Microsoft Cloud for Industry.
Early access available	February 3, 2025	Test and validate new features and capabilities that will be part of 2025 release wave 1, coming in April, before they are enabled automatically for your users. You can view the Microsoft Power Platform 2025 release wave 1 early access features now.
Release plans available in additional languages	February 7, 2025	The Microsoft Power Platform, Dynamics 365, Role-based Copilot offerings, 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	April 1, 2025	Production deployment for the 2025 release wave 1 begins. Regional deployments will start on April 1, 2025.

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 2025 release wave 1.

Let us know your thoughts. Share your feedback in the Microsoft Power Platform community forum. We'll use your feedback to make improvements.

Last updated on 12/04/2025

Role-based Copilot offerings: 2025 release wave 1 plan

The role-based Copilot offerings release plan for 2025 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 2025 release wave 1 covers new features for role-based Copilot offerings releasing from **April 2025** through **September 2025**.

Download the 2025 release wave 1 PDF for role-based Copilot offerings or select the option at the bottom of the table of contents.

The Dynamics 365 features coming in 2025 release wave 1 have been summarized in a separate release plan and a downloadable PDF.

The Microsoft Power Platform features coming in 2025 release wave 1 have been summarized in a separate release plan and a downloadable PDF.

2025 release wave 1 overview

The 2025 release wave 1 for role-based Copilot offerings brings new innovations that provide you with significant capabilities to transform your business. The release contains new features across Microsoft 365 Copilot for Sales, Microsoft 365 Copilot for Service, and Finance agents in Microsoft 365.

Microsoft 365 Copilot for Sales continues to drive innovation with advanced generative AI capabilities designed specifically for sales-focused roles. In this release, we're enhancing our assistive features by surfacing further CRM insights and recommendations to the sales team across the Microsoft 365 product suite. We're also streamlining SalesChat experiences and driving new agent workflows to put organizations in control of automation experiences and notifications.

Microsoft 365 Copilot for Service continues to deliver and enhance cutting-edge generative AI capabilities for agents within their flow of work. In this release, we will introduce connectivity with any CRM system and inline email summary and drafting.

Finance agents in Microsoft 365 enhances efficiency for finance professionals by providing insights that aid strategic decision-making and reduce manual tasks. The 2025 release wave 1 focuses on intelligent automation of variance analysis in Excel, access to external data sources, extending functionalities through Copilot Studio, supporting collections calls in Teams, and leveraging generative AI for summarizing macroeconomic conditions.

Key dates for the 2025 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 2025 release wave 1.

Expand table

Milestone	Date	Description
Release plans available	January 23, 2025	Learn about the new capabilities coming in 2025 release wave 1 (April 2025 - September 2025) across role-based Copilot offerings, Dynamics 365, Microsoft Power Platform, and Microsoft Cloud for Industry.
Release plans available in additional languages	February 7, 2025	The role-based Copilot offerings, Dynamics 365, Microsoft Power Platform, 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	April 1, 2025	Production deployment for 2025 release wave 1 begins. Regional deployments will start on April 1, 2025.

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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 2025 release wave 1 plans.

Last updated on 12/11/2025

Dynamics 365 2025 release wave 2 plan

The Dynamics 365 and Microsoft release plan for the 2025 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 2025 release wave 2 covers new features for Dynamics 365 releasing from **October 2025** through **March 2026**.

Download the 2025 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 2025 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

The role-based Copilot offerings coming in 2025 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

2025 release wave 2 overview

The 2025 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, finance and operations cross-app capabilities, Supply Chain Management, Project Operations, Human Resources, Commerce, Business Central, Customer Insights - Data, and Customer Insights - Journeys.

Sales

Dynamics 365 Sales brings the power of AI to help sellers beat their targets and automate busywork in 2025 release wave 2. Copilot delivers actionable insights and autonomous AI agents that work 24x7 to research and engage leads, drive purchase intent, and proactively bring key insights and emergent deal risks—helping sellers close more deals faster. A reimagined interface reorients sellers from data to insights.

Service

Dynamics 365 Customer Service will continue to enhance agentic and Copilot capabilities for Case and Knowledge management, as well as AI-driven routing.

Dynamics 365 Contact Center will continue to focus on enhancing agentic and Copilot capabilities to automate service journeys across digital and voice channels along with

introduction of new omnichannel and supervisor capabilities for 2025 release wave 2.

Dynamics 365 Field Service will deliver AI-powered agents, enhanced scheduling tools, mobile usability improvements, and deeper Microsoft 365 integration in the upcoming release wave. With innovations across inspections, vendor coordination, and Project Operations connectivity, Field Service empowers organizations to deliver smarter, faster, and more seamless service at scale.

Enterprise resource planning

Microsoft Sustainability Manager delivers enhanced capabilities including emissions data allocation, time-based factor mappings, expanded metric modeling, product carbon footprinting, extended data trail, reporting period locking, GRI template updates, and grid emissions tracking—empowering organizations with deeper insights and more accurate, flexible sustainability reporting.

Dynamics 365 Finance is bringing global-scale finance and agentic operations to our customers, enhancing our existing agents, that lead to faster financial close, provide additional automation and optimization across large-scale operations, and continue to enhance our business performance analytics and planning solutions.

Finance and operations cross-app capabilities will enhance Dynamics 365 applications by delivering consistent, scalable platform improvements. Recent updates focus on enabling asynchronous dual-write operations, natural language ERP queries, and intelligent agent development using Model Context Protocol (MCP). These innovations aim to boost productivity, streamline integration, and support data-driven decision-making across business processes.

Dynamics 365 Supply Chain Management will bring enhanced demand planning with event and promotion forecasting, improved quality management for sample handling, and a supplier communication agent for automated vendor interactions in 2025 release wave 2. New supplier engagement tools and warehouse app upgrades will also be introduced to further streamline operations and boost efficiency.

Dynamics 365 Project Operations will continue to deliver powerful enhancements across the project lifecycle. These include improved mobile and browser experiences for time and expense, better project planning with enterprise custom fields, streamlined billing and invoicing workflows, and expanded support for stocked items, investment projects, and migrations to the modern architecture.

Dynamics 365 Commerce advances in-store experience by providing a mobile-first point-of-sale that provides business continuity even during a business outage. The improvements to the Adyen payment connector allow modern payments like Pay by Link across channels, offering

more purchasing options for omnichannel customers. Additionally, omnichannel unified pricing enables retailers to establish more intricate pricing structures, helping them remain competitive.

SMB

Dynamics 365 Business Central introduces intelligent AI agents to enhance efficiency and automation in 2025 release wave 2. These agents seamlessly integrate to execute complex tasks, generate reports, automate processes, and optimize order creation using natural language processing. Additionally, this release focuses on quality management, subcontracting, sustainability, and e-document capabilities.

Customer Insights

Dynamics 365 Customer Insights - Data gives copilots and agents real-time, unified customer profiles, enabling teams to act on insights within their workflow. With enriched data, seamless platform integration, and faster processing, businesses can deliver timely, personalized experiences that boost engagement and conversions.

Dynamics 365 Customer Insights - Journeys empowers businesses to craft personalized, AI-driven customer experiences across all touchpoints. With Copilot, agents, and enhanced orchestration tools, teams can engage the right audiences at scale, streamline lead generation, and accelerate growth.

Key dates for the 2025 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 2025 release wave 2.

Expand table

Milestone	Date	Description
Release plans available	July 16, 2025	Learn about the new capabilities coming in the 2025 release wave 2 (October 2025 - March 2026) across Dynamics 365, Microsoft Power Platform, and role-based Copilot offerings.
Early access available	August 4, 2025	Test and validate new features and capabilities that will be part of 2025 release wave 2, coming in October, before they are enabled automatically for your users. You can view the Dynamics 365 **2025 release wave 2 early access features** now.

Milestone	Date	Description
Release plans available in additional languages	July 30, 2025	The Dynamics 365, Microsoft Power Platform, and role-based Copilot offerings 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, 2025	Production deployment for the 2025 release wave 2 begins. Regional deployments will start on October 1, 2025.

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

Last updated on 12/04/2025