Dynamics 365: 2023 release wave 2 plan

Article • 03/26/2024

The Dynamics 365 release plan for the 2023 release wave 2 announces the latest updates to customers as features are prepared for release. You can browse the release plan here online (updated throughout the month), view it in the release planner, or download the document as a PDF file, which is updated with every publish. The plan for 2023 release wave 2 covers new features for Dynamics 365 releasing from **October 2023** through **March 2024**.

Download the 2023 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 2023 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

The Microsoft Cloud for Industry features coming in the 2023 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

2023 release wave 2 overview

The 2023 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 Marketing, Sales, Customer Service, Field Service, Finance, Supply Chain Management, Project Operations, finance and operations cross-app capabilities, Human Resources, Commerce, Business Central, Guides, and Customer Insights as well as Microsoft Sales Copilot and Microsoft supply chain platform and its supporting products.

Marketing

Dynamics 365 Marketing will bring enhancements to Copilot features empowering marketers to quickly create new experiences and will bring unprecedented levels of personalization to email content, images, and layouts. Additionally, B2B dashboards and directly assigning leads to the right rep will align marketers and sellers, enabling them to act as a unified team across the buying journey.

Sales

Dynamics 365 Sales will focus on enabling sales organizations to prioritize and manage digital sales processes through enhanced sequence capabilities. We will allow users to assign and monitor lead assignment status with enhanced lead assignment capabilities by providing recommendations, summarizing data, retrieving information, and performing actions in context and within the flow of work.

Microsoft Sales Copilot reimagines how sellers work by continuing to deliver and enhance generative AI capabilities like email thread summarization, recommended CRM updates, sales email composition, CRM entity summarization, sales meeting summarization, and real-time sales tips. Additionally, further enhancements to collaboration spaces will extend beyond the creation of structured teams/channels and deliver sales copilot experiences that support sales teams during deal progression and shorten the time to close for sellers.

Service

Dynamics 365 Customer Service will continue to empower agents to work more efficiently through Copilot capabilities, Join me on Teams, visual enhancements to the agent workspace, ability to see live chats and voice calls in Inbox, and personalizing the size of the conversational control. Additionally, we are making enhancements to the voice channel, improvements to call dialer, and routing calls to agents with the longest idle time.

Dynamics 365 Field Service updates will include new capabilities for frontline workers, service managers, and dispatchers. We are delivering several top requests such as converting quotes to work orders, enhancing inspections, and evolving our resource scheduling capabilities.

Finance and Supply Chain

Dynamics 365 Finance is focused on enhancing organizations' visibility into their data, continued enhancements for AP and bank statement automation, and expanding out-of-the-box country coverage in LATAM. Additionally, the team will deliver further automation of complex tax scenarios and e-invoicing requirements for more countries and provide organizations the ability for business model expansion and agility.

Supply Chain Management continues to improve and optimize business processes to deliver the agility and resilience needed for businesses to thrive in an increasingly complex business environment. The sales and procurement processes will be further enhanced, manufacturers will enjoy greater flexibility, and warehouse processes related to counting, customer returns, and product receipts will be improved.

Dynamics 365 Project Operations is investing in enhancements to services procurement scenarios and project contracting and new functionalities and scenarios in pricing models will support the evolving patterns in the service-centric economy. Additionally, improvements to intelligent resource recommendations will provide suggestions based on experience, cost and utilization across employees and subcontractors.

Finance and operations cross-app capabilities continues to invest in capabilities that apply to all finance and operations apps, including Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations.

Dynamics 365 Human Resources will be improving recruiting experiences with functionally rich and intuitive experiences that target recruiters, candidates, and hiring managers. We will expand the HCM ecosystem to include learning management system integration through public APIs leveraging Dataverse along with expanding our payroll partner network.

Commerce

Dynamics 365 Commerce is leveraging the power of AI to enable the effortless creation of engaging product content for digital commerce sites. New B2B investments allow distributors to view, accept, and reject orders from a centralized dashboard that enables B2B sellers, distributors, and buyers to all work in the same place.

SMB

Dynamics 365 Business Central will focus on core functionality to help companies manage their intercompany and consolidations across environments. We will continue to enhance our Copilot capabilities and will further improve our warehouse capabilities, create more Power Automate templates, and provide developers with more capabilities for automating testing of dependent apps.

Guides

Dynamics 365 Guides is bringing several new capabilities and enhancements including Object Anchors, Azure Remote Rendering, and availability on Government Community Cloud High. Additionally, we are focusing on features allowing seamless integration with systems of record allowing customers to build mixed reality workflows that are integrated with their business data.

Customer Insights

Dynamics 365 Customer Insights is enhancing our Copilot features to allow you to ask questions in simple words, to quickly receive insights, and act on these immediately. New capabilities in real-time data management will provide the latest view of your customers, and easy access to insights within Dynamics 365 apps will allow your team to deliver seamless, personalized experiences across the customer's lifecycle.

Key dates for the 2023 release wave 2

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

Here are the key dates for the 2023 release wave 2.

Expand table

Milestone	Date	Description
Release plans available	July 18, 2023	Learn about the new capabilities coming in the 2023 release wave 2 (October 2023 - March 2024) across Dynamics 365, Microsoft Power Platform, and Microsoft Cloud for Industry.
Early access available	July 31, 2023	Test and validate new features and capabilities that will be part of 2023 release wave 2, coming in October, before they are enabled automatically for your users. You can view the Dynamics 365 **2023 release wave 2 early access features now**.
Release plans available in additional languages	August 7, 2023	The Microsoft Power Platform and Dynamics 365 release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish. Microsoft Cloud for Industry release plans are published in 4 additional languages: French, German, Dutch and Spanish.
General availability	October 1, 2023	Production deployment for the 2023 release wave 2 begins. Regional deployments will start on October 1, 2023.

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 2023 release wave 2 plans.

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

Get started with this release wave

Article • 07/18/2023

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

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

2023 release wave 2

October 2023 – March 2024

Marketing

See what's new and planned
Watch latest videos

Field Service

See what's new and planned
Watch latest videos

Human Resources

See what's new and planned
Watch latest videos

Guides

See what's new and planned
Watch latest videos

Sales

See what's new and planned
Watch latest videos

Finance

See what's new and planned
Watch latest videos

Commerce

See what's new and planned
Watch latest videos

Customer Service

See what's new and planned
Watch latest videos

Supply Chain Management

See what's new and planned
Watch latest videos

Business Central

See what's new and planned
Watch latest videos

Change history

Article • 01/19/2024

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

Dynamics 365 Marketing

Features added to release plan

Expand table

Feature	Date added
Easily manage customer consent from contact and lead forms	Nov 07, 2023
Improve reliability of insights with advanced bot protection	Nov 03, 2023
Streamline email creation with real-time HTML edits	Oct 12, 2023
Improve appeal and match brand identity with custom fonts	Oct 12, 2023
Simplify and optimize segments using query assist copilot	Oct 03, 2023
Get inspired and use Copilot to create engaging emails	Oct 03, 2023
Enhance email engagement by allowing browser viewing	Sep 27, 2023
Create compelling content with Copilot image recommendations	Sep 26, 2023
Prevent duplicate emails to contacts that share an email address	Sep 12, 2023
Engage customers with content and follow-ups based on website interactions	Sep 11, 2023
Increase engagement using alphanumeric SMS senders	Sep 11, 2023
Increase lead conversions by routing to the correct sales rep	Sep 07, 2023
Engage customers with text messages sent using Azure Communication Services	Sep 06, 2023
Receive in-app task assistance from Copilot	Sep 06, 2023

Release date changed

Expand table

Feature	Change	Date updated
Easily manage customer consent from contact and lead forms	Public preview date moved to Mar 2024. General availability date moved to Feb 2024.	Dec 11, 2023
Capture responses from external, third-party forms	Public preview date updated to Dec 2023. General availability date moved to Mar 2024.	Oct 26, 2023
Add styles to brand profiles and create reusable themes	Public preview date moved to Dec 2023. General availability date moved to Feb 2024.	Oct 25, 2023
Engage customers with content and follow-ups based on website interactions	Public preview date moved to Dec 2023. General availability date updated to Mar 2024.	Oct 25, 2023
Enhance email engagement by allowing browser viewing	Public preview date updated to Nov 2023. General availability date moved to Dec 2023.	Oct 25, 2023
Improve appeal and match brand identity with custom fonts	Public preview date moved to Oct 2023. General availability date moved to Dec 2023.	Oct 25, 2023
Easily style your emails with Copilot	Public preview date updated to Nov 2023. Removed general availability date.	Oct 18, 2023
Personalize customer experiences using calculated metrics from Customer Insights	Public preview date moved to Oct 2023. General availability date moved to Dec 2023.	Oct 17, 2023
Create journeys quickly with inspiring templates		Oct 16, 2023
Create journeys by describing them using Copilot	Public preview date moved to Dec 2023. General availability date moved to Feb 2024.	Oct 05, 2023
Prevent duplicate emails to contacts that share an email address	General availability date moved to Feb 2024	Oct 05, 2023
Receive in-app task assistance from Copilot	Public preview date moved to Feb 2024. General availability date moved to Dec 2023.	Oct 05, 2023
Scale your business with confidence with 300M maximum monthly interactions	Public preview date moved to Mar 2024. General availability date moved to Dec 2023.	Sep 29, 2023

Feature	Change	Date updated
Improve communication timing by setting up quiet times	Public preview date moved to Feb 2024. General availability date moved to Dec 2023.	Sep 15, 2023
Easily reference copies of sent emails in interaction timeline	Public preview date moved to Dec 2023. General availability date moved to Feb 2024.	Sep 05, 2023
Build custom reports using Microsoft Fabric integration	Public preview date moved to Mar 2024. General availability date moved to Dec 2023.	Aug 28, 2023
Perfect your messaging with Copilot text editing and rewriting	Public preview date moved to Oct 2023. General availability date moved to Nov 2023.	Aug 16, 2023

Features removed from release plan

Expand table

Feature	Reason	Date removed
Accelerate your pipeline with integrated analytics	Moved to the next release wave.	Dec 22, 2023
Reach customers at the right moment with send scheduling	Moved to the next release wave.	Dec 13, 2023
Improve engagement and compliance with double opt-in	Moved to the next release wave.	Dec 11, 2023
Effortlessly authenticate your domain with step-by-step Copilot guidance	Deprioritized and will not be delivered.	Nov 08, 2023
Content ideas and journey creator available in English in all geos	Deprioritized and will not be delivered.	Oct 26, 2023
Understand lead score and qualification factors using Copilot	Deprioritized and will not be delivered.	Oct 26, 2023
Easily style your emails with Copilot	Moved to the previous release wave.	Jul 31, 2023

Dynamics 365 Sales

Features added to release plan

Expand table

Feature	Date added
Use Copilot to get answers from your sales documents	Dec 01, 2023
Improve relevance of Copilot summaries and recent changes	Oct 26, 2023
Get enriched lead summary with information from Customer Insights	Oct 26, 2023
Stay on top of features and settings with new overview page experience	Oct 18, 2023
Leverage manager dashboards to coach sellers	Sep 18, 2023
Export-import segments and assignment rules between environments	Sep 15, 2023
Use assignment rules to manage seller availability and auto-assign leads	Sep 15, 2023
Work uninterrupted in focused mode with usage preference for all entities	Sep 14, 2023
Improve seller efficiency by customizing quote close experience	Sep 13, 2023
Visualize key stakeholders and take action with smart organization chart	Sep 12, 2023
Improve productivity with natural language search in Sales Copilot	Jul 31, 2023
Engage with your customers by invoking SMS chat pane from Activities	Jul 31, 2023
Modern and refreshed user experience with updated styling and controls	Jul 19, 2023

Release date changed

Expand table

Feature	Change	Date updated
Experience Copilot in an immersive widescreen mode	Public preview date moved to Feb 2024. General availability date moved to Mar 2024.	Dec 12, 2023
Improve productivity with natural language search in Sales Copilot	Public preview date moved to Jan 2024. General availability date moved to Jan 2024.	Nov 30, 2023
Leverage manager dashboards to coach sellers	Public preview date moved to Jan 2024. General availability date moved to Mar	Nov 16, 2023

Feature	Change	Date updated
	2024.	
Boost your sales with product content recommendations	Public preview date moved to Feb 2024. General availability date moved to Jan 2024.	Nov 16, 2023
Know your account better with AI-generated account summary	Public preview date moved to Feb 2024. General availability date moved to Jan 2024.	Nov 03, 2023
Work uninterrupted in focused mode with usage preference for all entities	Public preview date moved to Feb 2024. General availability date moved to Jan 2024.	Oct 31, 2023

Features removed from release plan

Expand table

Feature	Reason	Date removed
Strengthen customer relationships with contact summaries	Moved to a future release wave.	Nov 29, 2023
Guide sellers to work simultaneously using multiple sequences	Moved to the next release wave.	Oct 09, 2023
Empower seller to proactively pick next prioritized record based on business rule	Moved to a future release wave.	Sep 14, 2023
Improve success rate of assignment rules with harmonized pipeline monitoring	Moved to a future release wave.	Sep 14, 2023
Streamline repeated follow-ups with prospects and customers	Deprioritized and will not be delivered.	Jul 31, 2023

Viva Sales

Features removed from release plan

Expand table

Feature	Reason	Date removed
Match email to lead entity		Sep 11, 2023

Microsoft Sales Copilot

Features added to release plan

Expand table

Feature	Date added
Match email to lead entity	Sep 11, 2023

Release date changed

Expand table

Feature	Change	Date updated
Match email to lead entity	Public preview date updated to Dec 2023. Removed general availability date.	Nov 09, 2023

Features removed from release plan

Expand table

Feature	Reason	Date removed
Collaborate with sales teams using AI-powered planner tasks	Moved to the next release wave.	Jan 02, 2024

Dynamics 365 Commerce

Features added to release plan

Expand table

Feature	Date added
Try new order types that support your business	Oct 26, 2023
Enable estimated dates for customer fulfillments	Oct 26, 2023
See a unified order view from cart to door	Oct 26, 2023
Look up inventory in real time	Oct 26, 2023
Provide carting options to e-commerce platforms	Oct 26, 2023
Run automatic orchestration based on business events	Oct 26, 2023
Integrate AI Copilot to provide Data Q and A	Oct 05, 2023

Features removed from release plan

Expand table

Feature	Reason	Date removed
Optimize operations management for distributors' e-stores	Moved to a future release wave.	Oct 24, 2023
Generate product enrichment content for e-commerce sites with Copilot in site builder	Moved to the next release wave.	Oct 10, 2023
Roll out pricing strategies with flexible pricing rules	Moved to a future release wave.	Sep 26, 2023
Optimize online store operations management for distributors	Moved to the next release wave.	Sep 07, 2023
Streamline the sign-up process for B2B buyers	Moved to a future release wave.	Aug 16, 2023

Dynamics 365 Customer Insights

Features added to release plan

Expand table

Feature	Date added
Improved accuracy of the deduplication process	Sep 14, 2023

Feature	Date added
Improve data quality with identity resolution from LiveRamp	Sep 14, 2023
Enrich your customer data with location from HERE Technologies	Sep 14, 2023
Share customer profiles and insights via Data Lake	Sep 14, 2023
Increase seller productivity with lead profile summaries in Dynamics 365 Sales	Sep 14, 2023
Move specific configurations between environments	Sep 14, 2023
Address issues with environment status summary copilot	Sep 11, 2023
Govern data access with business units and role-based access control	Sep 08, 2023
Personalize omnichannel experiences with no code using Optimizely	Aug 29, 2023
Protect customer data by controlling who can see it	Aug 29, 2023
Seamlessly onboard customer data from your Delta Lake with no data integration	Jul 25, 2023
Increase control and flexibility when attaching to data in Microsoft Dataverse	Jul 25, 2023

Release date changed

Expand table

Feature	Change	Date updated
Seamlessly onboard customer data from your Delta Lake with no data integration	Public preview date moved to Jan 2024. General availability date updated to Feb 2024.	Dec 06, 2023
Get insights by automatically unifying your customer data from Dataverse	Public preview date moved to Mar 2024	Dec 06, 2023
Increase seller productivity with lead profile summaries in Dynamics 365 Sales	Public preview date moved to Feb 2024. General availability date moved to Mar 2024.	Nov 28, 2023
Share customer profiles and insights via Data Lake	Public preview date moved to Jan 2024. General availability date moved to Mar 2024.	Nov 02, 2023
Protect customer data by controlling who can see it	Public preview date moved to Jan 2024. General availability date updated to Feb 2024.	Oct 27, 2023
Leverage customer insights in other business applications	Public preview date moved to Dec 2023. General availability date moved to Feb	Oct 25, 2023

Feature	Change	Date updated
	2024.	
Move specific configurations between environments	Public preview date moved to Jan 2024. General availability date moved to Feb 2024.	Oct 16, 2023
Address issues with environment status summary copilot	Public preview date moved to Jan 2024. General availability date moved to Mar 2024.	Oct 12, 2023
Identify and eliminate data quality issues effortlessly with copilot	Public preview date moved to Jan 2024. General availability date moved to Feb 2024.	Oct 09, 2023
Increase control and flexibility when attaching to data in Microsoft Dataverse	Public preview date moved to Jan 2024. General availability date moved to Mar 2024.	Oct 05, 2023
Accelerate time to insights with data in Delta Lake format	Public preview date moved to Jan 2024. General availability date moved to Feb 2024.	Sep 05, 2023
Elevate customer experiences in real time	Public preview date moved to Dec 2023. General availability date moved to Mar 2024.	Sep 05, 2023

Features removed from release plan

Expand table

Feature	Reason	Date removed
Get insights by automatically unifying your customer data from Dataverse	Deprioritized and will not be delivered.	Nov 30, 2023
Identify and eliminate data quality issues effortlessly with copilot	Moved to the next release wave.	Aug 11, 2023

Dynamics 365 Customer Service

Features added to release plan

Expand table

Feature	Date added
Dynamics 365 Customer Service plugin for Microsoft 365 chat	Jan 03, 2024
Support Copilot features in additional languages, regions	Oct 16, 2023
Use timeline quick filters to access your activities faster	Oct 10, 2023
Allow agents to view schedules created in third-party systems	Oct 09, 2023
Show records enabled for unified routing in inbox	Oct 06, 2023
Real-time analytics enabled by default	Oct 04, 2023
Resolve issues with recommendations in activity monitor	Oct 03, 2023
Filter the Copilot content based on entity attributes	Sep 16, 2023
Use the enhanced attachment experience in emails	Sep 07, 2023
Enhanced UI for emergency calling	Sep 06, 2023
View skills and proficiency in Omnichannel real-time analytics reports	Aug 28, 2023
Configure agent-specific capacity profiles	Aug 03, 2023
Integrated health check of configurations	Aug 01, 2023
Find records in timeline with What you've missed	Jul 20, 2023
Pin and unpin records in timeline	Jul 20, 2023

Release date changed

Expand table

Feature	Change	Date updated
Improvements to the call dialer	Public preview date moved to Feb 2024. General availability date updated to Feb 2024.	Dec 06, 2023
Use timeline quick filters to access your activities faster	Public preview date moved to Feb 2024. General availability date updated to Oct 2023.	Dec 06, 2023
Draft email replies with a click using Copilot	Public preview date updated to Oct 2023. General availability date moved to Oct	Sep 05, 2023

Feature	Change	Date updated
Discover knowledge content with Copilot	Public preview date updated to Oct 2023. General availability date moved to Oct 2023.	Sep 05, 2023
Enhance customer engagement with Join a Teams call	Public preview date updated to Oct 2023. Removed general availability date.	Aug 31, 2023
Use overflow to handle lengthy wait times for work items in queues	Public preview date moved to Feb 2024. General availability date moved to Oct 2023.	Aug 30, 2023

Features removed from release plan

Expand table

Feature	Reason	Date removed
Summarize support cases with Copilot	Moved to the next release wave.	Aug 08, 2023
Summarize conversations with Copilot	Moved to the previous release wave.	Aug 08, 2023

Dynamics 365 Field Service

Features added to release plan

Expand table

Feature	Date added
See bookings in agenda view in the new mobile experience	Sep 22, 2023
Configure list view in the new mobile experience	Sep 22, 2023
Summarize work orders with Copilot in new mobile experience	Sep 22, 2023
Update work orders with Copilot in new mobile experience	Sep 22, 2023
Empower your workforce with mixed reality	Sep 20, 2023
Optimize schedule board navigation patterns	Sep 15, 2023
Multi-day scheduling in Resource Scheduling Optimization	Sep 15, 2023
Single Resource Optimization considers new requirements	Sep 15, 2023

Feature	Date added
Get technician scheduling suggestions in Teams	Sep 13, 2023
Break down long-duration or complex requirements	Sep 13, 2023
Ask Copilot about work order information using natural language	Sep 13, 2023
Customize work order views for Teams and Outlook	Sep 13, 2023
Customize the work order experience	Sep 13, 2023
Improved homepage in Microsoft Teams	Sep 13, 2023
Create lookup entries for work order fields	Sep 13, 2023
Compress image uploads from mobile devices	Jul 26, 2023
Offline sync settings for frontline workers	Jul 25, 2023
AI-powered work order recap for mobile users	Jul 25, 2023

Release date changed

Expand table

Feature	Change	Date updated
See bookings in agenda view in the new mobile experience	Public preview date moved to Dec 2023. General availability date moved to Dec 2023.	Dec 12, 2023
Get technician scheduling suggestions in Teams	Public preview date moved to Dec 2023. General availability date moved to Dec 2023.	Oct 27, 2023
Create lookup entries for work order fields	Public preview date moved to Dec 2023. General availability date moved to Dec 2023.	Oct 27, 2023
Improved homepage in Microsoft Teams	Public preview date moved to Dec 2023. General availability date moved to Dec 2023.	Oct 27, 2023
AI-powered work order recap	General availability date moved to Mar 2024	Oct 12, 2023
Offline sync settings for frontline workers	Public preview date moved to Nov 2023. General availability date moved to Nov 2023.	Oct 11, 2023
Complete work orders based on status	Public preview date moved to Dec 2023. General availability date moved to Dec 2023.	Sep 26, 2023

Feature	Change	Date updated
AI-powered work order recap for mobile users	Public preview date moved to Dec 2023. General availability date moved to Mar 2024.	Sep 14, 2023

Features removed from release plan

Expand table

Feature	Reason	Date removed
Get scheduling recommendations in the Outlook add-in	Moved to a future release wave.	Oct 10, 2023
Work orders created via Copilot in Outlook get saved in Field Service timeline	Merged this feature with the Create work orders in Outlook using AI feature.	Oct 09, 2023
Generate custom responses in Outlook with AI	Moved to the next release wave.	Sep 25, 2023
Deploy IoT solutions with simpler experience	Moved to a future release wave.	Sep 22, 2023
Generate a work order from a quote	Moved to a future release wave.	Sep 22, 2023
Enable mouse scroll to change date-range granularity	Moved to the previous release wave.	Sep 11, 2023

Finance and Operations cross-app capabilities

Features added to release plan

Expand table

Feature	Date added
Easy access to Dynamics 365 finance and operations on Dataverse	Sep 18, 2023
Offline support for Dynamics 365 finance and operations virtual tables	Sep 15, 2023
Manage administrative tasks, find information, and create reports with generative AI	Aug 24, 2023

Feature	Date added
Enable support for asynchronous operation in dual-write functionality	Aug 03, 2023

Dynamics 365 Guides

Features added to release plan

Expand table

Feature	Date added
Export guide as a shareable file with all guide content	Sep 12, 2023

Features removed from release plan

Expand table

Feature	Reason	Date removed
Easy import of 3D models in Guides	Moved to the next release wave.	Nov 02, 2023

Dynamics 365 Finance

Features added to release plan

Expand table

Feature	Date added
Electronic invoicing – Waybill (Carta Porte) update to version 3	Oct 27, 2023
Electronic invoicing – German XRechnung format update to version 3	Oct 05, 2023
Archive general ledger posted data	Sep 14, 2023
Archive data	Sep 13, 2023
Expand localization for LATAM countries - Guatemala	Sep 06, 2023
Expand localization for LATAM countries - Uruguay	Sep 06, 2023

Feature	Date added
Expand localization for LATAM countries - Paraguay	Sep 06, 2023
Expand localization for LATAM countries - Colombia	Sep 06, 2023
Expand localization for LATAM countries - Panama	Sep 06, 2023
Expand localization for LATAM countries - Nicaragua	Sep 06, 2023
Expand localization for LATAM countries - Costa Rica	Sep 06, 2023
Expand localization for LATAM countries - Chile	Sep 06, 2023
Generate payment journal, settle open invoices directly from bank reconciliation	Sep 05, 2023
Capturing additional fields from the result of prebuilt models	Aug 31, 2023
Integration with custom prebuilt model in Invoice capture	Aug 31, 2023
Electronic Invoicing service - Global e-invoicing ISV last-mile connector	Jul 25, 2023
Check number validation	Jul 07, 2023
Net customer and vendor balances	Jul 07, 2023

Release date changed

Expand table

Feature	Change	Date updated
Capturing additional fields from the result of prebuilt models	Public preview date moved to Dec 2023. General availability date moved to Nov 2023.	Nov 27, 2023
Net customer and vendor balances	Public preview date moved to Nov 2023. General availability date moved to Feb 2024.	Nov 02, 2023
Expand localization for LATAM countries - Colombia	Public preview date moved to Dec 2023. General availability date moved to Oct 2023.	Oct 23, 2023
Expand localization for LATAM countries - Paraguay	Public preview date moved to Dec 2023. General availability date moved to Oct 2023.	Oct 23, 2023

Feature	Change	Date updated
Expand localization for LATAM countries - Uruguay	Public preview date moved to Dec 2023. General availability date moved to Oct 2023.	Oct 23, 2023
Expand localization for LATAM countries - Guatemala	Public preview date moved to Dec 2023. General availability date moved to Feb 2024.	Oct 23, 2023
Business performance analytics - reporting hub and base reports on data	Public preview date moved to Dec 2023. General availability date moved to Feb 2024.	Aug 10, 2023
Business performance analytics - security	Public preview date moved to Dec 2023. General availability date moved to Feb 2024.	Aug 10, 2023
Business performance analytics	Public preview date moved to Dec 2023. General availability date moved to Feb 2024.	Aug 10, 2023

Features removed from release plan

Expand table

Feature	Reason	Date removed
Get customer account history details using Microsoft 365 Copilot	Moved to a future release wave.	Oct 30, 2023
Use Copilot to summarize and record customer email responses	Moved to a future release wave.	Oct 30, 2023
Get summarized insights while emailing customers with Microsoft 365 Copilot	Moved to a future release wave.	Oct 30, 2023
See improvements in stock transfer order feature	Deprioritized and will not be delivered.	Oct 02, 2023
Expand localization for LATAM countries	Moved to the previous release wave.	Aug 21, 2023
Use mandatory Spanish electronic invoices	Moved to a future release wave.	Aug 01, 2023

Feature	Reason	Date removed
Expanding electronic invoicing to LATAM countries	Merged this feature with the Expanding electronic invoicing to LATAM countries feature.	Jul 26, 2023

Dynamics 365 Project Operations

Features added to release plan

Expand table

Feature	Date added
Cancel PO receipts with connected item requirements	Sep 25, 2023
Display save status notification for WBS changes	Sep 25, 2023
Remove team member limits for externally scheduled projects	Sep 25, 2023
Use deferrals for stock or production project scenarios	Sep 12, 2023
Block vendor payments for vendor invoices until PM approval	Aug 30, 2023

Release date changed

Expand table

Feature	Change	Date updated
Explore advanced subcontract capabilities	Public preview date updated to Jan 2024. General availability date moved to Feb 2024.	Dec 26, 2023
Enable default financial dimensions for bookable resources	Public preview date updated to Jan 2024. General availability date moved to Mar 2024.	Oct 04, 2023
Support for intercompany vendor invoices in resource and non-stocked based scenarios	Public preview date moved to Feb 2024. General availability date moved to Feb 2024.	Sep 13, 2023
Easily summarize budget lines in Dynamics 365 apps	Public preview date moved to Feb 2024. General availability date updated	Aug 31, 2023

Feature	Change	Date updated
	to Mar 2024.	
Enable bulk resource reconciliation	Public preview date moved to Feb 2024	Jul 25, 2023

Features removed from release plan

Expand table

Feature	Reason	Date removed
Enable processing billed sales for resource-based nonstock deployments	Moved to the next release wave.	Jul 25, 2023
Improvements made to bulk approvals experience	Moved to a future release wave.	Jul 24, 2023
Allow contacts as customers in Project Operations	Moved to a future release wave.	Jul 24, 2023
Enable bulk resource reconciliation	Moved to the next release wave.	Jul 24, 2023

Dynamics 365 Human Resources

Features added to release plan

Expand table

Feature	Date added
Access employee leave and absence in Teams for Dynamics 365 Human Resources (merged infrastructure)	Jul 19, 2023

Release date changed

Expand table

Feature	Change	Date updated
Access employee leave and absence in Teams for Dynamics 365 Human Resources (merged infrastructure)	Public preview date moved to Dec 2023. General availability date updated to Oct 2023.	Oct 29, 2023

Features removed from release plan

Expand table

Feature	Reason	Date removed
Enable time and calendar integration with Project Operations	Moved to a future release wave.	Sep 26, 2023

Dynamics 365 Supply Chain Management

Features added to release plan

Expand table

Feature	Date added
Enhanced order processing in Pricing management	Sep 13, 2023
Add an AI inventory chatbot to your app or website	Jul 25, 2023
Manufacturing feature state updates for 10.0.36	Jun 30, 2023

Release date changed

Expand table

Feature	Change	Date updated
View and manage inventory with a new mobile app	Public preview date moved to Nov 2023. General availability date moved to Feb 2024.	Nov 20, 2023
Enable prospects in prospect-to-cash with dual-write	General availability date moved to Mar 2024.	Nov 02, 2023

Feature	Change	Date updated
Offset Inventory Visibility adjustments	Public preview date moved to Jan 2024. General availability date moved to Mar 2024.	Sep 13, 2023

Features removed from release plan

Expand table

Feature	Reason	Date removed
Optimized planning and sequencing	Deprioritized and will not be delivered.	Nov 08, 2023

Dynamics 365 Business Central

Features added to release plan

Expand table

Feature	Date added
Validate AppSource app hotfixes against latest app version	Jan 03, 2024
Use Azure Files with Azure File Service API module	Jan 03, 2024
Simpler Shopify connection	Dec 22, 2023
Block item, item variant or service item from use in service management transactions	Dec 22, 2023
Invoice a customer for multiple projects	Dec 21, 2023
Define default location for project or project phase	Dec 21, 2023
Create projects that you can invoice to multiple customers	Dec 20, 2023
Call Microsoft Graph with AL Microsoft Graph module	Dec 19, 2023
Make use of static and runtime metadata available in Excel layouts	Nov 24, 2023

Feature	Date added
Translatable Excel layouts	Nov 24, 2023
Usability improves for service and projects	Nov 14, 2023
Assemble to project	Nov 14, 2023
Archive projects	Nov 14, 2023
Define a service invoice posting policy for various users	Nov 14, 2023
Chat with Copilot	Oct 31, 2023
Call web services with AL Rest Client module	Oct 23, 2023
Detect invalid cloud migration configurations with proactive warnings	Oct 09, 2023
Retain permissions when enabling cloud migration	Oct 09, 2023
Improved data upgrade troubleshooting for Dynamics GP migration	Oct 09, 2023
Define multi-worksheet datasets for Excel reports	Sep 27, 2023
Extend general ledger posting aggregations	Sep 26, 2023
Automatically update AppSource apps with minor updates	Sep 14, 2023
Business Central virtual tables fully supported on Microsoft Dataverse	Sep 08, 2023
Delete data from uninstalled extensions as an admin	Sep 08, 2023
Power Pages support via Business Central virtual tables on Dataverse	Sep 07, 2023
New operational limits on scheduled tasks and web requests improve throughput	Sep 07, 2023
Service-to-service apps and device license users can schedule tasks	Sep 06, 2023
Add teaching tooltips on queries and report request pages	Sep 06,

Feature	Date added
	2023
Easier management of System Application permissions	Aug 31, 2023
Generate a customer statement only with open entries	Aug 28, 2023
Reverse a customer and vendor ledger entry with a realized gain or loss entry	Aug 28, 2023
Print and scan barcodes	Aug 24, 2023
Navigate easier between order, receipt, and invoice documents	Aug 23, 2023
Demo tool and data for service scenarios	Aug 22, 2023
Start faster with refreshed and enhanced setup data	Aug 22, 2023
Responsibility Centers are supported for Advance Payments in Czechia	Aug 22, 2023
Find all references now works on triggers, system methods, and trigger events	Aug 17, 2023
Use the AL Language extension for Linux in preview	Aug 17, 2023
Document your extensions with the ALDoc tool for partners	Aug 17, 2023
Get syntax highlighting for AL in Azure DevOps	Aug 17, 2023
Show list of keys while working on AL code	Aug 17, 2023
VAT posting in General Ledger setup	Aug 17, 2023
Get IntelliSense for adding variables in Visual Studio Code AL debugger console	Aug 16, 2023
Set the default folder location for new AL projects	Aug 16, 2023

Feature	Date added
Get smarter method signature recommendations in IntelliSense	Aug 16, 2023
Choose between more sampling intervals for snapshot and in-client profiling	Aug 16, 2023
Access worksheet pages from mobile phones	Aug 16, 2023
Track source and build metadata on extensions	Aug 15, 2023
Create Power Automate flows that dynamically support different companies	Aug 15, 2023
Get more information about effective permissions	Aug 14, 2023
Synchronize multiple Business Central companies with the same Dataverse environment	Aug 14, 2023
Get inlay hints in source editor for AL method parameters and return types	Aug 13, 2023
Hover over label variable to see text string value	Aug 13, 2023
Set new output folder setting for storing app files at AL project build	Aug 13, 2023
Analyze, group, and pivot data on lists	Aug 09, 2023
Share a data analysis with a co-worker	Aug 09, 2023
Easily integrate generative AI with your AL solutions	Aug 08, 2023
Block item variants	Aug 08, 2023
Receive more items than ordered by using inventory put-away documents	Aug 03, 2023
Control partner access per environment	Aug 02, 2023
AppSource ISV publishers can preview their AppSource apps with select customers	Aug 02, 2023

Feature	Date added
Include or exclude tables from cloud migration	Aug 02, 2023
Transfer environments between Microsoft Entra tenants	Aug 02, 2023
Get the AL Language extension in prerelease versions on Visual Studio Code Marketplace	Jul 26, 2023
Mark fields as read-only when customizing UI	Jul 24, 2023
Consolidated Power Automate flow creation from Business Central templates	Jul 19, 2023
Simplified Power Automate approval flow experience	Jul 19, 2023
Use drop shipments for triangular Intrastat trade	Jul 13, 2023
Use different general ledger accounts for payables, receivables	Jul 12, 2023
Adjust exchange rates easily, replace the built-in batch job	Jul 12, 2023
Get list of companies using Business Central connector in Power Automate	Jul 04, 2023

Release date changed

Expand table

Feature	Change	Date updated
Translatable Excel layouts	Public preview date moved to Jan 2024. General availability date moved to Jan 2024.	Dec 27, 2023
Make use of static and runtime metadata available in Excel layouts	Public preview date moved to Jan 2024. General availability date moved to Jan 2024.	Dec 27, 2023
New operational limits on scheduled tasks and web requests improve throughput	Public preview date moved to Dec 2023. General availability date moved to Nov 2023.	Dec 06, 2023
Chat with Copilot	Public preview date moved to Feb 2024. General availability date moved to Feb 2024.	Nov 30, 2023
AppSource ISV publishers can preview their AppSource apps with select	Public preview date moved to Feb 2024. General availability date moved to Feb	Oct 23, 2023

Feature	Change	Date updated
customers	2024.	
Define multi-worksheet datasets for Excel reports	Public preview date moved to Nov 2023. General availability date moved to Nov 2023.	Oct 23, 2023
Granular administration as Dynamics 365 Business Central Administrator	Public preview date moved to Nov 2023. General availability date moved to Nov 2023.	Oct 17, 2023
Access worksheet pages from mobile phones	Public preview date moved to Jan 2024. General availability date moved to Feb 2024.	Oct 09, 2023
Control partner access per environment	Public preview date moved to Nov 2023. General availability date moved to Feb 2024.	Oct 09, 2023
Include or exclude tables from cloud migration	Public preview date moved to Jan 2024. General availability date moved to Nov 2023.	Oct 09, 2023
E-invoicing with NemHandel in Denmark	Public preview date moved to Dec 2023. General availability date moved to Jan 2024.	Sep 15, 2023
VAT posting in General Ledger setup	Public preview date moved to Nov 2023. General availability date moved to Dec 2023.	Sep 15, 2023
Transfer environments between Microsoft Entra tenants	Public preview date moved to Jan 2024. General availability date moved to Dec 2023.	Sep 07, 2023
E-submission of VAT return in Denmark	Public preview date moved to Jan 2024. General availability date moved to Nov 2023.	Aug 30, 2023
Iceland localization app - delocalization	Public preview date moved to Jan 2024. General availability date moved to Dec 2023.	Aug 14, 2023
Complete bank account reconciliation faster with Copilot	Public preview date moved to Nov 2023. General availability date moved to Nov 2023.	Aug 08, 2023
Improved update release processes	Public preview date moved to Feb 2024. General availability date moved to Dec 2023.	Aug 02, 2023

Features removed from release plan

Expand table

Feature	Reason	Date removed
Provide queries for users to do ad hoc data analysis across tables	Moved to the next release wave.	Oct 23, 2023
Get more productive while approving time sheets	Moved to a future release wave.	Oct 10, 2023
Get more productive while entering time sheets	Moved to a future release wave.	Oct 10, 2023
Manage user expectations with selection context-based actions	Moved to the next release wave.	Oct 10, 2023
Relate native and virtual tables to expose more Business Central data in Dataverse	Moved to the next release wave.	Oct 10, 2023
Cancel Cloud Migration replication runs	Deprioritized and will not be delivered.	Oct 09, 2023
Share readable deep links to pages and records	Moved to the next release wave.	Aug 01, 2023
Get Power BI reports for reporting and data analysis on finance, sales, and inventory	Deprioritized and will not be delivered.	Jul 26, 2023
Turn off indexes as a partner	Deprioritized and will not be delivered.	Jul 26, 2023

2023 release wave 2 features available for early access

Article • 01/08/2024

This topic lists the features that can be enabled for testing in your environment beginning **July 31, 2023**.

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

- Dynamics 365 Sales
- Dynamics 365 Commerce
- Dynamics 365 Customer Service
- Dynamics 365 Field Service
- Dynamics 365 Finance
- Dynamics 365 Project Operations
- Dynamics 365 Supply Chain Management
- Dynamics 365 Business Central

The features from these apps update the existing user experiences. You can opt in early to enable these features in your environment. This will allow you to test these features and then adopt them across your environments. For information on how to enable these features, go to Opt in to 2023 release wave 2 updates.

> **Important**
>
> Other early access features may impact your users. To learn more about these features visit:
>
> - **Power Platform 2023 release wave 2 updates 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
Follow up on emails using recommended actions	Users, automatically	✔ Jul 31, 2023	✔ Oct 20, 2023
Engage with your customers by invoking SMS chat pane from Activities	Users, automatically	✔ Jul 31, 2023	✔ Oct 21, 2023
Navigate to new records faster with sales accelerator form load updates	Users, automatically	✔ Jul 31, 2023	✔ Oct 2, 2023
Modern and refreshed user experience with updated styling and controls	Users, automatically	✔ Jul 31, 2023	✔ Oct 21, 2023
Close opportunities effortlessly by prepopulating attributes	Users, automatically	-	Feb 2024

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
Expose inventory capabilities as microservices	Users, automatically	✔ Apr 30, 2023	✔ Oct 31, 2023
Enable flexible DOM constraints and processing strategies for effective fulfillment	Users, automatically	✔ Apr 30, 2023	✔ Oct 31, 2023
Try new order types that support your business	Users, automatically	✔ Oct 31, 2022	✔ Oct 16, 2023

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
Minimize the communication panel	Users, automatically	✔ Jul 31, 2023	✔ Oct 2, 2023
New call control user interface with intuitive icons for voice channel	Users, automatically	✔ Jul 31, 2023	✔ Oct 31, 2023
Improved search control to manage subjects	Users, automatically	✔ Jul 31, 2023	✔ Oct 2, 2023
Enhanced UI for emergency calling	Users, automatically	-	✔ Oct 30, 2023
Pin and unpin records in timeline	Users, automatically	✔ Jul 31, 2023	✔ Oct 2, 2023
Find records in timeline with What you've missed	Users, automatically	✔ Jul 31, 2023	✔ Oct 2, 2023
Copilot case and conversation summary default on	Users, automatically	-	Jan 2024
Real-time analytics enabled by default	Users, automatically	-	✔ Nov 17, 2023
Collaborate using Teams embed chat without having to enable it	Users, automatically	✔ Jul 31, 2023	✔ Oct 31, 2023

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
Compress image uploads from mobile devices	Users, automatically	✔ Aug 14, 2023	✔ Oct 2, 2023
Expedite service delivery with extended customer details	Users, automatically	✔ Jul 31, 2023	✔ Oct 31, 2023
Complete bookings while preserving end time	Users, automatically	✔ Jul 31, 2023	✔ Oct 2, 2023

Feature	Enabled for	Early access	General availability
Manage frontline worker certifications	Users, automatically	✔ Jul 31, 2023	✔ Oct 31, 2023
Maintain customer facilities with enhanced capabilities	Users, automatically	✔ Jul 31, 2023	✔ Oct 31, 2023
Work hours calendar supports multiple recurrences	Users, automatically	✔ Jul 31, 2023	✔ Oct 20, 2023
Show bookings proportional to duration on multiday views	Users, automatically	✔ Jul 31, 2023	✔ Oct 20, 2023

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
Business performance analytics – record to report data model	Users by admins, makers, or analysts	✔ Apr 28, 2023	Feb 2024
Business performance analytics	Users by admins, makers, or analysts	✔ Apr 28, 2023	Feb 2024
Business performance analytics - reporting hub and base reports on data	Users by admins, makers, or analysts	✔ Apr 28, 2023	Feb 2024
Business performance analytics - security	Users by admins, makers, or analysts	✔ Apr 28, 2023	Feb 2024
Enable the electronic reporting format destinations dialog box	Admins, makers, marketers, or analysts, automatically	✔ Jul 31, 2023	✔ Oct 2, 2023

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
Generate project plans using project manager copilot	Users by admins, makers, or analysts	✔ Jun 15, 2023	✔ Nov 10, 2023
Generate status reports with project manager Copilot	Users by admins, makers, or analysts	✔ Jun 15, 2023	✔ Nov 10, 2023
Assess issues and risks using project manager Copilot	Users by admins, makers, or analysts	✔ Jun 15, 2023	✔ Nov 10, 2023
Use deferrals for stock or production project scenarios	Users by admins, makers, or analysts	✔ Apr 21, 2023	Jan 2024
Use the expense mobile app for intuitive expense entry	Users by admins, makers, or analysts	✔ May 31, 2023	✔ Nov 10, 2023

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
Summarize purchase order changes for better decision making	Users by admins, makers, or analysts	✔ Jun 15, 2023	✔ Dec 4, 2023
Sell and price multiple items as a bundle	Users by admins, makers, or analysts	✔ Jul 31, 2023	✔ Oct 2, 2023
Inventory and logistics feature state updates for 10.0.36	Users by admins, makers, or analysts	✔ Jul 31, 2023	✔ Oct 2, 2023
Manufacturing feature state updates for 10.0.36	Users by admins, makers, or analysts	✔ Jul 31, 2023	✔ Oct 2, 2023
Planning feature state updates for 10.0.36	Users by admins, makers, or analysts	✔ Jul 31, 2023	✔ Oct 2, 2023
Procurement and sourcing feature state updates for 10.0.36	Users by admins, makers, or analysts	✔ Jul 31, 2023	✔ Oct 2, 2023

Feature	Enabled for	Early access	General availability
Product information management feature state updates for 10.0.36	Users by admins, makers, or analysts	✔ Jul 31, 2023	✔ Oct 2, 2023
Warehouse management feature state updates for 10.0.36	Users by admins, makers, or analysts	✔ Jul 31, 2023	✔ Oct 2, 2023

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
Support business events in Business Central connector for Power Automate	Admins, makers, marketers, or analysts, automatically	✔ Jul 20, 2023	✔ Oct 3, 2023
Change modification limits for triggering flows and bulk updates	Admins, makers, marketers, or analysts, automatically	✔ Jul 20, 2023	✔ Oct 3, 2023
Get the AL Language extension in prerelease versions on Visual Studio Code Marketplace	Admins, makers, marketers, or analysts, automatically	✔ Jul 1, 2023	✔ Oct 2, 2023
Sell Business Central apps through AppSource	Admins, makers, marketers, or analysts, automatically	✔ Apr 2, 2023	✔ Oct 9, 2023

Plan and prepare for Dynamics 365 Marketing in 2023 release wave 2

Article • 12/21/2023

> ⓘ **Important**
>
> The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Marketing**.

Overview

The undeniable impact of generative AI on the business landscape is sweeping across industries, paving the way for unparalleled growth opportunities. By automating repetitive tasks, generating data-driven insights, creating content, and powering advanced analytics, generative AI is equipping businesses with the tools to operate more efficiently and intelligently than ever before.

In the realm of marketing, customer experience, and productivity, AI is a game-changer. Marketers can leverage the power of AI to analyze large amounts of data, gain a deeper understanding of their customers in minutes, and optimize every interaction to create engaging experiences that meet and exceed customer expectations.

At Microsoft, we aspire to empower every organization to create the most personalized experience for every customer, which translates into business success. We believe that every business should be able to harness the power of generative AI, which is why we've introduced Copilot in Dynamics 365 Marketing. Copilot enables marketers to simply describe their needs and, in turn, helps generate ideas and content faster, launch journeys, and complete time-consuming tasks. These cutting-edge features increase productivity while unlocking capabilities that were previously out of reach.

With this release, we continue to bring your sales and marketing teams closer so they can stop working in silos and eliminate execution gaps and redundancies. This release allows sales and marketing teams to drive more revenue together using a unified data platform and orchestration capabilities to shift to the customer experience mindset.

Furthermore, with this release, you can unlock customer data and predict and personalize customer journeys in real time and at scale to improve your business outcomes across marketing, sales, and service. We aim to enable you to harness everything you know about your customers, across all channels, and mobilize your organization to engage in the moment to deliver a fluid and seamless experience across every interaction.

Our release revolves around three themes:

- Revolutionize how marketers work and what they can achieve with **Copilot and AI innovation**.
- Accelerate revenue and increase lifetime value through seamless experiences that **unify sales and marketing**.
- Respond to customers in real time to engage them in **moments that matter**.

Updates to Dynamics 365 Marketing 2023 release wave 2

Investment areas

Copilot and AI innovation Boost your productivity by harnessing the power of generative AI with Copilot to generate ideas and content faster, create journeys, and complete time-consuming tasks just by describing them.

Moments that matter Understand your customers' expectations and identify the most effective channels and touchpoints to trigger interactions that will successfully engage customers in the moments that matter.

Unify sales and marketing Bring your sales and marketing teams closer so they can 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 Marketing** 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 Marketing

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Marketing.

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

What's new and planned for Dynamics 365 Marketing

Article • 01/19/2024

This topic lists features that are planned to release from October 2023 through March 2024. 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 2023 release wave 1 plan.

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

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

Copilot and AI innovation

Revolutionize how marketers work and what they can achieve with Copilot and AI innovation.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Take campaigns from concept to launch using Copilot	Admins, makers, marketers, or analysts, automatically	Feb 2024	-	-
Easily style your emails with Copilot	Admins, makers, marketers, or analysts, automatically	✓ Nov 1, 2023	-	-
Add styles to brand profiles and create reusable themes	Admins, makers, marketers, or analysts, automatically	✓ Dec 12, 2023	-	-
Create compelling content with Copilot image recommendations	Admins, makers, marketers, or analysts, automatically	✓ Oct 23, 2023	-	-

Feature	Enabled for	Public preview	Early access*	General availability
Create journeys by describing them using Copilot	Admins, makers, marketers, or analysts, automatically	✔ Aug 17, 2023	-	Mar 2024
Get inspired and use Copilot to create engaging emails	Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 23, 2023
Simplify and optimize segments using query assist copilot	Admins, makers, marketers, or analysts, automatically	✔ Jul 18, 2023	-	Jan 2024
Perfect your messaging with Copilot text editing and rewriting	Admins, makers, marketers, or analysts, automatically	✔ Oct 23, 2023	-	-
Receive in-app task assistance from Copilot	Admins, makers, marketers, or analysts, automatically	Feb 2024	-	-

Moments that matter

Respond to customers' expectations in real time to engage them in moments that matter.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Provide varied experiences in one journey using journey split tiles	Admins, makers, marketers, or analysts, automatically	Mar 2024	-	-
Improve appeal and match brand identity with custom fonts	Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 1, 2023
Streamline email creation with real-time HTML edits	Admins, makers, marketers, or analysts, automatically	Feb 2024	-	To be announced
Improve communication timing by setting up quiet times	Admins, makers, marketers, or analysts, automatically	✔ Oct 2, 2023	-	✔ Dec 13, 2023

Feature	Enabled for	Public preview	Early access*	General availability
Easily reference copies of sent emails in interaction timeline	Admins, makers, marketers, or analysts, automatically	✔ Dec 13, 2023	-	-
Stay compliant with one-click unsubscribe for emails	Admins, makers, marketers, or analysts, automatically	-	-	Feb 2024
Capture responses from external, third-party forms	Admins, makers, marketers, or analysts, automatically	✔ Dec 1, 2023	-	-
Personalize customer experiences using calculated metrics from Customer Insights	Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 15, 2023
Engage customers with content and follow-ups based on website interactions	Admins, makers, marketers, or analysts, automatically	Mar 2024	-	-
Boost participation and simplify planning with session-based event registrations	Admins, makers, marketers, or analysts, automatically	✔ Jan 1, 2024	-	-
Improve reliability of insights with advanced bot protection	Admins, makers, marketers, or analysts, automatically	Mar 2024	-	-
Engage customers with text messages sent using Azure Communication Services	Users by admins, makers, or analysts	-	-	✔ Oct 16, 2023
Increase engagement using alphanumeric SMS senders	Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 16, 2023
Enhance email engagement by allowing browser viewing	Users by admins, makers, or analysts	-	-	✔ Dec 12, 2023
Easily manage customer consent from contact and lead forms	Admins, makers, marketers, or analysts, automatically	Mar 2024	-	-
Orchestrate journeys using any marketing interaction	Admins, makers, marketers, or analysts, automatically	-	-	Mar 2024
Ensure messages go to the right contact email address	Admins, makers, marketers, or analysts,	Feb 2024	-	-

Feature	Enabled for	Public preview	Early access*	General availability
Scale your business with confidence with 300M maximum monthly interactions	Admins, makers, marketers, or analysts, automatically	Jul 1, 2023	-	Feb 2024

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
Increase lead conversions by routing to the correct sales rep	Admins, makers, marketers, or analysts, automatically	-	-	Oct 25, 2023
Build custom reports using Microsoft Fabric integration	Admins, makers, marketers, or analysts, automatically	Mar 2024	-	-

- You are able to opt into some features as part of early access on July 31, 2023, including all mandatory changes that affect users. To learn more, go to Early access FAQ .

Description of **Enabled for** column values:

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

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

Copilot and AI innovation

Article • 12/21/2023

ⓘ Important

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

Boost your productivity by harnessing the power of generative AI with Copilot to generate ideas and content faster, create journeys, and complete time-consuming tasks just by describing them.

Add styles to brand profiles and create reusable themes

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Dec 12, 2023	-	-

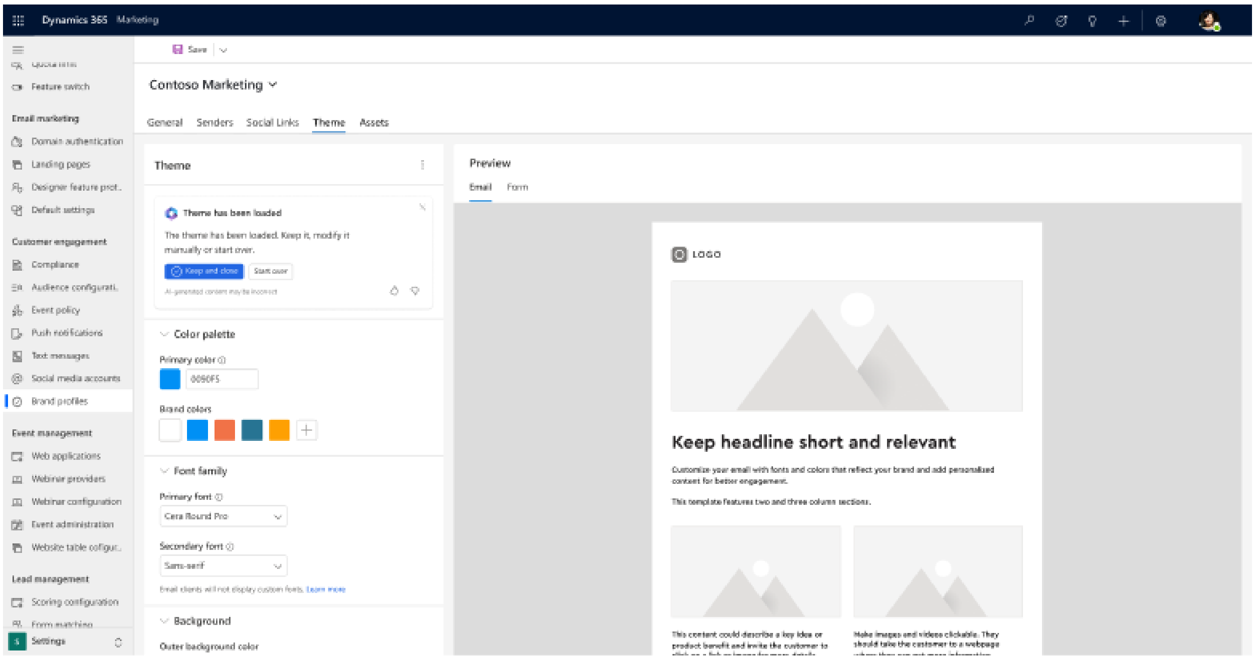
Business value

Maintaining a consistent and cohesive brand identity is key to building customer experiences and increasing brand recognition. However, replicating brand guidelines in your marketing emails, forms, and event registration pages is often time-consuming and requires back-and-forth styling and formatting.

Leveraging Copilot, you can now quickly create branded themes for your content and easily apply them to emails, forms, and event registration pages.

Feature details

- Add styles to brand profiles to ensure consistent branding and save time when designing emails and templates.
- Use your website URL to get design elements such as fonts, font sizes, and color palettes.
- Fine-tune and adjust elements to match your campaign or brand guidelines, save your theme, and easily apply it to new or existing content.



See also

[Create consistent branding with brand profiles](#) (docs)

Create compelling content with Copilot image recommendations

Article • 12/21/2023

Expand table

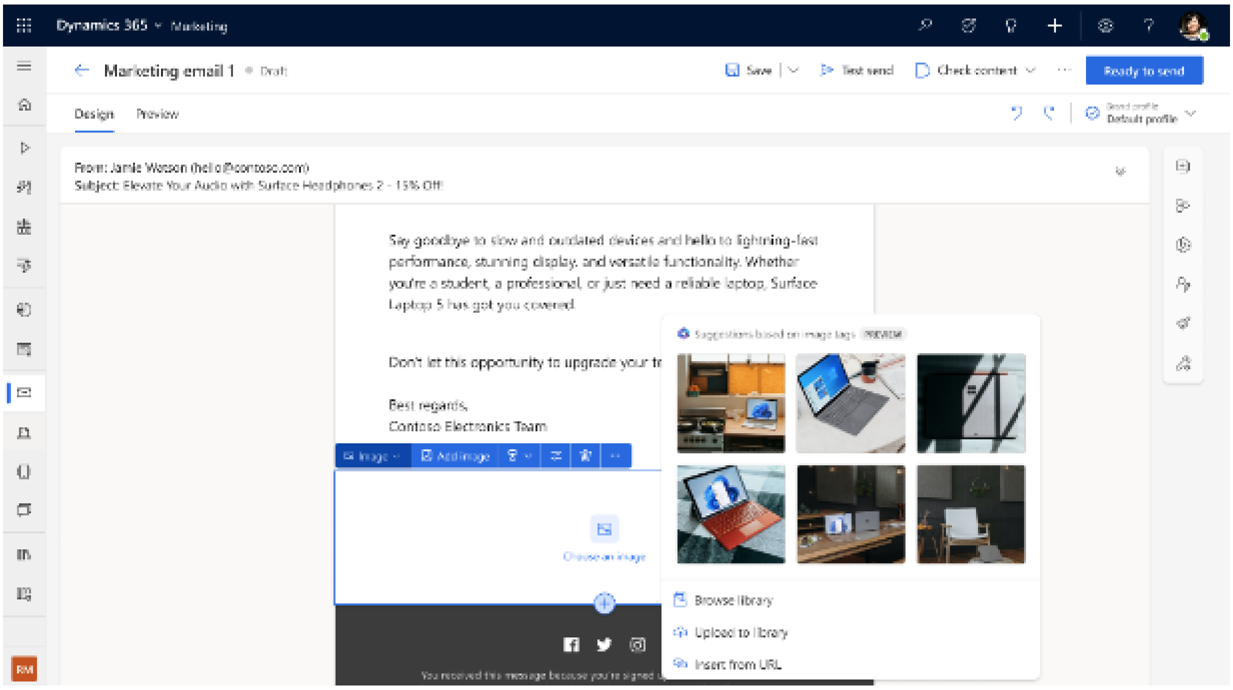
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 23, 2023	-	-

Business value

Visual content is critical to capturing your audience’s attention, increasing engagement with your brand, and conveying your message more effectively. However, browsing your library to find meaningful, relevant images for your content can be tedious and time-consuming. Now, a new Copilot assistant automatically identifies a selection of images from your library that best complement your content. Quickly and easily choose images that resonate with your audience without spending time searching.

Feature details

- Copilot functionality suggests images that match your content when you insert an image.
- Pick from the Copilot-suggested images, browse the library, or upload new images.
- Leverage image recommendations for email, forms, and push notification content.



See also

Upload, manage, and use images, files, and videos in online content (docs)

Easily style your emails with Copilot

Article • 01/11/2024

Expand table

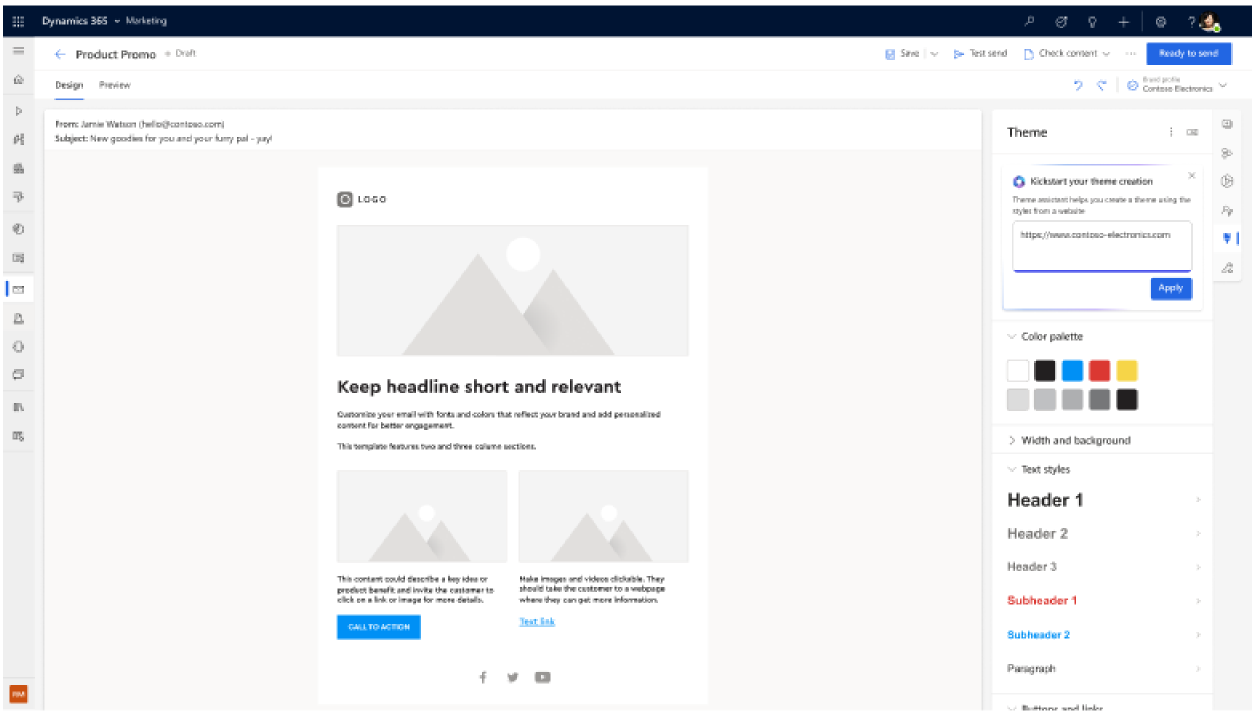
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Nov 1, 2023	-	-

Business value

Jumpstart your email creation process with Copilot. Effortlessly style email elements including buttons, text, and more using AI to quickly interpret styles from a website and apply them to your email. Save valuable time so you can focus on crafting compelling content instead of picking colors and font sizes.

Feature details

- Add your website URL to get design elements such as fonts, font size, and color palette.
- Fine-tune and adjust elements to match your campaign or brand guidelines.
- Choose whether to keep the theme or start over.



See also

Copilot - Style your emails with AI-assisted themes (docs)

Get inspired and use Copilot to create engaging emails

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 23, 2023

Business value

With this enhancement, you can easily start using Copilot to generate email content thanks to prefilled key points that match your selected email or email template. How great would it be if your email editor could suggest relevant and engaging content? AI-powered content ideas, a Copilot capability, does just that. Copilot helps you find inspiration and can be used as a starting point when composing emails for your audience. It's like asking a group of colleagues to brainstorm with you.

Copilot makes creating emails simpler, more efficient, and fun. It's a completely new and innovative functionality leveraging intelligent technology. Kickstart email creation with sample key points for frequently sent marketing emails. Choose the tone of voice that perfectly aligns with your brand and audience to create compelling content and access the generated content right in your email flow.

Feature details

- Easily access and get inspired by generative AI within your email flow (when opening the email, adding, or editing text).
- Enjoy high-quality generated content thanks to AI and work more efficiently with a refreshed look and feel.
- Select the tone of voice that best fits your brand and audience: engaged, adventurous, casual, luxury, or formal.
- Use sample key points for typical email types such as an abandoned cart, a referral, or an event invitation to get inspired and easily kick off the creation process.
- Use automatically prefilled key points for your selected email or email template to generate new content ideas with just a click of a button.

Content ideas is currently available worldwide in the following languages:

- Danish (Denmark)
- Dutch (Netherlands)
- English (United States)
- French (France)
- German (Germany)
- Italian (Italy)
- Spanish (Spain)

Geographic areas

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

- Germany
- US Sec
- US Nat
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- South America
- Canada
- India
- Japan
- France
- Korea
- China
- US Gov
- US DoD

See also

Copilot - Use AI to kickstart email creation (docs)

Perfect your messaging with Copilot text editing and rewriting

Article • 01/11/2024

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 23, 2023	-	-

Business value

Creating content that effectively captures your audience's attention is tedious, requiring time-consuming effort to perfect the language and tone of your message. Now, you can rapidly iterate on your content using Copilot to help optimize your messaging. Whether you're creating content for email, text messages, push notifications, or forms, using Copilot, you can easily rephrase messages, adjust the tone of voice, and shorten or lengthen copy, increasing productivity and delivering better results.

Feature details

Select any text and leverage Copilot to:

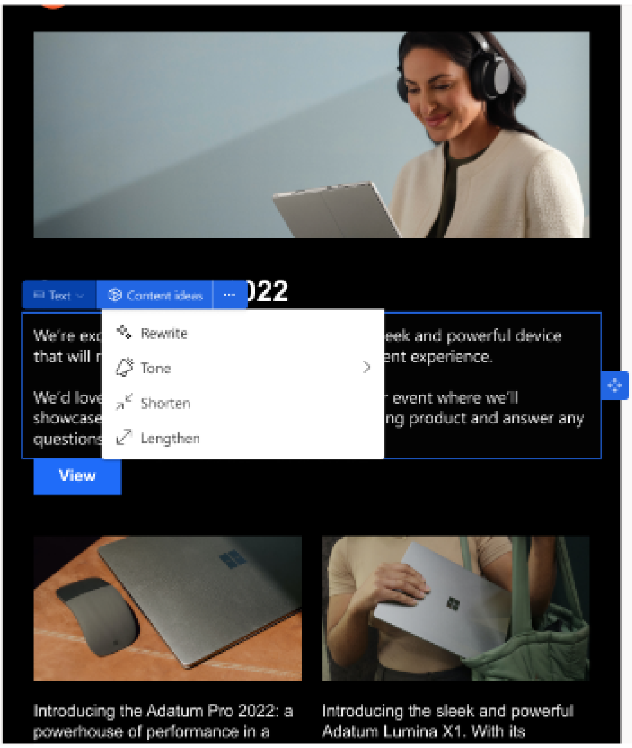
- Rewrite and choose from different variations.
- Change the tone of voice to be more engaging, formal, casual, luxurious, or adventurous.
- Shorten or lengthen copy.

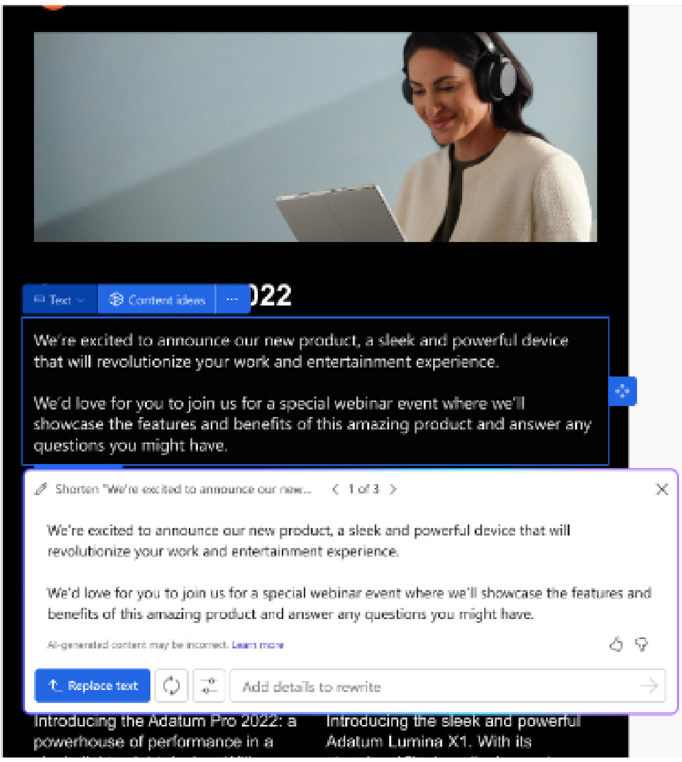
Editing text with Copilot is available for the following types of content:

- Email, email templates, and content blocks
- Forms
- Text messages
- Push notifications
- Event registration pages

ⓘ Note

The content rewrite Copilot is currently available in the United States in English only.





Geographic areas

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

- United States

See also

Copilot - Use AI to kickstart email creation (docs)

Receive in-app task assistance from Copilot

Article • 11/02/2023

ⓘ Important

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

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

Business value

Use Copilot to receive timely in-app guidance in everyday language. You can also ask questions, which Copilot answers with references to the Dynamics 365 Customer Insights - Journeys documentation.

Feature details

- Ask natural language questions, like "How do I analyze the results of a specific journey?" or "How do I authenticate my domains?" to help with any task and receive actionable responses.
- Each response is backed by the product documentation with specific references to deepen your understanding.

Geographic areas

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

- United States

Moments that matter

Article • 12/21/2023

ⓘ Important

Some of the functionality described in this release plan has 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 and identify the most effective channels and touchpoints to trigger interactions that will successfully engage customers in the moments that matter.

Boost participation and simplify planning with session-based event registrations

Article • 01/09/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jan 1, 2024	-	-

Business value

Event attendees can register for specific sessions in a multi-session event to ensure their event experience is relevant to their interests. You'll be able to identify which sessions have the highest demand and tailor post-event follow-ups based on session participation.

Feature details

- Easily switch session-level registration on or off for a specific event.
- If you enable session-level registrations, then your customers can register for specific event sessions through the event registration form.

Capture responses from external, third-party forms

Article • 12/21/2023

Expand table

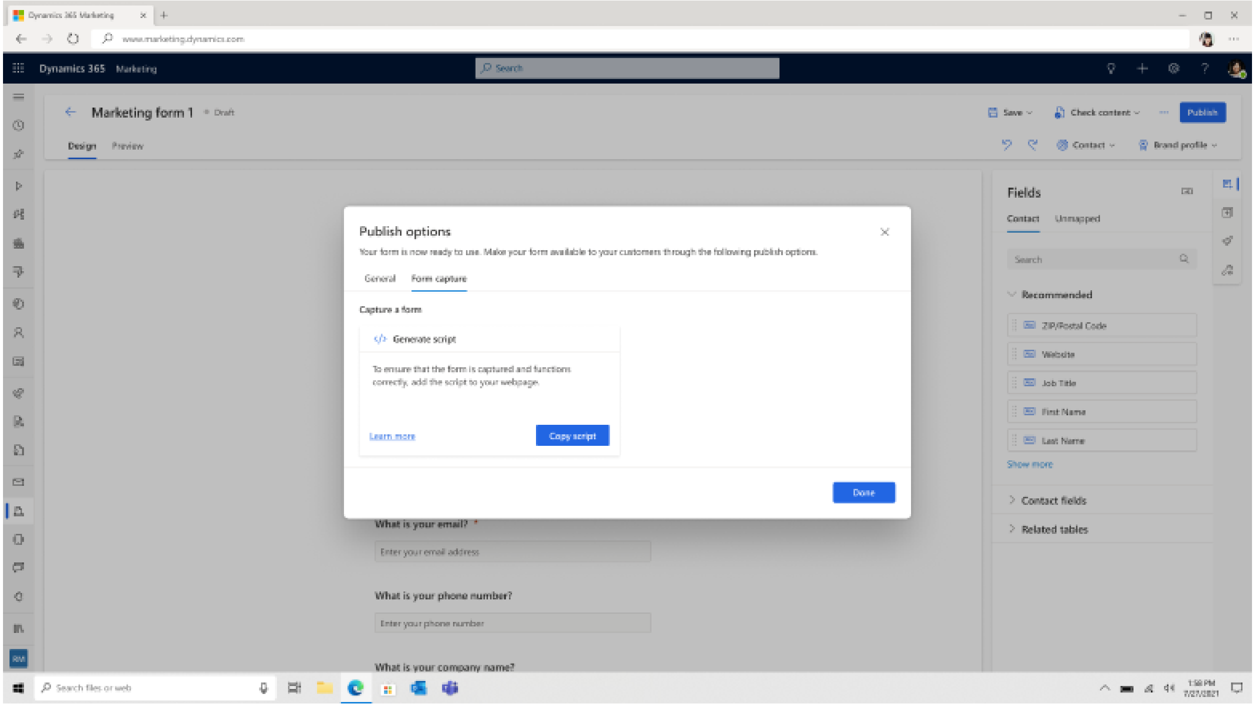
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Dec 1, 2023	-	-

Business value

Maximize the potential of your external custom-built forms and generate more leads and contacts for your business without the need to recreate them in Customer Insights – Journeys (real-time marketing). You can now capture submissions from any third-party forms on your website and automatically create new leads or contacts in Customer Insights – Journeys. This empowers you to better understand your audience, target them more accurately, and follow up effectively.

Feature details

- Capture form submissions from any external forms and use them to create new leads or contacts in Customer Insights – Journeys.
- Easily create JavaScript with mapping of your form fields to existing entity attributes.
- Embed the capture script into multiple pages containing the same form.



See also

Capture forms in Customer Insights - Journeys (docs)

Easily manage customer consent from contact and lead forms

Article • 12/21/2023

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may 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	Mar 2024	-	-

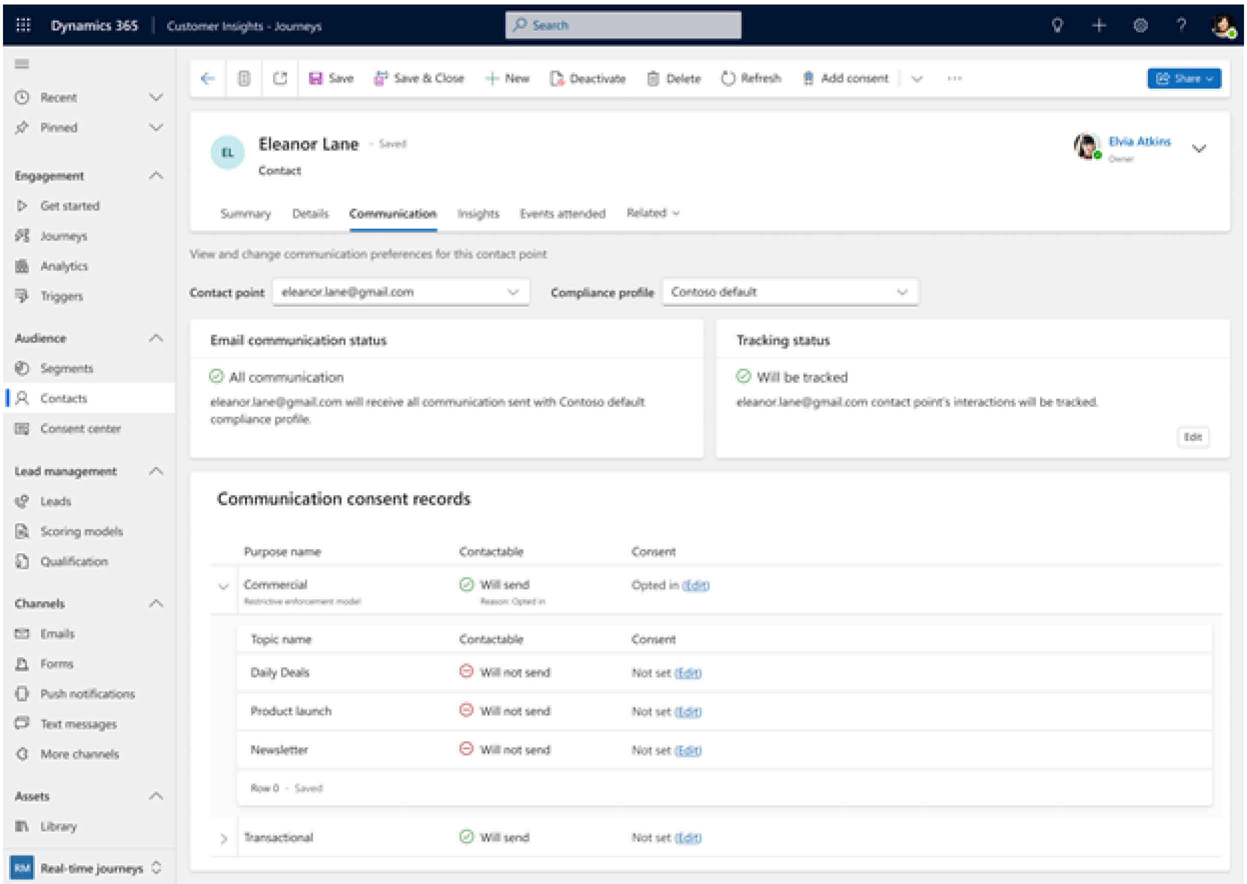
Business value

The enhanced contact and lead forms enable you to quickly see and update a customer's consent, helping you effortlessly manage what types of messages are sent to your customers. This comprehensive view gives you one place to manage consent across every channel and line of business for your organization. See if a customer has opted out of all commercial communication from your business. Explore which topics a contact has opted in or out of receiving across all channels: email, text, and custom channels. Get a complete understanding of each contact and lead's consent preferences in one easy-to-use screen.

Feature details

- Get a summary view of the consent provided by each contact or lead to understand if the customer is contactable at a glance.
- Easily modify the consent for the email addresses, phone numbers, and custom channels of a contact or lead directly from the contact or lead forms, giving you control over the type of messages sent to the customer on each channel.
- Drill down into consent provided to each compliance profile configured for your organization, giving you the ability to understand customer consent for each line

of business.



Dynamics 365
Customer Insights - Journeys
Search
Save
Save & Close
New
Deactivate
Delete
Refresh
Add consent
Share
Recent
Pinned
Engagement
Get started
Journeys
Analytics
Triggers
Audience
Segments
Contacts
Consent center
Lead management
Leads
Scoring models
Qualification
Channels
Emails
Forms
Push notifications
Text messages
More channels
Assets
Library
Real-time journeys
Eleanor Lane
Contact
Elvia Atkins
Summary
Details
Communication
Insights
Events attended
Related
View and change communication preferences for this contact point
Contact point
eleanor.lane@gmail.com
Compliance profile
Contoso default
Email communication status
All communication
eleanor.lane@gmail.com will receive all communication sent with Contoso default compliance profile.
Tracking status
Will be tracked
eleanor.lane@gmail.com contact point's interactions will be tracked.
Edit
Communication consent records
Purpose name
Contactable
Consent
Commercial
Will send
Opted in (Edit)
Topic name
Contactable
Consent
Daily Deals
Will not send
Not set (Edit)
Product launch
Will not send
Not set (Edit)
Newsletter
Will not send
Not set (Edit)
Transactional
Will send
Not set (Edit)

Easily reference copies of sent emails in interaction timeline

Article • 01/11/2024

Expand table

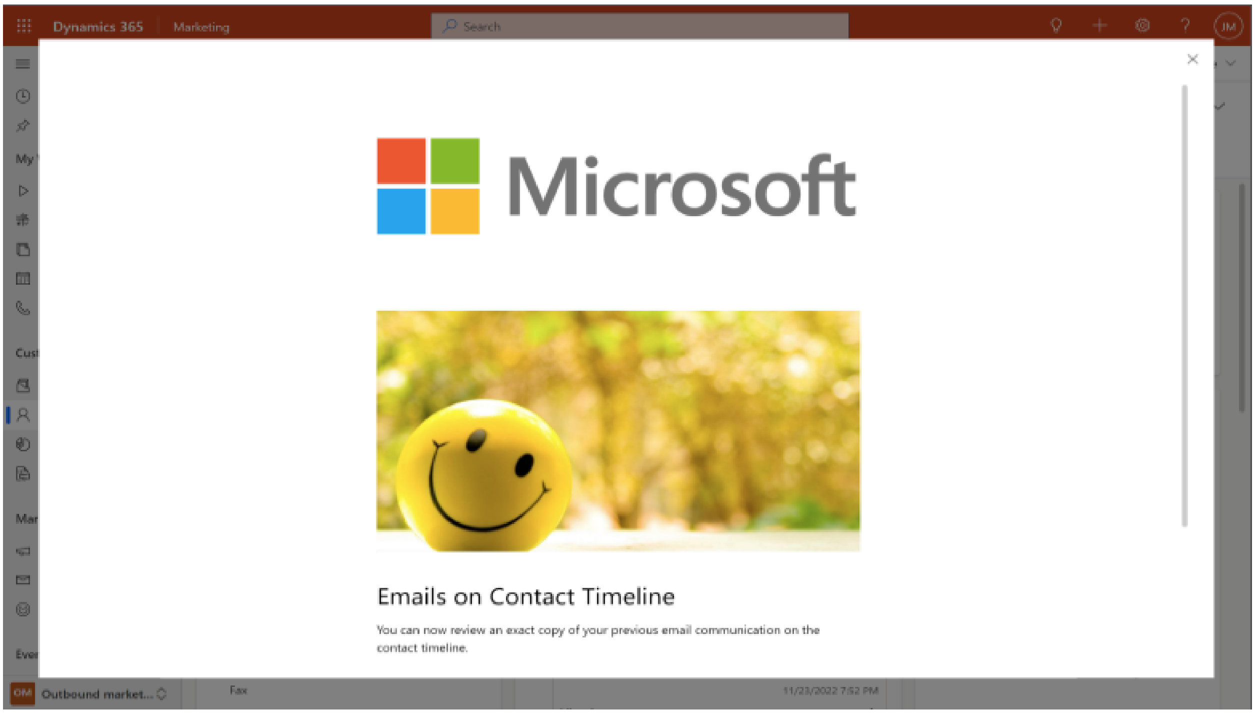
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Dec 13, 2023	-	-

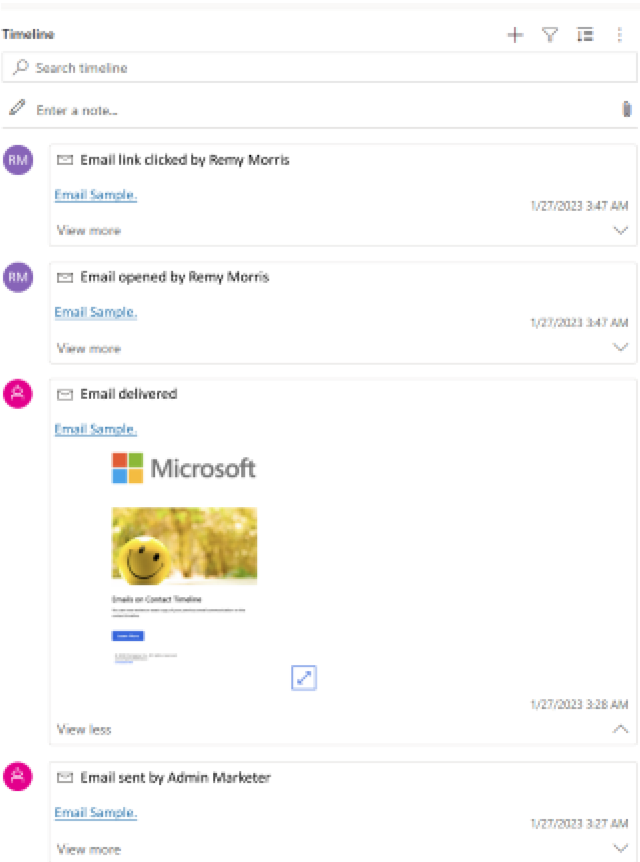
Business value

Understanding your company's customer interactions is key to improving your customer experience. Now you can deepen customer understanding by viewing exact copies of sent emails, allowing you to build more personalized experiences. Reviewing sent emails improves your overall visibility, compliance, and auditing.

Feature details

- See exact copies of emails sent in contact and lead timelines.
- Review the output generated by advanced personalization features such as conditional content.
- Adjust storage of archived emails to meet your business needs.





See also

Reference copies of sent emails in the interaction timeline (docs)

Engage customers with text messages sent using Azure Communication Services

Article • 11/15/2023

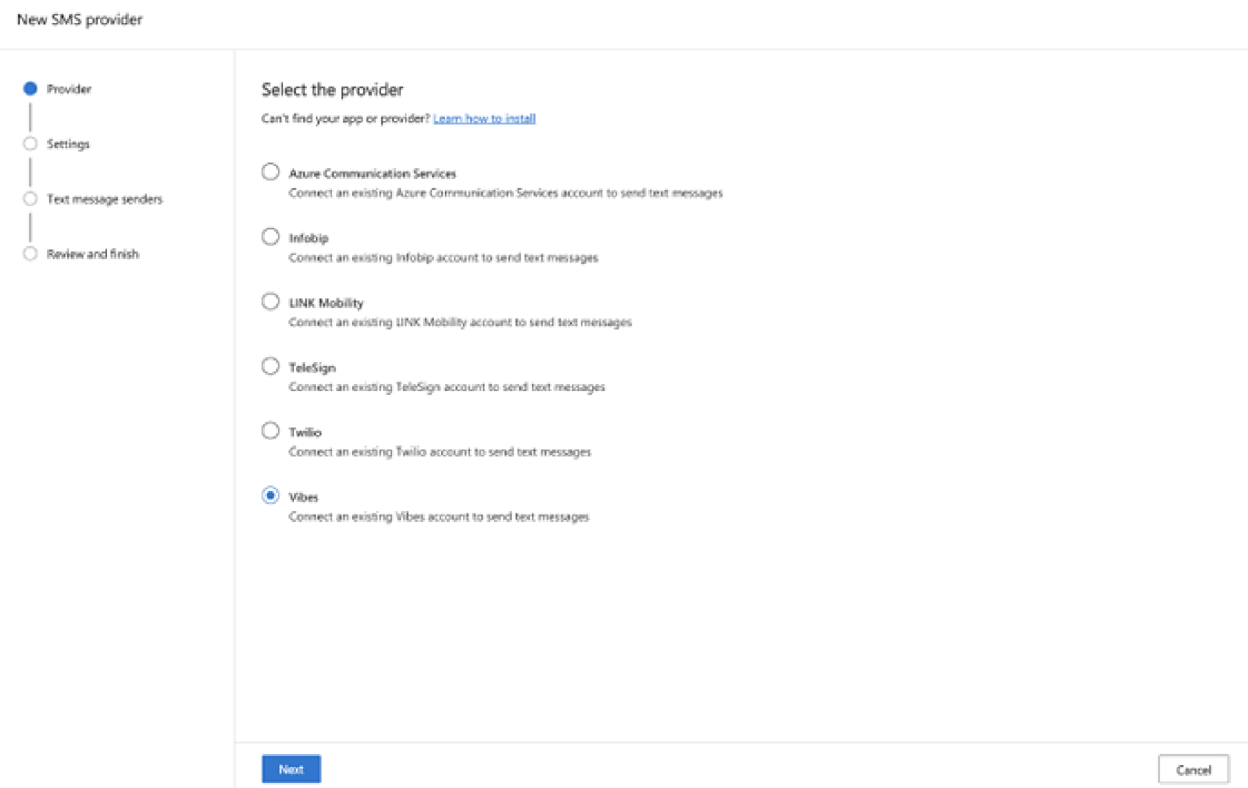
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Oct 16, 2023

Business value

Send text messages to customers using your Azure Communication Services SMS subscription, simplifying your operations by using Microsoft's native SMS provider for all your products. Leverage all the real-time functionalities such as personalization, templates, and analytics, expanding the potential of your Azure Communication Services subscription.

Feature details

- Connect an existing Azure Communication Services SMS subscription and use it to send SMS messages in Dynamics 365 Customer Insights - Journeys.
- Use the full set of native SMS features including personalization, two-way communication, and analytics.



See also

Add a sender number from an active Azure Communication Services subscription (worldwide) (docs)

Enhance email engagement by allowing browser viewing

Article • 01/11/2024

Expand table

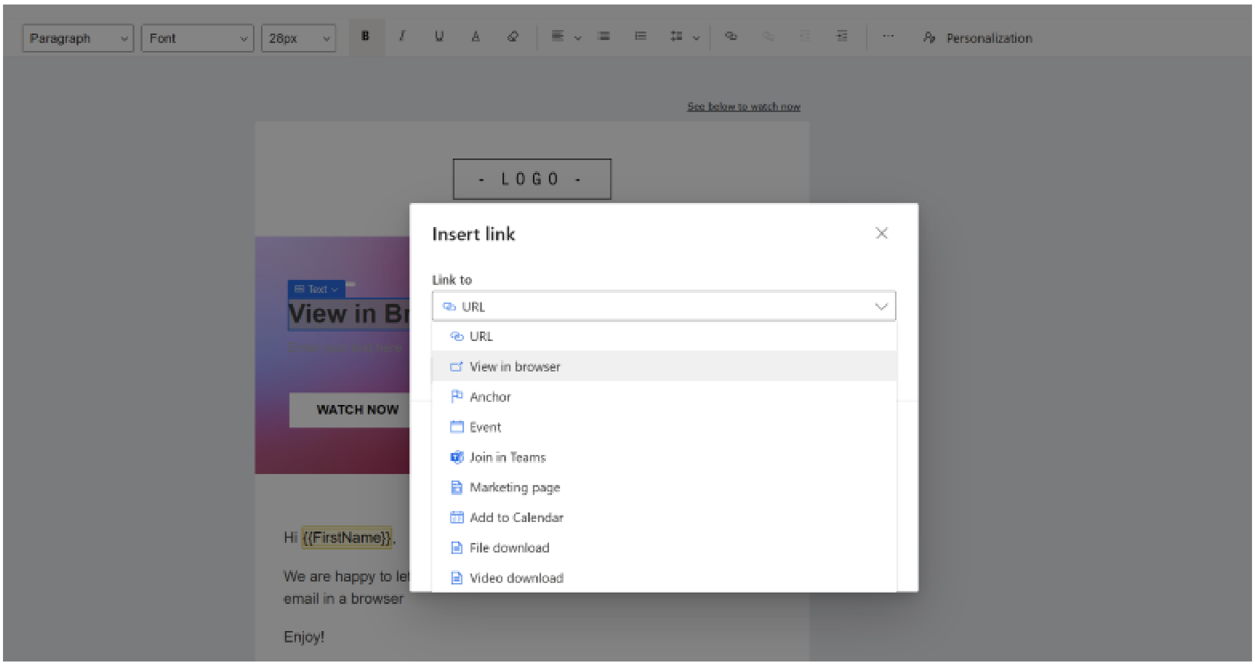
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Dec 12, 2023

Business value

Different email providers have different ways of displaying emails. Sometimes this can result in missing or distorted content, messy layouts, and poor customer experience, especially on mobile devices. The option to "View in browser" in real-time marketing allows your customers to see your emails exactly as you created them, improving their experience and making your marketing campaigns more effective. You can also use the link to preview your emails and share them with your team for feedback and approval.

Feature details

- Add a "View in browser" link anywhere in your email.
- Use any wording to describe the link.
- Use in-browser viewing for better rendering on mobile devices.
- Overcome email provider rendering limitations.



Ensure messages go to the right contact email address

Article • 10/28/2023

ⓘ Important

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

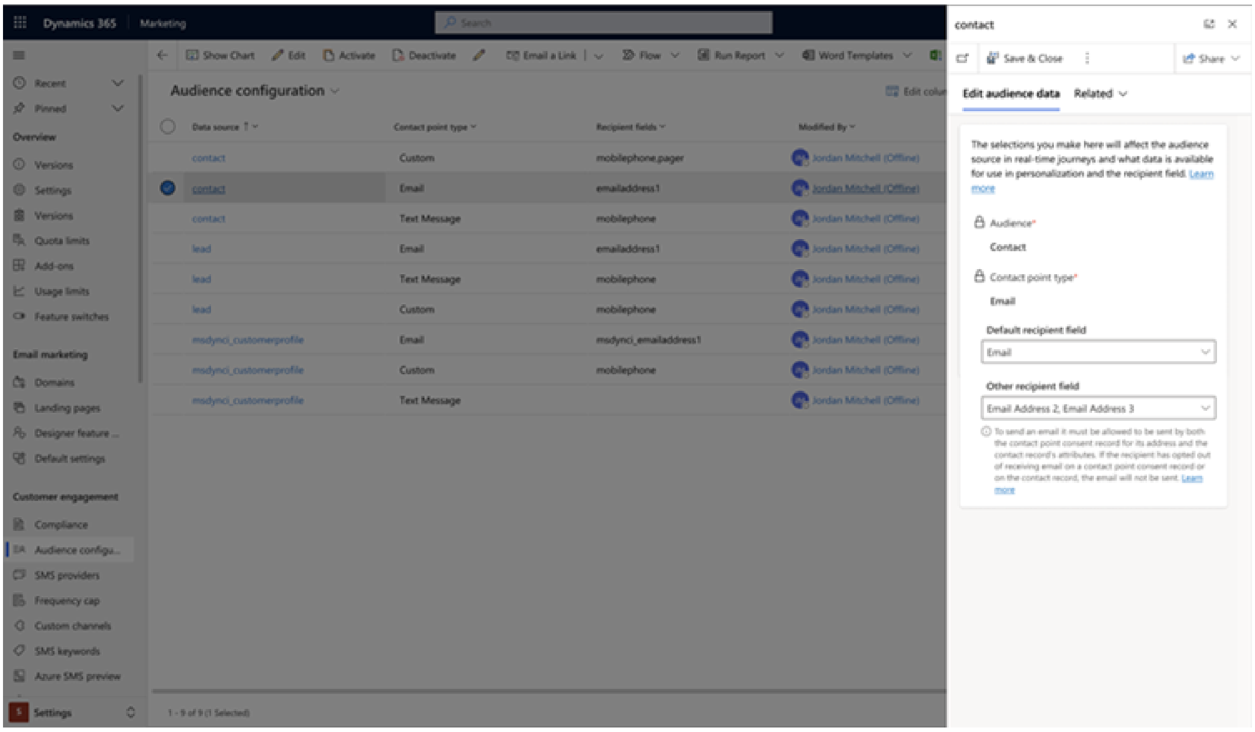
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2024	-	-

Business value

It's critical that your messages are delivered by the right channel at the right time. Often, you'll need to pick the correct email address among the several you may have for a contact. Now, you can choose which of the contact's email addresses to target in your journeys. For example, some email messages may be more appropriate for a contact's work email address, whereas others may best target a personal email address. Now, you have full control over which email address to send email messages to, enabling you to reach your customers where they're most likely to see your messages and take action.

Feature details

- Administrators can add multiple alternative email recipient fields to a contact's Audience Configuration in addition to setting a default email recipient field.
- Marketing professionals can pick which email address field to use for their messages during journey creation, allowing them to target a specific email address of a contact.
- Choose if consent is synced between contact point consent records and the contact's consent attributes with a new feature switch, giving you control over how consent is checked for your emails in Customer Insights – Journeys.



Improve appeal and match brand identity with custom fonts

Article • 12/21/2023

Expand table

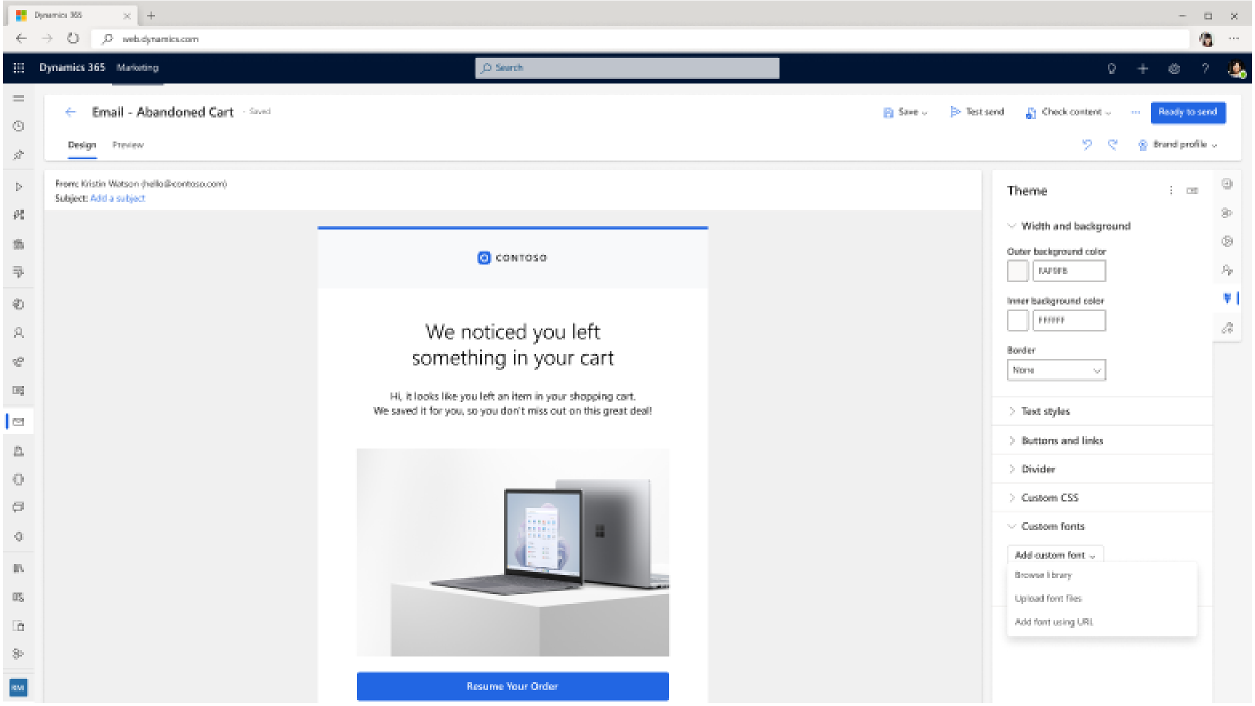
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 1, 2023

Business value

Create emails that stand out to your customers and convey a consistent brand image. By choosing fonts that align with your style and comply with your identity guidelines, you can also improve email accessibility and readability as well as create content that is consistent across languages, devices, and browsers.

Feature details

- Choose font family, size, color, style, and alignment for your text from the toolbar. Customize each text element or use the same settings for all.
- Pick from web fonts, Google fonts, or custom fonts that you upload.
- Add, remove, or edit custom fonts in the account settings. Create font presets and apply them to your text easily.
- Easily add fonts using a URL.



Dynamics 365
web.dynamics.com
Dynamics 365
Marketing
Search
Email - Abandoned Cart
Saved
Save
Test send
Check content
Ready to send
Design
Preview
Brand profile
From: Kristin Watson (hello@contoso.com)
Subject: Add a subject
CONTOSO
We noticed you left something in your cart
Hi, it looks like you left an item in your shopping cart.
We saved it for you, so you don't miss out on this great deal!
Resume Your Order
Theme
Width and background
Outer background color
Inner background color
FFFFFF
Border
None
Text styles
Buttons and links
Divider
Custom CSS
Custom fonts
Add custom font
Browse library
Upload font files
Add font using URL

Improve communication timing by setting up quiet times

Article • 01/11/2024

Expand table

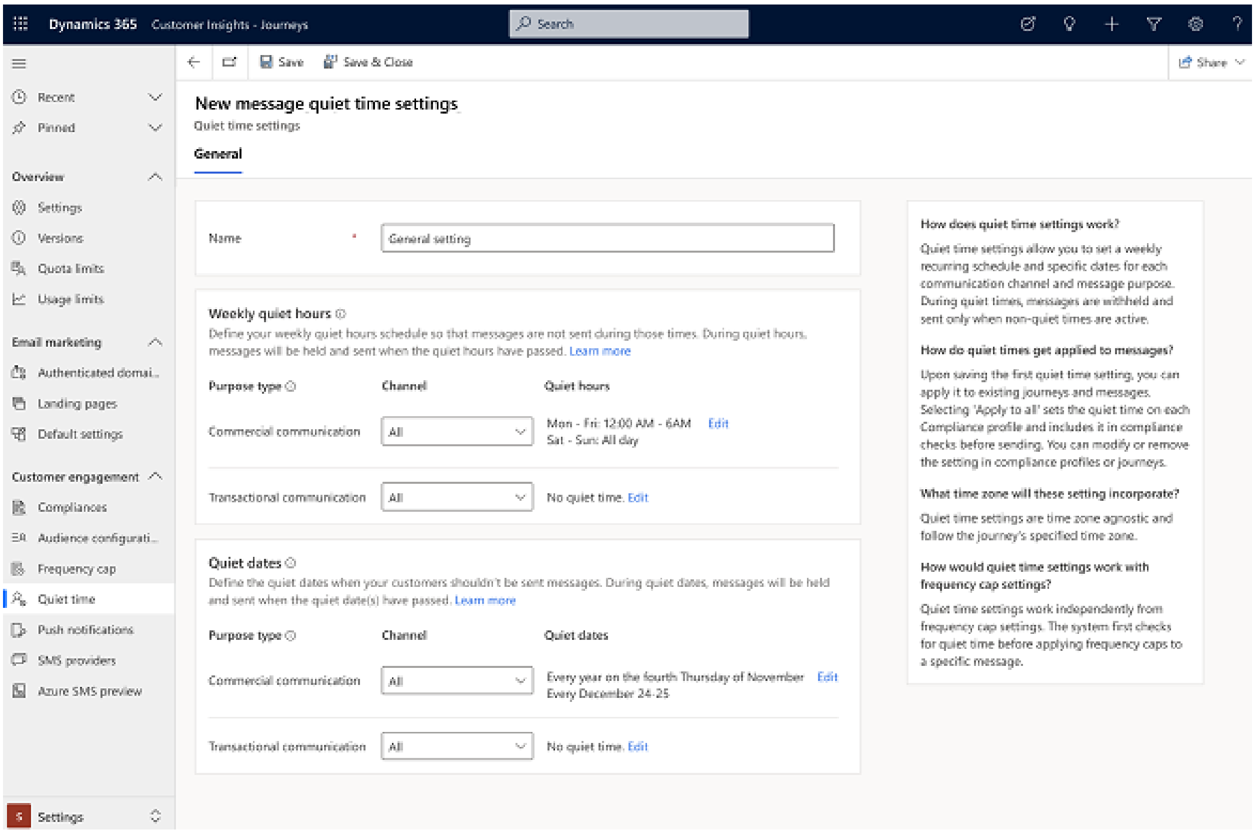
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 2, 2023	-	✔ Dec 13, 2023

Business value

Quiet time settings ensure that your messages are only sent when you want them to be delivered, increasing engagement and meeting customer expectations. It’s also more important than ever to meet compliance obligations by only contacting your customers when they want to be reached. With quiet times, you can easily prevent messages from being delivered during nights, weekends, or holidays. You can control quiet times separately for different channels and message types as well as create unique settings for each line of business.

Feature details

- Set days such as bank holidays or times when customers shouldn’t receive messages.
- Set quiet time by channel, such as email, text message, push notifications, and custom channels.
- Vary quiet times by commercial and transactional message types.
- Quiet time aligns with the time zone of the journey.
- All messages are checked against quiet time settings automatically to ensure compliance and that business rules are followed.
- Messages are held until the end of the quiet time, ensuring prompt delivery after the quiet time ends. During a defined quiet time, messages are stored and delivered just after the quiet time ends.



See also

Set quiet times to prevent messages from sending during unwanted hours (docs)

Increase engagement using alphanumeric SMS senders

Article • 11/15/2023

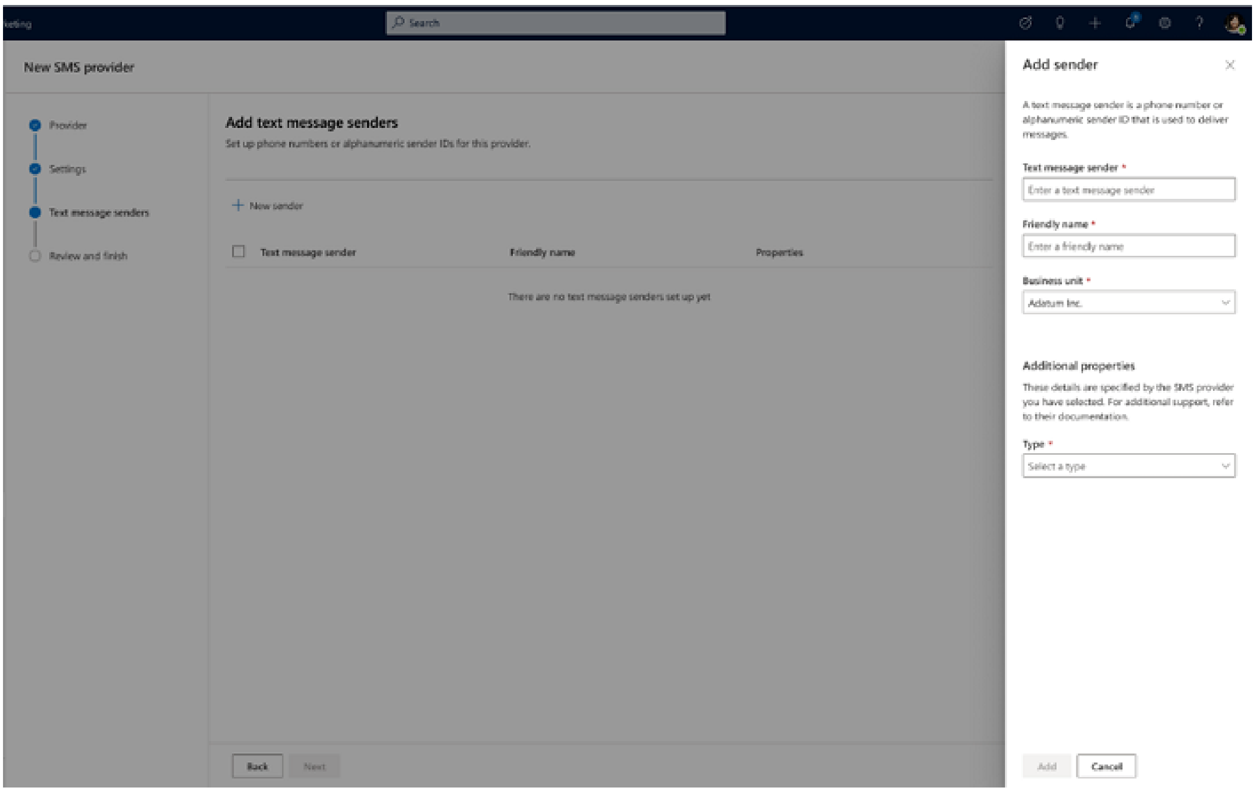
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 16, 2023

Business value

With alphanumeric senders, you can now send one-way text messages to your customers using a custom string of letters or numbers, making it easier for customers to recognize that messages are from a trusted source. By using your brand or company name, you gain brand awareness, increase trust, and, ultimately, boost the overall effectiveness of your SMS marketing efforts.

Feature details

- Include names as SMS senders for transactional and commercial SMS messages.
- Direct customers to your preference page to opt-out of SMS messages.



See also

Create outbound text messages (docs)

Personalize customer experiences using calculated metrics from Customer Insights

Article • 01/19/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✓ Dec 15, 2023

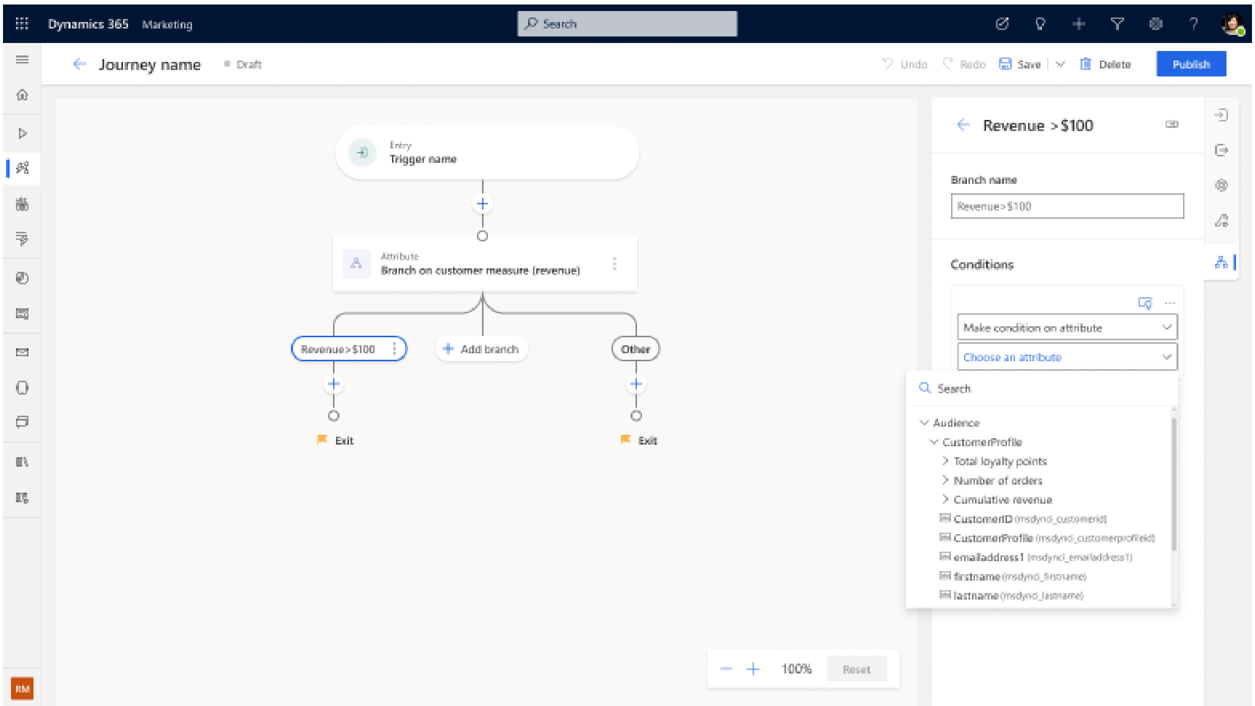
Business value

You can already create highly personalized experiences for your customers when you use Dynamics 365 Customer Insights and Dynamics 365 Marketing together by using rich profile data for every customer. Now, you can further augment personalization by using customer measures from Dynamics 365 Customer Insights and tailoring journeys and content based on loyalty, lifetime value, and any other calculated measure. With this data seamlessly accessible to you, you're empowered to deliver experiences you previously may not have been able to, such as personalizing offers based on average order size or frequency of visits to the store.

Feature details

- Leverage attributes from entities related to the customer profile entity in Dynamics 365 Customer Insights for personalization in marketing messages and branch conditions in journeys.
- Easily access customer measures (for example, total revenue and loyalty points) from Dynamics 365 Customer Insights without moving data.

- Create journey branches or content variants with customer measures using the familiar no-code personalization experience in Dynamics 365 Marketing.



Stay compliant with one-click unsubscribe for emails

Article • 12/21/2023

ⓘ Important

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

Expand table

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

Business value

One-click unsubscribe keeps you compliant with new requirements from Google and Yahoo for bulk email senders. Making it easy to unsubscribe from your messages in a single click improves your reputation as a brand and as an email sender. When combined with real-time journey consent topics, one-click unsubscribe encourages your customers to stay subscribed to your other commercial emails while unsubscribing from a single topic. Letting customers opt out easily can improve open rates, click-through rates, and ensure that your messages are less likely to be marked as spam.

Feature details

- Stay compliant with Google and Yahoo email sending requirements for bulk senders that go into effect February 2024.
- Emails include `list-unsubscribe` and `list-unsubscribe-post` headers, which enable popular email clients to give their users a one-click unsubscribe experience directly from within their email application instead of visiting an unsubscribe web page.
- For real-time journeys using preference centers for multibrand consent, one-click unsubscribe only opts the recipient out of that single brand's purpose, ensuring

future email to other brands continues to be delivered.

- When using topics, one-click unsubscribe for real-time journey emails only opts the recipient out of the topic of the email, keeping the email subscribed to other types of email for that brand.
- For outbound marketing subscription centers, one-click unsubscribe opts the contact out of all future marketing emails by setting the contact's `DoNotBulkEmail` field to prevent sending email.

Streamline email creation with real-time HTML edits

Article • 01/19/2024

ⓘ Important

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

Expand table

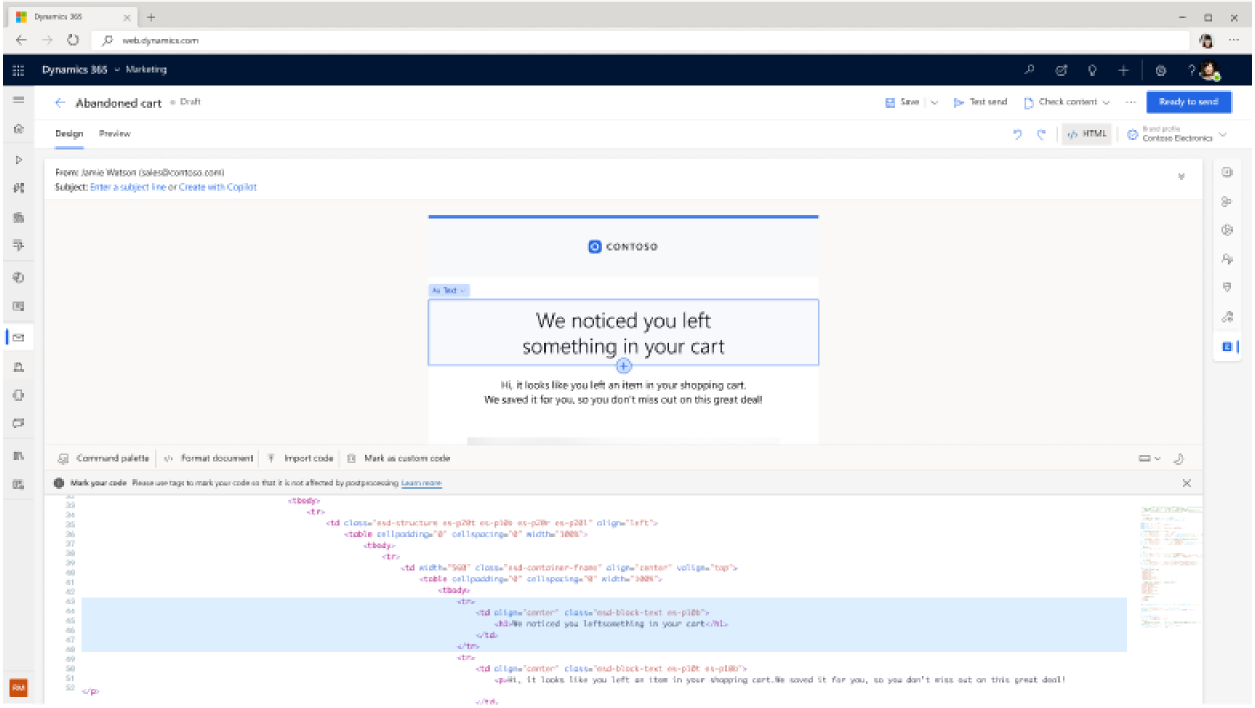
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Feb 2024	-	To be announced

Business value

Easily customize emails in Dynamics 365 Customer Insights - Journeys with the ability to toggle back and forth between the visual editor and HTML code. Get more control over how you display information by marking the code and seeing how it renders across devices and email clients.

Feature details

- **Real-time live editing**: Code directly within the email editor and see changes in real time.
- **Protect your HTML code**: Wrap your HTML code in tags to keep it consistent across email clients.
- **Efficient email customization**: Streamline email creation, eliminate rendering hassles, and reduce support tickets.


Dynamics 365
web.dynamics.com
Dynamics 365 Marketing
Abandoned cart · Draft
Save
Test send
Check content
Ready to send
Design
Preview
HTML
Contoso Electronics
From: Jamie Watson (sales@contoso.com)
Subject: Enter a subject line or Create with Copilot
CONTOSO
We noticed you left something in your cart
Hi, it looks like you left an item in your shopping cart.
We saved it for you, so you don't miss out on this great deal!
Command palette
Format document
Import code
Mark as custom code

Unify sales and marketing

Article • 12/21/2023

ⓘ Important

Some of the functionality described in this release plan has 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 can stop working in silos, eliminate execution gaps, and remove redundancies by collaborating to effectively drive more revenue together.

Build custom reports using Microsoft Fabric integration

Article • 01/19/2024

ⓘ Important

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

Expand table

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

Business value

In today's data-driven world, marketers face the challenge of gaining a comprehensive view of their campaigns to make informed decisions. Each business has unique needs and requirements for aggregating data from various sources. While Dynamics 365 Marketing already offers powerful out-of-the-box reports, we also offer additional custom reporting capabilities to address your unique scenarios.

Now in real-time marketing, you can effortlessly create custom Power BI reports tailored to your business needs by leveraging Microsoft Fabric capabilities. Harness seamless access to data to gain a complete understanding of your campaigns, lead management, market performance, and customer engagement, enabling you to identify new opportunities.

Feature details

The integration of Dynamics 365 Marketing with Microsoft Fabric automatically makes all your marketing data available for analysis in Microsoft Fabric using your premium Power BI license without having to copy data, build ETL (extract, transform, and load) pipelines, or use third-party integration tools.

Fabric integration allows you to:

- Get direct access to your marketing data storage.
- Effortlessly create your custom reports using your Power BI license without the need to export the data.

Increase lead conversions by routing to the correct sales rep

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 25, 2023

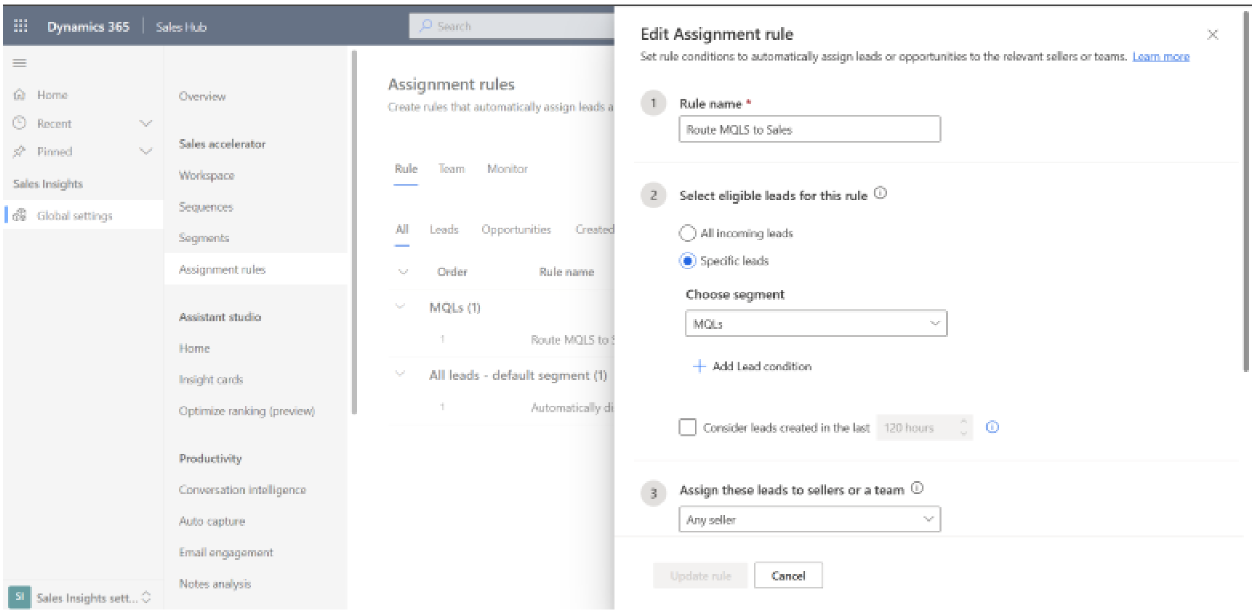
Business value

To win more deals, marketing and sales teams must work together to identify the best leads and convert those leads into business opportunities. Marketers need to define qualification criteria and post-qualification actions to grow the pipeline with the best candidates. Sellers need to follow up on leads when they're hot.

Using Dynamics 365 Customer Insights - Journeys and Dynamics 365 Sales together, you can now easily route qualified leads identified by the marketing team to a seller without customized solutions or manual intervention. This boosts marketing and sales teams' productivity while maintaining focus on the right customers.

Feature details

- Define lead qualification criteria based on scoring models.
- Define qualification actions to update the relevant fields of the lead record when a lead meets the defined criteria.
- Based on the qualification action, create automated assignment rules (available in Dynamics 365 Sales Premium or Dynamics 365 Sales Enterprise) based on your business needs, such as the sales rep's capacity or matching attributes between the rep and lead.



See also

Qualify the best leads (docs)

Plan and prepare for Dynamics 365 Sales in 2023 release wave 2

Article • 12/21/2023

> ⓘ **Important**
>
> The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Sales**.

Overview

https://aka.ms/ReleaseHighlight/2023W2/CustomerExperience

Dynamics 365 Sales is the market-leading sales application that empowers every organization to sell more by understanding their customers and the way they want to buy—powered by data, intelligence, and experiences that people love. Dynamics 365 Sales brings the power of business data wherever the seller is working—across their favorite productivity tools like Office 365 and Teams. By focusing on the most relevant and authentic engagements, sellers can quickly get to the heart of in-the-moment customer needs and sell more efficiently.

The world's way of working has transformed dramatically in the last decade and even more so within the last couple of years. The role of the seller is evolving, too. Buyers expect a blend of digital and personalized experiences throughout their journey. The seller evolution requires a need for several shifts in their current experience: prioritization of their work, intelligent digital communication tools, better collaboration to improve productivity, and spending more time becoming trusted advisors to their customers. To do this, sellers can't be overwhelmed trying to make sense of too much data and information; rather, they need the data to work for them by providing value in every customer interaction.

For 2023 release wave 2, we continue to use data and AI to help sellers prioritize their engagement. The introduction of Copilot in Sales, an omnipresent experience in Dynamics 365 Sales, helps sellers reduce mundane tasks and accelerate execution and business outcomes by providing recommendations, summarizing data, retrieving information, and performing actions in context and within the flow of work.

Do you have a new feature idea or feedback? We encourage you to connect with us at Sales Ideas.

Updates to Dynamics 365 Sales 2023 release wave 2

Investment areas

Copilot With Dynamics 365 Copilot, organizations empower their workers with AI tools built for sales, service, marketing, operations, and supply chain roles. These AI capabilities enable everyone to spend more time on the best parts of their jobs and less time on mundane tasks.

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 for Dynamics 365 Sales experiences focus on enhancing seller productivity and effectiveness in their flow of work, by enabling them to automate the sales process, and augment seller actions and decisions with AI-powered insights and actions. Copilot features help sellers save time, boost productivity, lighten workloads, and stay focused on connecting with customers and closing deals.

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.

Sales engagement The sales engagement capabilities (formerly known as Sales accelerator) in Dynamics 365 Sales allow your sellers to engage with their customers in the smartest way possible, through AI-driven insights about their customer relationship and conversations, and through tools that help accelerate and standardize the selling process. These tools help sellers to maintain a healthy relationship with their customers and have an impactful conversation with them.

The following sales engagement capabilities are planned for this release wave:

- Engage a bot for the initial customer outreach so that only good quality leads reach the sellers at the right time, saving precious time for the sellers.
- While you're on a call with a customer, get insights and tips based on past interactions with the customer and communicate effectively based on the suggestions.
- With conversation intelligence support extended for third-party telephony providers, you get seamless insights irrespective of the call provider you're using.
- Prepopulate emails based on the content you frequently use while drafting emails, such as self-introduction and product details, reducing the time spent preparing emails.
- A whole host of enhancements around sequences, including sequence step visibility, sequence performance, custom templates, step loops, multiple sequences assignment, personalization, automated replies, and more.
- Improvements to sales accelerator through enhanced worklist items, up next widgets, and better performance, personalization, and ease-of-use capabilities.
- Send and receive customer communication through SMS and get real-time notifications for incoming SMS.

Sales execution and sales force automation The sales execution and sales force automation capabilities in Dynamics 365 Sales allow sellers to be more productive and efficient in their core area of work—selling. These capabilities help sellers initiate a campaign, generate leads, assign leads to sellers, convert those leads to opportunities, manage accounts and contacts, and manage all activities around leads and opportunities until the deal is closed.

The following capabilities are planned for this release wave to enhance sales execution and sales force automation:

- Prevent duplicate leads from entering the system either through manual creation or bulk import.
- Get follow-up tasks created automatically based on information from various Office applications like emails, Teams messages, and Teams call transcripts, and get friendly reminders to help you complete those tasks.
- Create opportunities with ease by using the new version of input forms that declutter information with an enhanced visual layout.
- Use the AI-powered solution to get account-based suggestions for targeted selling and precise workflows to leverage.

- Create a customer org chart so that sellers know the roles of contacts in the organization and can view the relationship map.

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

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

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

Check out the release plan

For application administrators

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

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

Get the most out of Sales

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Sales.
Product documentation	Find documentation for Sales.
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.

What's new and planned for Dynamics 365 Sales

Article • 01/19/2024

This topic lists features that are planned to release from October 2023 through March 2024. 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 2023 release wave 1 plan.

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

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

Copilot

Reimagine Dynamics 365 productivity leveraging GPT technology.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Gear up for meetings with AI-generated preparation notes	Users by admins, makers, or analysts	✔ Jul 28, 2023	-	✔ Oct 20, 2023
Stay on top of your lead with AI-generated lead summary	Admins, makers, marketers, or analysts, automatically	✔ Jul 28, 2023	-	✔ Oct 20, 2023
Improve relevance of Copilot summaries and recent changes	Admins, makers, marketers, or analysts, automatically	-	-	Jan 2024
Experience Copilot in an immersive widescreen mode	Users by admins, makers, or analysts	Feb 2024	-	-
Leverage manager dashboards to coach sellers	Users by admins, makers, or analysts	Jan 2024	-	Mar 2024

Feature	Enabled for	Public preview	Early access*	General availability
Stay updated with contextual news within Copilot chat	Users by admins, makers, or analysts	✔ Jul 28, 2023	-	✔ Oct 20, 2023
Get enriched lead summary with information from Customer Insights	Admins, makers, marketers, or analysts, automatically	-	-	Jan 2024
Stay on top of your deals with AI-generated opportunity summaries	Users by admins, makers, or analysts	✔ Jul 28, 2023	-	✔ Oct 20, 2023
Elevate your customer engagements with AI-recommended content	Users by admins, makers, or analysts	Feb 2024	-	-
Know your account better with AI-generated account summary	Users by admins, makers, or analysts	Feb 2024	-	-
Improve productivity with natural language search in Sales Copilot	Users by admins, makers, or analysts	Jan 2024	-	-
Follow up on emails using recommended actions	Users, automatically	-	✔ Jul 31, 2023	✔ Oct 20, 2023

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
Use Copilot to get answers from your sales documents	Users by admins, makers, or analysts	Feb 2024	-	To be announced
Maximize sales success with AI-suggested past successful deals	Users by admins, makers, or analysts	Mar 2024	-	To be announced
Boost your sales with product content recommendations	Users by admins, makers, or	Feb 2024	-	To be announced

Feature	Enabled for	Public preview	Early access*	General availability

Sales engagement

New sales engagement capabilities help sellers stay efficient and successful.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Work uninterrupted in focused mode with usage preference for all entities	Users by admins, makers, or analysts	Feb 2024	-	-
Engage with your customers by invoking SMS chat pane from Activities	Users, automatically	-	Jul 31, 2023	Oct 21, 2023
Navigate to new records faster with sales accelerator form load updates	Users, automatically	-	Jul 31, 2023	Oct 2, 2023

Sales execution and sales force automation

Sales execution includes tools and processes that help sellers engage with a prospective customer from the early stage of awareness to closing a sale.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Visualize key stakeholders and take action with smart organization chart	Users by admins, makers, or analysts	May 19, 2023	-	Oct 20, 2023
Improve seller efficiency by customizing quote close experience	Users by admins, makers, or analysts	-	-	Oct 20, 2023
Stay on top of features and settings with new overview page experience	Admins, makers, marketers, or analysts, automatically	-	-	Feb 2024

Feature	Enabled for	Public preview	Early access*	General availability
Modern and refreshed user experience with updated styling and controls	Users, automatically	-	✔ Jul 31, 2023	✔ Oct 21, 2023
Export-import segments and assignment rules between environments	Admins, makers, marketers, or analysts, automatically	-	-	Feb 2024
Use assignment rules to manage seller availability and auto-assign leads	Admins, makers, marketers, or analysts, automatically	-	-	✔ Nov 30, 2023

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
Close opportunities effortlessly by prepopulating attributes	Users, automatically	-	-	Feb 2024

- You are able to opt into some features as part of early access on July 31, 2023, including all mandatory changes that affect users. To learn more, go to Early access FAQ .

Description of **Enabled for** column values:

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

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

Copilot

Article • 12/21/2023

ⓘ Important

Some of the functionality described in this release plan has 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 Dynamics 365 Copilot, organizations empower their workers with AI tools built for sales, service, marketing, operations, and supply chain roles. These AI capabilities enable everyone to spend more time on the best parts of their jobs and less time on mundane tasks.

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 for Dynamics 365 Sales experiences focus on enhancing seller productivity and effectiveness in their flow of work, by enabling them to automate the sales process, and augment seller actions and decisions with AI-powered insights and actions. Copilot features help sellers save time, boost productivity, lighten workloads, and stay focused on connecting with customers and closing deals.

Elevate your customer engagements with AI-recommended content

Article • 01/10/2024

ⓘ Important

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

Expand table

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

Business value

In today's sales landscape, sales teams have a wealth of resources at their disposal, including documents, blogs, articles, and other materials. Depending on the size of the organization, dedicated teams create relevant and pointed documentation for sellers to reference and share with customers during the sales process. It's essential to ensure that sellers have access to the most appropriate documents that can create the desired impact when shared with key decision-makers during sales meetings or calls.

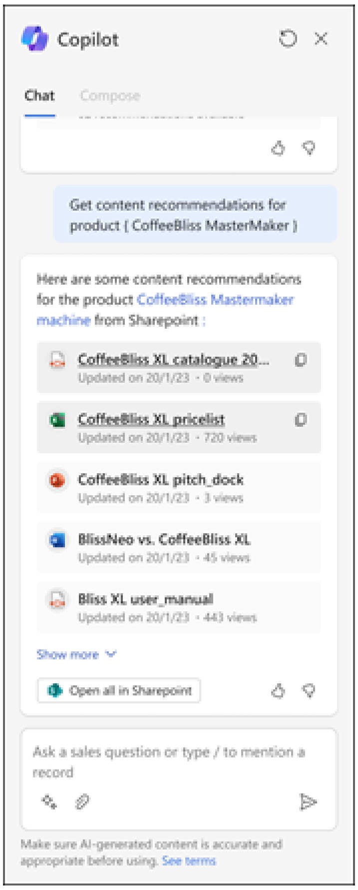
Hence, a seamless and efficient recommendation process can positively impact revenue by influencing ongoing deals and boosting the deal pipeline. Generative AI can revolutionize this recommendation process by surfacing the right content based on context and customizing and summarizing it for easy consumption and distribution by sellers. This approach saves time and effort for sellers and allows them to remain focused on customer collaboration.

Feature details

This capability will enable your sellers to choose the right content during customer collaborations. With this feature, you'll be able to:

- Get recommended content based on engagement context.

- Quickly search content using natural language.
- Get content recommendations during calls and the ability to share the details with customers.



Geographic areas

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

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- South America
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- Japan
- France
- Korea
- China

Follow up on emails using recommended actions

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 31, 2023	✔ Oct 20, 2023

Business value

Currently, sellers have to keep track of their email conversations. They have to meticulously recall and note action items and ensure to set a due date and take tasks to completion. The tasks could be as simple as setting up a follow-up meeting to as complex as revising quotes after talking to all stakeholders and could take a few minutes to a few days to complete.

With this enhancement, the system monitors and identifies action items from email conversations and populates them within the Up-Next widget for easy reference. The system also sends reminders to complete the task, thus reducing notetaking and the risk of missing tasks.

Feature details

With this feature, sellers will be able to:

- View suggestions to create follow-up tasks based on the content in an incoming email in Dynamics 365.
- View the follow-up tasks in the Copilot pane.
- Get reminders to complete tasks.

Geographic areas

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

- Germany
- Norway
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- Switzerland

- United Arab Emirates
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See also

Show emails that are not replied (docs)

Gear up for meetings with AI-generated preparation notes

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Jul 28, 2023	-	✔ Oct 20, 2023

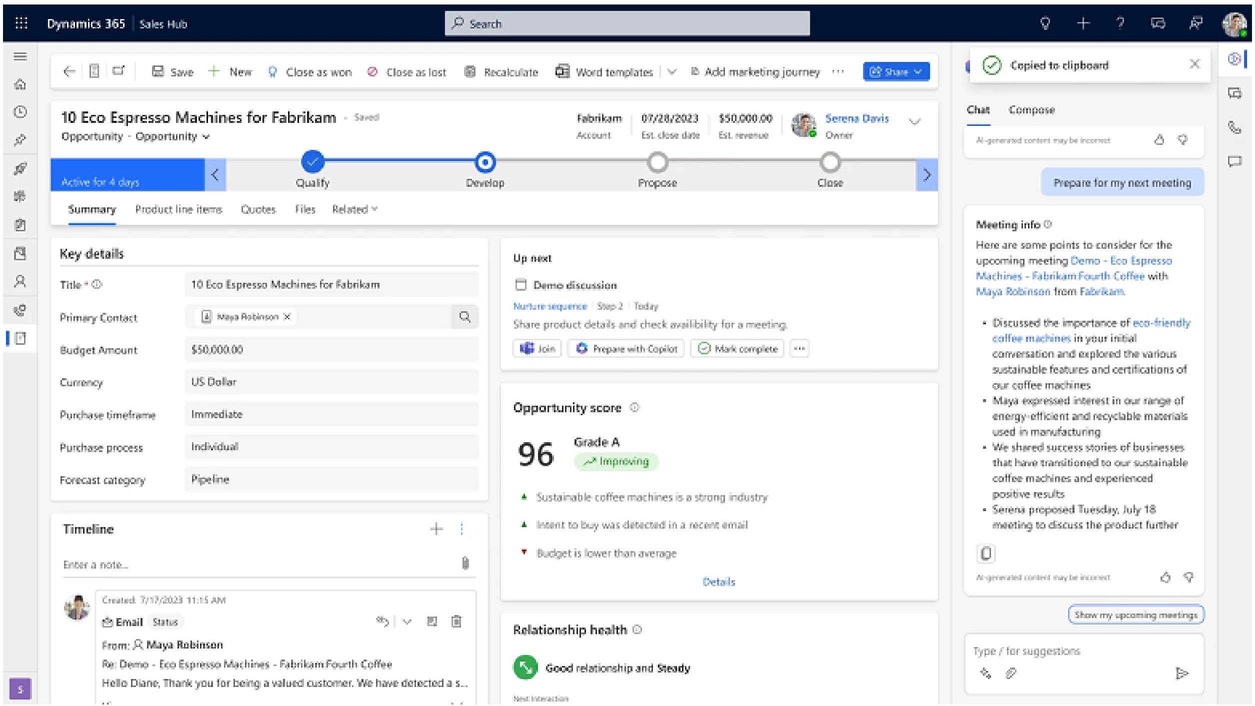
Business value

Sellers have a limited time window for an effective customer conversation. They need to have the right data points to discuss with the customer to build credibility. Depending upon the sales lifecycle, sellers need different kinds of information to be productive at an upcoming customer meeting. The source of this information is scattered across multiple systems and websites. Quickly finding the right information for an effective conversation is often time-consuming and could lead to erroneous assumptions.

Copilot in Dynamics 365 Sales uses generative AI to maximize sellers' efficiency and help them achieve more from each customer engagement. It helps sellers focus on the key points collected from various sources, making meetings more meaningful and productive. Copilot enables informed decision-making and increased participation, leading to more productive discussions and sales outcomes.

Feature details

- Copilot in Sales detects meetings coming up in the next 24 hours and prompts the customer to prepare for them.
- Copilot in Sales offers a summary of recent email exchanges and the last 10 notes to help you prepare.



Geographic areas

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

See also

How AI-powered opportunity summaries transform collaboration (blog)

Prepare for upcoming meetings (docs)

Improve relevance of Copilot summaries and recent changes

Article • 01/05/2024

ⓘ Important

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

Expand table

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

Business value

Tailored summaries of sales records are essential for aligning with each organization’s sales preferences. This feature enables admins to customize Copilot to generate summaries and recent changes lists according to their business needs. With these customizations, sellers can save valuable time and get a quick summary of sales records and a list of recent changes based on fields that matter most to them. As a result, sellers can prioritize leads more efficiently, focus on high-potential opportunities, and dedicate more time to meaningful customer engagements.

Feature details

With this feature, administrators can:

- Configure up to 10 fields for generating opportunity and lead summaries.
- Configure up to 10 fields for compiling recent changes lists for opportunities and leads.

Leverage manager dashboards to coach sellers

Article • 12/06/2023

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may 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	Jan 2024	-	Mar 2024

Business value

By analyzing aggregated customer interactions and seller behaviors, sales leaders can determine the effectiveness of their sales strategies, respond to market changes, and coach their sales staff more efficiently.

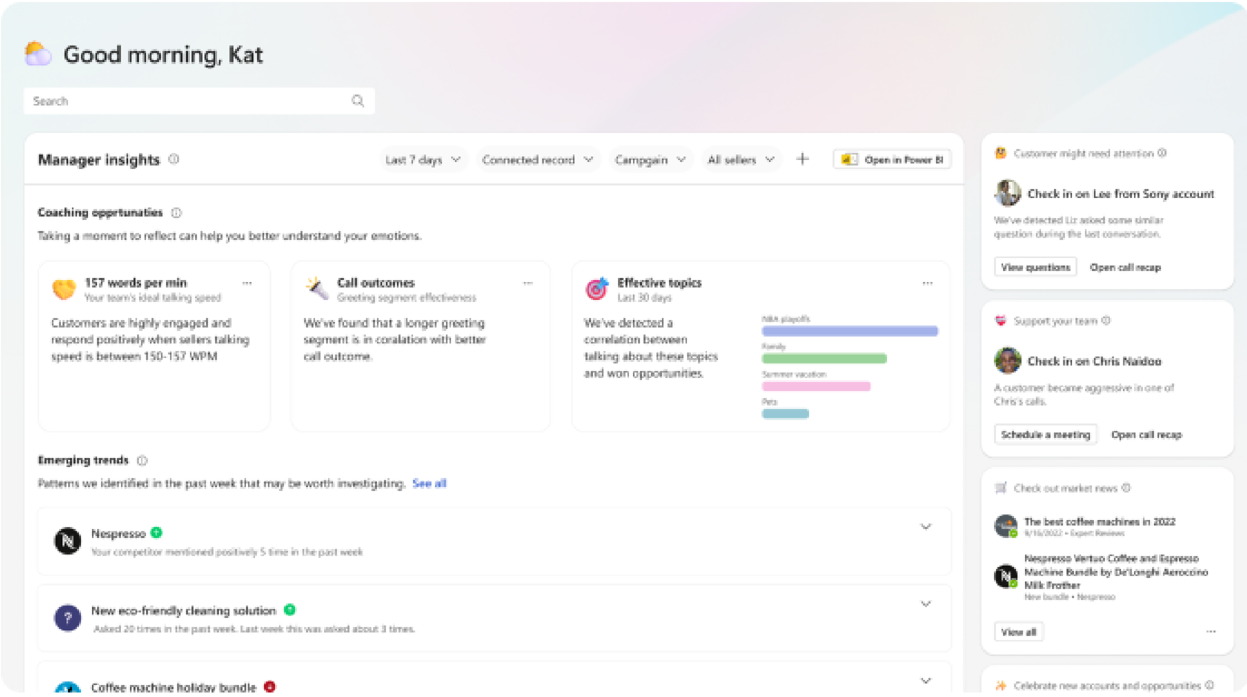
Feature details

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

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

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

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



Stay on top of your deals with AI-generated opportunity summaries

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Jul 28, 2023	-	✔ Oct 20, 2023

Business value

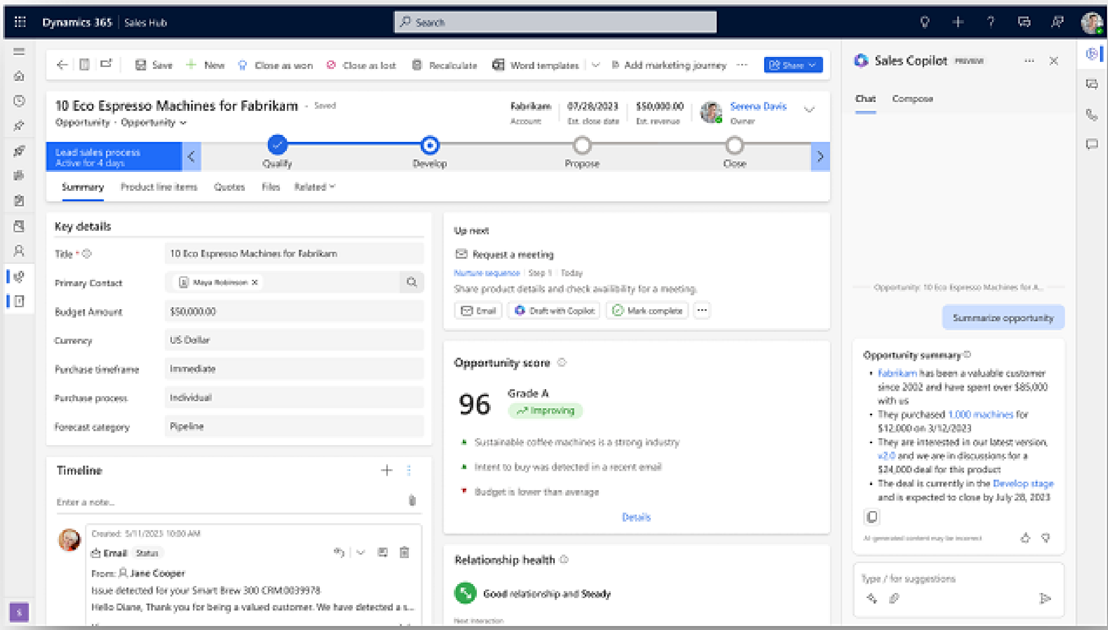
Sellers work on multiple deals concurrently. They need to be on top of all the deals for them to prioritize their work effectively. As information is scattered across the system, it's a time-consuming and tedious task for sellers to sift through vast amounts of data to find relevant information. Moreover, in the case of large deals, multiple team members work on the opportunity concurrently, and hence staying on top of the deal can get very challenging.

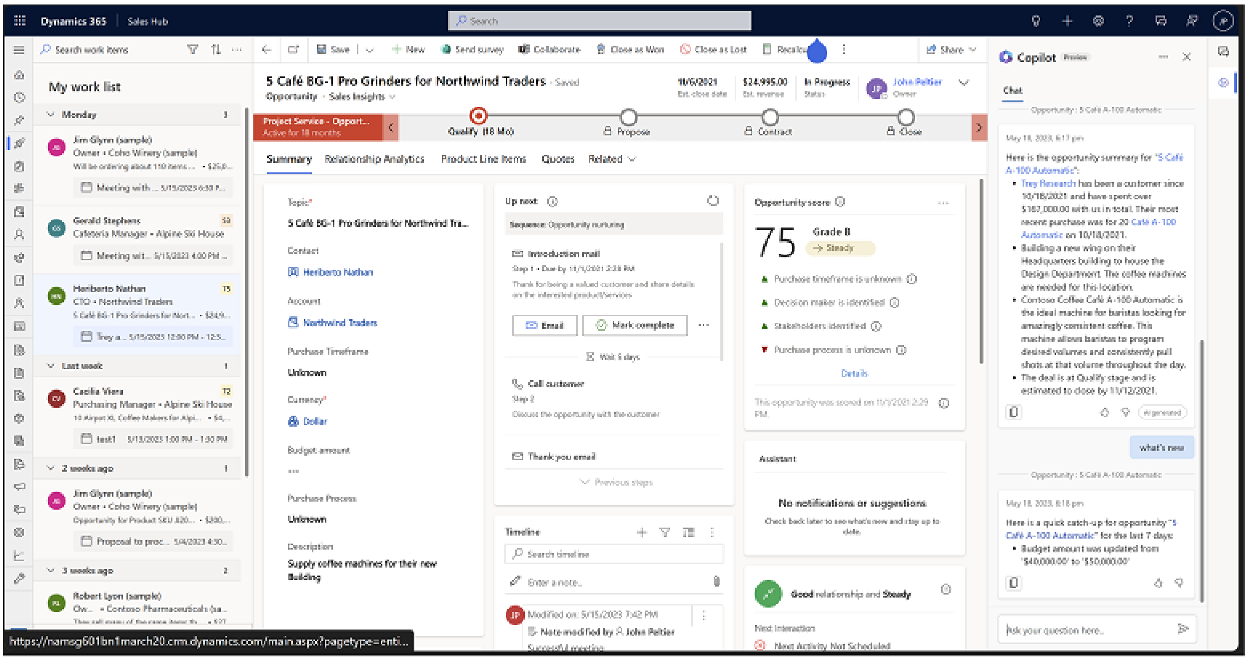
AI-generated opportunity summaries provide a quick and comprehensive summary of key customer data, including buying behavior, preferences, and past purchases. By leveraging this information, sellers can gain valuable insights into customer needs, allowing them to tailor their sales pitches and increase their chances of success. It allows a seller to summarize the most important aspects of a sales opportunity, such as the customer's needs, the proposed solution, and the expected value or benefit to the customer. This helps the seller communicate the opportunity more clearly and effectively to potential buyers or decision-makers.

Feature details

With this feature, sellers will be able to:

- View the AI-generated summary of an opportunity in a reader-friendly format. The summary includes an overview of the status and progress of a potential sale or deal. It provides a snapshot of where the opportunity stands in the sales process, how likely it is to close, and the potential revenue it could generate.
- View the highlighted changes, which indicate the changes since the last sign-in and the degree of importance, helping you pay close attention to the most recent changes.





Geographic areas

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See also

Summarize an opportunity or a lead (docs)

Stay on top of your lead with AI-generated lead summary

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jul 28, 2023	-	✔ Oct 20, 2023

Business value

Sellers spend a lot of time gathering and understanding information about new leads. Sellers find it difficult to know if the leads come from existing contacts or accounts, and whether they have any existing relationship with those customers.

With the enriched data from Dynamics 365 Sales, Bing news, and LinkedIn, sellers can tailor their approach to be more personalized and effective, leading to a higher likelihood of closing deals. With AI-powered lead summaries, sellers can now access a quick overview of leads from various sources. This feature saves time and effort and ensures that sales teams focus on the most promising leads, leading to increased seller productivity and efficiency.

Feature details

With these enhancements, you'll be able to:

- View an AI-powered summary of a lead.
- Flag if the lead is from any existing contact and account within the CRM.
- Read the latest news about the associated account.
- Find the LinkedIn profiles of the prospects.

Geographic areas

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

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See also

Summarize an opportunity or a lead (docs)

Stay updated with contextual news within Copilot chat

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Jul 28, 2023	-	✔ Oct 20, 2023

Business value

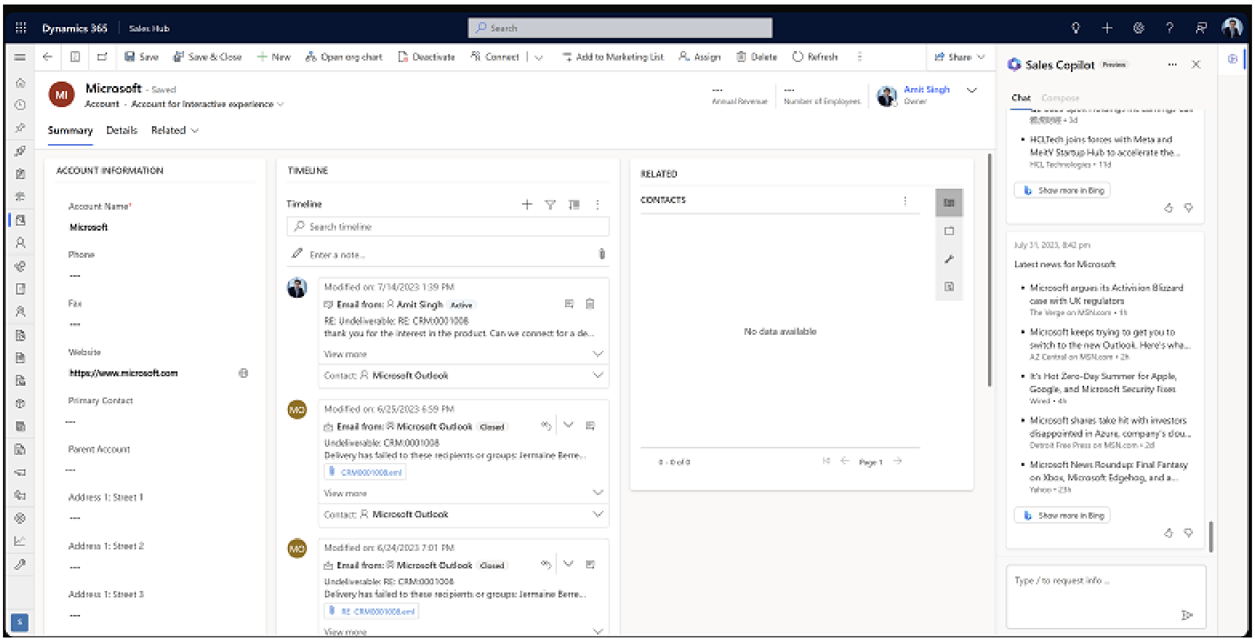
By integrating Bing's contextual news, users can access real-time news articles, blog posts, or other relevant content related to the company they are working with. This feature can help sales professionals stay informed about their customers' industry trends, market updates, competitor activities, and other relevant news that may impact their sales strategies and engagements.

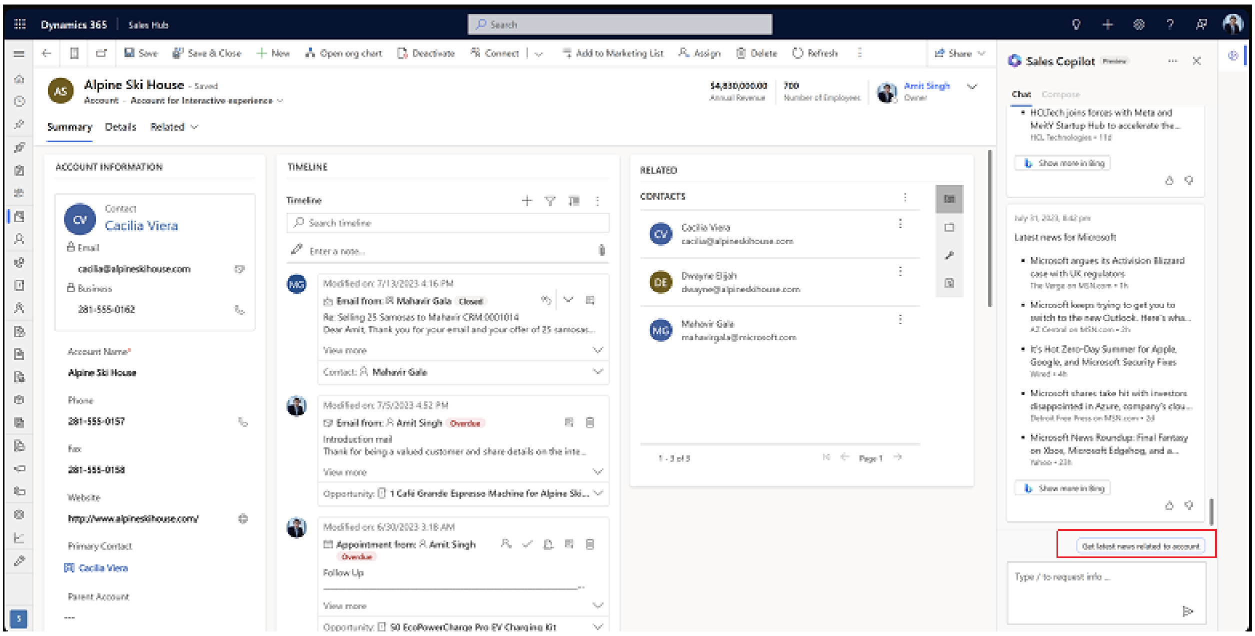
Having this information readily available within the Dynamics 365 Sales product can empower sales teams to have more informed conversations, tailor their pitches, and identify new opportunities. It can also contribute to building stronger customer relationships and improving overall sales performance.

Feature details

With this feature, sellers will be able to:

- View the latest news about an account or company contextually within Dynamics 365 Sales, curated from Bing.
- Trigger the 'Get latest news' command from the Lead, Contact, Opportunity or Account form to view the latest account news.





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- India
- Japan
- France
- Korea
- China

See also

Show latest news for an account (docs)

Copilot and AI Innovation

Article • 01/11/2024

ⓘ Important

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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.

Boost your sales with product content recommendations

Article • 12/21/2023

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Feb 2024	-	To be announced

Business value

As a sales professional, you often find it challenging to find the right product information in a timely manner. With the personalized content recommendation feature, you're presented with the right document at the right time, significantly enhancing meeting preparations, saving time, and fostering deeper customer connections. The seamless integration of content recommendations directly within the workflow ensures that you remain focused, enabling you to maximize the value of each interaction.

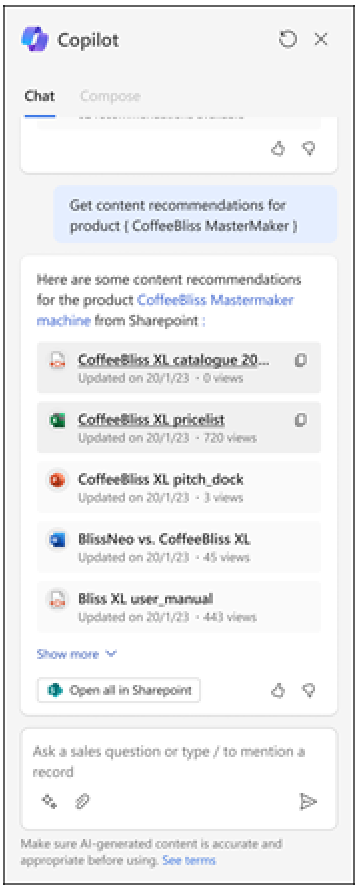
Feature details

As an admin, you can:

- Configure any knowledge source to retrieve product-specific content.

As a seller, you can:

- Get contextual content recommendations based on the products included in the opportunity, from sources like SharePoint.
- Leverage the Copilot prompts for easy retrieval of product-specific content.


Copilot
Chat
Compose
Get content recommendations for product (CoffeeBliss MasterMaker)
Here are some content recommendations for the product CoffeeBliss Mastermaker machine from Sharepoint :
CoffeeBliss XL catalogue 20...
Updated on 20/1/23 · 0 views
CoffeeBliss XL pricelist
Updated on 20/1/23 · 720 views
CoffeeBliss XL pitch_dock
Updated on 20/1/23 · 3 views
BlissNeo vs. CoffeeBliss XL
Updated on 20/1/23 · 45 views
Bliss XL user_manual
Updated on 20/1/23 · 443 views
Show more
Open all in Sharepoint
Ask a sales question or type / to mention a record
Make sure AI-generated content is accurate and appropriate before using. See terms

Sales engagement

Article • 12/21/2023

ⓘ Important

Some of the functionality described in this release plan has 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 sales engagement capabilities (formerly known as Sales accelerator) in Dynamics 365 Sales allow your sellers to engage with their customers in the smartest way possible, through AI-driven insights about their customer relationship and conversations, and through tools that help accelerate and standardize the selling process. These tools help sellers to maintain a healthy relationship with their customers and have an impactful conversation with them.

The following sales engagement capabilities are planned for this release wave:

- Engage a bot for the initial customer outreach so that only good quality leads reach the sellers at the right time, saving precious time for the sellers.
- While you're on a call with a customer, get insights and tips based on past interactions with the customer and communicate effectively based on the suggestions.
- With conversation intelligence support extended for third-party telephony providers, you get seamless insights irrespective of the call provider you're using.
- Prepopulate emails based on the content you frequently use while drafting emails, such as self-introduction and product details, reducing the time spent preparing emails.
- A whole host of enhancements around sequences, including sequence step visibility, sequence performance, custom templates, step loops, multiple sequences assignment, personalization, automated replies, and more.
- Improvements to sales accelerator through enhanced worklist items, up next widgets, and better performance, personalization, and ease-of-use capabilities.
- Send and receive customer communication through SMS and get real-time notifications for incoming SMS.

Engage with your customers by invoking SMS chat pane from Activities

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 31, 2023	✔ Oct 21, 2023

Business value

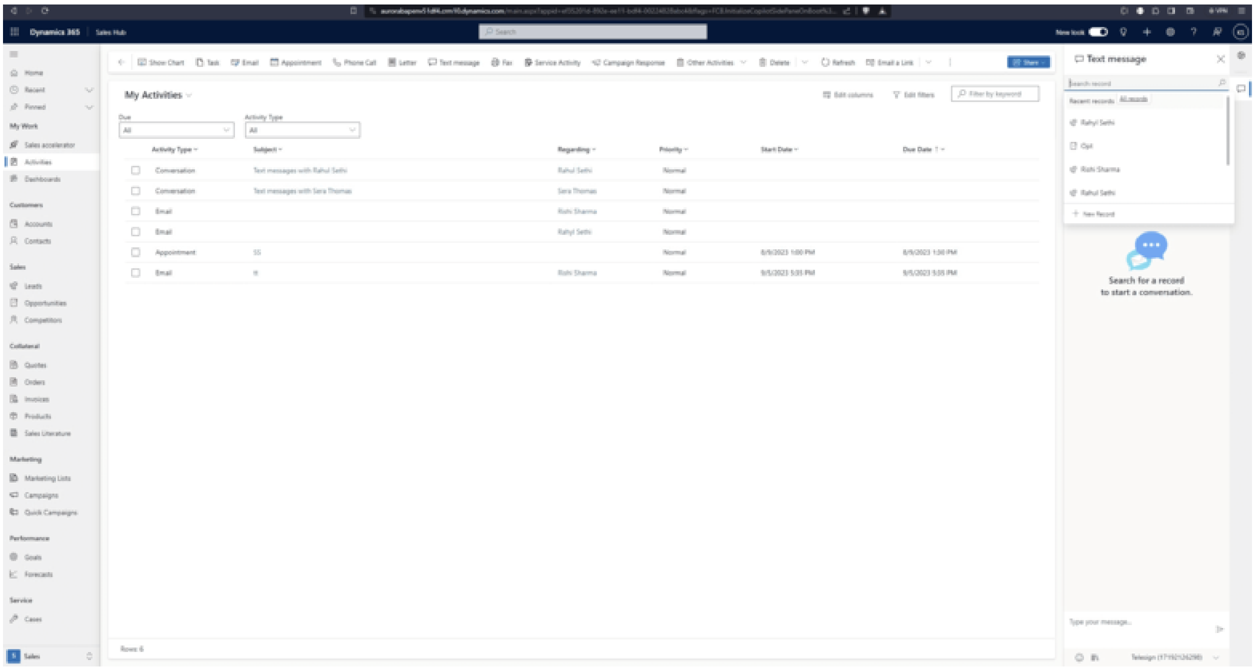
In the current B2B industries, effective customer engagement is the most important means for building and maintaining customer relationships and closing deals. It's important to communicate with your customers through channels that they prefer. As the world changes toward a digital way of living, more and more customers prefer to be contacted via SMS. Even sellers find SMS as a convenient and effective channel to send reminders, provide quick updates, or respond to customer queries.

This feature will enable ease of communication by increasing the number of touchpoints for users to invoke the SMS pane. Users can start SMS conversations from the ribbon bar within the Activities page, similar to other communication channels like email and call.

Feature details

With this feature, sellers will be able to:

- Invoke the SMS chat pane and send text messages from the Activities page within Dynamics 365 Sales.
- Access Unread Messages as a separate view within Activities.



See also

Open text message conversations (docs)

Navigate to new records faster with sales accelerator form load updates

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓ Jul 31, 2023	✓ Oct 2, 2023

Business value

As a seller, efficient worklist management and seamless record navigation are crucial. With our latest update, we have focused on improving these aspects by reducing form loading time by around 40 percent and enhancing the overall navigation experience. This means that sellers will be able to move through their actions quickly and smoothly, enabling them to spend more time with customers and less time on system navigation. If you're a seller looking to prioritize your worklist and streamline your workflow, our updated experience is designed to help you achieve that.

Feature details

When a seller selects sales accelerator and navigates across worklist items, the overall application performance should be easy and quick to move through. As a part of this capability, the underlying entity record form loading and navigation model will be upgraded to reduce the loading time within Sales Accelerator Workspace.

See also

View my records by using the work list (docs)

Work uninterrupted in focused mode with usage preference for all entities

Article • 01/03/2024

ⓘ Important

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

Expand table

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

Business value

Focus View has generated considerable interest among Dynamics 365 Sales users, which is evident by its high adoption rates and positive feedback. One of the primary requests from users is the ability to set Focus View as their default landing page based on their usage preference. This empowers users to seamlessly continue their work in Focus View without the need to switch from the grid view every time they sign in to the application, thereby maintaining continuity in their workflow. Additionally, users wanted an easy way to enable Focus View for relevant entities. This feature aims to meet these demands, ensuring increased use of Focus View in alignment with the users' and organizations' business requirements.

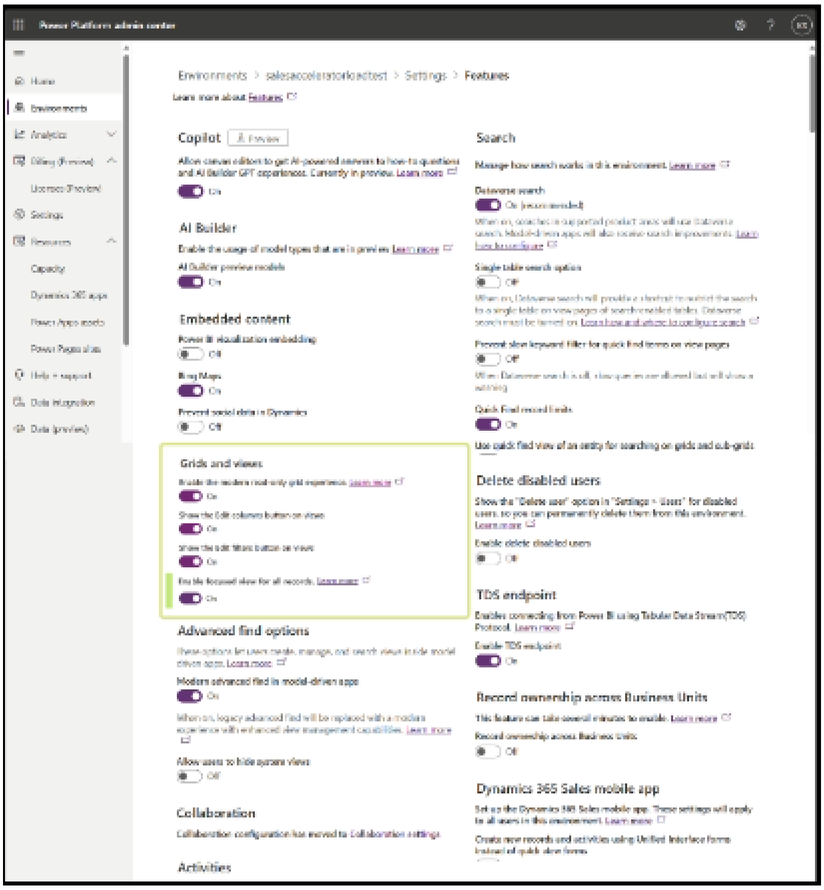
Feature details

As a seller, you can:

- Set Focus View as the default view for all relevant entities when users sign in to the application.
- Focus View will be moved inside the "Show As" button similar to other views like Kanban or List view.

As an admin, you can:

- Use an admin setting to decide the entities for which Focus View should be available.
- Make Focus View the default landing page for any out-of-the-box or custom entity.



Sales execution and sales force automation

Article • 12/21/2023

ⓘ Important

Some of the functionality described in this release plan has 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 sales execution and sales force automation capabilities in Dynamics 365 Sales allow sellers to be more productive and efficient in their core area of work—selling. These capabilities help sellers initiate a campaign, generate leads, assign leads to sellers, convert those leads to opportunities, manage accounts and contacts, and manage all activities around leads and opportunities until the deal is closed.

The following capabilities are planned for this release wave to enhance sales execution and sales force automation:

- Prevent duplicate leads from entering the system either through manual creation or bulk import.
- Get follow-up tasks created automatically based on information from various Office applications like emails, Teams messages, and Teams call transcripts, and get friendly reminders to help you complete those tasks.
- Create opportunities with ease by using the new version of input forms that declutter information with an enhanced visual layout.
- Use the AI-powered solution to get account-based suggestions for targeted selling and precise workflows to leverage.
- Create a customer org chart so that sellers know the roles of contacts in the organization and can view the relationship map.

Export-import segments and assignment rules between environments

Article • 01/07/2024

ⓘ Important

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

Expand table

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

Business value

As an administrator or sales manager, you need to set up assignment rules in multiple environments like sandbox, dev, test, or production. This increases the time taken to transfer rules from one environment to another and is prone to errors. With this feature, you can export your segments and assignment rules from one environment and import them into another environment easily.

Feature details

As an administrator or sales manager, you can:

- Export segments and assignment rules from a source environment.
- Import segments and assignment rules to any target environment.
- Update any environment-specific data—for example, User ID.

Improve seller efficiency by customizing quote close experience

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Oct 20, 2023

Business value

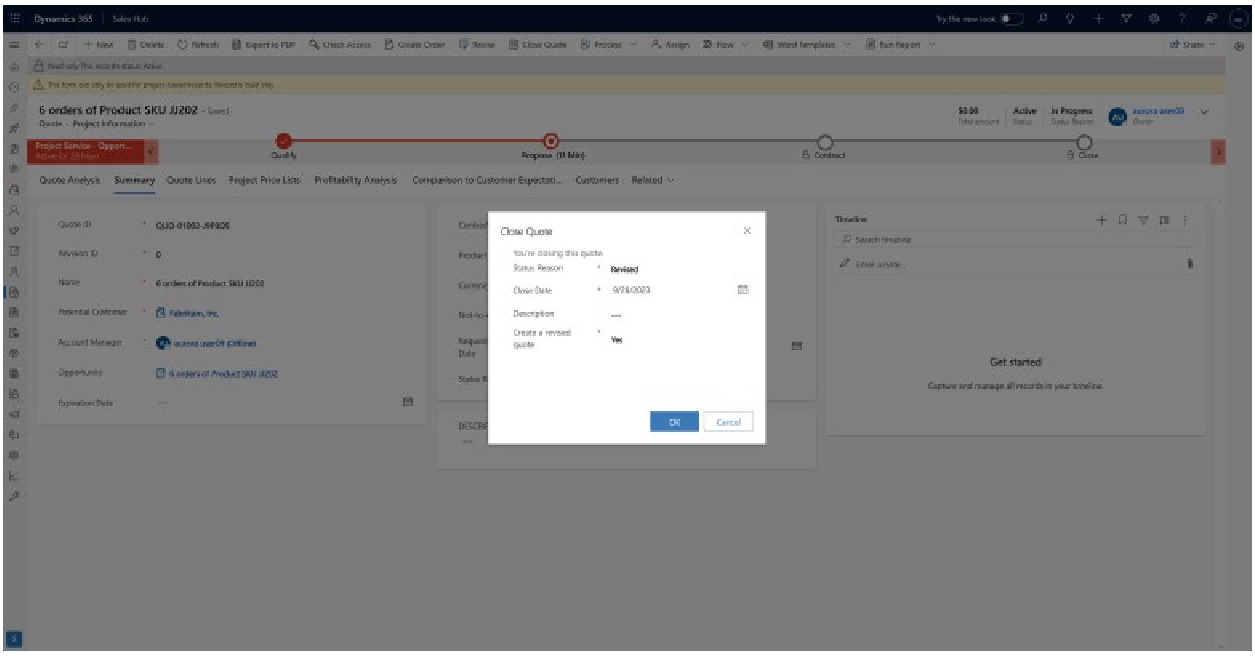
Sellers rely on quotes to provide customers with accurate pricing and detailed information about products or services. Quotes serve as formal offers, outlining the terms, pricing, and specifications of a potential sale. This enhancement is aimed at improving seller efficiency by allowing organizations to customize the experience as per the sales process.

With this enhancement, you can set the default value for the **Create a Revised Quote** field, saving time and ensuring consistency. It also streamlines the quote closure process with quick actions, reducing the time and effort required to finalize quotes. These improvements in efficiency help you focus on crucial sales activities, improving productivity and customer satisfaction.

Feature details

With this enhancement, you'll be able to:

- Set a default value for the **Create a Revised Quote** field.
- Enable quick actions to close quotes based on your preferred Status reason, Create revision, and Close opportunity options with just a click.



Thank you for your idea

Thank you for submitting this idea:

- Make "create a revised quote" customizable

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Customize the quote closure experience (docs)

Modern and refreshed user experience with updated styling and controls

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 31, 2023	✔ Oct 21, 2023

Business value

The new and refreshed user experience in Dynamics 365 Sales provides significant benefits to customers. The updated styling, including drop shadows and brighter background colors, enhances the look and usability of the system, resulting in increased user engagement and productivity. With the new fluent-based controls in forms, business process flows, and dialogs, customers can work more efficiently and effectively within the system, enabling them to achieve better results in less time.

In addition, the refreshed headers, tabs, sections, and business process flows in form pages make it easier for customers to navigate and interact with the system, while the new command bar provides a more intuitive and familiar experience, reducing training time and improving user adoption.

Overall, the new and refreshed user experience delivers a better user experience with improved productivity, increased user satisfaction, and better decision-making. This translates to significant benefits for businesses, including increased profitability and growth.

Feature details

These enhancements bring:

- New styling with drop shadows and brighter background colors for a more visually appealing and elevated appearance.
- Field controls such as text input, action input, lookup, and check box controls built and designed using fluent components for a more modern look and feel.
- New fluent-based controls in forms, business process flows, and dialogs for a modern and consistent experience across the platform.
- Command bar with consistent spacing, rounded corners, and elevation for a more intuitive and familiar experience.

- Refreshed headers, tabs, sections, and business process flows in form pages for easier navigation and improved user experience.
- Refreshed input and error message styling.

Stay on top of features and settings with new overview page experience

Article • 11/30/2023

ⓘ Important

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

Expand table

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

Business value

The Dynamics 365 Sales admin settings can be difficult to navigate, causing frustration for administrators. Feature discovery is also hindered by the lack of a search function and in-app notifications of new features and settings, leading to inefficient use of the platform.

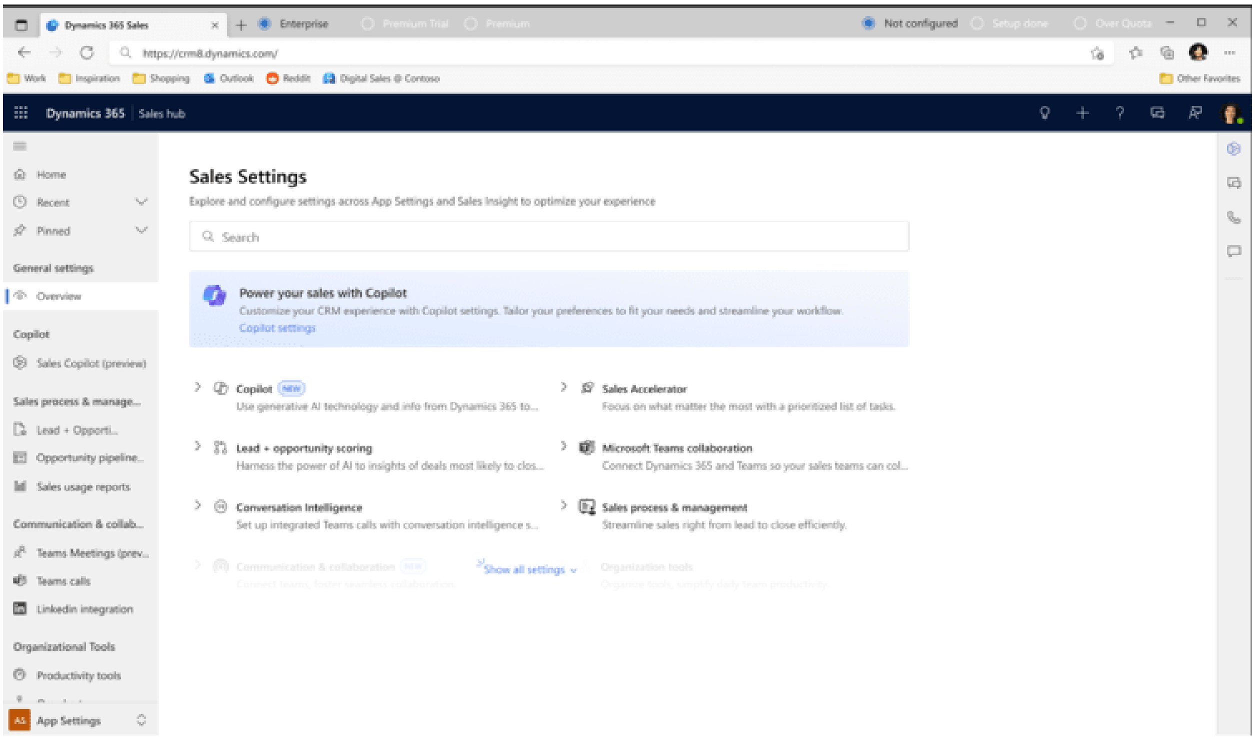
By using the search capability, system administrators can improve operational efficiency by locating specific settings quickly and reducing time spent on navigating through the system. It also simplifies onboarding for new administrators, reducing training time and costs. Additionally, feature and settings notifications ensure maximum use of the platform's capabilities, by helping system administrators discover new and relevant features leading to improved performance and productivity.

Feature details

The new search function in Dynamics 365 Sales admin settings will help system administrators achieve the following:

- **Quick navigation**: Locate settings efficiently.
- **Easy onboarding**: Reduces learning curve for new users.

- **Feature discovery**: Promotes optimal platform use.
- **Enhanced user experience**: Improves user satisfaction.



Use assignment rules to manage seller availability and auto-assign leads

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Nov 30, 2023

Business value

Assignment rules empower sales managers to automatically find owners for leads or opportunities based on seller availability and capacity. Sometimes leads and opportunities must be assigned to a team or added to a queue to allow sellers within the team or with access to the queue to pick them up. This feature allows:

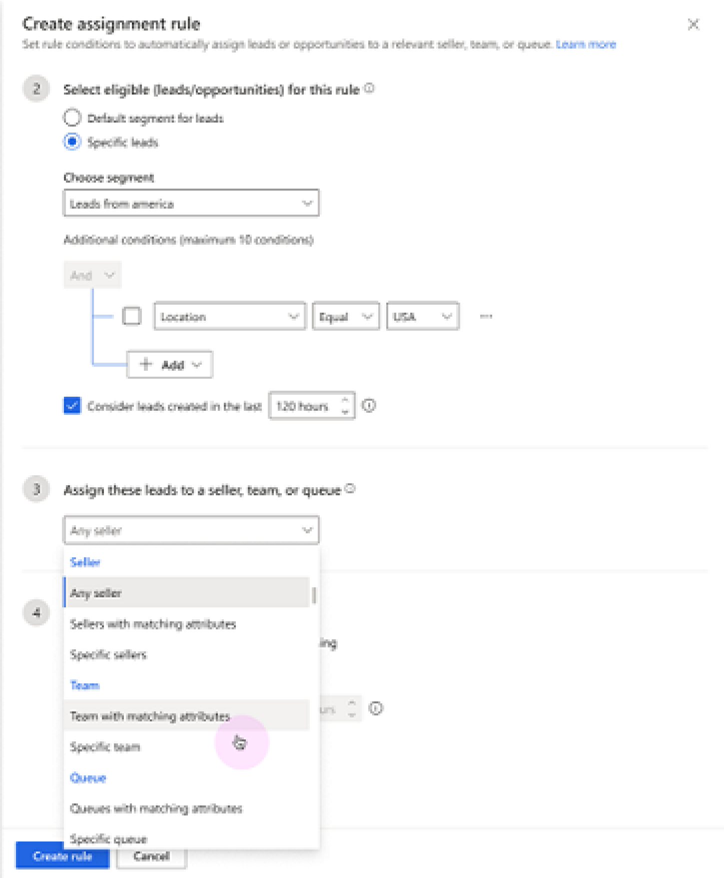
- Users to define rules to automatically assign leads or opportunities to a team based on dynamic matching criteria between lead/opportunity attributes and team attributes.
- Users to define rules to automatically add a lead or opportunity to a queue based on dynamic matching criteria between lead/opportunity attributes and queue attributes.
- Sales managers to easily update a seller's calendar and availability to automatically receive leads and opportunities.

Feature details

As a sales manager, you can automatically assign leads and opportunities to sales teams or add to a queue. You can also manage the seller's availability. You'll have the following capabilities:

- Define dynamic conditions between lead and opportunity attributes and team/queue attributes.
- Define conditions for attributes of related entities.
- Define up to five matching conditions per rule.

- If a rule finds multiple teams or queues, then choose to skip or assign to any one of the matching teams or queues.
- When a seller is away and unavailable, you can update their availability on the calendar.



Visualize key stakeholders and take action with smart organization chart

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ May 19, 2023	-	✔ Oct 20, 2023

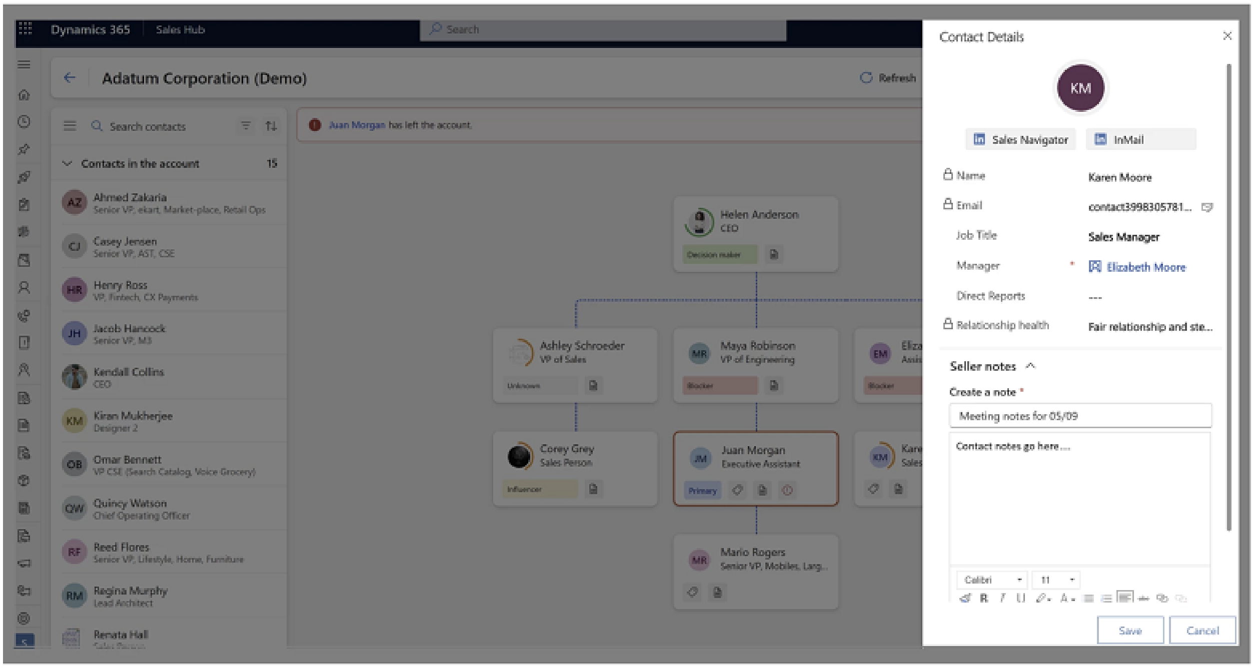
Business value

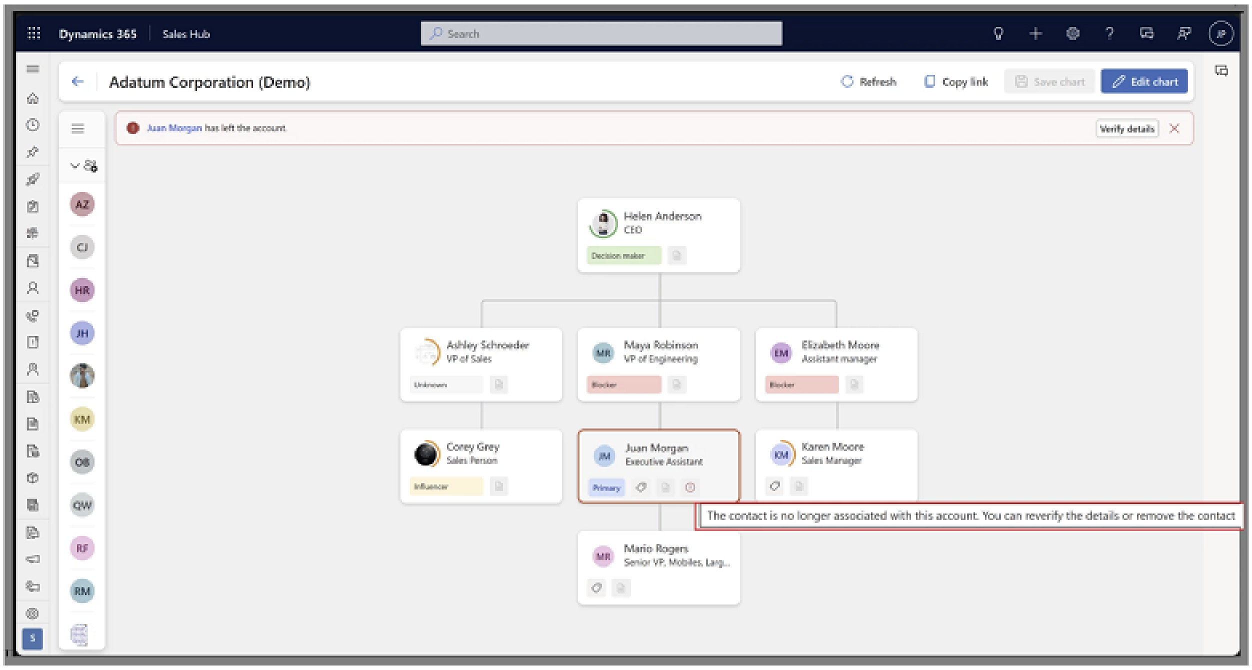
Formulate the right engagement plan to reach out to the right stakeholders. Account team members often need help identifying the right stakeholders within a customer organization for their deals. Sellers typically engage only with a fraction of the buying committee, which could lead to missed upsell or cross-sell opportunities. There's a need to capture the buyers' roles easily but also get a snapshot of the contact's activity levels with your organization to see if this is a stakeholder who needs more attention. With the new smart organization charts feature, you can build and visualize your customer organization for maintaining a healthy business relationship.

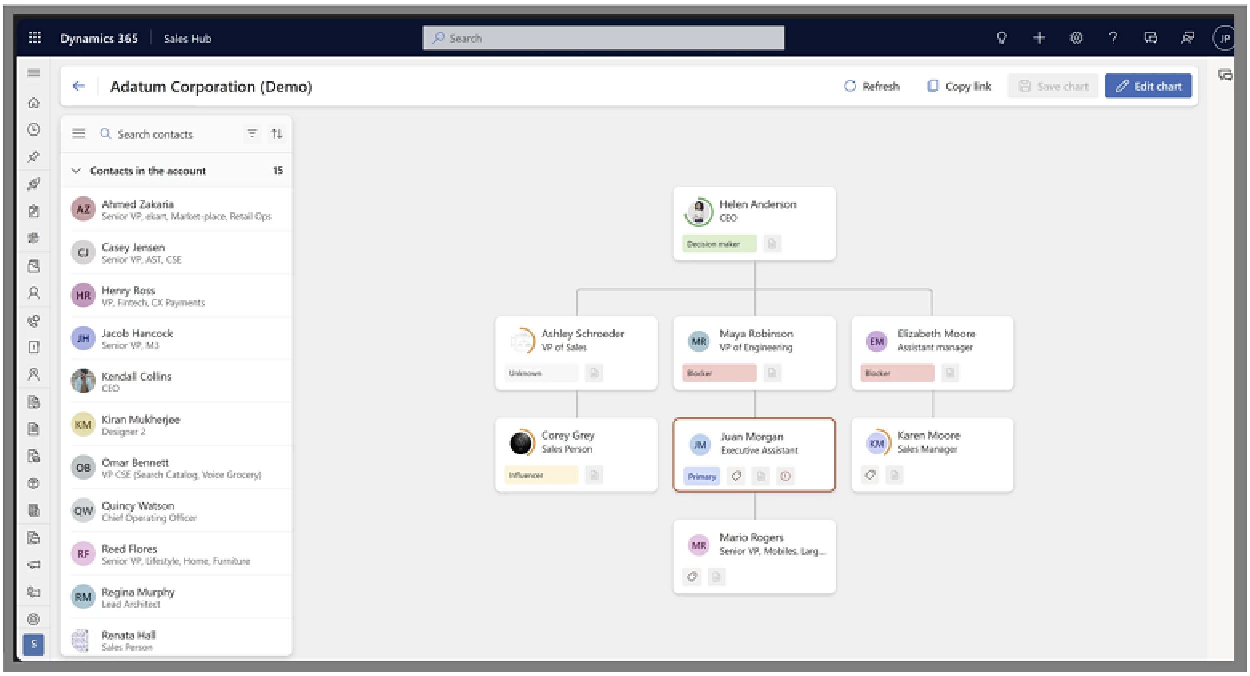
Feature details

The smart organization charts offer the following capabilities:

- Build the entire org chart via simple drag-and-drop action.
- Leverage tags to indicate key players and decision-makers.
- Create Assistant cards to include executive assistants in the organization chart.
- Capture notes directly from org charts on the go.
- Access your organization chart directly from the Contacts form as well.
- Monitor the health and risks of the customer relationships using relationship health embedded in organization charts.
- Get notified when contacts leave the organization with LinkedIn Sales Navigator License.


Dynamics 365
Sales Hub
Adatum Corporation (Demo)
Juan Morgan has left the account.
Contacts in the account 15
Contact Details
Name Karen Moore
Job Title Sales Manager
Manager Elizabeth Moore
Seller notes
Create a note
Meeting notes for 05/09
Contact notes go here....
Save
Cancel


Dynamics 365
Sales Hub
Adatum Corporation (Demo)
Refresh
Copy link
Save chart
Edit chart
Juan Morgan has left the account.
Verify details
Helen Anderson
CEO
Ashley Schroeder
VP of Sales
Maya Robinson
VP of Engineering
Elizabeth Moore
Assistant manager
Corey Grey
Sales Person
Juan Morgan
Executive Assistant
Karen Moore
Sales Manager
Mario Rogers
The contact is no longer associated with this account. You can reverify the details or remove the contact



See also

[Understand organization charts](#) (docs)

Seller experiences

Article • 12/21/2023

ⓘ Important

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

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

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

Close opportunities effortlessly by prepopulating attributes

Article • 12/21/2023

ⓘ Important

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

Expand table

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

Business value

When your proposal is accepted, it calls for a celebration, and we make sure that you swiftly transition from success to closure. But even if they decline, the show must go on.

This enhancement streamlines your opportunity closing process. It takes the burden of manual data entry off your shoulders by automatically filling the Opportunity close form with the pertinent opportunity attributes. This means that less time is spent on manual data entry, ensuring your focus remains on nurturing relationships and growing your business.

Feature details

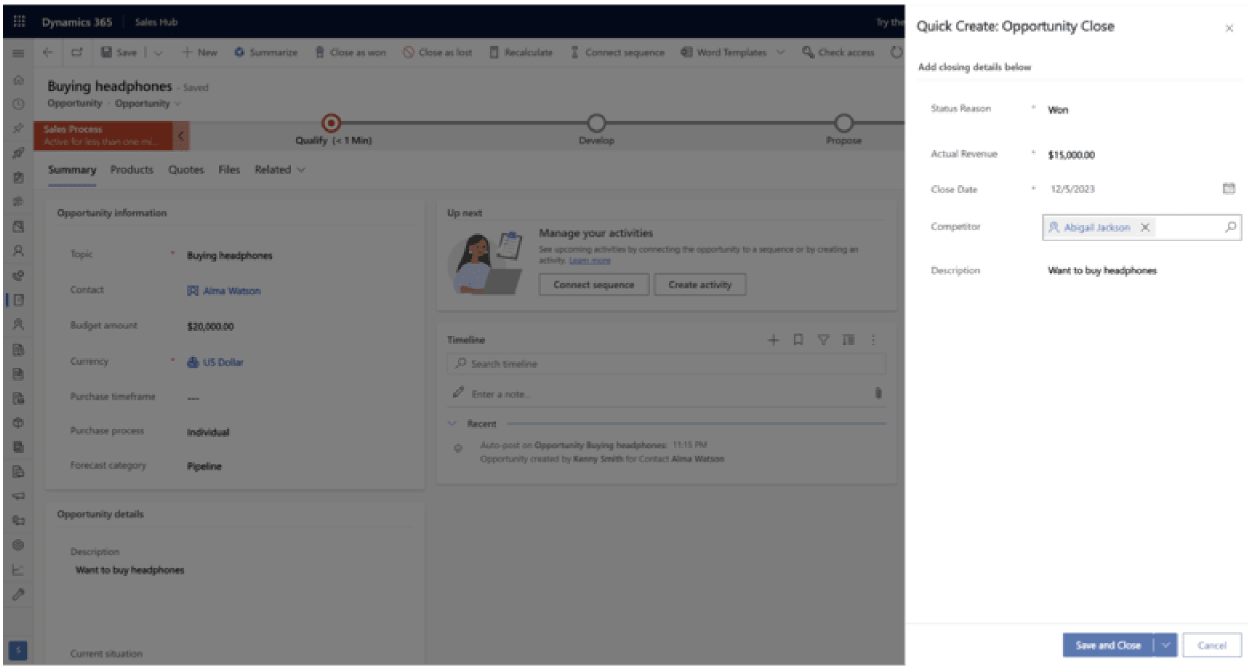
As an admin, you can:

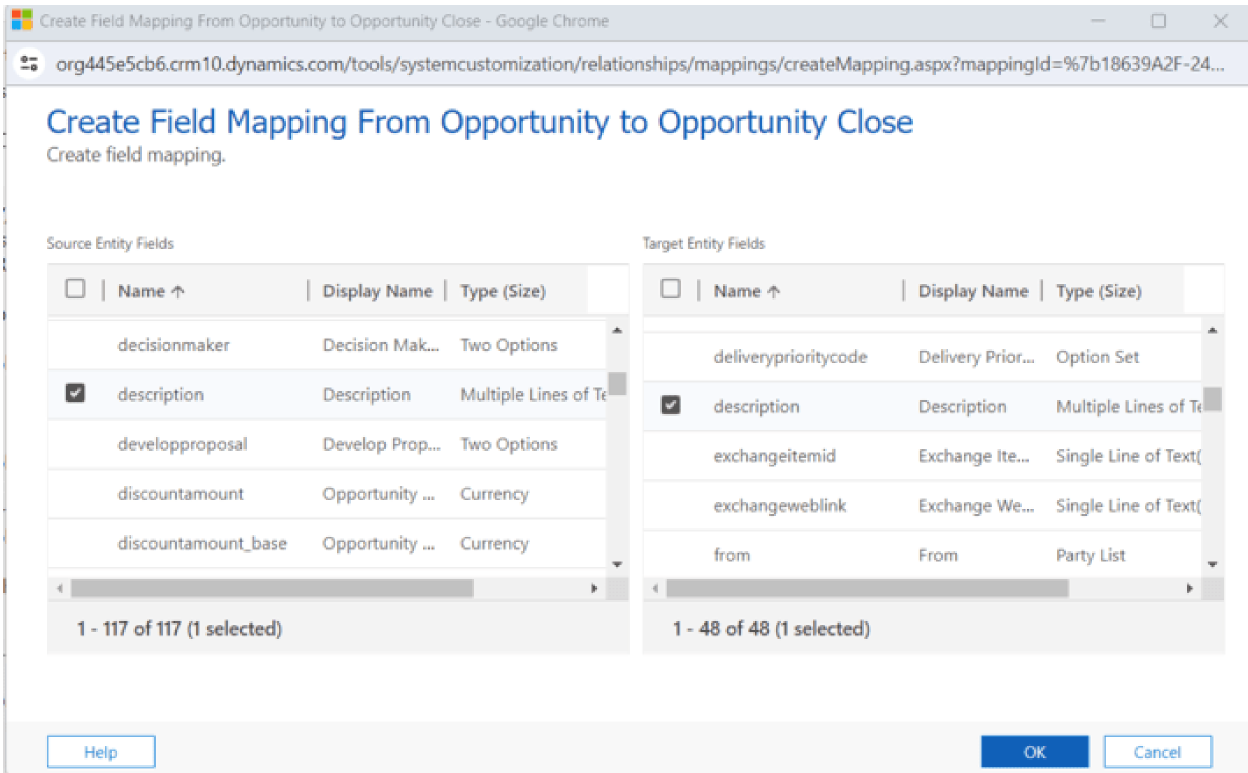
- Map attributes in the **Opportunity close form** with the columns in the Opportunity table so that the attributes are prepopulated appropriately.

As a seller, you can:

- See that the **Opportunity close form** is automatically prepopulated with information on the corresponding opportunity record, making the closure process smooth and error-free.

- Fill in the **Competitor** field when closing the opportunity as 'Won'.





Plan and prepare for Microsoft Sales Copilot in 2023 release wave 2

Article • 12/21/2023

> ⓘ **Important**
>
> The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. In this article, you'll find the product overview and what's new and planned for **Microsoft Sales Copilot**.

Overview

Microsoft Sales Copilot is transforming the way sellers work. Sales Copilot is a copilot app that assists sellers everywhere they work, whether in Outlook, Microsoft Teams, or Dynamics 365 Sales, and connects to other CRM systems like Salesforce. Sales Copilot supercharges productivity through integrated data, enrichment, workflows, insights, and next generation AI capabilities that bridge Microsoft 365 productivity tools and any business system of record.

Designed for sellers productivity in Microsoft 365 and Microsoft Teams, Sales Copilot delivers:

- AI capabilities like email summarization, sales email composition, CRM entity summarization, sales meeting summarization, and real-time sales tips.
- Real-time business context from a seller's CRM system of record in the flow of work in Outlook and Teams (supporting Salesforce and Dynamics 365 Sales).
- A premium sales meeting experience with AI-powered intelligence to improve sales conversations and professionalism, and to streamline seller follow-through.
- Microsoft Teams sales templates to speed up structured team or channel creation, helping sellers collaborate in deal rooms with colleagues and customers with the assistance of a sales copilot.

Sales Copilot does all this while intelligently assisting the seller in updating the CRM right from Microsoft 365 and Teams, keeping data fresh, and eliminating the need for context switching.

For 2023 release wave 2, we continue to optimize the seller experience in Microsoft Teams and Outlook—using data and AI to help sellers remain in their flow of work. Sales Copilot brings the system of record and productivity tools together to meet sellers where they are and surface in-context collaboration experiences that improve engagements, intelligently suggest CRM updates, and help sellers reclaim time to focus on customer connections.

Microsoft Sales Copilot releases monthly; view the latest updates at Microsoft Sales Copilot Blog .

Do you have a new feature idea or some feedback? We encourage you to connect with us at Microsoft Sales Copilot - Community .

Investment areas

Microsoft Outlook experiences Sales Copilot app experiences in Microsoft Outlook empower sellers to effectively communicate with their customers and sales team. In 2023 release wave 2, sellers will continue to see innovation in our core experiences—email summary and replies with sales data and insights, streamlined access to contextual CRM data, suggested CRM updates, and record creation experiences.

Microsoft Teams experiences Sales Copilot experiences in Microsoft Teams help sellers collaborate on deals with colleagues and customers and prepare for and run effective sales meetings. In 2023 release wave 2, sellers will be confident going into customer meetings with a set of Teams experiences that assist with meeting preparation, real-time tips during meetings, and streamlined customer follow-up. Customer collaboration and group productivity will get a boost from Sales Copilot deal rooms, bringing together the right members, and providing them with contextual insights and tools to close deals together.

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

Check out the release plan

For application administrators

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

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

Get the most out of Microsoft Sales Copilot

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.

Helpful links	Description
Licensing	Improve your understanding of how to license Microsoft Sales Copilot.
Product documentation	Find documentation for Microsoft Sales Copilot.
User community	Engage with Microsoft Sales Copilot experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Microsoft Sales Copilot.

What's new and planned for Microsoft Sales Copilot

Article • 01/19/2024

This topic lists features that are planned to release from October 2023 through March 2024. 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.

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

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

Microsoft Outlook experiences

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

Expand table

Feature	Enabled for	Public preview	General availability
Match email to lead entity	Users by admins, makers, or analysts	✔ Dec 11, 2023	-
Generate email drafts and replies using Copilot AI	Users, automatically	-	✔ Oct 15, 2023
Summarized email threads with save to CRM	Users, automatically	-	✔ Dec 31, 2023
Summarized CRM data for customer meeting preparation	Users, automatically	-	✔ Dec 31, 2023
AI-generated meeting summaries	Users, automatically	-	✔ Dec 31, 2023

Microsoft Teams experiences

Experiences in Microsoft Teams to assist sellers with sales collaboration and effective customer communication.

Expand table

Feature	Enabled for	Public preview	General availability
Real-time tips and suggested answers during Teams meetings	Users, automatically	-	Dec 2023

- You are able to opt into some features as part of early access on July 31, 2023, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Microsoft Outlook experiences

Article • 12/21/2023

ⓘ Important

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

Sales Copilot app experiences in Microsoft Outlook empower sellers to effectively communicate with their customers and sales team. In 2023 release wave 2, sellers will continue to see innovation in our core experiences—email summary and replies with sales data and insights, streamlined access to contextual CRM data, suggested CRM updates, and record creation experiences.

AI-generated meeting summaries

Article • 01/19/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Dec 31, 2023

Business value

Effortless follow-up and streamlined communication with customers increase meeting effectiveness and deal closure for sellers by prioritizing next steps.

Feature details

Sales best practices suggest summarizing customer meetings with action items and follow-up dates. Sales Copilot reduces manual work for sellers, making it easy to track information, efficiently share notes, and include relevant action items and follow-ups from prior meetings with customers.

Geographic areas

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

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

- Europe
- Asia Pacific
- United Kingdom
- Australia
- South America
- Canada
- India
- Japan
- France
- Korea

Match email to lead entity

Article • 01/19/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 11, 2023	-

Business value

Many sales organizations rely on the concept of leads as a critical step in the sales conversion process. Traditionally, a lead refers to a contact, individual, or organization that has expressed an interest in other goods or services of an organization.

By supporting the leads entity, Sales Copilot can match incoming and outgoing emails to leads in the organization's CRM, thus showing field-level context and existing relationships to other entities within the system.

Feature details

Supporting leads in Sales Copilot means:

- Sellers can match an email to leads that surface from the selected email, the same way the product does for contacts.
- Sellers can schedule a meeting and match it to a lead.
- Sellers can create new leads from external emails they receive from leads that are not already tracked in their CRM.
- Sellers can make edits to fields in the lead entity from Sales Copilot.
- Admins have the ability to disable support for the lead entity.

Geographic areas

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

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

Summarized CRM data for customer meeting preparation

Article • 01/14/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Dec 31, 2023

Business value

Sellers spend a lot of time researching accounts and opportunities prior to engagements. This includes prospects that are new leads, existing engagements, or just the latest updates since last talking. Building trust is critical, unknown risks are liabilities. Sales Copilot can keep sellers up to date with a 360-degree view, thereby reducing risk and improving sales success rates.

Feature details

Sales Copilot provides the seller with the most recent and relevant information in a concise and easy-to-understand format to build trust, reduce risk, and improve success.

Future enhancement will incorporate CRM notes, CRM timeline and activities, past email thread summaries, past meeting summaries, insights based on past relationship data, and meeting agendas included in the Outlook calendar invites.

Geographic areas

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

- Germany

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

Summarized email threads with save to CRM

Article • 01/19/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Dec 31, 2023

Business value

Sales Copilot lets sellers save summarized interaction data rather than entire email threads, to ensure that the CRM system remains usable, and help sellers be more productive in their flow of work. Accurate data powers sales enablement managers who generate reports to understand pipelines and conversion rates.

Feature details

Sellers can struggle to balance customer emails with other tasks. Sales Copilot can improve productivity by synthesizing key points from long email threads and saving the necessary details to their CRM for sharing and future reference.

Future enhancements will give admins that ability to configure, using the Sales Copilot admin controls in Teams, whether the summary is saved in addition to full transcripts, or independently.

Geographic areas

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

- Germany

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

Plan and prepare for Microsoft Copilot for Sales in 2023 release wave 2

Article • 02/13/2024

ⓘ **Important**

The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. In this article, you'll find the product overview and what's new and planned for **Microsoft Copilot for Sales**.

Overview

Microsoft Copilot for Sales is an AI assistant designed for sellers to maximize productivity and close more deals, bringing next-generation AI and sales insights from their CRM platform into the Microsoft 365 productivity tools that they use daily. As a seller, you'll be able to work more efficiently and improve customer experience with email assistance, personalized sales content creation, and AI-generated insights. Sales managers can empower their teams with AI-powered manager insights and collaboration tools. Copilot for Sales integrates seamlessly with Microsoft Dynamics 365 Sales and Salesforce Sales Cloud, and can be configured to connect to other sales solutions.

Investment areas

Microsoft Outlook experiences

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

Microsoft Teams experiences
Microsoft Copilot for Sales is an AI assistant designed for sellers. The Microsoft Copilot for Sales app in Teams provides recommendations and information to help you stay connected to your customers, minimize data entry, and personalize your engagements to close deals faster with higher win rates. Collaborate on deals with colleagues, prepare for and run effective sales meetings, get a deeper understanding of your customers' needs from transcribed call summaries, and take the right action at the right time with automatically generated follow-ups. The Microsoft Copilot for Sales experience within Microsoft Teams is delivered through an integrated app experience and by enriching the Copilot in Microsoft Teams capabilities with sales-specific skills, data, and actions.

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

Check out the release plan

For application administrators

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

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

Get the most out of Microsoft Copilot for Sales

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Microsoft Copilot for Sales.
Product documentation	Find documentation for Microsoft Copilot for Sales.
User community	Engage with Microsoft Copilot for Sales experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Microsoft Copilot for Sales.

What's new and planned for Microsoft Copilot for Sales

Article • 02/23/2024

This topic lists features that are planned to release from October 2023 through March 2024. 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 next wave's release plans, go to 2024 release wave 1 plan.

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

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

Microsoft Outlook experiences

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

Expand table

Feature	Enabled for	Public preview	General availability
Support sellers with Copilot for Sales mobile experience in Outlook	Users, automatically	-	Mar 2024

Microsoft Teams experiences

Experiences in Microsoft Teams to assist sellers with sales collaboration and effective customer communication.

Expand table

Feature	Enabled for	Public preview	General availability
Collaborate with sales teams using AI-powered planner tasks	Users, automatically	-	Mar 2024
Adaptive cards no longer require CRM sign-in for Dynamics 365	Users, automatically	-	✔ Dec 11, 2023
Support sellers with Copilot for Sales mobile experiences in Teams	Users, automatically	-	Mar 2024

- You are able to opt into some features as part of early access on July 31, 2023, 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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- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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

Cross-app experiences

Article • 05/06/2024

> ⓘ **Important**
>
> This content is archived and is not being updated. For the latest documentation, go to What's new or changed in Microsoft Copilot for Sales. For the latest release plans, go to Dynamics 365, Power Platform, and Cloud for Industry release plans.

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

Microsoft Copilot for Sales is an AI assistant designed for sellers that is available across applications. Cross-app experiences represent capabilities such as sales-specific skills and actions that appear in multiple surfaces within Microsoft 365 or Dynamics 365.

Leverage manager dashboards to coach sellers

Article • 05/06/2024

ⓘ Important

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ⓘ Important

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Expand table

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

Business value

By analyzing aggregated customer interactions and seller behaviors, sales leaders can determine the effectiveness of their sales strategies, respond to market changes, and coach their sales staff more efficiently.

Feature details

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

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

- Customer sentiment correlation with keyword and competitor mentions.
- Conversation style correlation to deal outcomes.

- Conversational KPIs over time.
- Holistic view of sellers' performances, as well as insight into conversation patterns that close deals.
- Messaging performance in the field and customer perceptions of the competitive landscape.
- Sales-oriented filters such as call time and length, seller, connected record, connected record status, campaign, and more.

See also

Analyze your sellers' conversation data with Power BI (docs)

Microsoft Outlook experiences

Article • 02/13/2024

ⓘ Important

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Get AI-powered opportunity suggestions when saving to CRM

Article • 05/06/2024

ⓘ Important

This content is archived and is not being updated. For the latest documentation, go to [What's new or changed in Microsoft Copilot for Sales](). For the latest release plans, go to [Dynamics 365, Power Platform, and Cloud for Industry release plans]().

Expand table

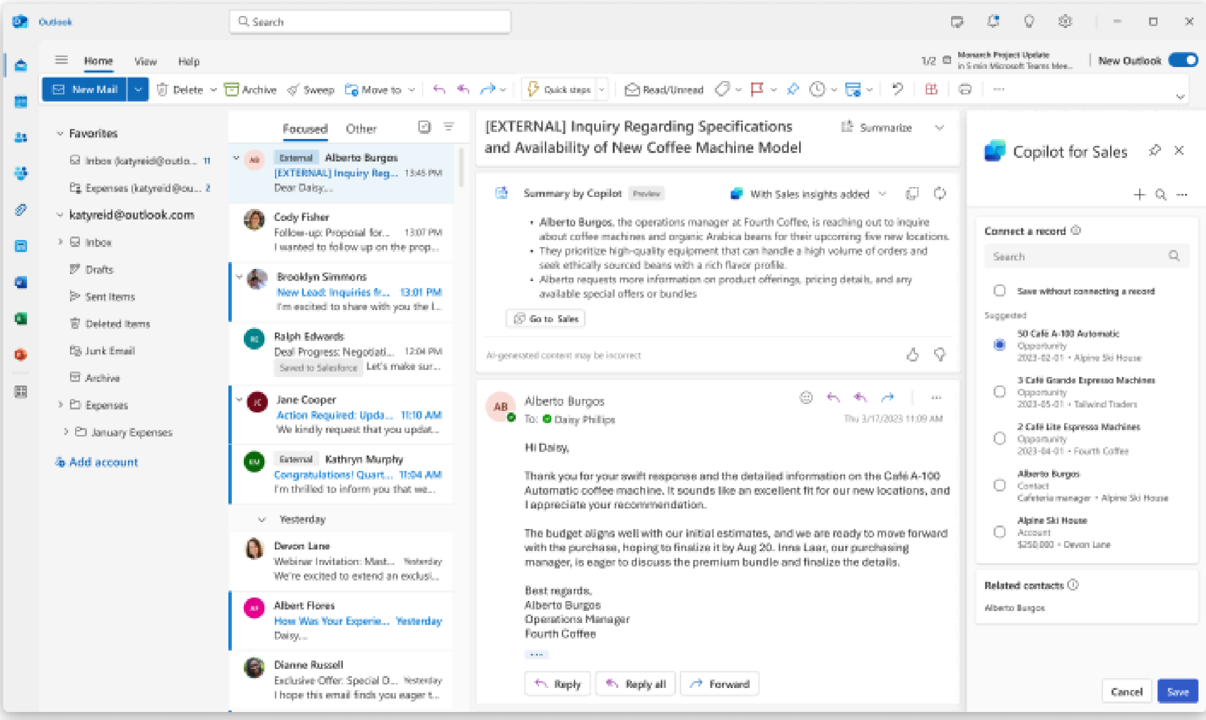
Enabled for	Public preview	General availability
Users, automatically	-	✔ Mar 25, 2024

Business value

Updating CRM data is an important seller activity but can feel like a tax on their time. Businesses and sellers alike rely on up-to-date CRM records and the correct connections between related records and businesses often assess sellers based on their diligence in updating records. To improve the seller experience, we’re introducing AI-powered opportunity suggestions. Now sellers can effortlessly save emails and meetings to the most relevant opportunities in their CRM based on AI-powered opportunity suggestions.

Feature details

When you save an email or meeting to CRM, you can pick from a list of smart suggestions that are most relevant to the save operation.



See also

[Save Outlook activities to your CRM](#) (docs)

Create entity directly from Copilot for Sales app in Outlook

Article • 05/06/2024

ⓘ Important

This content is archived and is not being updated. For the latest documentation, go to [What's new or changed in Microsoft Copilot for Sales](). For the latest release plans, go to [Dynamics 365, Power Platform, and Cloud for Industry release plans]().

Expand table

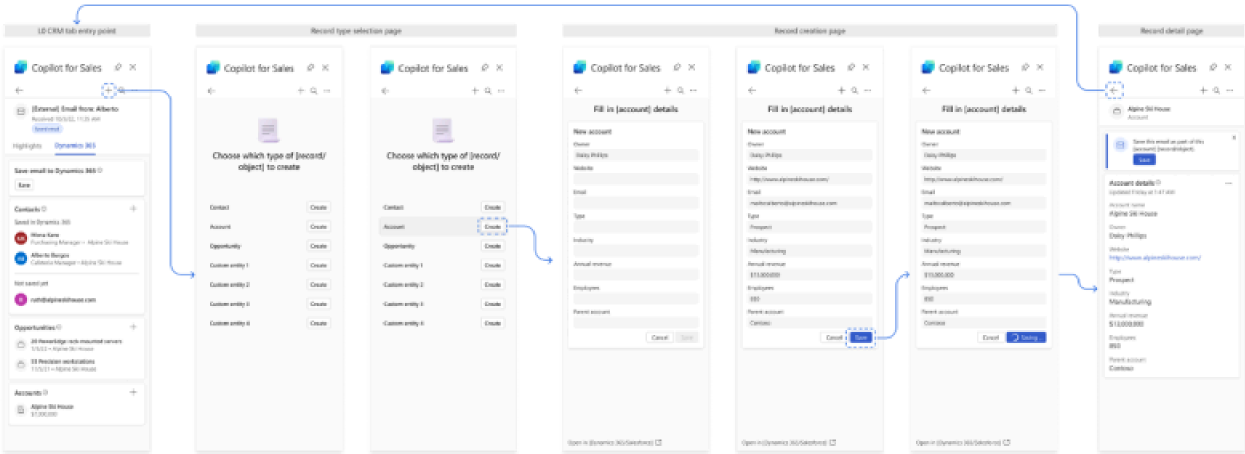
Enabled for	Public preview	General availability
Users, automatically	-	✔ Mar 18, 2024

Business value

Sellers need the ability to create and save non-contact records from the Copilot for Sales app in Outlook into their CRM. This keeps them in the flow of work and amplifies their productivity on a day-to-day basis.

Feature details

- Within the Copilot for Sales side pane in Outlook, you can quickly and directly create any configured entity (Contact, Opportunity, Lead, Account, and more).
- For complex creation forms, an additional option to deep link to the CRM system will also be available.
- Creation of new entities is also available when searching for a record doesn't return a result. For example, when editing a contact and searching for an account to add it to, if an account is not found, one can be created.



See also

Create a new record in your CRM from Copilot for Sales (docs)

Microsoft Teams experiences

Article • 02/13/2024

ⓘ Important

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

Microsoft Copilot for Sales is an AI assistant designed for sellers. The Microsoft Copilot for Sales app in Teams provides recommendations and information to help you stay connected to your customers, minimize data entry, and personalize your engagements to close deals faster with higher win rates. Collaborate on deals with colleagues, prepare for and run effective sales meetings, get a deeper understanding of your customers' needs from transcribed call summaries, and take the right action at the right time with automatically generated follow-ups. The Microsoft Copilot for Sales experience within Microsoft Teams is delivered through an integrated app experience and by enriching the Copilot in Microsoft Teams capabilities with sales-specific skills, data, and actions.

Adaptive cards no longer require CRM sign-in for Dynamics 365

Article • 02/13/2024

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Dec 11, 2023

Business value

Currently, adaptive cards require you to sign in to CRM. If you are not signed in or are signed in to a different environment, you don't see the information shared by the sender, thereby hampering efficient collaboration. With this enhancement, you aren't required to sign in to CRM from Copilot for Sales, for adaptive cards that show data from Dynamics 365. If you have the right permissions in Dynamics 365, adaptive cards will load. Thus, you'll see what the sender meant you to see, without encountering the friction of a CRM sign-in step from Copilot for Sales.

Feature details

You won't be required to sign in to CRM from Copilot for Sales for adaptive cards that show data from Dynamics 365. If you have the right permissions in Dynamics 365, adaptive cards* will load.

- If you are signed out, you will see the card load seamlessly whereas previously you would have been prompted to sign in.
- If you are signed in to a different environment, you'll see the card load straightaway whereas previously you would have received an error. Additionally, you'll see a visual indicator letting you know the source environment of the data in the card.

*Applies to:

- Adaptive cards sent from Message Extension in Teams and “Copy link” in Outlook.
- Opportunity summary's first-run-experience adaptive card in collaboration space (not a bot-invoked opportunity summary card in collaboration space).

Plan and prepare for Dynamics 365 Customer Service in 2023 release wave 2

Article • 01/02/2024

> **Important**
>
> The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Service**.

Overview

https://aka.ms/ReleaseHighlight/2023W2/CustomerService

Dynamics 365 Customer Service is a part of the Digital Contact Center Platform that helps provide best-in-class customer service through live customer engagements, agent collaboration, advanced telephony, and AI-based analytics. Advanced routing, case management, knowledge management, assistive AI, and embedded Microsoft Teams capabilities maximize agent productivity, while simplified administration and integrated analytics optimize contact center operations. Organizations can provide an omnichannel experience with chat, voice, social, and business messaging channels.

In 2023 release wave 2, our focus is on delivering the following capabilities:

- Copilot and AI innovation to enhance agent productivity
- Channel-based swarming with Microsoft Teams
- Nuance integration
- Voice channel enhancements

Updates to Dynamics 365 Customer Service 2023 release wave 2

Investment areas

Administrator experiences The modern administration experience provides a consistent setup experience that unifies the management of Dynamics 365 Customer Service, unified routing, and omnichannel activities.

The Customer Service admin center app consolidates all administrator experiences that are relevant to customer support into a single app. It provides an intuitive and guided, wizard-like experience to enable rapid first-time and incremental setup, as well as proactive health checks to ensure the system has been set up and works as expected.

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

Copilot and AI innovation Copilot transforms the Customer Service support experience with generative AI. Copilot helps agents easily use internal knowledge sources by generating optimized responses in a single click. Agents are more productive and deliver better service experience with Copilot helping them find resources to resolve issues faster, handle cases more efficiently, and automate time-consuming tasks. To name a few features, Copilot drafts contextual answers to questions in chat and email, responds to questions from the agent, and generates case and conversation summaries.

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

Supervisor experiences The supervisor experience is targeted at customer service managers and analysts. Availability of key operational metrics allows supervisors to continuously monitor contact center operations and make course corrections. For example, supervisors can intervene when customer sentiment becomes negative and improve agent staffing to optimize productivity, thereby keeping service levels high.

Supervisors can also use the extensibility feature and customize data models to include additional metrics and report on custom entities, improving contact center efficiency.

Teams integration Use Dynamics 365 Customer Service and Microsoft Teams together to provide your agents and customers with a cohesive environment where they can seamlessly collaborate with each other.

With embedded chat and swarming, agents can get help from experts across the entire organization to resolve complex customer issues.

Agents can connect with their customers using the Join a Teams call feature and meetings integration to have more efficient collaboration with video, screen share, and remote control options.

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

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

Check out the release plan

For application administrators

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

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Get the most out of Customer Service

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Customer Service.
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.

What's new and planned for Dynamics 365 Customer Service

Article • 01/19/2024

This topic lists features that are planned to release from October 2023 through March 2024. 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 2023 release wave 1 plan.

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

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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
Resolve issues with recommendations in activity monitor	Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 6, 2023
Integrated health check of configurations	Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 31, 2023

Agent experiences

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Use the enhanced attachment experience in emails	Users by admins, makers, or analysts	-	-	✔ Dec 1, 2023
Minimize the communication panel	Users, automatically	-	✔ Jul 31, 2023	✔ Oct 2, 2023
Show records enabled for unified routing in inbox	Users by admins, makers, or analysts	-	-	Jan 2024
Allow agents to view schedules created in third-party systems	Users by admins, makers, or analysts	-	-	✔ Oct 31, 2023
New call control user interface with intuitive icons for voice channel	Users, automatically	-	✔ Jul 31, 2023	✔ Oct 31, 2023
Improved search control to manage subjects	Users, automatically	-	✔ Jul 31, 2023	✔ Oct 2, 2023
Show agents their live chats and voice calls in the inbox	Users by admins, makers, or analysts	-	-	✔ Oct 31, 2023
Enhanced UI for emergency calling	Users, automatically	-	-	✔ Oct 30, 2023
Use timeline quick filters to access your activities faster	Users by admins, makers, or analysts	✔ Oct 2, 2023	-	✔ Oct 9, 2023
Pin and unpin records in timeline	Users, automatically	-	✔ Jul 31, 2023	✔ Oct 2, 2023
Find records in timeline with What you've missed	Users, automatically	-	✔ Jul 31, 2023	✔ Oct 2, 2023
Resize communication panel for channels	Users by admins, makers, or analysts	-	-	✔ Oct 31, 2023

Copilot and AI innovation

Copilot in Dynamics 365 Customer Service consists of a range of next-generation generative AI capabilities that can expedite resolution of customer issues and increase customer satisfaction.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Support Copilot features in additional languages, regions	Users by admins, makers, or analysts	-	-	Dec 2023
View analytics for Copilot's impact on your business	Users by admins, makers, or analysts	✔ Jun 16, 2023	-	✔ Oct 20, 2023
Configure custom attributes & notes for case summaries and emails	Users by admins, makers, or analysts	-	-	Dec 2023
Filter the Copilot content based on entity attributes	Users by admins, makers, or analysts	Feb 2024	-	-
Copilot case and conversation summary default on	Users, automatically	-	-	Jan 2024
Enhanced knowledge base for Copilot features	Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 8, 2023
Dynamics 365 Customer Service plugin for Microsoft 365 chat	Users by admins, makers, or analysts	Feb 2024	-	-
Discover knowledge content with Copilot	Users by admins, makers, or analysts	✔ May 20, 2023	-	✔ Oct 20, 2023
Draft email replies with a click using Copilot	Users by admins, makers, or analysts	✔ May 20, 2023	-	✔ Oct 20, 2023

Omnichannel

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Enhanced security with OAuth 2.0 support in live chat	Users by admins, makers, or analysts	-	-	✔ Oct 20, 2023
Extend emergency calling to Canada	Users by admins, makers, or analysts	-	-	Feb 2024
Improvements to the call dialer	Users by admins, makers, or analysts	✔ Oct 2, 2023	-	Feb 2024
Caller ID number support for outbound calls	Users by admins, makers, or analysts	-	-	✔ Oct 31, 2023
Integrate third-party IVR with voice channel	Users by admins, makers, or analysts	✔ Jul 28, 2023	-	Mar 2024

Supervisor experiences

Enable supervisors to monitor and improve contact center operations.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
View skills and proficiency in Omnichannel real-time analytics reports	Users by admins, makers, or analysts	-	-	✔ Oct 31, 2023
Real-time analytics enabled by default	Users, automatically	-	-	✔ Nov 17, 2023

Teams integration

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Collaborate using Teams embed chat without having to	Users, automatically	-	✔ Jul 31, 2023	✔ Oct 31, 2023

Feature	Enabled for	Public preview	Early access*	General availability
enable it				
Enhance customer engagement with Join a Teams call	Users by admins, makers, or analysts	✔ Oct 2, 2023	-	-

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
Route calls to agents who are least active	Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 31, 2023
Configure agent-specific capacity profiles	Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 23, 2023
Use overflow to handle lengthy wait times for work items in queues	Admins, makers, marketers, or analysts, automatically	Feb 2024	-	To be announced
Use agent availability API for unauthenticated chats	Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 31, 2023

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Administrator experiences

Article • 01/02/2024

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The modern administration experience provides a consistent setup experience that unifies the management of Dynamics 365 Customer Service, unified routing, and omnichanel activities.

The Customer Service admin center app consolidates all administrator experiences that are relevant to customer support into a single app. It provides an intuitive and guided, wizard-like experience to enable rapid first-time and incremental setup, as well as proactive health checks to ensure the system has been set up and works as expected.

Integrated health check of configurations

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 31, 2023

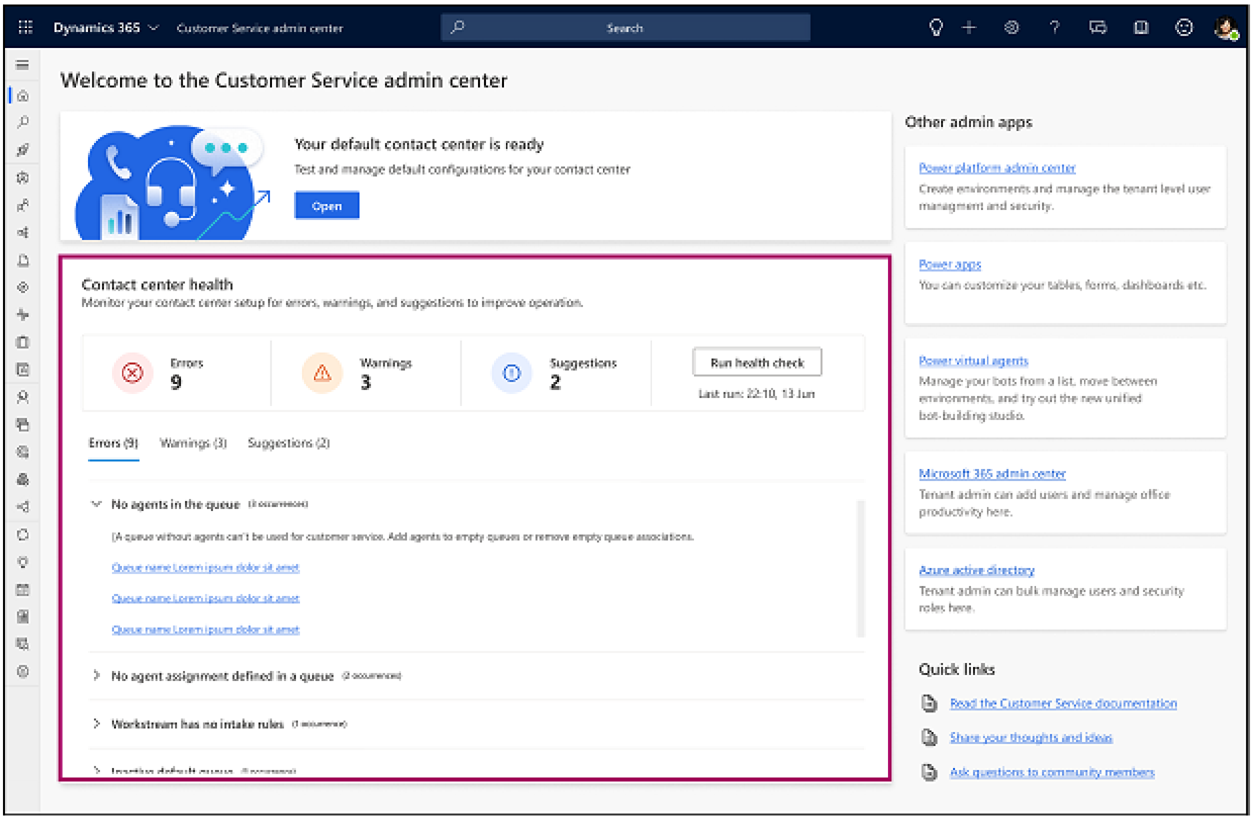
Business value

Admins can run a health check to identify errors and warnings in their current configuration and be proactively notified of emerging issues while the checks run in the background. This approach can help administrators maintain healthy and optimal call center flows and configurations and reduce customer support issues that are caused by misconfigurations.

Feature details

Administrators can do the following with the health check tool:

- Run the tool manually.
- Drill through the issues and get suggestions and best practices to fix them.
- Maintain the call center optimally and reduce misconfigurations.


Dynamics 365
Customer Service admin center
Search
Welcome to the Customer Service admin center
Your default contact center is ready
Test and manage default configurations for your contact center
Open
Contact center health
Monitor your contact center setup for errors, warnings, and suggestions to improve operation.
Errors
9
Warnings
3
Suggestions
2
Run health check
Last run: 22:10, 13 Jun
Errors (9)
Warnings (3)
Suggestions (2)
No agents in the queue
(A queue without agents can't be used for customer service. Add agents to empty queues or remove empty queue associations.
Queue name Lorem ipsum dolor sit amet
Queue name Lorem ipsum dolor sit amet
Queue name Lorem ipsum dolor sit amet
No agent assignment defined in a queue
Workstream has no intake rules
Other admin apps
Power platform admin center
Create environments and manage the tenant level user managment and security.
Power apps
You can customize your tables, forms, dashboards etc.
Power virtual agents
Manage your bots from a list, move between environments, and try out the new unified bot-building studio.
Microsoft 365 admin center
Tenant admin can add users and manage office productivity here.
Azure active directory
Tenant admin can bulk manage users and security roles here.
Quick links
Read the Customer Service documentation
Share your thoughts and ideas
Ask questions to community members

Resolve issues with recommendations in activity monitor

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 6, 2023

Business value

Organizations use automatic record creation rules to create cases automatically from incoming emails. For instance, when an email doesn't get converted to a case, administrators use the activity monitor tool to diagnose events and resolve them. Easy discoverability of the view helps administrators to quickly locate the email or task to case conversion events for the past seven days and resolve any issues. Until now, the activity monitor view has been used to display the reason why case creation failed or was skipped. With this enhancement, the activity monitor view also provides recommendations to resolve case-creation issues, which helps administrators take quick actions and solve their issues independently.

Feature details

This feature provides the following capabilities for administrators:

- View the count of email or task to case conversion events that were skipped, failed, and successful for the past seven days on the customer support Overview page in the Customer Service admin center app.
- Use the new view to show the conversion events for the past seven days. Administrators can navigate to this view from the Overview page or switch to this view using the view selector.
- View the additional column in the activity monitor view, with recommendations for each event, and resolve customer issues independently.

Geographic areas

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

- Germany
- US Sec
- US Nat
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- South America
- Canada
- India
- Japan
- France
- Korea
- China
- US Gov
- US DoD

See also

Use activity monitor to review and track rules (docs)

Agent experiences

Article • 01/02/2024

ⓘ Important

Some of the functionality described in this release plan has 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 agent experience is at the heart of Dynamics 365 Customer Service and enhancing agent confidence is the key to improving customer satisfaction. Dynamics 365 Customer Service provides a powerful agent desktop, with infused generative AI, seamless collaboration capabilities, and productivity tools in a customizable workspace that boosts agent effectiveness, enabling them to deliver personalized customer experiences across any channel.

Allow agents to view schedules created in third-party systems

Article • 12/29/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Oct 31, 2023

Business value

The booking calendar view helps agents save time and effort previously spent navigating external systems. This view leads to increased productivity and allows agents to focus more on their core tasks.

Feature details

The My booking schedule view helps agents easily access their work schedules without having to navigate to an external system. As an agent, you can quickly see and review your shift bookings, with a detailed breakdown of individual activities within each shift, such as work hours, time off, lunch breaks, training, and more.

To enable this feature, you must first import the bookings from a third-party system using either of the following options:

- Dataverse APIs.
- Partner adapter that offers out-of-the-box integration between Dynamics 365 Customer Service and the workforce management system. For more information, see the AppSource for WFM adapters documentation.

Once the bookings are imported, administrators can enable the agent booking calendar for agents using the following system navigation: **Customer Service admin center app** > **Workforce Management** > **Agent calendar** > **On**.

Compose emails using improved attachment experience

Article • 03/26/2024

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Jan 5, 2024

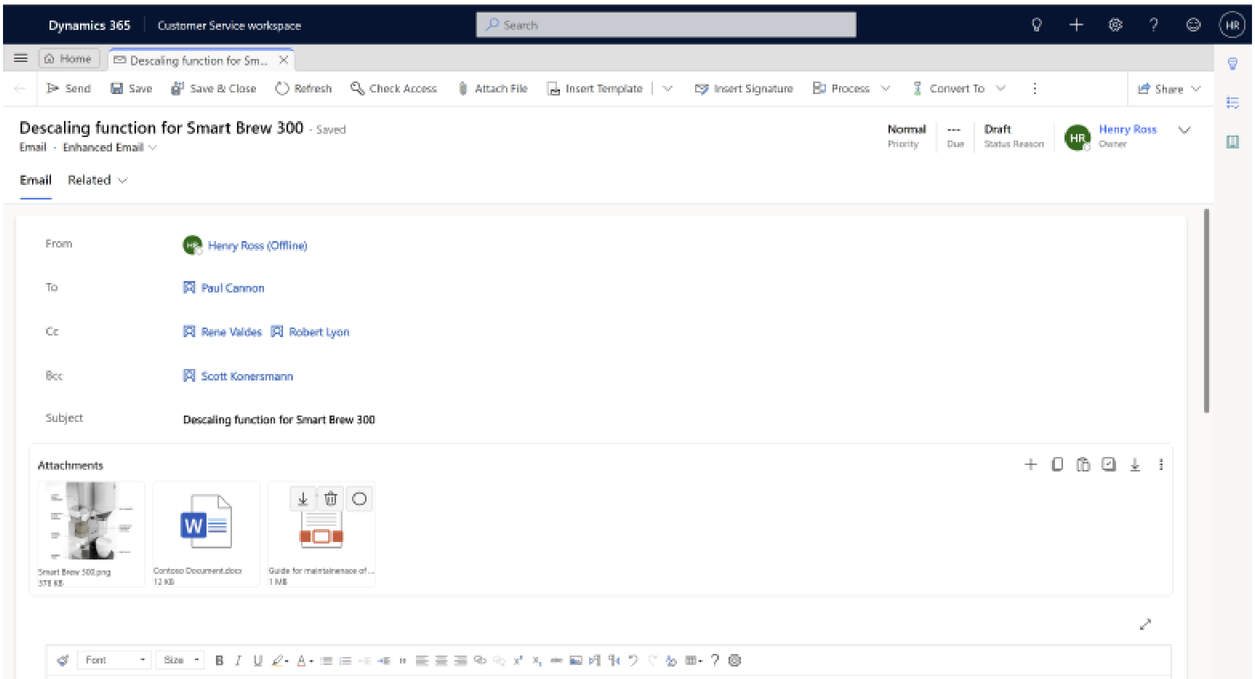
Business value

The enhanced attachment experience allows agents to drag and drop attachments in emails, saving time and increasing their productivity. A reminder is sent to agents if they forget to include an attachment that they've mentioned in the email subject or body.

Feature details

With the enhanced email attachment experience, agents can:

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



See also

[Use enhanced experience to attach files to emails](docs) (docs)

Enhanced UI for emergency calling

Article • 12/21/2023

Expand table

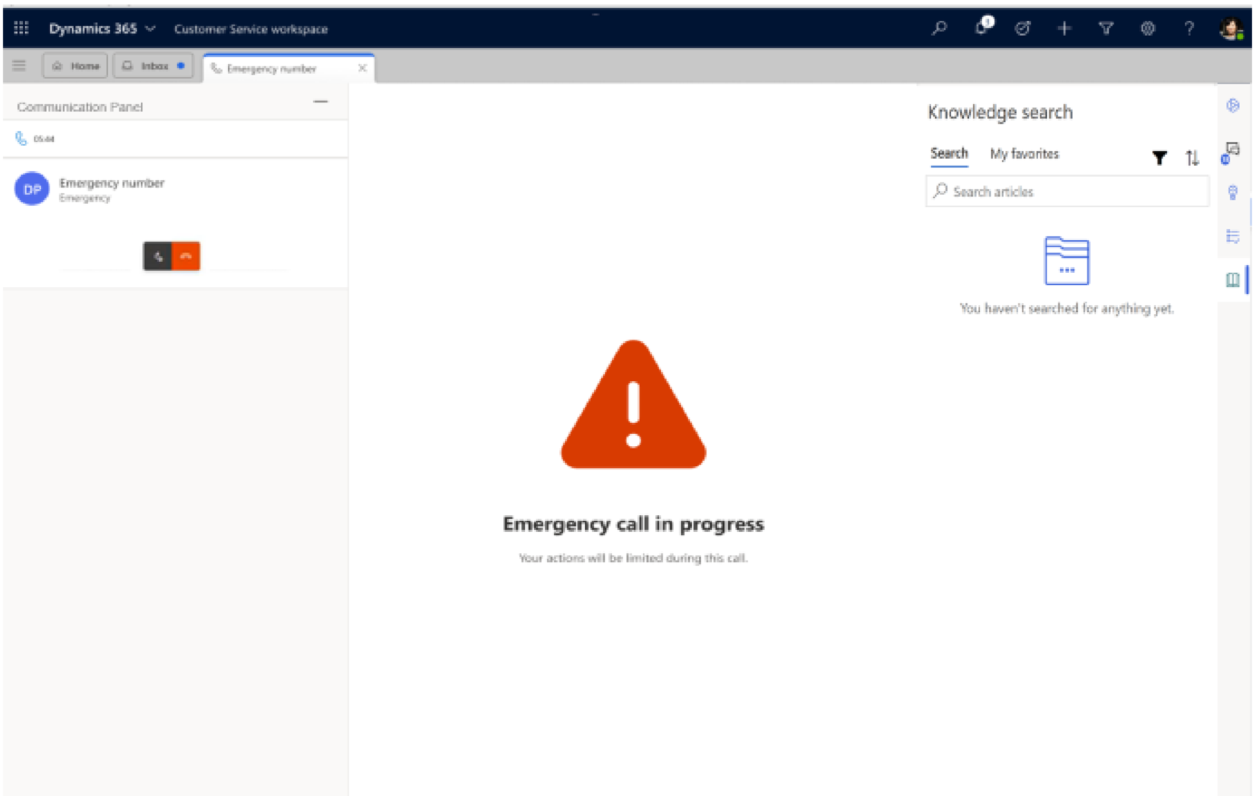
Enabled for	Public preview	Early access	General availability
Users, automatically	-	-	✔ Oct 30, 2023

Business value

An enhanced experience that displays an alert icon and UI text to indicate an emergency call is in progress helps agents be cognizant of their current situation.

Feature details

When the agent makes an emergency call, the interface now changes to display an alert icon and the UI text indicates that an emergency call is in progress.



Find records in timeline with What you've missed

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 31, 2023	✔ Oct 2, 2023

Business value

The What you've missed feature in timeline helps users quickly see the records they haven't viewed. This helps them increase their efficiency by prioritizing and scrolling through the records as needed.

Feature details

The What you've missed feature in timeline helps keep users informed by enabling them to easily view records they haven't yet opened or viewed. This helps them quickly address the activities they need to catch up on and scroll past anything that isn't a priority.

See also

View what you've missed in timeline (docs)

Forecast volume, agent demand for customer interactions

Article • 05/06/2024

ⓘ Important

This content is archived and is not being updated. For the latest documentation, go to [Welcome to Dynamics 365 Customer Service](). For the latest release plans, go to [Dynamics 365, Power Platform, and Cloud for Industry release plans]().

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Mar 4, 2024

Business value

Customer service managers need trusted agent forecasts to plan future headcounts and schedule the right level of staffing to provide first-class customer service over voice and digital channels. Overestimation of the number of agents results in higher labor costs, while underestimation leads to longer wait times and decreased customer satisfaction, damaging your brand loyalty.

We've previewed volume and agent forecasting in the past few releases, enabling customer service managers to make hiring decisions and staff adjustments for the upcoming budget year. In this release, we're making the feature generally available for customers to use in production.

Feature details

The forecasting-related capabilities, previewed in earlier releases, are now generally available with this release. These capabilities include the following:

Agents for conversations (voice and digital channels):

- Forecast agent demand for conversations on a daily interval for up to six months into the future.

- Intraday forecast at 15-minute intervals for agent demand up to six weeks into the future.
- Auto-detect seasonality from historical traffic.
- Apply service level, shrinkage, and concurrency to the forecast.
- Slice forecast data by channels and queues.
- Export forecast data into a spreadsheet.

Volume forecasting:

- Daily forecast for case and conversation volumes for up to six months into the future.
- Intraday forecast at 15-minute intervals for case and conversation volumes up to six weeks into the future.
- Auto-detect seasonality from historical traffic.
- Slice forecast data by channels and queues.
- Export forecast data into a spreadsheet.

See also

Forecast case and conversation volumes, and agents for conversations (docs)

Improved search control to manage subjects

Article • 10/24/2023

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 31, 2023	✔ Oct 2, 2023

Business value

Dynamics 365 Customer Service includes a subject organizational structure that lets you mark and categorize service cases, knowledge base articles, and products. With this feature, we're implementing the improved subject control to all forms that will make it easier to view and search the subject tree hierarchy.

Feature details

The enhanced search control for subjects will be available by default for all the out-of-the-box and custom forms, and will provide the following capabilities:

- Easy-to-view subject tree hierarchy
- Ability to search across parent subjects and child nodes
- Highlight search results

See also

Create and manage subjects in a subject tree (docs)

Minimize the communication panel

Article • 10/24/2023

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 31, 2023	✔ Oct 2, 2023

Business value

The communication panel is where you, as an agent, interact with your customer. You can view the communication panel only when you accept an incoming conversation to communicate with the customer from the Customer Service workspace. This feature brings a more accessible way to minimize and access the communication panel.

Feature details

For active conversations, agents can minimize the communication panel in the Customer Service workspace to the bottom right of the app. Agents can also minimize it to the bottom left of the app by following the accessibility best practices.

See also

View the communication panel for conversations (docs)

New call control user interface with intuitive icons for voice channel

Article • 12/06/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 31, 2023	✔ Oct 31, 2023

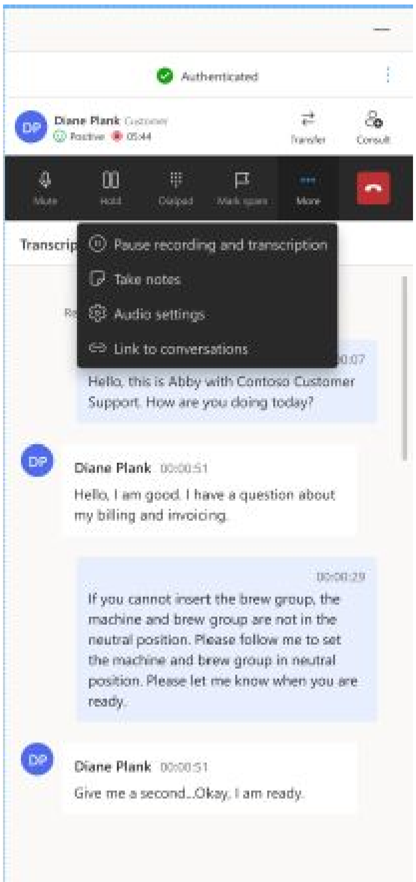
Business value

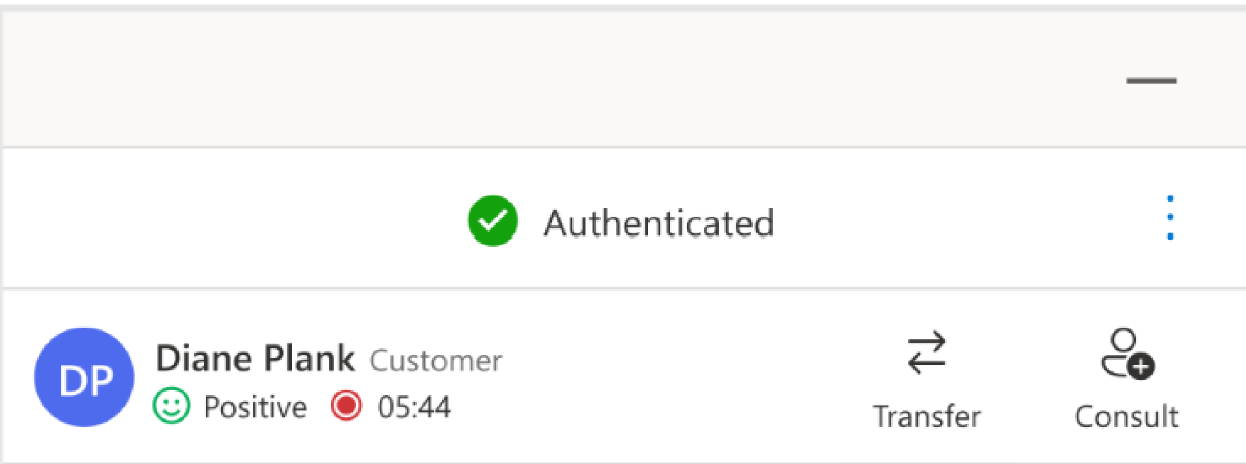
The new Conversation control interface has intuitive icons with descriptions that help agents understand the use of the icons without having to hover over it.

Feature details

The enhanced interface for Conversation control includes the following:

- Bigger icons that occupy the standardized grid of the conversation panel.
- Icons have a description to help agents understand the icon's intended action without hovering over it.
- The Transfer and Consult icons are the most used icons and are available next to the customer's name.





See also

Dynamics 365 Omnichannel - Voice: Call control improvements (video)

Use agent dashboard and call controls in the voice channel (docs)

Pin and unpin records in timeline

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 31, 2023	✔ Oct 2, 2023

Business value

Provide flexibility for your agents by allowing them to pin activities such as records to the top of the timeline so that they can quickly access them later.

Feature details

The pin and unpin capability provides flexibility for agents by keeping activities such as records visible at the top of the timeline. This helps agents save time by not requiring them to scroll an entire timeline to find the information they need.

See also

Pin or unpin records in timeline (docs)

Resize communication panel for channels

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Oct 31, 2023

Business value

Agents who spend more time serving customers on chat and digital messaging need a conversation-centric experience to focus on active conversations. This feature allows agents to personalize the size of the conversation control when using Customer Service workspace.

Feature details

Agents can view the communication panel in the Customer Service workspace app only when they accept an incoming conversation from a customer. With this enhancement, agents interacting with customers through the communication panel will be able to set the size of the conversation control according to their preference.

Route work items based on external schedules

Article • 03/26/2024

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Mar 4, 2024	-	-

Business value

You can route conversations to the right agents who are available according to their schedules, thus avoiding misrouting and delays in addressing customer inquiries.

Feature details

Configure assignment rules to route and assign cases and conversations based on agents' shift schedules that you can import from external workforce management (WFM) systems through a plug-in. By verifying agents' schedules in advance, organizations can avoid routing tasks to off-duty agents, and reduce the risk of delays. You can incorporate shift assignments and time-off considerations into the routing process to foster an employee-centric approach, and streamline operational workflows for productivity and improved retention rates.

See also

Configure routing based on external schedules (docs)

Show agents their live chats and voice calls in the inbox

Article • 01/09/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Oct 31, 2023

Business value

Help your agents increase their productivity by giving them the ability to manage all of their work from the inbox. The inbox centralizes the agent's work on their live chats and calls, alongside cases, emails, voicemails, and asynchronous chats in a single view so that they can increase their productivity.

Feature details

Live chat and voice calls are central to the omnichannel agent experience. To provide agents with a single place to manage all of their critical work, we're adding support for the live chat and voice entities in the inbox. These feature enhancements will include dedicated card layouts and support for routing needs.

The following inbox enhancements are included:

- Routing of live work items to the agent's inbox
- View of live work items in a focused "live" section
- Agent ability to see live chat and voice call views
- Card layouts for live chat and voice that display key information

Show records enabled for unified routing in inbox

Article • 11/30/2023

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may 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	-	-	Jan 2024

Business value

Help your agents increase their productivity by giving them the ability to manage their work from the inbox. The inbox displays the unified routing enabled records, alongside cases, emails, voicemails, asynchronous chats, live chats, and voice calls in a single view so that agents can increase their productivity.

Feature details

The inbox now displays records enabled for routing, offering agents a centralized view to efficiently manage their workload. Administrators can configure inbox views for records enabled for routing such as lead, appointment, or task.

Use the enhanced attachment experience in emails

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Dec 1, 2023

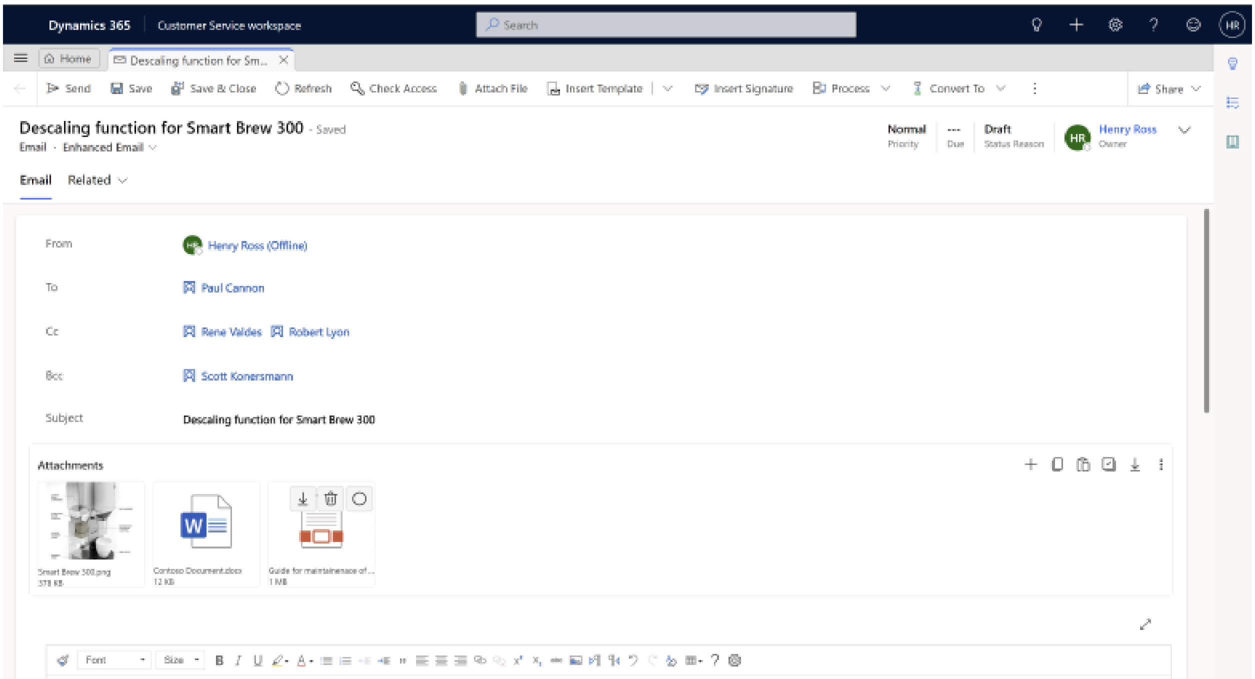
Business value

The enhanced attachment experience allows agents to drag and drop attachments in the email, saving time and increasing agent productivity. The capability to copy attachments from one email to another will also be useful to agents when reusing attachments from older emails. The enhanced email attachment experience offers improved user experience where bulk actions can be performed easily and the attachment sizes are displayed in the nearest appropriate units.

Feature details

The key capabilities of the enhanced email attachments include:

- Ability to add attachments by dragging and dropping them to the email.
- Copying attachments from one or more emails to another.
- Bulk download and deletion of attachments.
- Attachment size is displayed in the appropriate units.
- Toggle between tile and grid views.


Dynamics 365
Customer Service workspace
Search
Home
Descaling function for Sm...
Send
Save
Save & Close
Refresh
Check Access
Attach File
Insert Template
Insert Signature
Process
Convert To
Share
Descaling function for Smart Brew 300 - Saved
Email · Enhanced Email
Normal
Priority

Due
Draft
Status Reason
Henry Ross
Owner
Email
Related
From
Henry Ross (Offline)
To
Paul Cannon
Cc
Rene Valdes
Robert Lyon
Bcc
Scott Konersmann
Subject
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Smart Brew 300.png
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Size

Use timeline quick filters to access your activities faster

Article • 12/06/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Oct 2, 2023	-	✔ Oct 9, 2023

Business value

Quick filters on the timeline help users save time when frequently filtering records. Users can save their timeline filters as bookmarks for even quicker use the next time they access the timeline.

Feature details

- Timeline quick filters help users easily access their activities without the hassle of selecting and saving the filters.
- Quick filters help users save time and avoid unnecessary clicks.
- Users can also bookmark their quick filters for added effiiciency when frequently filtering records.

Copilot and AI innovation

Article • 01/02/2024

ⓘ Important

Some of the functionality described in this release plan has 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. Copilot helps agents easily use internal knowledge sources by generating optimized responses in a single click. Agents are more productive and deliver better service experience with Copilot helping them find resources to resolve issues faster, handle cases more efficiently, and automate time-consuming tasks. To name a few features, Copilot drafts contextual answers to questions in chat and email, responds to questions from the agent, and generates case and conversation summaries.

Configure custom attributes, notes for case summaries and emails

Article • 02/13/2024

Expand table

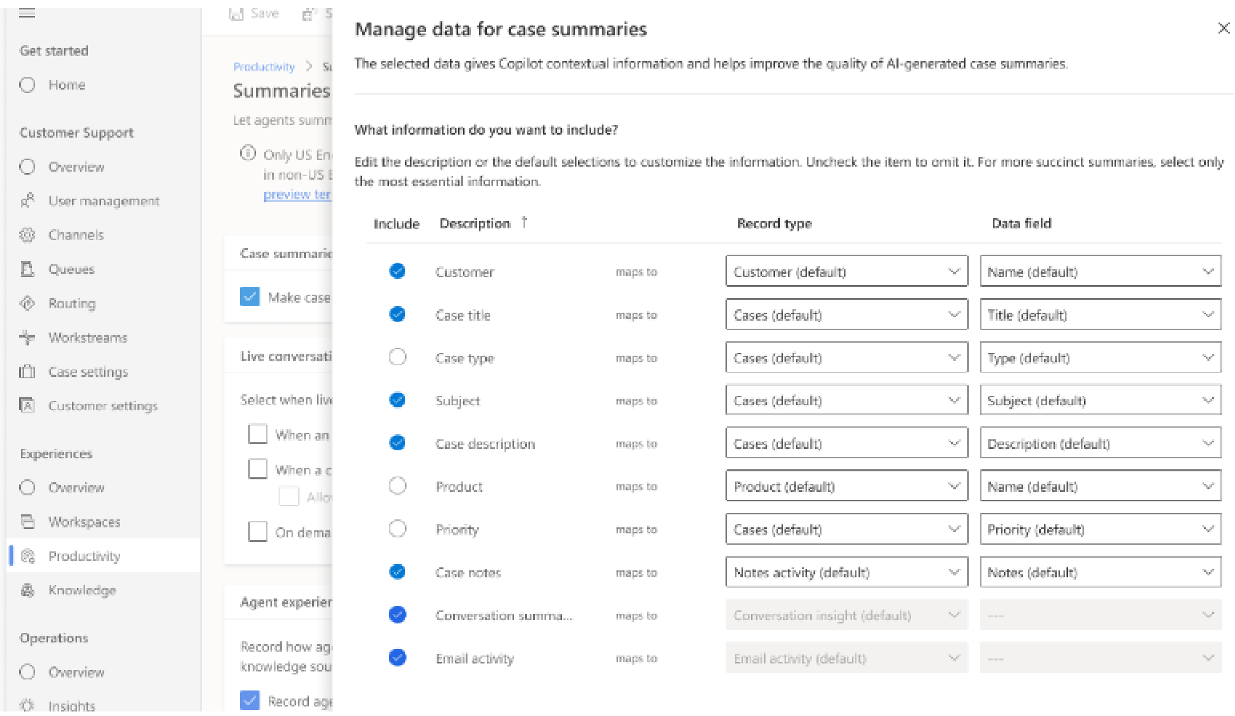
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Dec 8, 2023

Business value

With Copilot, customers now have the ability to configure their custom fields and notes when generating case summaries and email responses, instead of relying on out-of-the-box case fields and notes.

Feature details

Customers who don't use out of the box case fields and notes can now configure Copilot to use their custom fields and notes when producing case summaries and email responses.



Copilot case and conversation summary default on

Article • 02/13/2024

Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	-	✔ Jan 12, 2024

Business value

Enabling Copilot by default will enable agents to benefit from faster ramp-ups, transfers, and wrap-ups with cases and conversations, resulting in accelerated resolution times.

Feature details

The Copilot case and conversation summary capabilities will be enabled by default for organizations that meet the following criteria:

- Azure OpenAI is available in the region in which Dynamics 365 is available.
- The out-of-the-box case forms are in use on any app module.
- The Customer Service Workspace app is in use with digital messaging and/or voice for conversation summary.

Discover knowledge content with Copilot

Article • 12/05/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ May 20, 2023	-	✔ Oct 20, 2023

Business value

Agents spend a lot of time searching knowledge sources and consulting with subject matter experts to troubleshoot customer issues. With Copilot, agents can troubleshoot issues faster through a conversational chat experience.

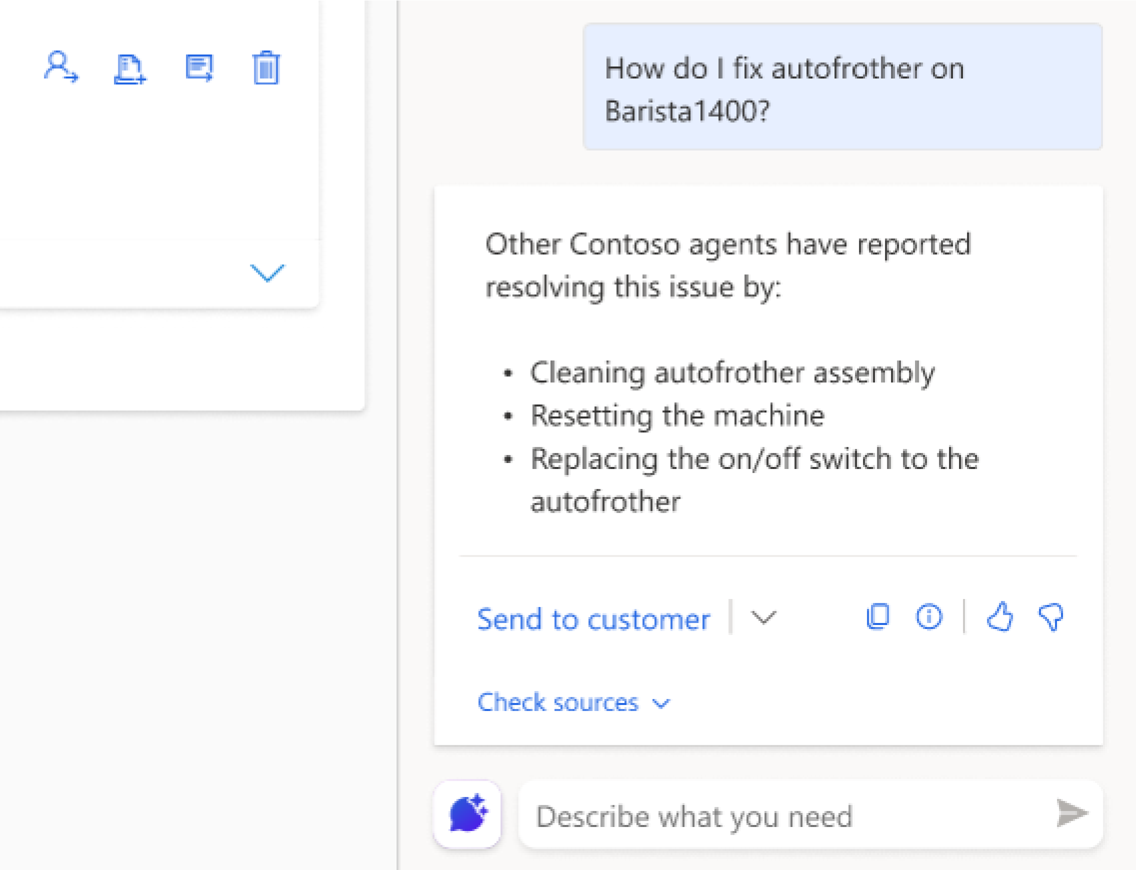
Feature details

Copilot can diagnose customer problems, use the organization's internal knowledge and vast amounts of data from trusted websites, and supply the agent with an appropriate solution to give to the customer. Copilot analyzes customer data to identify patterns, anticipate customer needs, and make suggestions to the agent on how to best handle each interaction.

With this powerful tool at their disposal, agents can handle more queries in less time, increase efficiency, and improve the overall customer experience. Because agents are in the loop every step of the way, they are in full control of using AI to drive their productivity. Agents can verify the responses, check the resources, and personalize the message to match the customer's specific needs to ensure their satisfaction and optimal experience.

The conversational copilot experience is available across all engagement channels. With the upcoming release, agents can do the following:

- Link a copilot conversation to a case automatically.
- Refer the copilot conversations that can now be stored in Dataverse.
- Use the responses that are generated off of Dynamics 365 knowledge articles, external sources via knowledge integration, and trusted public websites.



Geographic areas

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

- Germany
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- South America
- Canada
- India
- Japan
- France
- China

See also

Use Copilot to solve customer issues (docs)

Draft email replies with a click using Copilot

Article • 12/05/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ May 20, 2023	-	✔ Oct 20, 2023

Business value

Copilot in Customer Service, powered by generative AI, transforms customer service. With Copilot, customer service agents can craft personalized, contextual email replies with just a click. Customer service agents can choose from predefined response prompts or even provide custom prompts for complex customer emails. With a click, Copilot crafts relevant and contextual replies tailored to each customer's needs. That means customer service agents can provide unparalleled email support and leave customers feeling heard and valued. They can say goodbye to the minutes spent searching, drafting replies, and generic, impersonal template responses. With Copilot, agents can save time and deliver world-class customer service.

Feature details

Deliver better email service in less time. In seconds, Copilot can draft contextual customer service emails that would take several minutes if written from scratch. The more complex and contextual your email, the bigger your time savings.

Draft replies with a click.

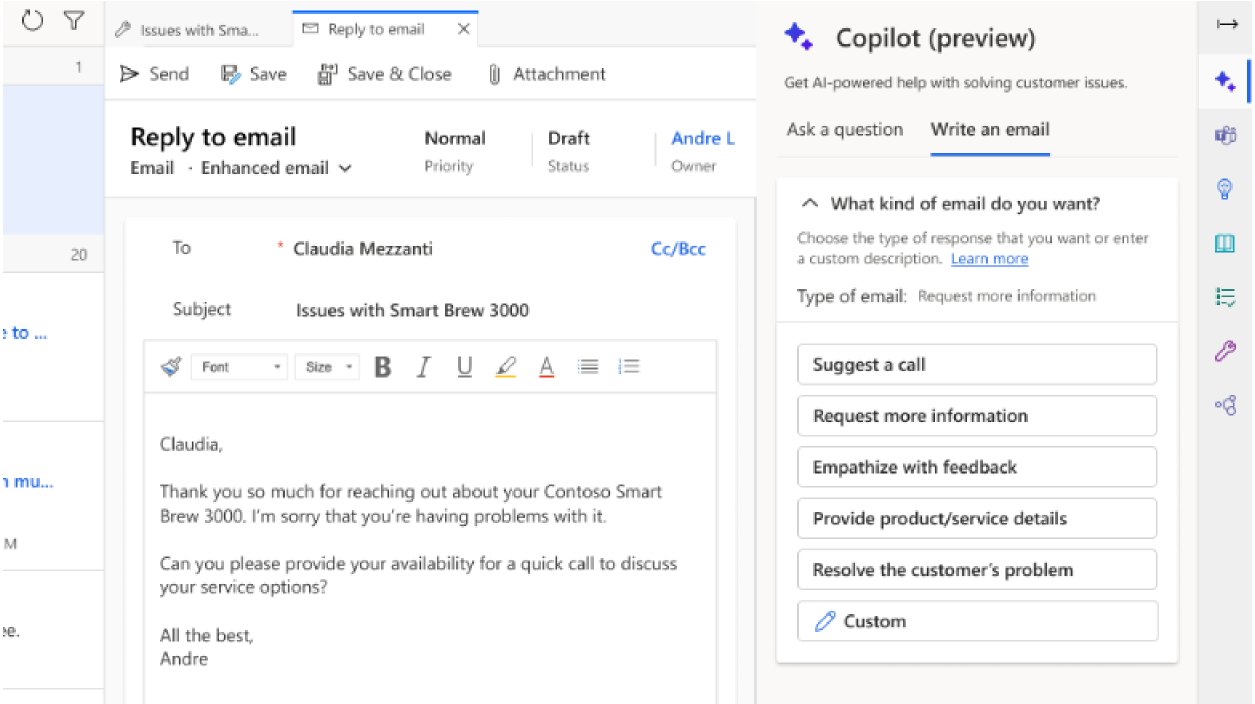
Select from predefined prompts and you'll have an email. For complex situations, you can even provide your own custom prompt.

Use your company's knowledge.

Copilot uses the context of your email conversation, case notes, and knowledge articles to produce personalized, contextual emails. It’s never been easier to solve your customer’s issues. You can even use web results.

You are in control.

You can fine-tune and edit the suggested email reply before you send it to the customer.



Geographic areas

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

- Germany
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- South America
- Canada
- India
- Japan
- France
- China

See also

Use Copilot to solve customer issues (docs)

Enhanced knowledge base for Copilot features

Article • 02/13/2024

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 8, 2023

Business value

Organizations that use the Copilot multiturn question-and-answer and the email assist features will benefit from improved quality enhancements, resulting in better experiences for their customers.

Feature details

The following performance, scale, and quality improvements in Copilot features will benefit agents:

- The limit of 100,000 isn't applicable on knowledge base articles that Copilot is able to process, ensuring that Copilot will work with an enterprise-scale knowledge base.
- The processing time for new or updated knowledge articles will reduce from daily to less than 15 minutes, ensuring that Copilot always has the latest content.
- Support for querying content in tables format in a knowledge article.
- The display of hyperlinks that are captured in the source knowledge articles content.

See also

Use Copilot to solve customer issues (docs)

Support Copilot features in additional languages, regions

Article • 11/15/2023

ⓘ Important

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

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

Business value

Copilot features are now supported in additional languages, no longer limiting agents to use Copilot only in English. Customers can easily adopt Copilot as it will be generally available outside the United States.

Feature details

Copilot features will no longer be in a limited preview outside the United States. Customers can opt in to the data movement across regions in the Power Platform admin center and use Copilot features outside the United States.

The following features will be generally available globally:

- Ask a Question
- Write an Email
- Case Summaries
- Conversation Summaries

These features can be used in the following additional languages:

- Danish
- Dutch
- French
- German

- Italian
- Japanese
- Spanish

Geographic areas

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

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

View analytics for Copilot's impact on your business

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Jun 16, 2023	-	✔ Oct 20, 2023

Business value

Copilot in Customer Service uses generative AI to create an impact across various tasks such as completing customer conversations, triaging and closing cases, and drafting and sending email. The copilot report in historical analytics helps users understand the impact Copilot helps create across these various modalities.

Feature details

The copilot report in Customer Service historical analytics empowers supervisors and customer service managers to identify the impact that Copilot helps create across their entire customer service operation. With Copilot, customer service agents are able to complete various tasks related to conversations, cases, and email more easily.

The copilot report contains the following key metrics:

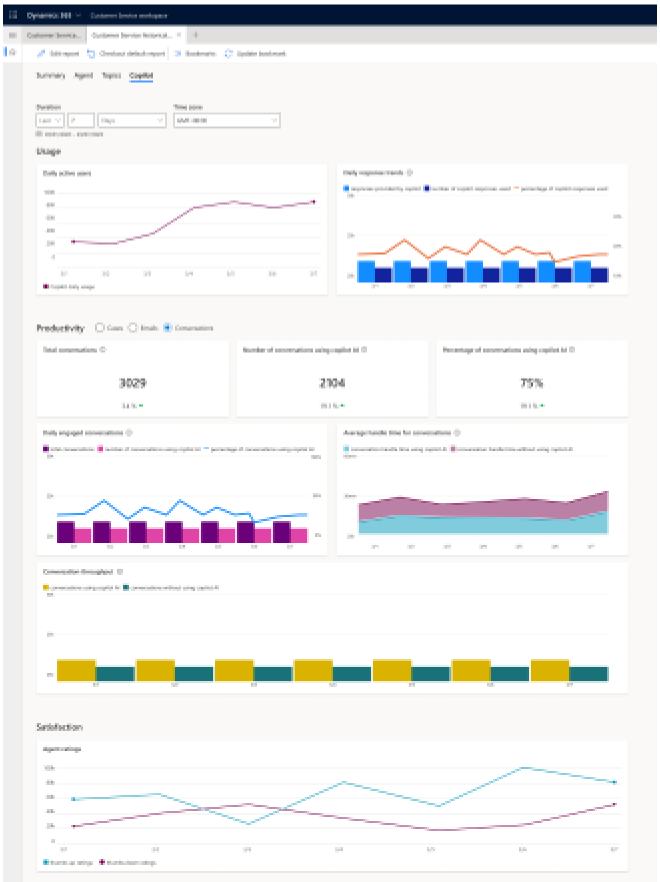
- **Daily active users**: Displays the number of unique users who used any of the copilot features in the last day.
- **Percentage of copilot responses used**: Displays the number of responses that Copilot generated across all copilot features, and the percentage of those that were actually consumed by the agents.
- **Agent ratings**: Users are allowed to provide a thumbs-up or thumbs-down on Copilot when they use any of its features. The trend of the aggregated data provides an understanding of user satisfaction.

The following metrics display two values that indicate when Copilot is and isn't used:

- **Average handle time for conversations**: Displays the impact on the average handle time metric of conversations.
- **Average days to close for cases**: Also known as case resolution time.

- **Average email response time**: Displays the time taken to draft and send an email.

These measurements help demystify for a customer service manager how their agents are interacting with the copilot capabilities and how they help improve their business.



Geographic areas

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

- Germany
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- South America
- Canada
- India
- Japan
- France
- China

See also

Analyze the impact of AI-enhanced customer service with Copilot analytics (blog)

View analytics for Copilot impact (docs)

Omnichannel

Article • 01/02/2024

> ⓘ **Important**
>
> **Some of the functionality described in this release plan has 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 Customer Service enable organizations to instantly connect and engage with their customers via channels like live chat, SMS, voice, Microsoft Teams, and social channels. By providing a seamless agent experience and valuable conversation insights across channels, the omnichannel features enable organizations to deliver a true, all-in-one contact center.

Caller ID number support for outbound calls

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Oct 31, 2023

Business value

Use of caller IDs for names and numbers is a standard way to be recognized as a legitimate caller for customers. In privacy-sensitive areas, supporting anonymous calling is critical.

Feature details

Organizations are recommended to configure an outbound caller ID. If caller ID isn't configured, PSTN carriers might consider the outbound calls as fraudulent activity, and may drop them. Outbound caller ID configuration is also required to be compliant with laws in regions such as Australia and Europe. Also, the support of anonymous calling can be business-critical in privacy-sensitive areas.

The outbound caller ID, company name, and numbers are displayed to customers in the following scenarios:

- During customer callbacks.
- If an agent makes an outbound call.
- If an agent transfers a call, for example, to an external number.

Enhanced dialing experience available out of the box

Article • 02/13/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Oct 2, 2023	Feb 2024

Business value

The refined dialer experience with new capabilities makes it easier for agents to call customers. This feature is now available by default. The improved capabilities include number country and region detection, and allow agents to edit and format numbers, view recent calls, and choose outbound numbers to place calls.

Feature details

The enhanced dialing experience will be enabled by default. The improvements include:

- Number typing and editing.
- Number formatting.
- Number country/region detection.
- Recent calls list.
- Select supported countries/regions to call.
- Agents can select the outbound number to call with.
- Auto focus on number input on open.

Enhanced security with OAuth 2.0 support in live chat

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✓ Oct 20, 2023

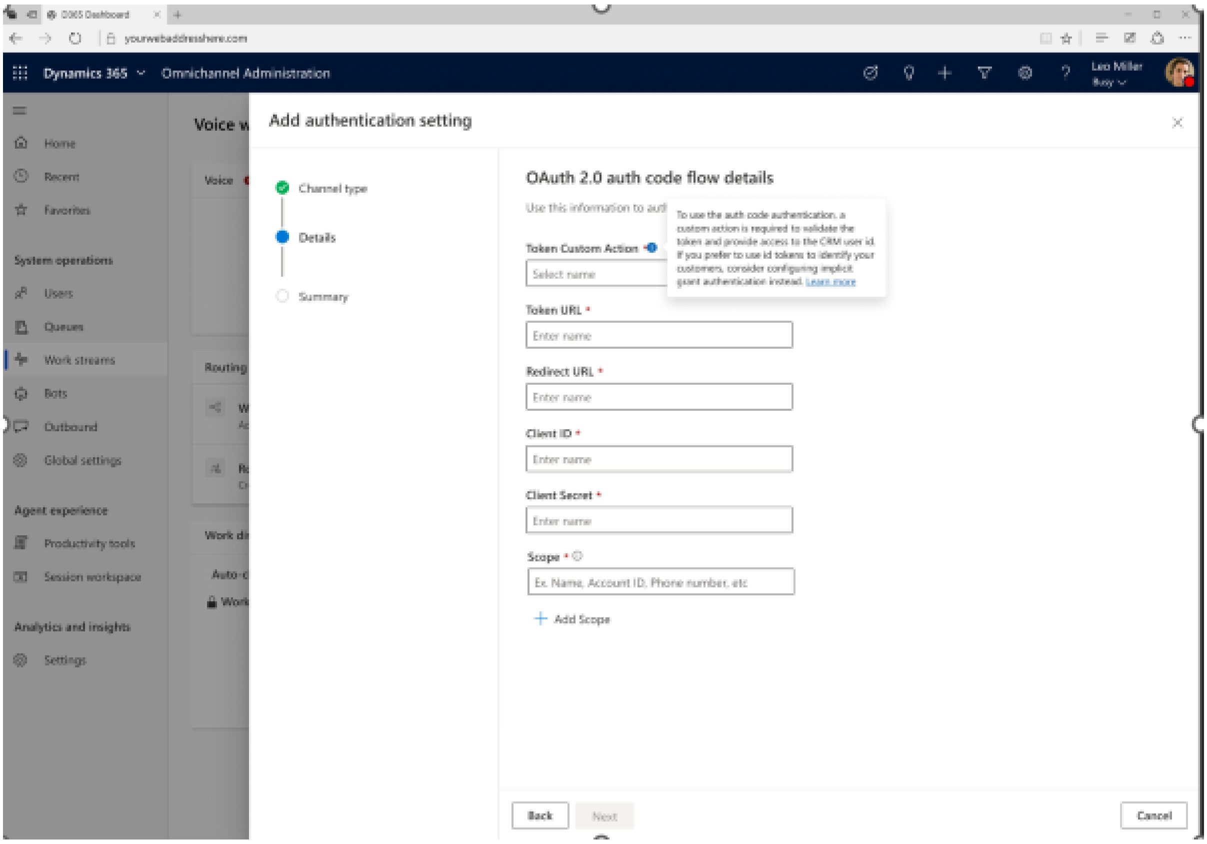
Business value

With OAuth 2.0, businesses can offer the chat channel to their customers with enhanced security for improved customer privacy and information security.

Feature details

The following features will be available to provide enhanced security:

- The Omnichannel administrator can configure live chat to use an OAuth 2.0 authorization code flow, and accept fields that are commonly used in an OpenID integration with most identity providers.
- The web developer who implements the live chat widget on your website can pass an authorization code through as a part of the authentication flow.
- You can set up a custom action in your Dynamics 365 instance to identify the contact related to the authorized user.



Add authentication setting
Channel type
Details
Summary
OAuth 2.0 auth code flow details
Token Custom Action
To use the auth code authentication, a custom action is required to validate the token and provide access to the CRM user id. If you prefer to use id tokens to identify your customers, consider configuring implicit grant authentication instead. Learn more
Token URL *
Redirect URL *
Client ID *
Client Secret *
Scope *
Add Scope
Back
Next
Cancel

Improve productivity by converting voicemail to case

Article • 02/13/2024

ⓘ Important

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

Expand table

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

Business value

This feature will allow agents to convert a voicemail to a case, allowing for faster triage of issues that are relayed in voice messages. This allows the voice channel to have a tighter integration with case management.

Feature details

In the inbox for agents, where agents can view voicemails that are assigned to them, the option to convert to a case will be available on the voicemail ribbon. Agents can easily convert the voicemail to a case with a simple click. Customer issues can be solved faster when agents can convert voicemails to a case.

Improvements to the call dialer

Article • 12/21/2023

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Oct 2, 2023	-	Feb 2024

Business value

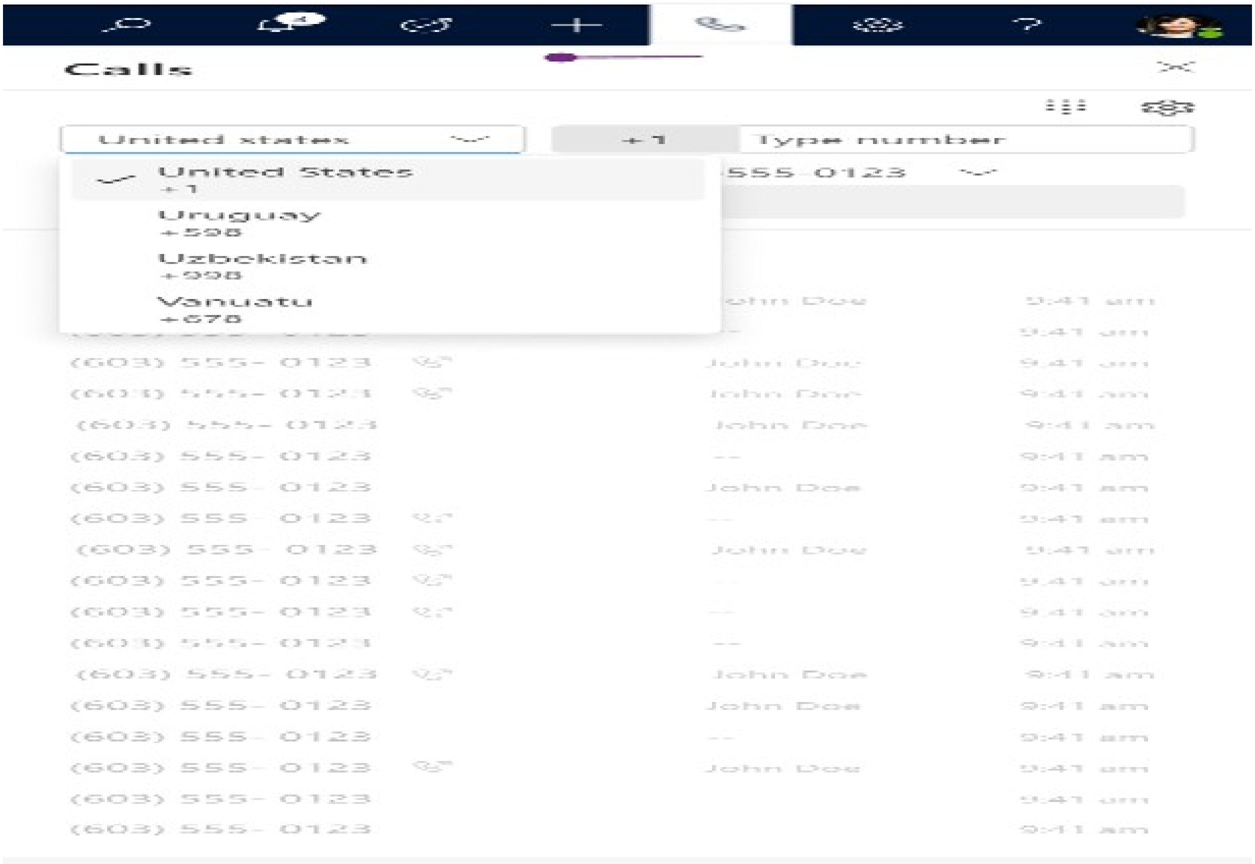
A refined dialer experience with new capabilities makes it easier for agents to call customers.

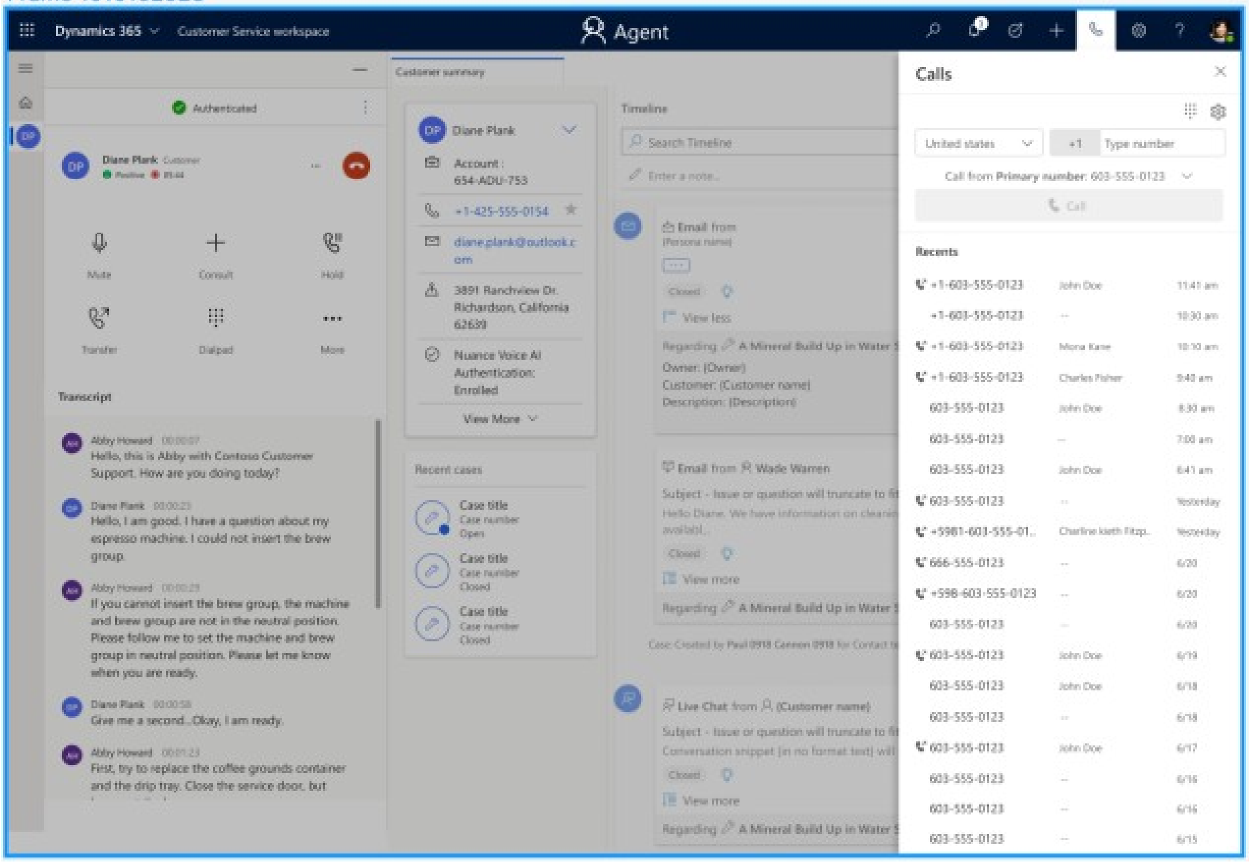
Feature details

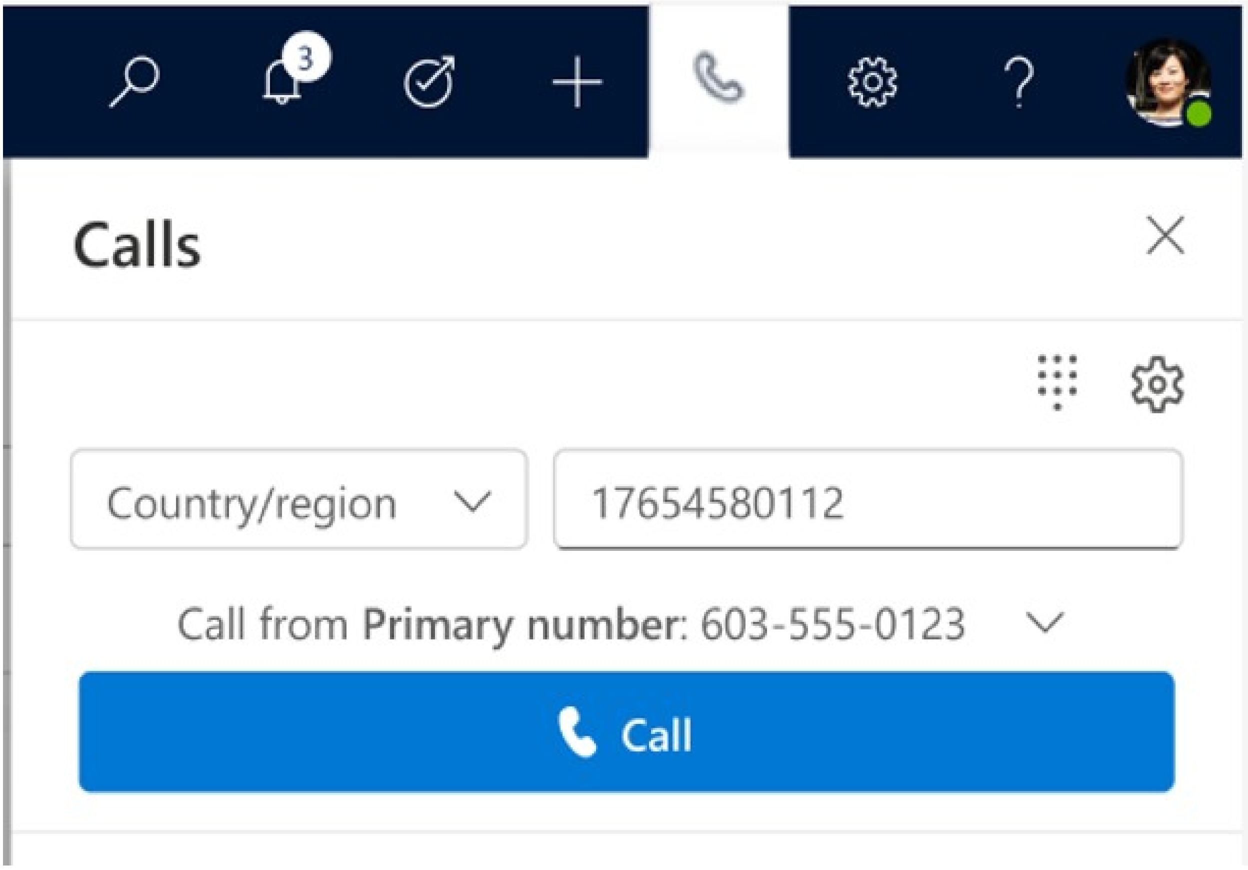
An intuitive and efficient dialer to make phone calls is a centerpiece for agents who have to communicate with customers on the phone.

Improvements include:

- Number typing and editing.
- Number formatting.
- Number country/region detection.
- Recent calls list.
- Select supported countries/regions to call.
- Agents can select the outbound number to call with.
- Default country/region selection based on locale.


Calls
United states
+1
Type number
United States
+1
Uruguay
+598
Uzbekistan
+998
Vanuatu
+678


Dynamics 365
Customer Service workspace
Agent
Authenticated
Diane Plank
Mute
Consult
Hold
Transfer
Dialpad
More
Transcript
Hello, this is Abby with Contoso Customer Support. How are you doing today?
Hello, I am good. I have a question about my espresso machine. I could not insert the brew group.
If you cannot insert the brew group, the machine and brew group are not in the neutral position. Please follow me to set the machine and brew group in neutral position. Please let me know when you are ready.
Give me a second...Okay, I am ready.
First, try to replace the coffee grounds container and the drip tray. Close the service door, but
Customer summary
Account : 654-ADU-753
+1-425-555-0154
diane.plank@outlook.com
3891 Ranchview Dr. Richardson, California 62639
Nuance Voice AI Authentication: Enrolled
View More
Recent cases
Case title
Timeline
Search Timeline
Enter a note...
Calls
United states
+1
Type number
Call from Primary number: 603-555-0123
Call
Recents



See also

Try the new outbound dialing experience in Dynamics 365 Customer Service (blog)

Call a customer (docs)

Integrate third-party IVR with voice channel

Article • 12/21/2023

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may 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, 2023	-	Mar 2024

Business value

Interoperability of third-party interactive voice response (IVR) enables organizations to provide continuous self-service to their customers. Self-service improves the call deflection rate so that human agents have more time to engage in meaningful and impactful conversations with their customers.

Feature details

Integrating third-party IVR technologies with the voice channel in Dynamics 365 Customer Service enables organizations to improve customer satisfaction and contact center productivity. It includes the support of escalation from IVR to agents, sharing of contextual data via dataverse, and custom UX controls to surface the data to agents. The interoperability documentation follows an in-front-of-the-switch architecture, supporting Nuance Cloud IVR capabilities as is today, as well as other CCaaS vendors to orchestrate the call between IVR and Omnichannel for Customer Service using SIP operations.

Use cases

- Customers can perform self-service tasks with third-party IVRs.

- Customer intent and context for calling are precisely identified via industry-specialized natural language models.
- Customers can be transferred along with custom-defined context data to an agent who is fully informed and ready to continue the conversation and resolve cases.
- Call intent and customer data can be used for proper call routing.

Benefits

As we move forward into an AI world with increased speed and information, experiences have become more seamless and automated. This integration allows customers to achieve the following benefits:

- Improve call center productivity by increasing the ratio of call deflections and self-service calls.
- Reduce costs by optimizing the workforce.
- Reduce average time spent on calls escalated from IVR to agents due to the availability of context.

Geographic areas

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

- United States

See also

Introduction to Nuance Cloud IVR bot integration (docs)

Supervisor experiences

Article • 01/02/2024

ⓘ Important

Some of the functionality described in this release plan has 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 targeted at customer service managers and analysts. Availability of key operational metrics allow supervisors to continuously monitor contact center operations and make course corrections. For example, supervisors can intervene when customer sentiment becomes negative and improve agent staffing to optimize productivity, thereby keeping service levels high.

Supervisors can also use the extensibility feature and customize data models to include additional metrics and report on custom entities, improving contact center efficiency.

Real-time analytics enabled by default

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	-	✔ Nov 17, 2023

Business value

Supervisors will be able to leverage real-time analytics and take advantage of its capabilities to monitor their contact center operations effectively, without any dependency on the administrator.

Feature details

Currently, administrators have to enable real-time analytics from the Customer Service admin center app, so that Omnichannel supervisors will be able to view the report from the Customer Service Workspace site map. With this feature, real-time analytics on the Customer Service Workspace site map will be enabled by default for Omnichannel supervisors. This change is applicable to existing organizations where the feature was never turned on, and to new organizations, going forward. Reports will be provisioned when a user selects the item in the site map.

> ⓘ **Note**
>
> This change won't affect organizations that had turned off the feature previously. Administrators will be able to disable real-time analytics, if required.

View skills and proficiency in Omnichannel real-time analytics reports

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Oct 31, 2023

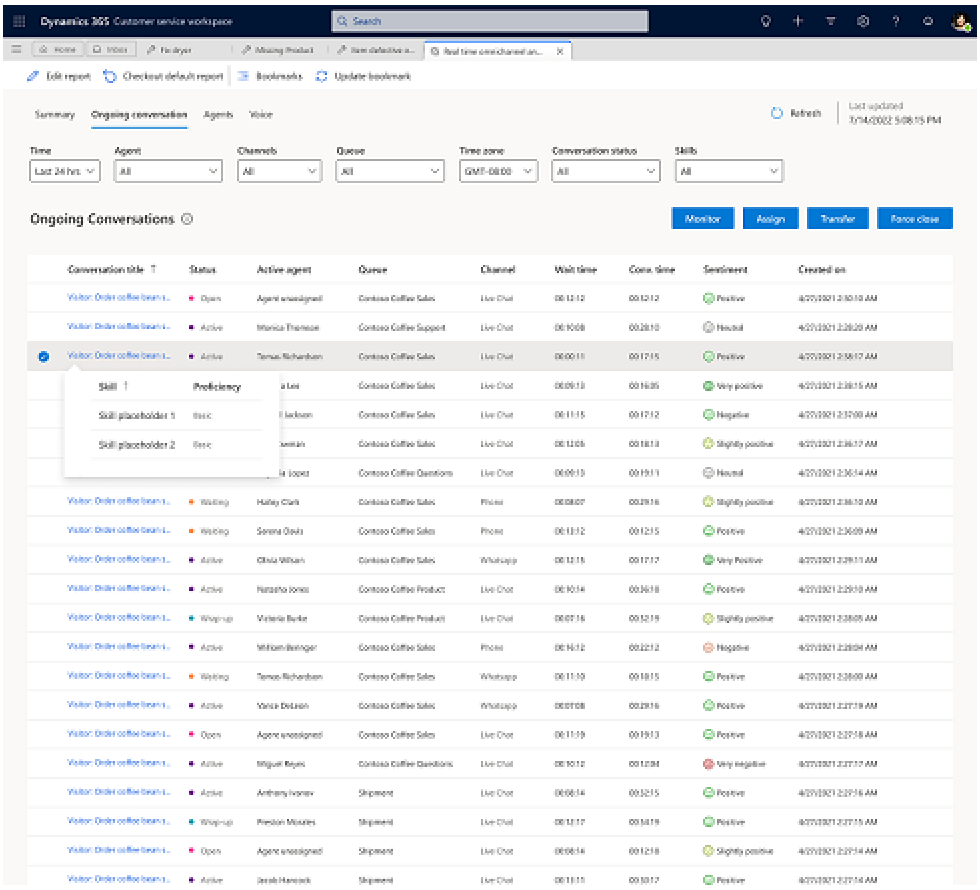
Business value

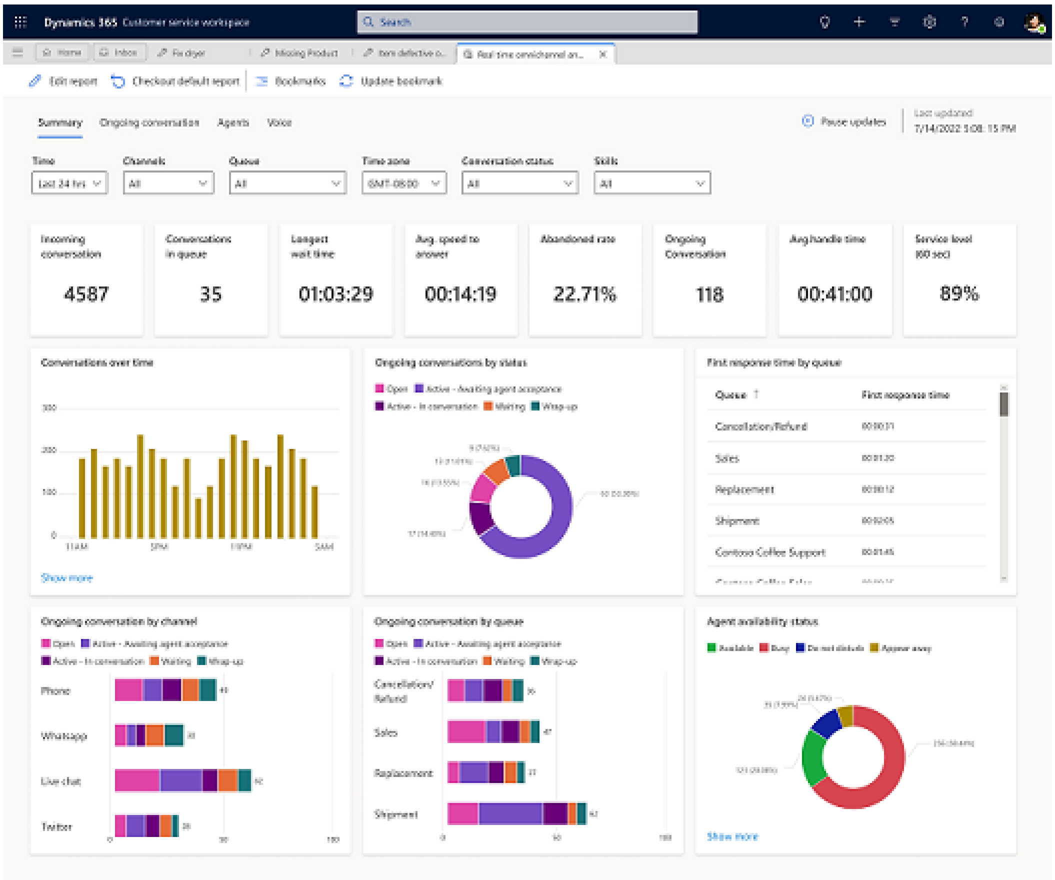
Monitoring ongoing conversations and taking actions like assigning and transferring conversations, based on the availability of an agent without knowing their skills and skill level, can lead to suboptimal customer support experience. With the skills filter, you can monitor skills that are integral to work distribution.

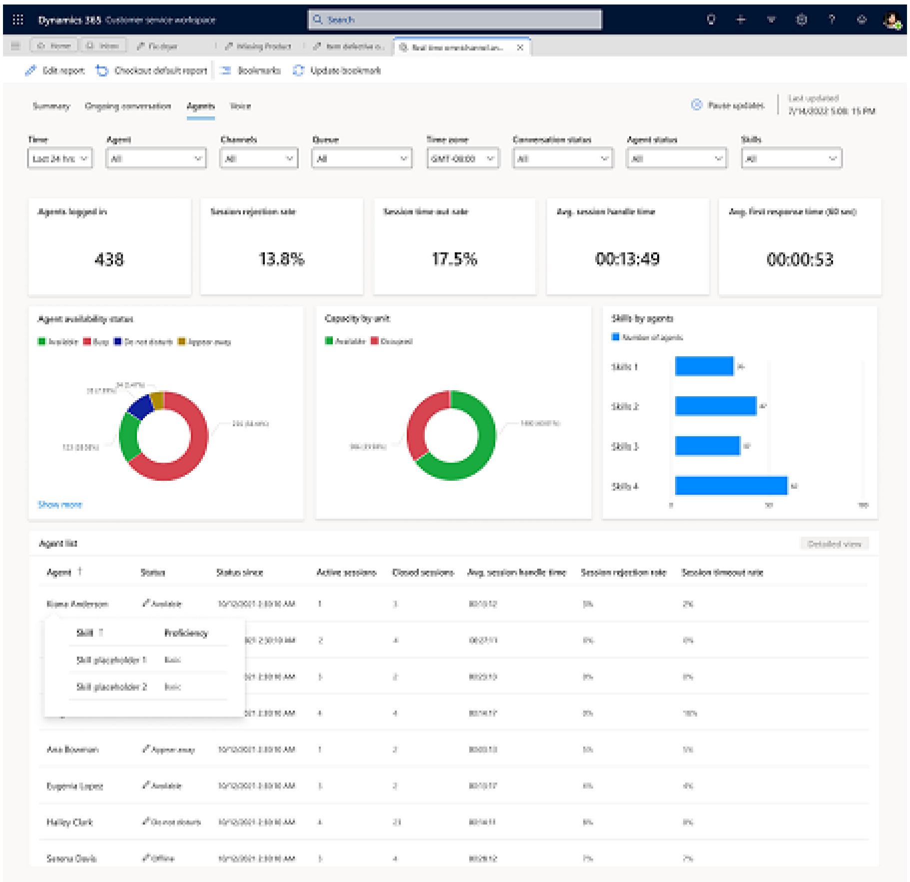
Feature details

As a supervisor, you'll be able to:

- Filter existing summary, agent, voice, and ongoing conversations by skills.
- Drill down on available metrics, such as average handle time, wait time, agent availability, and so on for specific skills.
- Understand agent's skill from the agent report and skills required for a conversation from ongoing conversation reports, respectively, by hovering over the respective rows.
- View proficiency (or skill level) in the data model for use in visual customization.


Dynamics 365 Customer service workspace
Search
Edit report
Checkout default report
Bookmarks
Update bookmark
Summary
Ongoing conversation
Agents
Voice
Refresh
Last updated
7/14/2022 5:08:15 PM
Time
Agent
Channels
Queue
Time zone
Conversation status
Skills
Ongoing Conversations
Monitor
Assign
Transfer
Force close
Conversation title
Status
Active agent
Queue
Channel
Wait time
Conv. time
Sentiment
Created on
Skill
Proficiency


Dynamics 365 Customer service workspace
Search
Edit report
Checkout default report
Bookmarks
Update bookmark
Summary
Ongoing conversation
Agents
Voice
Pause updates
Last updated
7/14/2022 5:08:15 PM
Time
Channels
Queue
Time zone
Conversation status
Skills
Incoming conversation
4587
Conversations in queue
35
Longest wait time
01:03:29
Avg. speed to answer
00:14:19
Abandoned rate
22.71%
Ongoing Conversation
118
Avg handle time
00:41:00
Service level (60 sec)
89%
Conversations over time
Show more
Ongoing conversations by status
First response time by queue
Queue
First response time
Cancellation/Refund
Sales
Replacement
Shipment
Contoso Coffee Support
Ongoing conversation by channel
Phone
WhatsApp
Live chat
Twitter
Ongoing conversation by queue
Cancellation/Refund
Sales
Replacement
Shipment
Agent availability status
Show more


Dynamics 365 Customer service workspace
Search
Edit report
Checkout default report
Bookmarks
Update bookmark
Summary
Ongoing conversation
Agents
Voice
Pause updates
Last updated
7/14/2022 5:08:15 PM
Time
Last 24 hrs
Agent
Channels
Queue
Time zone
GMT-08:00
Conversation status
Agent status
Skills
Agents logged in
438
Session rejection rate
13.8%
Session time out rate
17.5%
Avg. session handle time
00:13:49
Avg. first response time (60 sec)
00:00:53
Agent availability status
Available
Busy
Do not disturb
Appear away
Show more
Capacity by unit
Available
Occupied
Skills by agents
Number of agents
Skills 1
Skills 2
Skills 3
Skills 4
Agent list
Detailed view
Agent
Status
Status since
Active sessions
Closed sessions
Avg. session handle time
Session rejection rate
Session timeout rate
Skill
Proficiency
Skill placeholder 1
Skill placeholder 2
Ana Bowman
Appear away
Eugenia Lopez
Available
Hailey Clark
Do not disturb
Serena Davis
Offline

Teams integration

Article • 01/02/2024

ⓘ Important

Some of the functionality described in this release plan has 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 Customer Service and Microsoft Teams together to provide your agents and customers with a cohesive environment where they can seamlessly collaborate with each other.

With embedded chat and swarming, agents can get help from experts across the entire organization to resolve complex customer issues.

Agents can connect with their customers using the Join a Teams call feature and meetings integration to have more efficient collaboration with video, screen share, and remote control options.

Collaborate using Teams embed chat without having to enable it

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 31, 2023	✔ Oct 31, 2023

Business value

With most customer support agents now working remotely, the days of getting help from a peer in the next cubicle are over. Working in isolation can cause agents and customers to become frustrated with issues taking longer to resolve. Resolving a customer issue often requires input from multiple departments across a company.

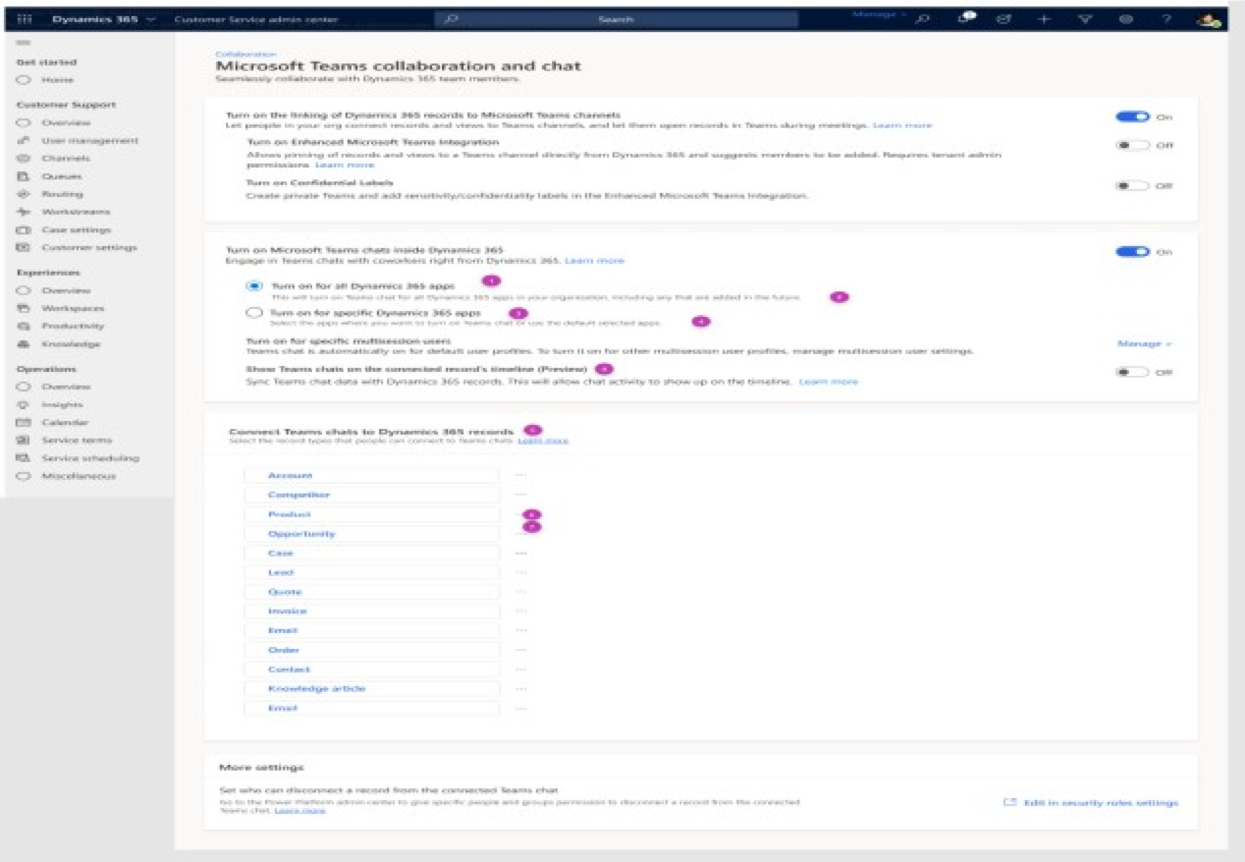
We've found that agents rank collaboration as the second most important part of their job, only behind customer engagement. That's why we've made collaboration easier in Dynamics 365 Customer Service by making experiences such as embed chat the default setting rather than requiring an admin to turn them on.

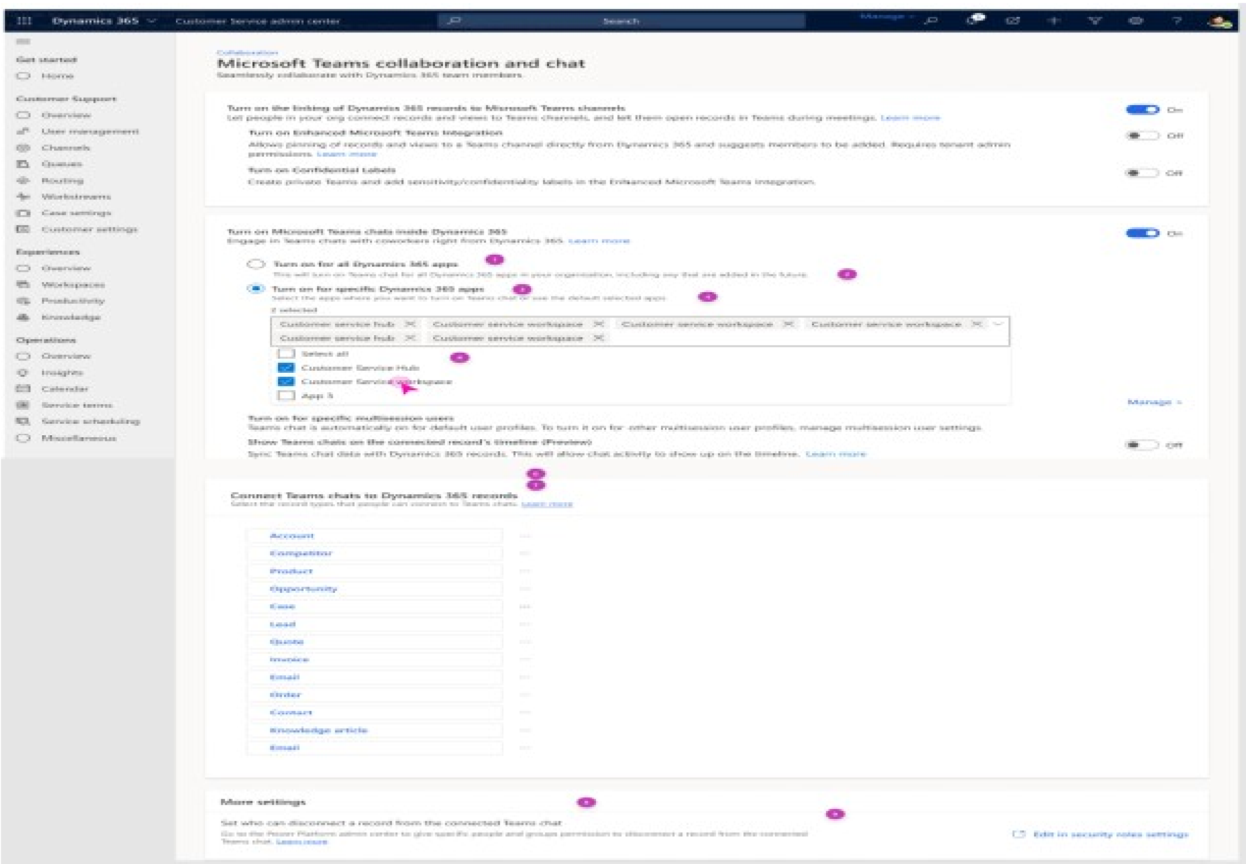
Feature details

You no longer need a global tenant admin to turn on the Teams collaboration feature, embed chat. Embed chat will be on by default for all organizations in:

- Customer Service Hub.
- Customer Service workspace for all out-of-the-box agent workspace profiles. For any custom profile, a Dynamics 365 admin will still need to turn on embed chat for it to show in the productivity pane.

At any time, a Dynamics 365 admin can disable embed chat if needed.





See also

Configure Microsoft Teams chat in Customer Service (docs)

Enhance customer engagement with Join a Teams call

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Oct 2, 2023	-	-

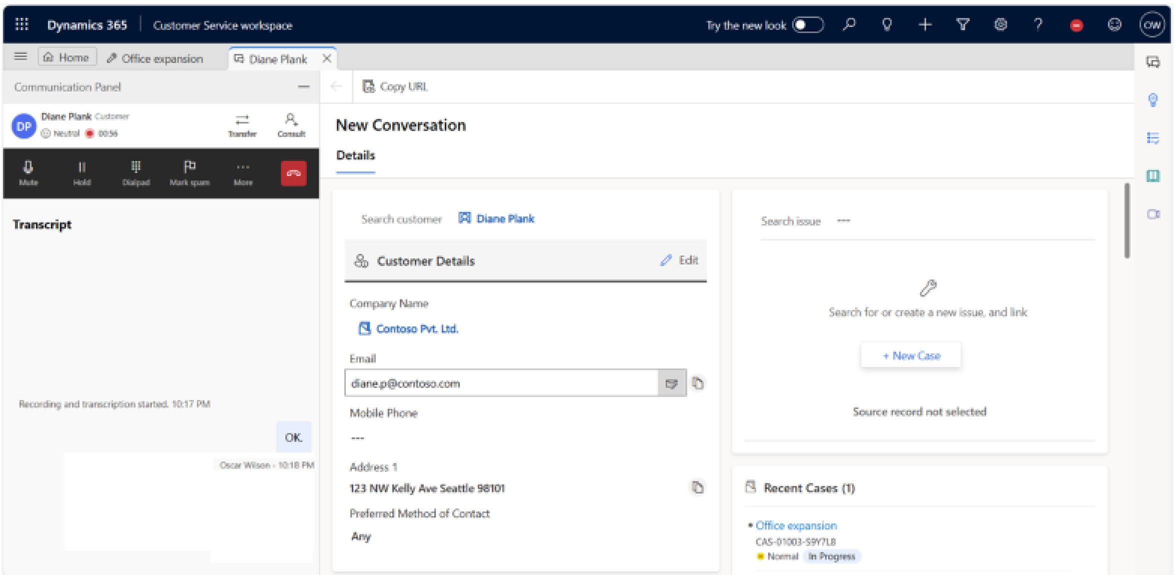
Business value

Join a Teams call helps agents to collaborate with customers in just a single click, improving their support activities through video calls, screen sharing, and co-browsing capabilities offered by Microsoft Teams. It allows agents to use existing investments to offer personalized service to their customers without requiring the customers to have a Teams license or previous experience using Teams.

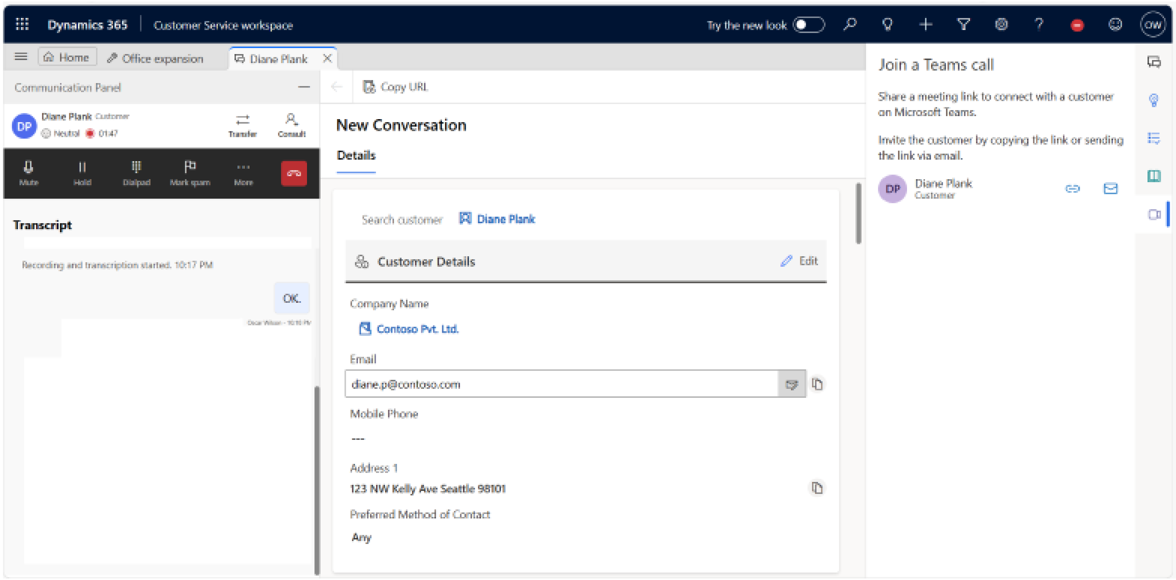
Feature details

Agents can now make their customer interactions more effective by using a one-click flow to switch their conversations to Teams. By inviting customers to join them on Teams, they can quickly offer more personalized support that's enhanced with video, co-browse, and screen-share options. Agents can use their existing Teams license without any additional investment, and their customers don't need a Teams license or previous experience using Teams.

- This feature is functional when there's an ongoing engagement (voice or chat).
- Agents can select the icon on the productivity pane to access the feature. They have options to invite customers for a Teams call by sharing a link with them or emailing it.



- Once the link is shared, customers can join the call through the link. Agents can click the join button to join the call.



See also

Invite customers to join you on Teams to enhance your conversations (docs)

Unified routing

Article • 01/02/2024

ⓘ Important

Some of the functionality described in this release plan has 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, namely case, record, chat, digital messaging, and voice, to the best-suited agents. The assignment rules take into account customer-specified criteria, such as priority and skills. The routing service uses AI to automatically classify, route, and assign work items, and eliminates the need for constant queue supervision and manual work distribution to offer operational efficiencies for organizations. The various features like percent-based routing, overflow management, and routing to preferred agents help optimize the routing of work items to the best-suited agents.

Configure agent-specific capacity profiles

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 23, 2023

Business value

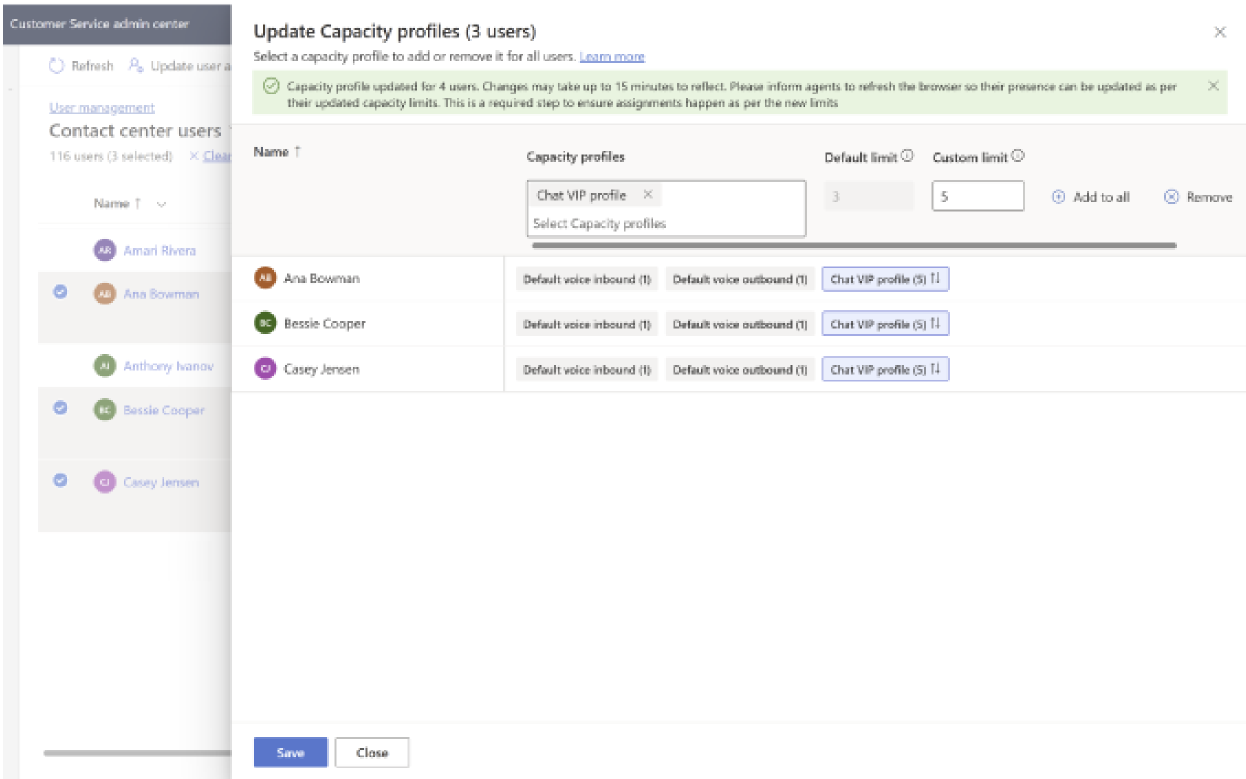
Capacity profiles are a powerful way to manage agent capacity across channels and help define the types and amount of work agents can take up. In this release, admins and supervisors can allocate different quotas or concurrent conversation limits to agents depending on their expertise and experience. Senior or proficient agents can handle more cases and conversations compared to the junior agents for the same work type.

Feature details

This feature enables experienced agents to take up more concurrent work than the others.

Admins will be able to:

- Specify custom limit for agents for specific profiles in the user management hub in the Customer Service admin center.
- Use this feature with OData API calls and manage users programmatically.



See also

Enhance agent efficiency and flexible work distribution with capacity profiles (blog)

Route calls to agents who are least active

Article • 12/06/2023

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 31, 2023

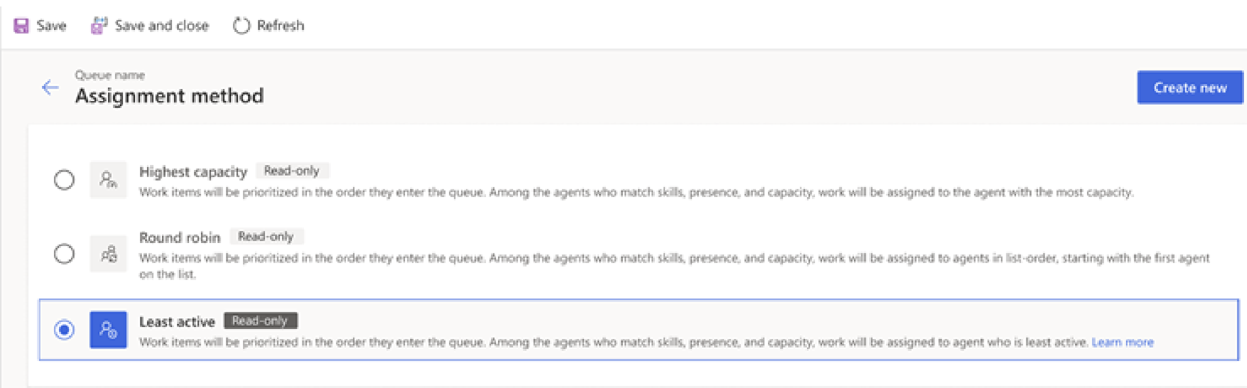
Business value

Organizations can route phone calls to agents who have been least active for the longest duration to ensure better use of agents, improved customer satisfaction, and better agent engagement, as agents are well rested between calls.

Feature details

The **Most idle** assignment method for the voice queues, that assigns work items to agents who are idle (or least active) for the longest period, was previewed in October 2022. Now, this capability will be generally available with the name **Least Active** routing. The functionality remains unchanged from its public preview version.

Least Active will be the default assignment method for new voice queues. The selection for existing voice queues will remain unchanged.



See also

Enhance agent utilization and engagement with least active routing (blog)

Use agent availability API for unauthenticated chats

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Oct 31, 2023

Business value

Improve customer experience by minimizing wait times and optimize service support by checking the availability of agents for unauthenticated chats that would otherwise be in the queue for a longer duration.

Feature details

The agent availability API that's available to use for authenticated chats to determine availability of agents in the queue is now extended to unauthenticated chats also. For example, you can use the API to determine the availability of the agents and then display the chat widget to unauthenticated chat users and enhance their customer support experience.

Plan and prepare for Microsoft Copilot for Service in 2023 release wave 2

Article • 02/13/2024

> ⓘ **Important**
>
> The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. In this article, you'll find the product overview and what's new and planned for **Microsoft Copilot for Service**.

Overview

Microsoft Copilot for Service helps organizations quickly realize the benefits of generative AI by extending their existing investments in CRM and contact center solutions to enhance customer experiences and boost agent productivity. It unlocks an organization's trusted knowledge to accelerate onboarding and case resolution, improve efficiency, and automate tasks for agents in their flow of work.

Copilot for Service spans across agent desktops of choice, such as Salesforce and Zendesk, and connects with other tools your agents already use every day, like Outlook and Teams, with the inclusion of Copilot for Microsoft 365.

Learn more about Microsoft Copilot for Service:

- Microsoft Copilot for Service overview (documentation)
- Quickstart - create and deploy an agent-facing copilot (documentation)

Previously, adding AI to a contact center could take months or even years of development. It requires a team of conversational designers, subject matter experts, developers, and data scientists.

Copilot for Service, however, provides out-of-the-box solutions to converse over existing contact center data, such as external and internal websites, direct file uploads, and contact center knowledge in third-party systems. It can be deployed to web and other channels in just minutes, and businesses can easily customize their copilot with an intuitive configuration experience and seamlessly add custom conversation flows with Microsoft Copilot Studio and Power Platform tooling, including 1,100+ prebuilt connectors.

Investment areas

Administrator experience
Administrator experiences help configure Copilot for Service to create agent-facing copilots powered by generative AI. Additionally, admins can configure and customize copilots they deploy in Outlook and Teams.

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

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

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

Agents working in Outlook can use Copilot for Service to summarize and draft emails, access case summaries, browse and update CRM records, and schedule meetings informed by case summaries and other relevant information from CRM records.

Agent-facing copilots in CRM systems
Without costly development time or rip and replace efforts, organizations can simply point to their data—such as public websites, SharePoint, knowledge base articles, and offline files—and in a few minutes create a copilot that unlocks generative AI-powered conversations across all of their data using out-of-the-box integrations for Salesforce, ServiceNow, Genesys, and Zendesk.

The copilot embedded in a CRM agent desktop accelerates agent onboarding and case resolution, improves efficiency, and automates tasks to help free agents to focus on customers.

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

Check out the release plan

For application administrators

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

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

Get the most out of Microsoft Copilot for Service

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Microsoft Copilot for Service.
Product documentation	Find documentation for Microsoft Copilot for Service.
User community	Engage with Microsoft Copilot for Service experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Microsoft Copilot for Service.

What's new and planned for Microsoft Copilot for Service

Article • 03/07/2024

This topic lists features that are planned to release from October 2023 through March 2024. 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.

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 experience

An intuitive administrator experience makes it easy for admins to create, deploy, and configure agent-facing copilots in CRM systems and apps such as Outlook and Teams.

Expand table

Feature	Enabled for	Public preview	General availability
Create and embed agent-facing copilots for CRM systems	Users by admins, makers, or analysts	✔ Dec 1, 2023	✔ Feb 1, 2024
Deploy Copilot for Service app to Outlook and Teams	Users by admins, makers, or analysts	✔ Feb 28, 2024	To be announced
Configure copilot features and customize settings	Users by admins, makers, or analysts	✔ Feb 28, 2024	To be announced
Deploy agent-facing copilots in agent consoles, Teams, and custom websites	Users by admins, makers, or analysts	✔ Dec 1, 2023	✔ Feb 1, 2024

Agent experiences in Microsoft Teams

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

Expand table

Feature	Enabled for	Public preview	General availability
Provide meeting summary and follow-up items to create CRM tasks in Teams recap	Users by admins, makers, or analysts	Mar 2024	To be announced
Browse and update CRM records during Teams meetings	Users by admins, makers, or analysts	✓ Feb 26, 2024	To be announced

Agent experiences in Outlook

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

Expand table

Feature	Enabled for	Public preview	General availability
Generate email drafts and replies using generative AI	Users by admins, makers, or analysts	✓ Feb 26, 2024	To be announced
Generate a summary of case-related emails and save to your CRM system	Users by admins, makers, or analysts	✓ Feb 26, 2024	To be announced
Provide case summary to agents while working on customer emails	Users by admins, makers, or analysts	✓ Feb 26, 2024	To be announced
Prepare for customer meetings	Users by admins, makers, or analysts	✓ Feb 26, 2024	To be announced
Provide recommended CRM updates to agents in Outlook	Users by admins, makers, or analysts	✓ Feb 26, 2024	To be announced

Agent-facing copilots in CRM systems

Help your agents resolve customer issues faster by using copilots that can reason over the CRM data, directly from the agent's console.

Expand table

Feature	Enabled for	Public preview	General availability
Use custom plugins in agent-facing copilots	Users by admins, makers, or analysts	✔ Dec 1, 2023	✔ Feb 1, 2024
Use Microsoft Copilot directly in your existing CRM systems	Users by admins, makers, or analysts	✔ Dec 1, 2023	✔ Feb 1, 2024

- You are able to opt into some features as part of early access on July 31, 2023, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Administrator experience

Article • 02/13/2024

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

Administrator experiences help configure Copilot for Service to create agent-facing copilots powered by generative AI. Additionally, admins can configure and customize copilots they deploy in Outlook and Teams.

Configure copilot features and customize settings

Article • 02/13/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2024	To be announced

Business value

Copilot for Service gives your admins flexibility to enable and customize copilot features to best suit your agents' needs.

Feature details

Capabilities that will be available for admins through the Copilot for Service app include:

- Global admins can enable or disable Copilot features or provide access to these features to a specific set of users.
- Environment admins can enable or disable copilot features for each of their environments.
- Environment admins can customize CRM entities and define what fields can be edited.

Geographic areas

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

- United States

Create and embed agent-facing copilots for CRM systems

Article • 02/15/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Dec 1, 2023	✓ Feb 1, 2024

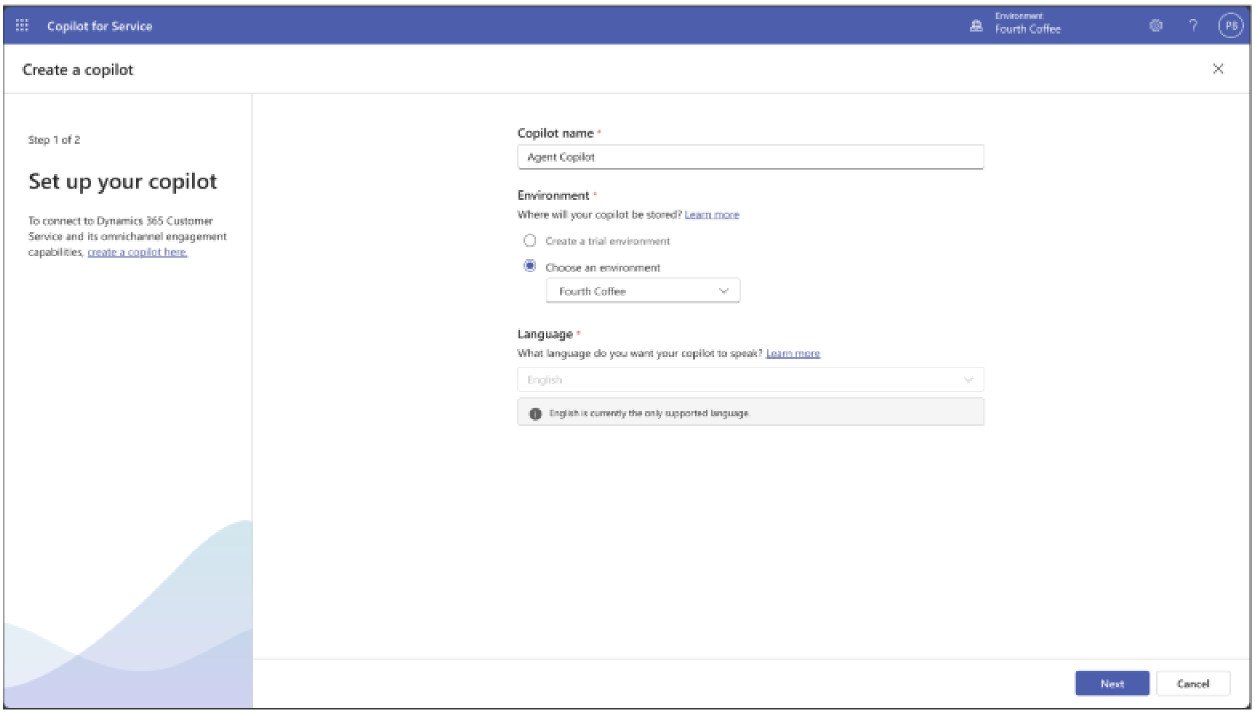
Business value

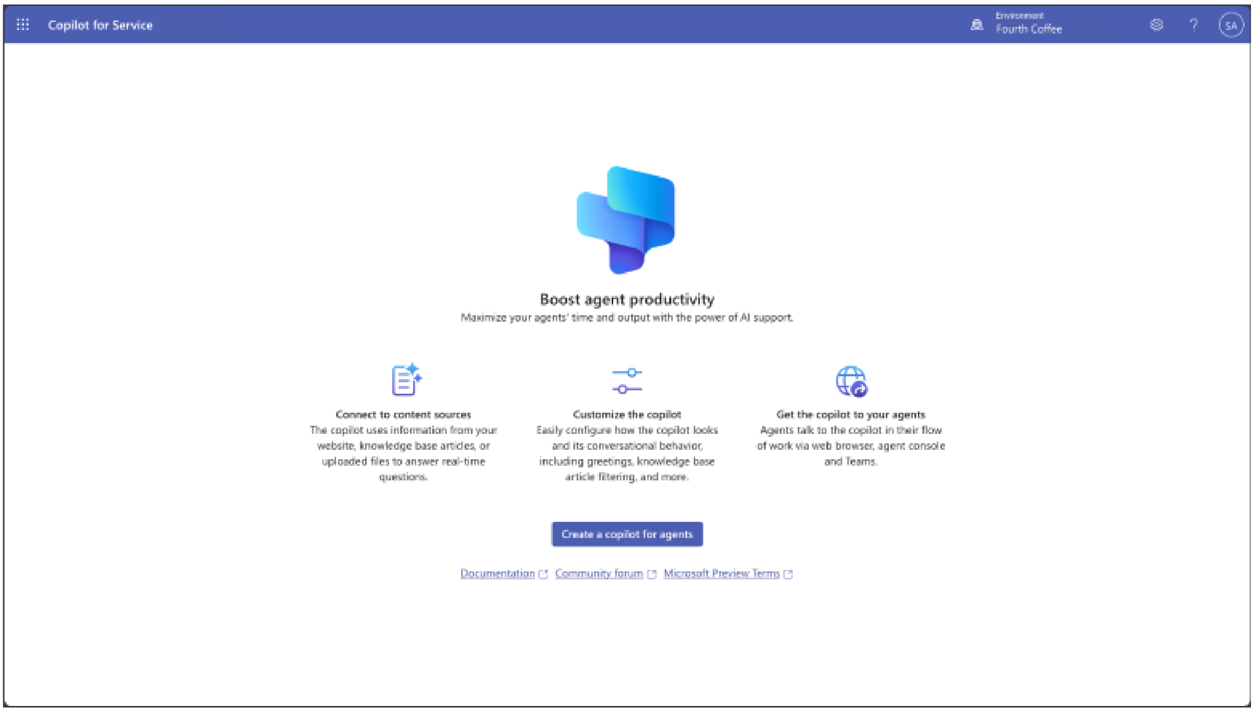
Boost your agent productivity further with new assistance features from agent-facing copilots beyond their agent console.

Feature details

The contact center admin can easily create an agent-facing copilot that connects to various data sources to empower agent productivity:

- Connect to multiple CRM systems, including Salesforce, ServiceNow, Zendesk, and Genesys.
- Connect to external websites, SharePoint, OneDrive, and directly uploaded files to generate answers to agent questions.
- Extend with plug-ins and actions.





Geographic areas

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

- United States

Deploy agent-facing copilots in agent consoles, Teams, and custom websites

Article • 02/13/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Dec 1, 2023	✓ Feb 1, 2024

Business value

Agent-facing copilots can be surfaced in a variety of apps and systems, ensuring that generative AI will fit into your existing processes.

Feature details

Agent-facing copilots can be embedded in agent consoles, Microsoft Teams, and on custom websites so answers are always at your fingertips:

- Deploy to various third-party (3P) CRMs, such as Salesforce, ServiceNow, Zendesk, and Genesys.
- Deploy to Microsoft Teams.
- Deploy to custom websites.

You can configure authentication in your copilots to verify the user's identity and keep your organizational data and information within your organization.

Geographic areas

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

- United States

Deploy Copilot for Service app to Outlook and Teams

Article • 02/13/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2024	To be announced

Business value

Global admins can deploy Copilot for Service in modern business apps to make it easier for agents to get the information they need, when they need it.

Feature details

- A global admin can deploy the Copilot for Service app in the Microsoft admin center for both Outlook and Teams.
- While deploying, the admin can specify the users who will have access to the app.
- Once this app is deployed, Copilot for Service will be enabled in Outlook and Teams and can provide service-specific copilot capabilities.

Geographic areas

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

- United States

Agent experiences in Microsoft Teams

Article • 02/13/2024

ⓘ Important

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

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

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

Browse and update CRM records during Teams meetings

Article • 02/13/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2024	To be announced

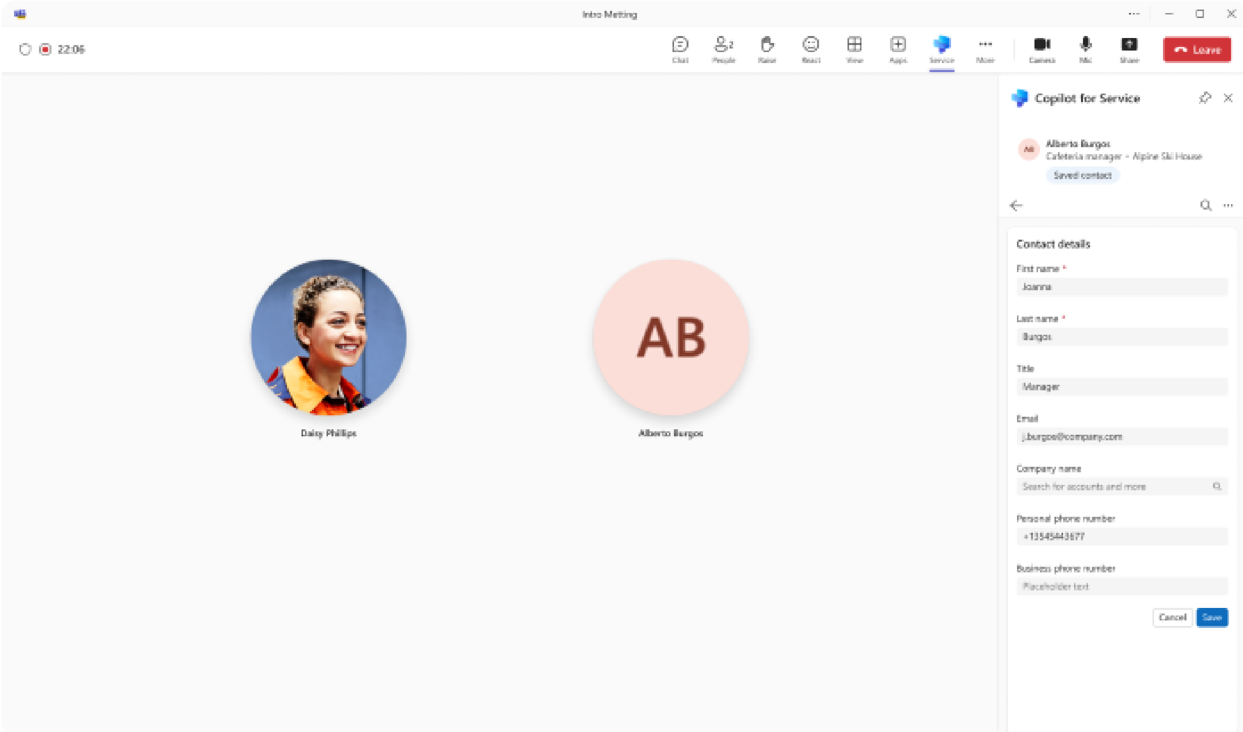
Business value

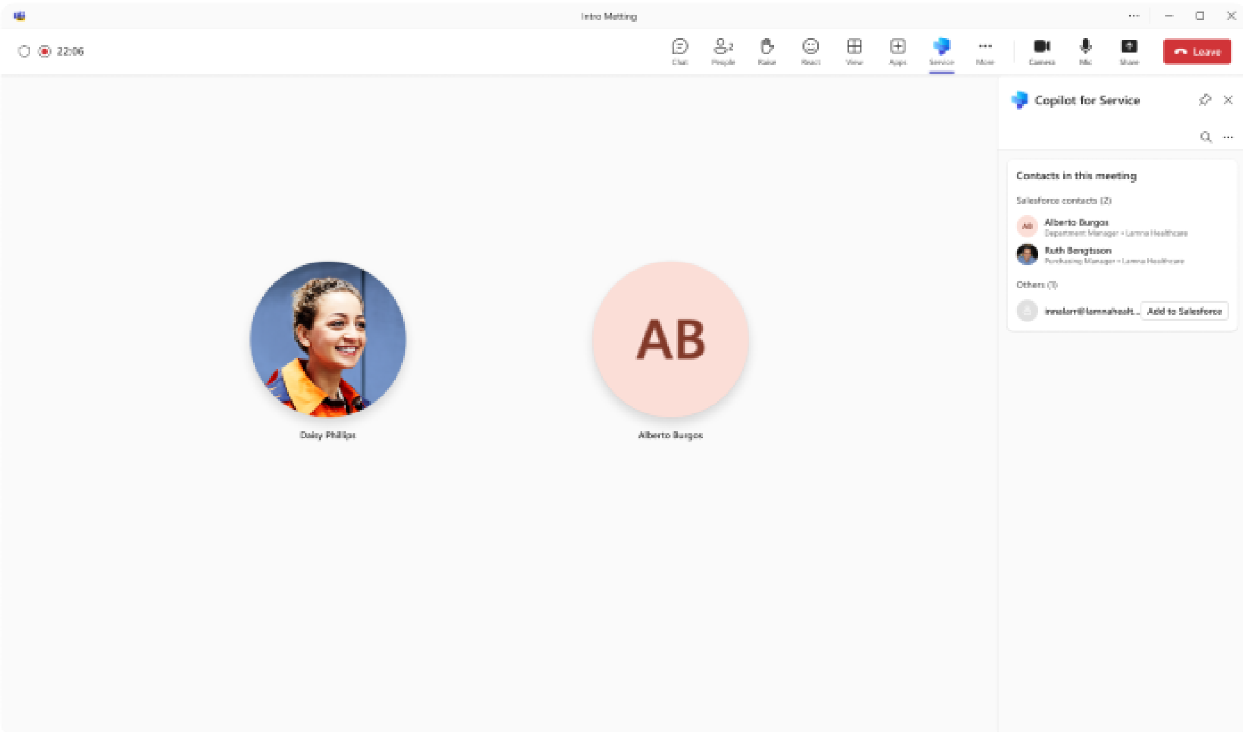
As agents are talking to the customers, having access to all the information about the customer makes it easy to serve them.

Feature details

While in a meeting, agents will have access to Microsoft Copilot for Service, enabling them to do the following:

- Access all the CRM records related to the customer in a meeting.
- Edit CRM records, like case or contact details, from Microsoft Teams while in a meeting.
- Link to open CRM records from Microsoft Teams during a meeting.





Geographic areas

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

- United States

Agent experiences in Outlook

Article • 02/13/2024

ⓘ Important

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

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

Agents working in Outlook can use Copilot for Service to summarize and draft emails, access case summaries, browse and update CRM records, and schedule meetings informed by case summaries and other relevant information from CRM records.

Generate email drafts and replies using generative AI

Article • 02/13/2024

ⓘ Important

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

Expand table

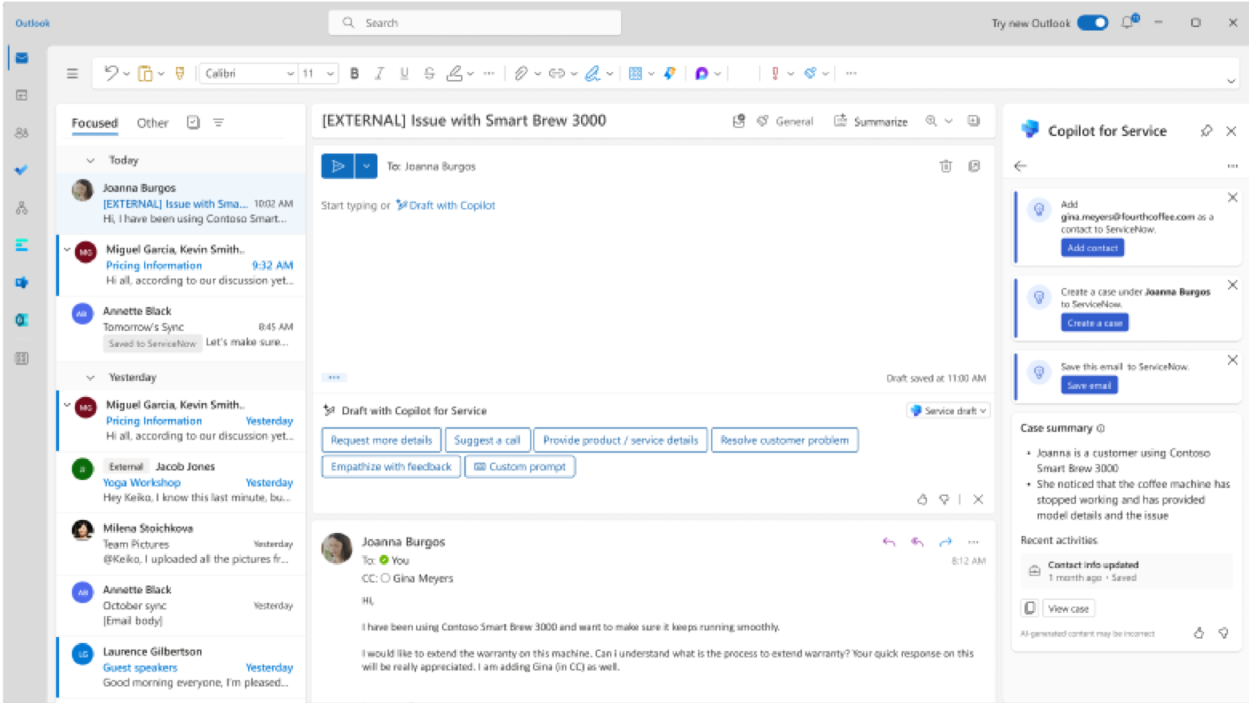
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2024	To be announced

Business value

In seconds, agent-facing copilots can draft contextual customer service emails that would take several minutes from scratch. The more complex and contextual the email, the bigger the time savings.

Feature details

- Agents can select from the predefined intents for the email to be drafted. Agents can provide their own custom intent.
- Copilot uses the context of the email conversation and case details to produce personalized, contextual emails.



Geographic areas

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

- United States

Generate a summary of case-related emails and save to your CRM system

Article • 02/13/2024

ⓘ Important

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

Expand table

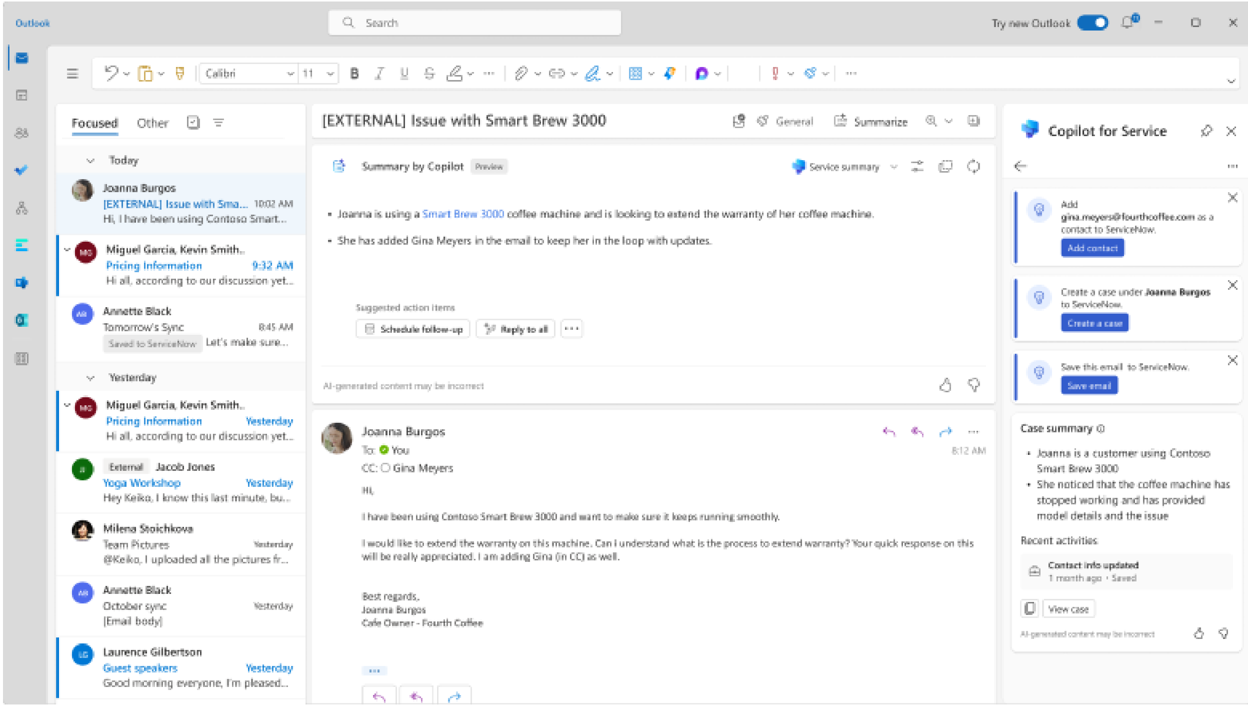
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2024	To be announced

Business value

With Copilot for Service, agents don't have to read through long email conversations and threads, and can get email summaries to quickly catch up on the conversations.

Feature details

- Copilot for Service will provide an email summary in Outlook capturing all the important information required for agents to understand the context of the case they're working on.
- The generated summary can be saved to your connected CRM system and can access the information in the CRM system as well.



Geographic areas

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

- United States

Prepare for customer meetings

Article • 02/13/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2024	To be announced

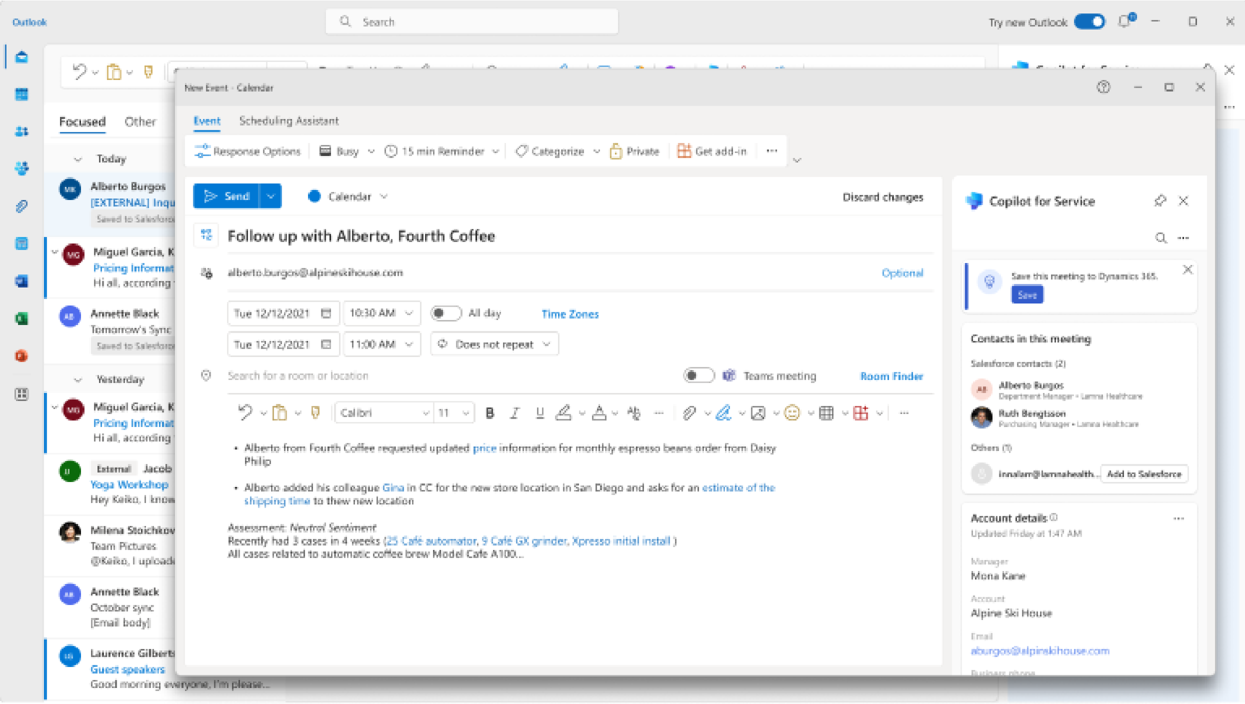
Business value

Agents can prepare for customer meetings and have the relevant details about the associated case ahead of time in the meeting invites.

Feature details

This feature offers the following capabilities:

- Provide access to Copilot for Service in meeting invites.
- Provide case summary to the case associated with the meeting.
- Provide access to view and edit CRM records, such as contacts and accounts.



Geographic areas

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

- United States

Provide case summary to agents while working on customer emails

Article • 02/13/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2024	To be announced

Business value

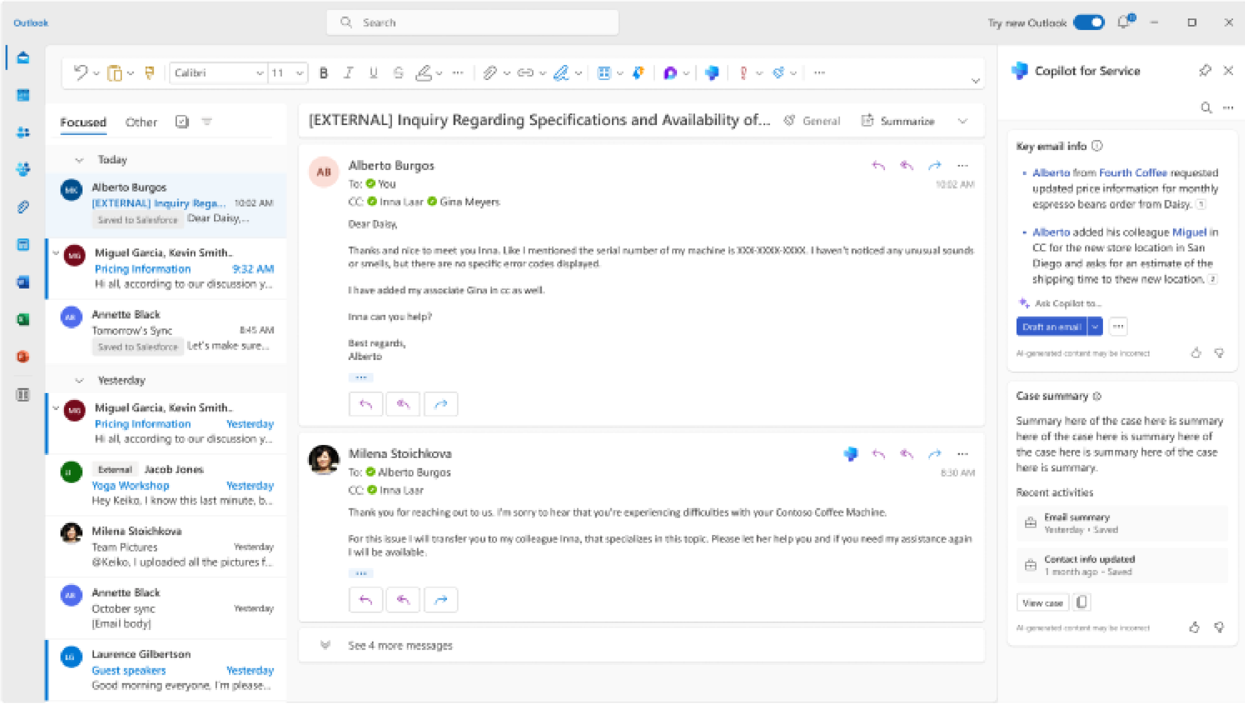
Accessing the case summary as they work on emails from customers helps agents catch up to the case and customer issues.

Feature details

With Copilot for Service, agents can access case summaries as they work on emails from customers.

Through Copilot for Service, agents can:

- Access a summary for the case associated with the email conversation they're in.
- Save the case summary to the CRM system.



Geographic areas

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

- United States

Provide recommended CRM updates to agents in Outlook

Article • 02/13/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2024	To be announced

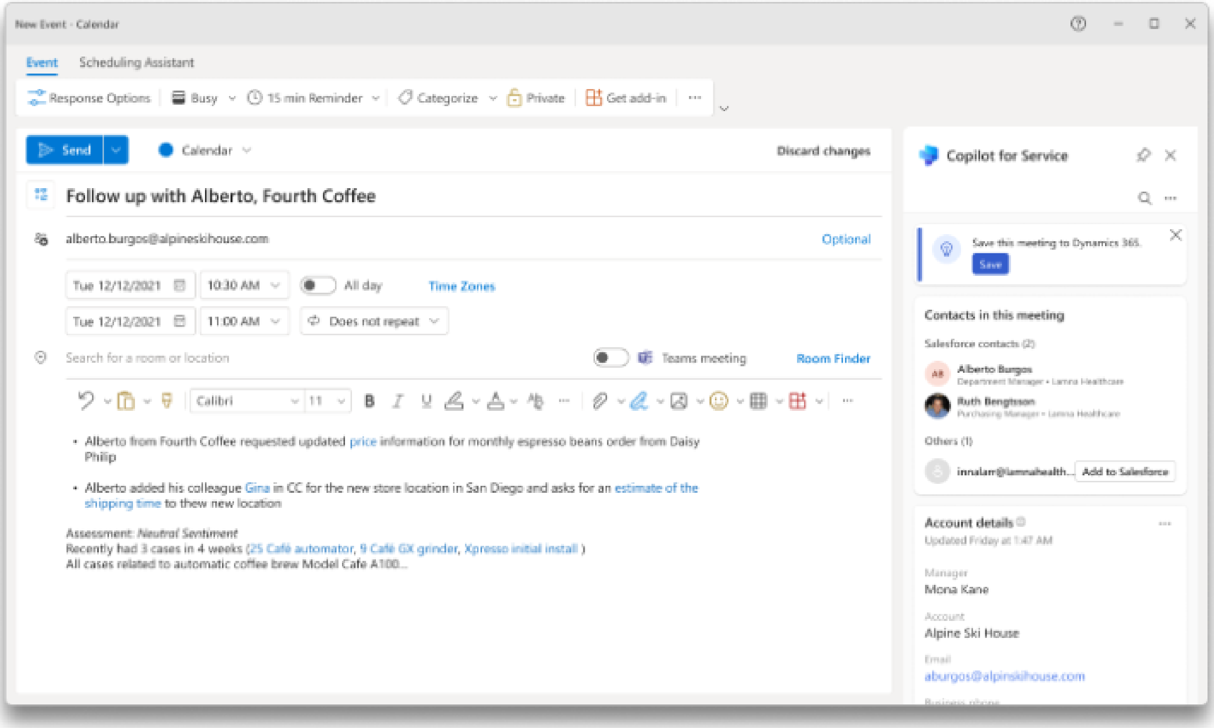
Business value

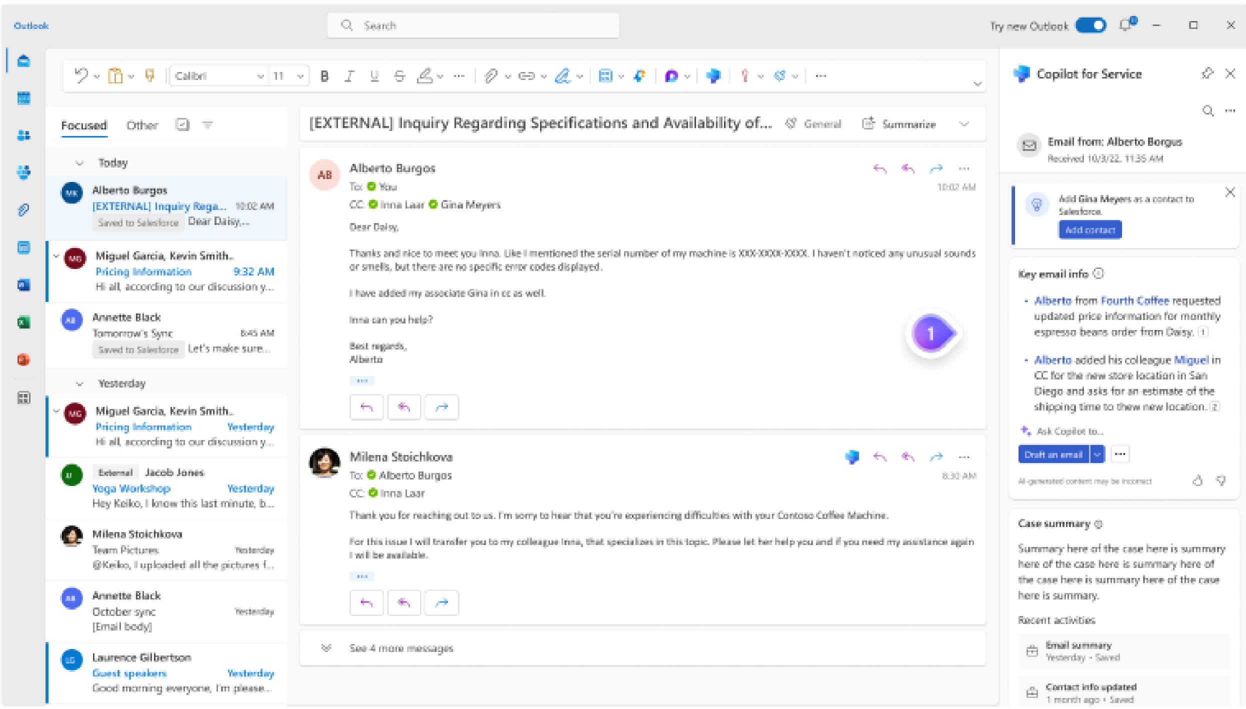
As agents work through multiple emails and customers, it's important to make sure that all their CRM records are up to date. With Copilot for Service, agents can get recommended CRM updates to help them keep everything updated in a timely fashion.

Feature details

With Copilot for Service, agents can see the following recommendations based on their email conversations:

- Add a contact to the CRM system.
- Save email to the CRM system.
- Save meetings to the CRM system.
- Save summaries to the CRM system.





Geographic areas

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

- United States

Agent-facing copilots in CRM systems

Article • 02/13/2024

ⓘ Important

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

Without costly development time or rip and replace efforts, organizations can simply point to their data—such as public websites, SharePoint, knowledge base articles, and offline files—and in a few minutes create a copilot that unlocks generative AI-powered conversations across all of their data using out-of-the-box integrations for Salesforce, ServiceNow, Genesys, and Zendesk.

The copilot embedded in a CRM agent desktop accelerates agent onboarding and case resolution, improves efficiency, and automates tasks to help free agents to focus on customers.

Use custom plugins in agent-facing copilots

Article • 02/13/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 1, 2023	✔ Feb 1, 2024

Business value

Many businesses have their own needs, and agents need to work with multiple systems to complete their day-to-day task. With the capability to extend with Copilot Studio, custom actions can be created for use in agent-facing copilots. The copilot can run these actions to complete tasks in other systems.

Feature details

Agent-facing copilots embedded in CRM systems can use custom plugins as per their business needs, created in Copilot Studio.

Geographic areas

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

- United States

Use Microsoft Copilot directly in your existing CRM systems

Article • 02/13/2024

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 1, 2023	✔ Feb 1, 2024

Business value

Use generative AI in your existing contact center to enhance service experiences and boost agent productivity.

Feature details

Copilot for Service includes Copilot for Microsoft 365 and extends your existing contact center with generative AI to enhance service experiences and boost agent productivity. Your agents can use natural language to ask questions to Copilot right on the side of your agent console or desktop.

Geographic areas

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

- United States

Plan and prepare for Dynamics 365 Field Service in 2023 release wave 2

Article • 12/21/2023

> ⓘ **Important**
>
> The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Field Service**.

Overview

Dynamics 365 Field Service is an industry-leading field service management application that allows companies to transform their service operations by connecting people, places, and things to deliver customer-centric experiences. It includes work order management, resource scheduling, and asset management capabilities as well as frontline worker tools. Field Service allows organizations to move from paper-based reactive service to delivering proactive and predictive world-class service, empowering digital transformation and allowing innovative business models such as outcome-based service.

In 2023 release wave 2, we're launching the next generation of modern, task-oriented experiences for service managers, dispatchers, and frontline workers along with a brand new copilot experience built right into Microsoft 365 applications like Outlook and Teams, harnessing the power of AI. Frontline workers get further improvements and brand-new capabilities in The Field Service Mobile application. Service managers receive new capabilities to simplify how they manage customers and the work order process. Dispatchers can more efficiently triage and assign work orders that are nearby, and the refreshed schedule board experience is available for all users. Service managers, dispatchers, and frontline workers find AI-powered experiences throughout the application.

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

Updates to Dynamics 365 Field Service 2023 release wave 2

Investment areas

Copilot in Field Service Enable frontline workers and service managers to create, view, and manage work orders using the power of generative AI. Copilot capabilities within the Microsoft 365 integrations and the Field Service core application support users with assisted work order creation, management, and scheduling recommendations resulting in increased frontline productivity.

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

We're transforming the core user experience within the Field Service Mobile application using new mobile-first experiences and controls. This includes a new booking and work order management experience, including navigation updates, improved touch targets, and familiar swipe gestures to accomplish tasks within the app. Makers decide if they want to enable this new user experience through an admin toggle.

In addition, we're adding new features to the mobile app:

- Compress image uploads to reduce bandwidth and capacity consumption
- Offline sync settings for frontline workers to control their sync experience

Microsoft 365 integrations for Field Service Frontline workers and managers can create, view, and manage work orders within Microsoft 365 applications, including Microsoft Teams and Outlook. A Viva Connections dashboard in Teams allows frontline workers to get an at-a-glance view of their workday and frontline managers to view and create work orders. Additionally, an Outlook add-in allows frontline managers to view and create work orders in Outlook, so they can quickly respond to service requests and questions. Users can also access the Remote Assist app in one click from their Viva Connections dashboard.

Optimize service operations Optimizing service operations is all about enabling organizations, admins, and service managers to increase productivity and streamline field service operations.

Our brand-new work order user experience with embedded copilot capabilities and enhanced work order lifecycle management makes it easier than ever for service managers to manage work orders and ensure customer requirements are met on time. We're also improving client management and location capabilities and enable a seamless quote to work order process, making it simple for service managers to manage clients and locations. Additionally, service managers can use enhanced characteristics to define skills of resources.

Get ready to experience the power of Field Service and take your service processes to the next level.

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

In this release wave, the legacy schedule board will be fully retired, and the new schedule board will get another set of enhancements:

- Easy ways to break down long-lasting or complex requirements with key improvements to specify patterns.
- Enable scrolling shortcuts to quickly zoom in and out on the schedule board to adjust the date/time granularity.
- Change bookings on the daily, weekly, and monthly views on the schedule board so that they are displayed proportional to their durations to quickly determine resource availability and utilization.

Additionally, the Resource Schedule Optimization add-in received updates for schedule optimizations:

- Include new bookings to improve resource utilization for single-resource optimization.

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.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Field Service.

Helpful links	Description
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.

What's new and planned for Dynamics 365 Field Service

Article • 01/19/2024

This topic lists features that are planned to release from October 2023 through March 2024. 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 2023 release wave 1 plan.

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

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

Copilot in Field Service

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
Create work orders in Outlook using AI	Users by admins, makers, or analysts	✔ Aug 9, 2023	-	✔ Nov 15, 2023
Customize work order views for Teams and Outlook	Users by admins, makers, or analysts	-	-	✔ Dec 5, 2023
Get scheduling recommendations in the Outlook add-in	Users by admins, makers, or analysts	✔ Oct 13, 2023	-	✔ Nov 15, 2023
Ask Copilot about work order information using natural language	Users by admins, makers, or analysts	✔ Dec 5, 2023	-	Mar 2024

Feature	Enabled for	Public preview	Early access*	General availability
Update work orders with Copilot in new mobile experience	Users by admins, makers, or analysts	✔ Dec 15, 2023	-	To be announced
Summarize work orders with Copilot in new mobile experience	Users by admins, makers, or analysts	✔ Dec 15, 2023	-	To be announced
AI-powered work order recap	Users by admins, makers, or analysts	✔ Aug 9, 2023	-	Mar 2024
AI-powered work order recap for mobile users	Users by admins, makers, or analysts	✔ Sep 13, 2023	-	Mar 2024

Empower frontline workers

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
Offline sync settings for frontline workers	Users by admins, makers, or analysts	✔ Nov 17, 2023	-	To be announced
Compress image uploads from mobile devices	Users, automatically	✔ Aug 14, 2023	-	✔ Oct 2, 2023
Configure list view in the new mobile experience	Users by admins, makers, or analysts	✔ Dec 4, 2023	-	To be announced
See bookings in agenda view in the new mobile experience	Users by admins, makers, or analysts	✔ Dec 4, 2023	-	-

Microsoft 365 integrations for Field Service

Manage work orders for frontline workforce within Microsoft 365 apps.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Create lookup entries for work order fields	Admins, makers, marketers, or analysts, automatically	✔ Oct 9, 2023	-	✔ Dec 5, 2023
Improved homepage in Microsoft Teams	Admins, makers, marketers, or analysts, automatically	✔ Oct 9, 2023	-	✔ Dec 5, 2023
Customize the work order experience	Users by admins, makers, or analysts	-	-	✔ Dec 5, 2023
Get technician scheduling suggestions in Teams	Users by admins, makers, or analysts	✔ Dec 5, 2023	-	✔ Dec 5, 2023
Integrations with Microsoft 365 apps for existing Field Service customers	Users by admins, makers, or analysts	✔ Aug 9, 2023	-	✔ Dec 5, 2023

Optimize service operations

Dynamics 365 Field Service features allow admins and service managers to get tasks done quickly with new simplified workflows.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
New and improved work order experience	Users by admins, makers, or analysts	✔ Aug 9, 2023	-	✔ Nov 15, 2023
Expedite service delivery with extended customer details	Users, automatically	-	✔ Jul 31, 2023	✔ Oct 31, 2023
Complete work orders based on status	Admins, makers, marketers, or analysts, automatically	-	-	✔ Dec 6, 2023
Complete bookings while preserving end time	Users, automatically	-	✔ Jul 31, 2023	✔ Oct 2, 2023
Manage frontline worker	Users, automatically	-	✔ Jul 31,	✔ Oct 31,

Feature	Enabled for	Public preview	Early access*	General availability
certifications			2023	2023
Integrate financial and inventory management	Users by admins, makers, or analysts	✔ Nov 15, 2023	-	To be announced
Empower your workforce with mixed reality	Admins, makers, marketers, or analysts, automatically	-	-	✔ Nov 15, 2023
Maintain customer facilities with enhanced capabilities	Users, automatically	-	✔ Jul 31, 2023	✔ Oct 31, 2023

Resource scheduling

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Work hours calendar supports multiple recurrences	Users, automatically	-	✔ Jul 31, 2023	✔ Oct 20, 2023
Multi-day scheduling in Resource Scheduling Optimization	Users by admins, makers, or analysts	✔ Oct 2, 2023	-	-
Optimize schedule board navigation patterns	Users by admins, makers, or analysts	-	-	Feb 2024
Break down long-duration or complex requirements	Users by admins, makers, or analysts	-	-	✔ Dec 1, 2023
Show bookings proportional to duration on multiday views	Users, automatically	-	✔ Jul 31, 2023	✔ Oct 20, 2023
Retire the legacy schedule board	Admins, makers, marketers, or analysts, automatically	✔ Aug 1, 2023	-	✔ Oct 20, 2023

Feature	Enabled for	Public preview	Early access*	General availability
Single Resource Optimization considers new requirements	Users by admins, makers, or analysts	-	-	✔ Oct 20, 2023

- You are able to opt into some features as part of early access on July 31, 2023, 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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Empower frontline workers

Article • 11/20/2023

ⓘ Important

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

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In addition, we're adding new features to the mobile app:

- Compress image uploads to reduce bandwidth and capacity consumption
- Offline sync settings for frontline workers to control their sync experience

Compress image uploads from mobile devices

Article • 10/24/2023

Enabled for	Public preview	Early access	General availability
Users, automatically	✓ Aug 14, 2023	-	✓ Oct 2, 2023

Business value

To save time, bandwidth, and storage capacity, images can be compressed when uploaded in the Field Service mobile experience.

Feature details

With mobile devices, frontline workers can quickly take several images of assets and customer sites using high-quality cameras built into the device. These images are large, often exceeding 5 MB in size. When large images are uploaded in the Field Service mobile app, it can take a long time, as well as consume network bandwidth and server storage space. Often, high-quality images are not required and a compressed version is sufficient while saving resources.

From the Field Service mobile app, technicians can take advantage of compression during image upload to reduce network bandwidth and conserve Dataverse storage. The app handles the necessary compression and ensures that the compressed images are uploaded to the server.

This feature will be available first as a disabled user option set on August 14, 2023, and enabled by default on October 2, 2023. Image compression for inspections follows in a later update on November 15, 2023, and it's controlled by the same user option.

See also

Take notes with attachments (docs)

Configure list view in the new mobile experience

Article • 12/21/2023

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Dec 4, 2023	-	To be announced

Business value

With the configurable list view in Field Service Mobile, makers can optimize list views on various tables such as assets, work orders or customer accounts, to display the relevant columns for that table. With better usage of the mobile screen space and ability to configure up to five columns per row, technicians will have increased ability to get information from the view, without having to click into the record, saving time spent in the app. This new list view also has smoother scrolling and is more performant on mobile devices, further enhancing ease of use.

Feature details

With the configurable list view:

1. Makers can choose up to five columns per table to display in the mobile list view.
2. The icon in the list view is removed, saving the limited mobile screen real estate.
3. List view has smoother scrolling and is more performant with in-built lazy load.

See also

Do and record your work (docs)

Offline sync settings for frontline workers

Article • 12/21/2023

ⓘ Important

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

Expand table

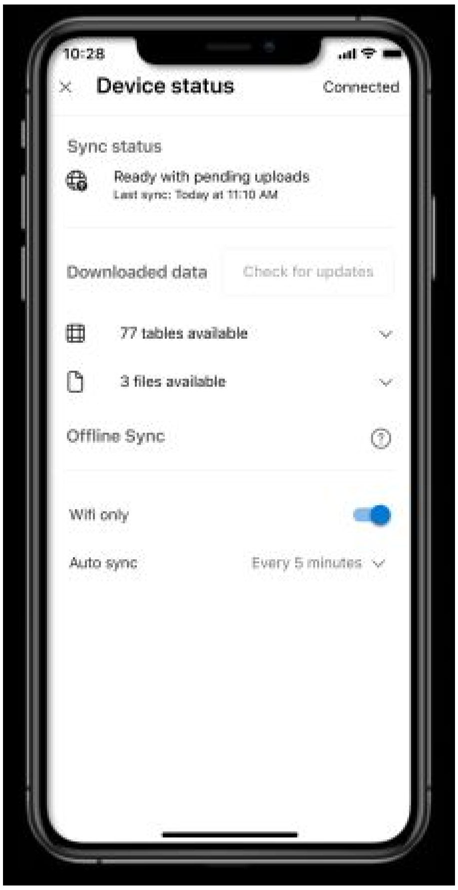
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Nov 17, 2023	-	To be announced

Business value

Frontline workers get more control over their offline experience with new sync settings. These new sync settings help save on cellular data usage and device battery life.

Feature details

Field Service Mobile app users get two new settings in their Offline Status Page. These settings let them control the automatic sync intervals and the connection type.



- Sync Interval: Adjust the sync interval to sync more or less frequently depending on individual needs. Users can also choose to not automatically sync at any interval if they only want to sync on demand.
- Sync on Wi-Fi: Lets users choose if their automatic sync happens on cellular networks and Wi-Fi connections or only when connected to a Wi-Fi network.

See also

Offline sync settings (docs)

See bookings in agenda view in the new mobile experience

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Dec 4, 2023	-	-

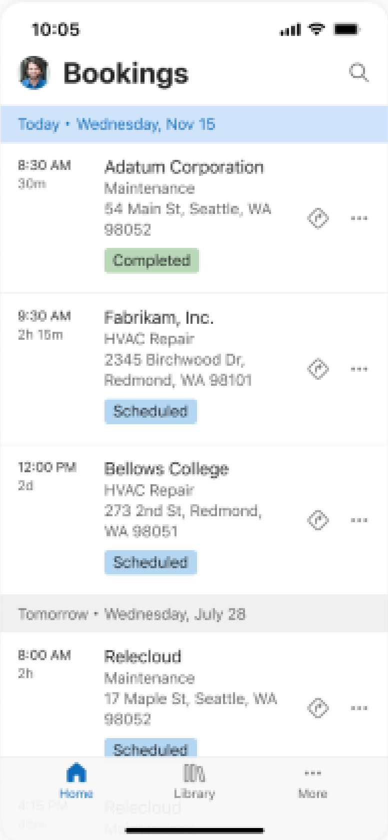
Business value

With the agenda view in the new user experience for the Field Service mobile app, technicians can quickly see an overview of their scheduled bookings over several days. They can scroll in both directions to find past and future bookings, and get an at-a-glance view of pertinent details such as customer name, current booking status, start time, and more. Organizations can customize the view and add additional relevant columns to enhance usability for their technicians, reducing the need for them to open the booking to find details.

Feature details

Agenda view includes:

- Scroll to see bookings across multiple days from 90 days in the past to 90 days in the future.
- Usability enhancements for easy visibility, such as large colored labels for booking status and day separators.
- Swipe gestures for quick actions such as changing the booking status.
- Shortcuts, for example, the *Get Directions* icon to start the navigation to a booking from the agenda view.
- Visible out-of-the-box columns, such as booking name, booking start time, duration, and customer name to enable technicians to see an overview of the booking without opening its details.
- Customization options for organizations to match their business scenarios with the agenda view by editing existing columns or adding new columns.


10:05
Bookings
Today • Wednesday, Nov 15
8:30 AM
30m
Adatum Corporation
Maintenance
54 Main St, Seattle, WA 98052
Completed
9:30 AM
2h 15m
Fabrikam, Inc.
HVAC Repair
2345 Birchwood Dr, Redmond, WA 98101
Scheduled
12:00 PM
2d
Bellows College
HVAC Repair
273 2nd St, Redmond, WA 98051
Scheduled
Tomorrow • Wednesday, July 28
8:00 AM
2h
Relecloud
Maintenance
17 Maple St, Seattle, WA 98052
Scheduled
Home
Library
More

Copilot in Field Service

Article • 12/21/2023

ⓘ Important

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

Enable frontline workers and service managers to create, view, and manage work orders using the power of generative AI. Copilot capabilities within the Microsoft 365 integrations and the Field Service core application support users with assisted work order creation, management, and scheduling recommendations resulting in increased frontline productivity.

Ask Copilot about work order information using natural language

Article • 12/21/2023

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Dec 5, 2023	-	Mar 2024

Business value

In day-to-day field operations, having quick and reliable access to information is crucial. Microsoft Dynamics 365 Field Service recognizes this need and is introducing a revolutionary feature - an AI-based Copilot assistant.

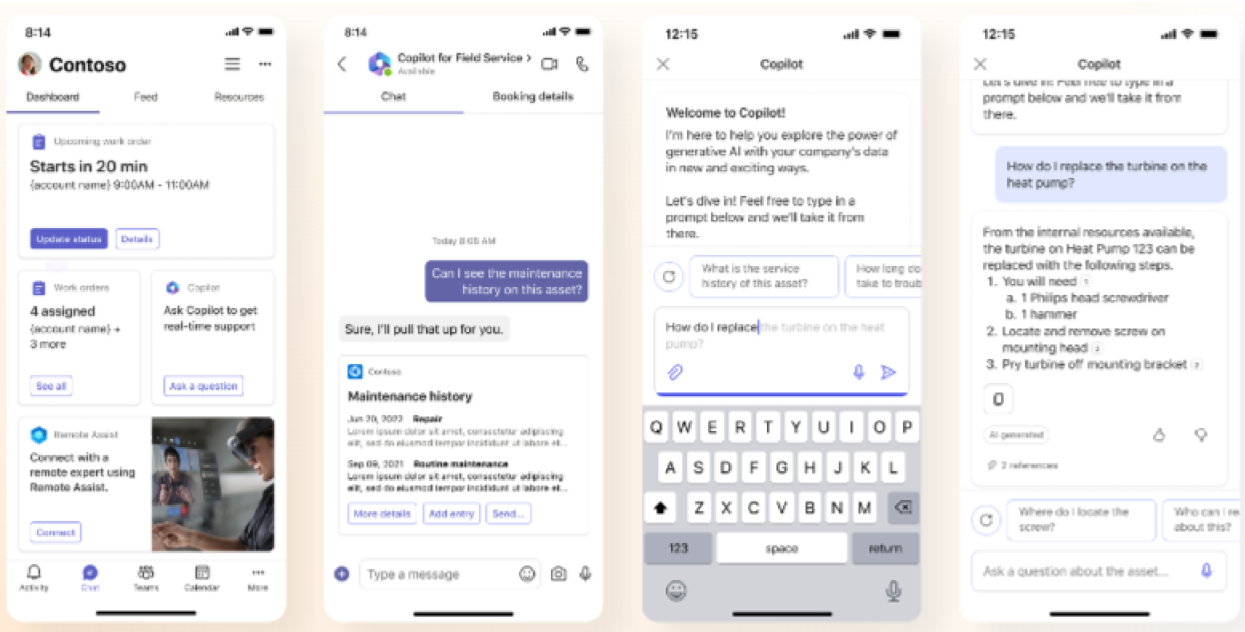
Frontline workers or technicians often spend time onsite looking for necessary information before they start their job. A copilot interface allows them to quickly search and look up background or necessary information needed to complete the job and improve first time fix rates.

Feature details

Frontline workers or field service technicians can look up information related to their work orders while doing their jobs with an intuitive natural language copilot experience within Microsoft Teams. Frontline workers or technicians can access information needed to complete their jobs at any time using natural language. Microsoft Copilot helps technicians access work order information with a natural language interface to query and modify work orders as needed.

Seamless access to Microsoft Dataverse: Copilot can access the extensive data stored in the Microsoft Dataverse, including critical field service entities like work orders, and booking. This integration ensures technicians have the latest information readily available.

Designed for field use, the Copilot is accessible across different platforms (web, Teams) and devices (desktop or mobile), offering real-time assistance whenever and wherever needed. This flexibility ensures that technicians remain agile and well-informed in various field scenarios.



Geographic areas

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

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

- Korea

See also

Dynamics 365 Field Service Plugin for Microsoft Copilot (docs)

Create work orders in Outlook using AI

Article • 12/21/2023

Expand table

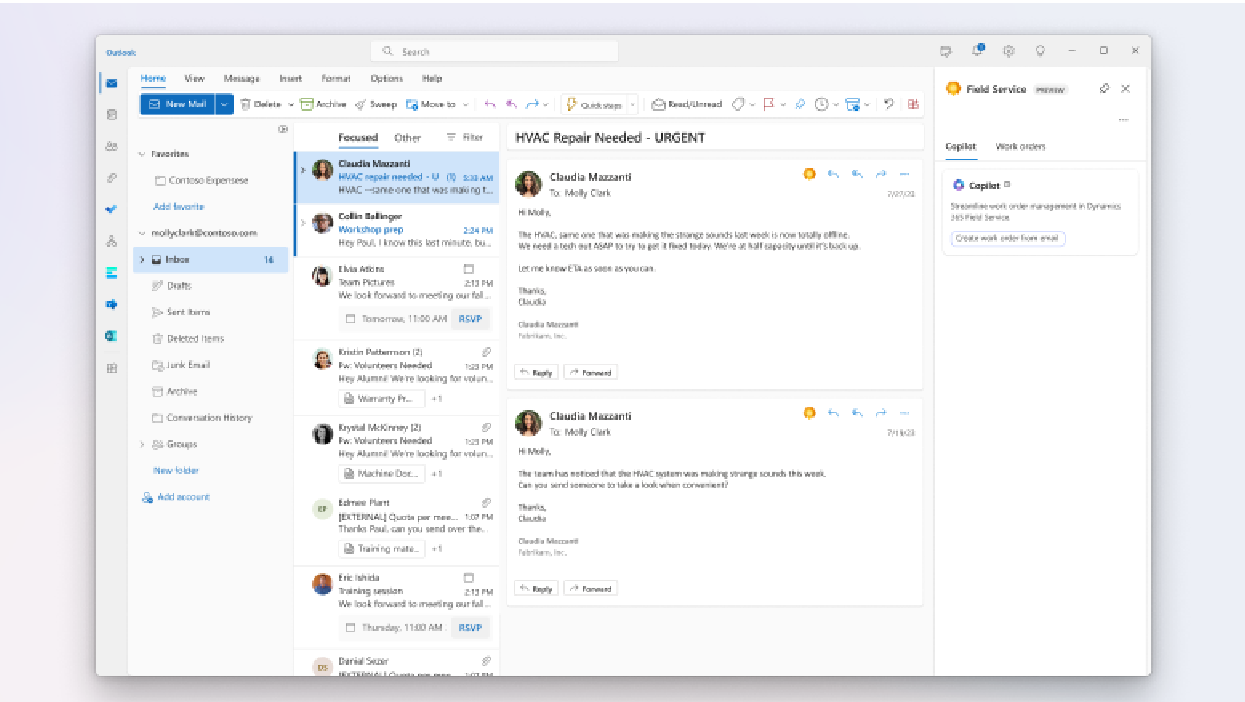
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Aug 9, 2023	-	✔ Nov 15, 2023

Business value

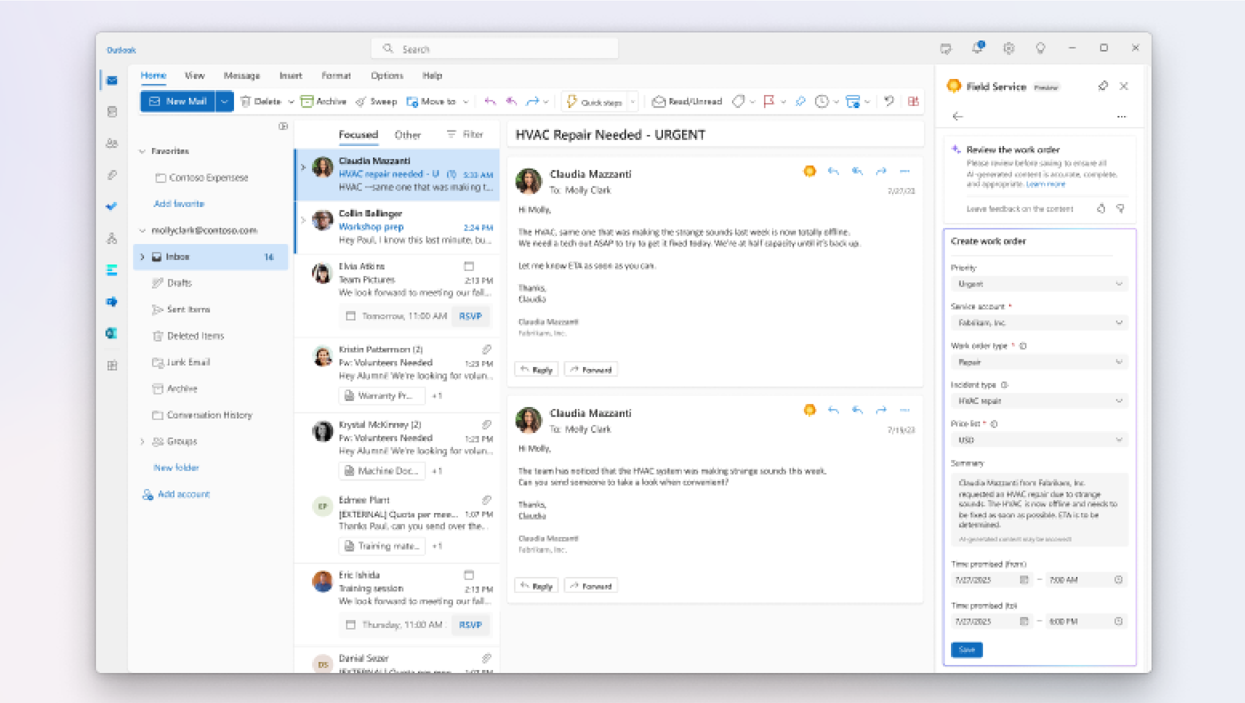
Work order creation can be a lengthy process with many required fields. A copilot helps fill in work order information to save service managers time and effort.

Feature details

Frontline workers and managers can create, view, and manage work orders within Microsoft 365 applications, including Microsoft Outlook by harnessing the power of generative AI to deliver accelerated work order creation.



With this feature, you can accelerate the work order creation with Copilot in Outlook. The AI-based copilot can assist with extracting relevant details from emails and filling in data to the work order form based on the text in the email thread.



Geographic areas

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See also

Field Service Outlook Add-in with Copilot for the Frontline Manager (docs)

Customize work order views for Teams and Outlook

Article • 01/09/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Dec 5, 2023

Business value

Tailor the work order experience to the organization's needs, with customizable data schemas in Microsoft Outlook and Teams. Copilot in the Outlook add-in assists in pre-filling the work order based on the email context and the organization's customizations.

Feature details

Field Service customers typically modify the work order form by adding, renaming, removing, or rearranging form fields based on their needs. Field Service admins can now create or customize a view in the Power Apps Maker experience, and sync the view with the Dynamics 365 Field Service Outlook add-in and Teams app. The view then automatically renders the user interface in the Outlook add-in and Teams app to construct the customized work order form. Copilot follows the data schema of the view and helps populate the work order form according to the email context and customized work order table. This feature enables the organization to tune the Copilot according to their business needs.

Geographic areas

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

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- Korea

Get scheduling recommendations in the Outlook add-in

Article • 12/06/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Oct 13, 2023	-	✔ Nov 15, 2023

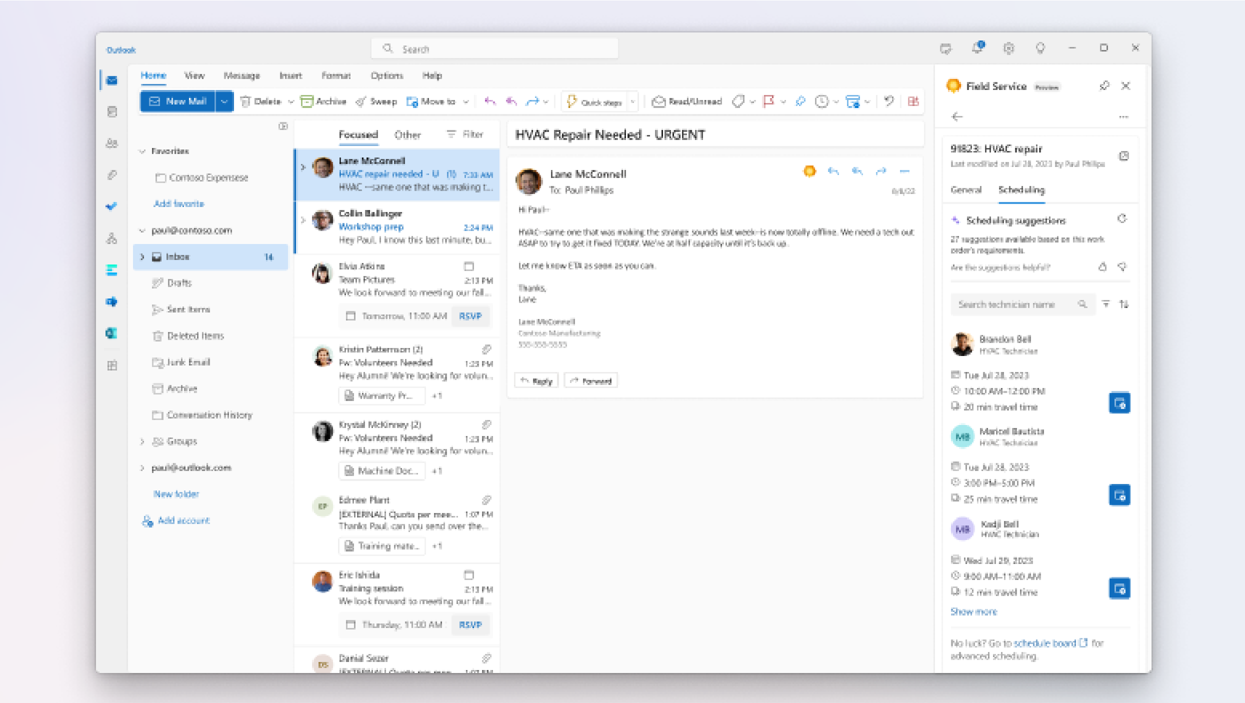
Business value

Finding and scheduling the right frontline worker can be a lengthy multi-step process. An assistant recommends workers and time slots for the job, saving dispatchers time needed to validated matched resources.

Feature details

Frontline managers and dispatchers can get recommendations to choose technicians or frontline workers to schedule work orders based on attributes like availability, skills, or expertise.

The scheduling assistant based on the resource scheduling solution is now available in the Outlook add-in, which is part of the Field Service integrations for Microsoft 365 applications. The feature helps dispatchers schedule, reschedule, or move a booking for a work order. Scheduling suggestions are based on resource availability, skills, customer promised time windows, customer location proximity, and business unit.



Geographic areas

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See also

Get schedule assistance (docs)

Summarize work orders with Copilot in new mobile experience

Article • 12/11/2023

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	Dec 2023	-	To be announced

Business value

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

Feature details

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

Update work orders with Copilot in new mobile experience

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Dec 15, 2023	-	To be announced

Business value

Our reimagined technician experience enables frontline workers to use Copilot to update work orders. Technicians can speak to Copilot and describe the work they have performed, such as completed service tasks, used parts, or services they performed. Copilot suggests updates for the booking and work order data based on the technician's description. After revising and accepting those suggestions, Copilot updates the form, reducing the administrative burden on technicians to track and update the various activities manually. Technicians can be more productive and focus on providing excellent customer service.

Feature details

With this feature, technicians get the ability to update various details regarding the booking and work order using a speech-first Copilot experience. When a technician narrates the work that they have performed, Copilot shows suggestions to update the following values:

- Mark service tasks as completed.
- Mark products and services as used and update their quantity.
- Update the status of the booking based on the work performed.
- Update other fields on the booking, such as start time and end time.

See also

AI-powered work order update (docs)

Resource scheduling

Article • 12/21/2023

ⓘ Important

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

In this release wave, the legacy schedule board will be fully retired, and the new schedule board will get another set of enhancements:

- Easy ways to break down long-lasting or complex requirements with key improvements to specify patterns.
- Enable scrolling shortcuts to quickly zoom in and out on the schedule board to adjust the date/time granularity.
- Change bookings on the daily, weekly, and monthly views on the schedule board so that they are displayed proportional to their durations to quickly determine resource availability and utilization.

Additionally, the Resource Schedule Optimization add-in received updates for schedule optimizations:

- Include new bookings to improve resource utilization for single-resource optimization.

Break down long-duration or complex requirements

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Dec 1, 2023

Business value

When working with long-duration or complex requirements, it's often necessary to specify the pattern (sometimes called the work contour) for how the work will break down into bookings when the requirement is scheduled. This feature improves and modernizes this process, making it significantly easier to break down requirements prior to booking.

Feature details

We improve the experience for breaking down requirements into requirement details. Examples of key improvements are:

- Modernize the existing Specify Pattern control, improving performance and stability and aligning it with the new schedule board.
- Allow bulk operations for requirement details, including the ability to bulk edit at various timescales.
- Enable split and move operations to easily make updates as schedules and capacities change.

See also

Schedule multi-day work or requirements in Universal Resource Scheduling (docs)

Multi-day scheduling in Resource Scheduling Optimization

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Oct 2, 2023	-	-

Business value

Enable scheduling efficiencies and accuracies by optimizing job requirements that span multiple days automatically.

Feature details

A service requirement can be scheduled across multiple days and weeks. For example, a 40-hour work order across an entire work week where the same field technician is expected to perform more detailed work at the same location each day.

Dispatchers can schedule multi-day work manually or by using the schedule assistant. The Resource Scheduling Optimization add-in for Dynamics 365 Field Service now supports multi-day requirement optimization too. The system assigns requirements that span multiple days to a resource based on the breakdown of the underlying requirement details.

See also

Optimize multi-day service requests (docs)

Optimize schedule board navigation patterns

Article • 12/21/2023

ⓘ Important

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

Expand table

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

Business value

Manage schedules more efficiently by reducing the navigation steps on the schedule board. Save time and reduce frustration with intuitive navigation patterns that don't require extensive training or support.

Feature details

The schedule board receives improved navigation patterns that help users manage schedules more efficiently:

- **User-centric navigation**: By preserving the user's position on the schedule board when they navigate away and return to it, the schedule board aligns with the user's context and reduces unnecessary steps. This behavior leads to a more intuitive and efficient user experience.
- **Intuitive back navigation**: Returning users to their original starting point instead of a default view matches user expectations and standard web navigation patterns. This improvement reduces confusion and enhances usability.

Retire the legacy schedule board

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 1, 2023	-	✔ Oct 20, 2023

Business value

The new schedule board is faster and delivers significant usability and accessibility improvements. It's the foundation for new capabilities for multiday scheduling and intelligent interactions.

Feature details

The setting that enables the use of the legacy schedule board is retired, and all users move to the new schedule board experience by default. The new schedule board is faster, with significant usability and accessibility improvements, and also lays the foundation for new capabilities for multiday scheduling and intelligent interactions. The legacy schedule board control is still included in the Universal Resource Scheduling solution.

This feature gets enabled automatically for all schedule board users with no action required.

Show bookings proportional to duration on multiday views

Article • 12/21/2023

Expand table

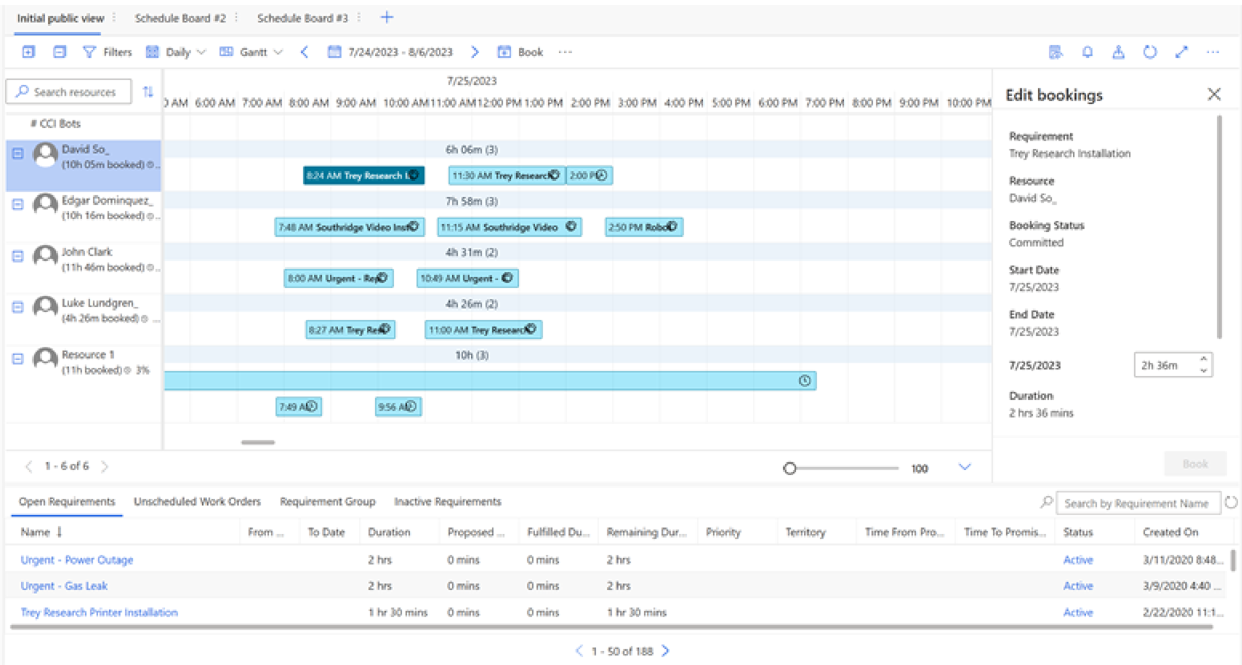
Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 31, 2023	✔ Oct 20, 2023

Business value

Determine a resource's availability and utilization quickly with an updated multiday view.

Feature details

When using multiday views on the schedule board, you need to see bookings displayed proportional to their duration in order to accurately and quickly determine the availability and utilization of a bookable resource. With this change, bookings on the daily, weekly, and monthly views show proportional to their duration instead of stacked. This feature makes it significantly easier to see the availability of any resource from these views.



See also

Configure the schedule board tab settings in Universal Resource Scheduling (docs)

Single Resource Optimization considers new requirements

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Oct 20, 2023

Business value

Disruptions and changes in a resource's schedule can cause that schedule to become unbalanced. Single resource optimization allows a dispatcher to automatically re-optimize the resource's schedule. This feature looks to fill in gaps in a resource's schedule using the organization's optimization goals.

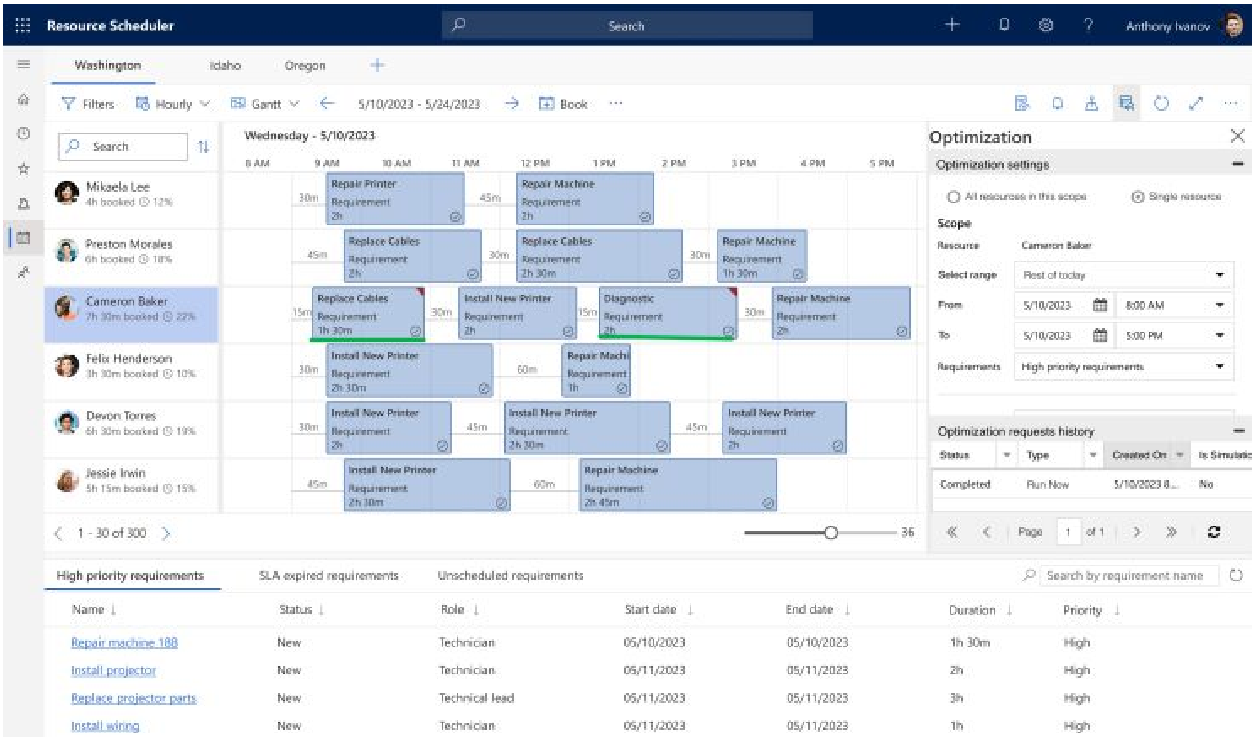
Feature details

Disruptions or exceptions during the day that affects a resource's schedule are fairly common:

- A technician finishes a booking earlier than estimated, and now has idle time before the next booking.
- A technician is stuck in traffic and can't make it to the next booking on time.
- A customer cancels an appointment at the last minute, and now there's a gap in the resource's schedule.

Dispatchers need an efficient way to fix such disruptions. This include re-optimizing existing bookings to make sure there's no overlap, or to schedule new work to cover idle time, or to optimize travel time.

This feature expands on our capabilities to optimize the schedule for a specific resource, allowing single resource optimization to pull in additional requirements to fill gaps in the technicians' schedules, create a more optimized route, or address high-priority requirements.



See also

Single resource optimization for Resource Scheduling Optimization (docs)

Work hours calendar supports multiple recurrences

Article • 11/15/2023

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 31, 2023	✔ Oct 20, 2023

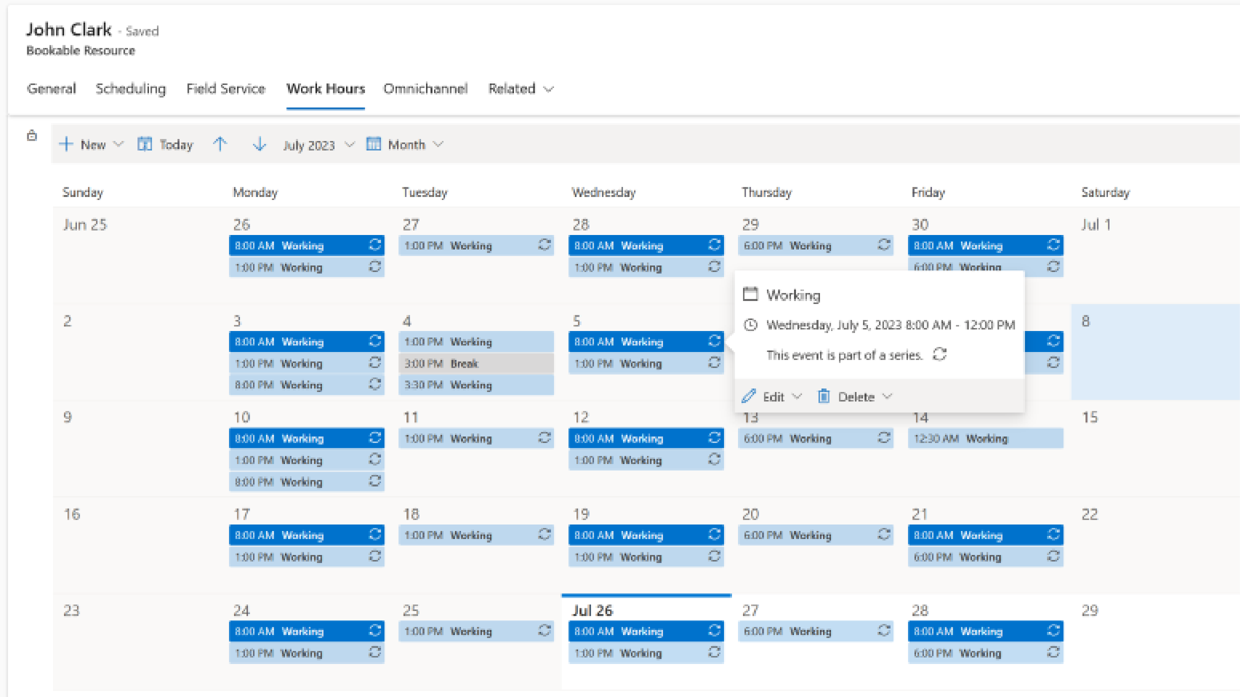
Business value

Today, you can only have one work hour recurrence per resource. With the added capability of multiple recurrences, you can now unlock greater flexibility in your resource scheduling to meet business demands further while adjusting to the needs of your workforce for employee retention and job satisfaction.

Feature details

Adding recurrences over a date range overwrites any previous recurrence settings. With this update, dispatchers can now add as many recurrences as they want. The newest work hours entry on a given day gets used. Now you can:

- Add multiple recurrences within a single day to represent different instances of recurring shift work. For example: Morning, afternoon, and evening shifts in a single day with different recurrences.
- Have overlapping recurrences within a week like a recurrence for Monday and Wednesday and a recurrence for Tuesday. Previously the Tuesday recurrence would have deleted the other entries. Now they can coexist alongside each other.
- Input work-hour events in different time zones, which is helpful for workers who travel. Previously the calendar supported only one timezone across all work-hour calendar events.



The work hour calendar update is the first phase in the broader flexible resource locations work scope. In subsequent phases, we add territory and start/end location entities to the work hours calendar, allowing dispatchers to easily set up an ad-hoc or recurrence for where and when a resource works.

Flexible resource locations transform your operation with support for staffing your team in different locations on different days. Based on customer demand, you may need to send resources to different areas. These may be local areas or outside the country. In some cases, resources may travel to a remote area once a month and perform work in that area, or perhaps your team travels from customer location to customer location without having a home base. Maybe resources pick up their parts at the warehouse every Wednesday but start from their homes on other days. With date-effective location support, you can meet these variant location-based demands interacting with an API that allows you to change your resources' location. This feature enables setting start and end locations by technicians daily by service managers, dispatchers, or even the employees themselves.

See also

Work hour calendar - overlapping rules (docs)

Microsoft 365 integrations for Field Service

Article • 12/21/2023

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

Frontline workers and managers can create, view, and manage work orders within Microsoft 365 applications, including Microsoft Teams and Outlook. A Viva Connections dashboard in Teams allows frontline workers to get an at-a-glance view of their workday and frontline managers to view and create work orders. Additionally, an Outlook add-in allows frontline managers to view and create work orders in Outlook, so they can quickly respond to service requests and questions. Users can also access the Remote Assist app in one click from their Viva Connections dashboard.

Create lookup entries for work order fields

Article • 12/21/2023

Expand table

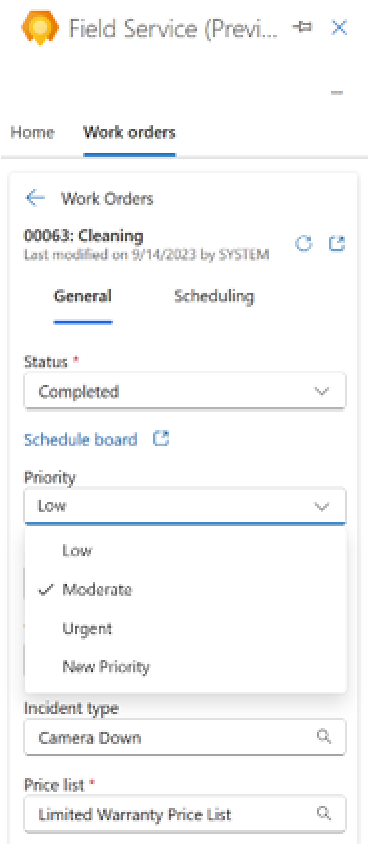
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 9, 2023	-	✔ Dec 5, 2023

Business value

Creating new entries is necessary when frontline managers don't have enough data in their Field Service system of record. The ability to create new entries allows frontline managers to easily and quickly add customer information within Teams or Outlook directly and save time.

Feature details

Quickly create new entries for fields on the work order form in the Dynamics 365 Field Service Outlook add-in and Dynamics 365 Field Service Teams app. An additional screen where they can fill in the details shows when users create these records.



Geographic areas

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

- Germany
- Norway
- Singapore
- South Africa
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- Asia Pacific
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- Korea

See also

Create a work order manually in Outlook (docs)

Customize the work order experience

Article • 01/09/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	-	-	✔ Dec 5, 2023

Business value

Tailor the work order experience to the organization's needs, with customizable data schemas in Microsoft Outlook and Teams.

Feature details

Field Service customers typically modify the work order form by adding, renaming, removing, or rearranging form fields based on their needs. Field Service admins can now create or customize a view in the Power Apps Maker experience, and sync the view with the Dynamics 365 Field Service Outlook add-in and Teams app. The view then automatically renders the user interface in the Outlook add-in and Teams app to construct the customized work order form.

Geographic areas

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See also

Customize the Microsoft 365 integration for Field Service (docs)

Get technician scheduling suggestions in Teams

Article • 12/21/2023

Expand table

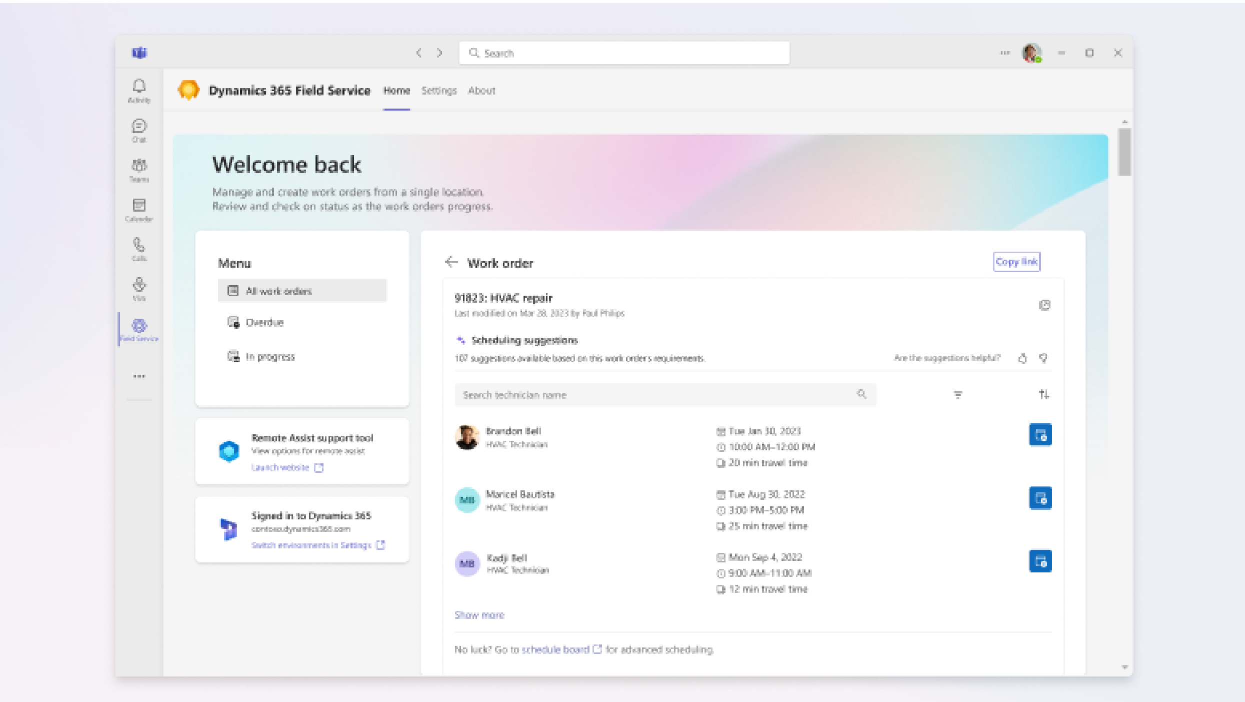
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Dec 5, 2023	-	✔ Dec 5, 2023

Business value

Finding and scheduling the right frontline worker can be a lengthy multistep process. The scheduling assistant recommends workers and time slots for the job.

Feature details

Frontline managers and dispatchers can get recommendations to choose technicians or frontline workers to schedule work orders based on attributes like availability, skills, or expertise. The scheduling assistant is available in Field Service integrations for Microsoft 365 applications, including Microsoft Teams.



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

See also

Get schedule assistance (docs)

Improved homepage in Microsoft Teams

Article • 12/21/2023

Expand table

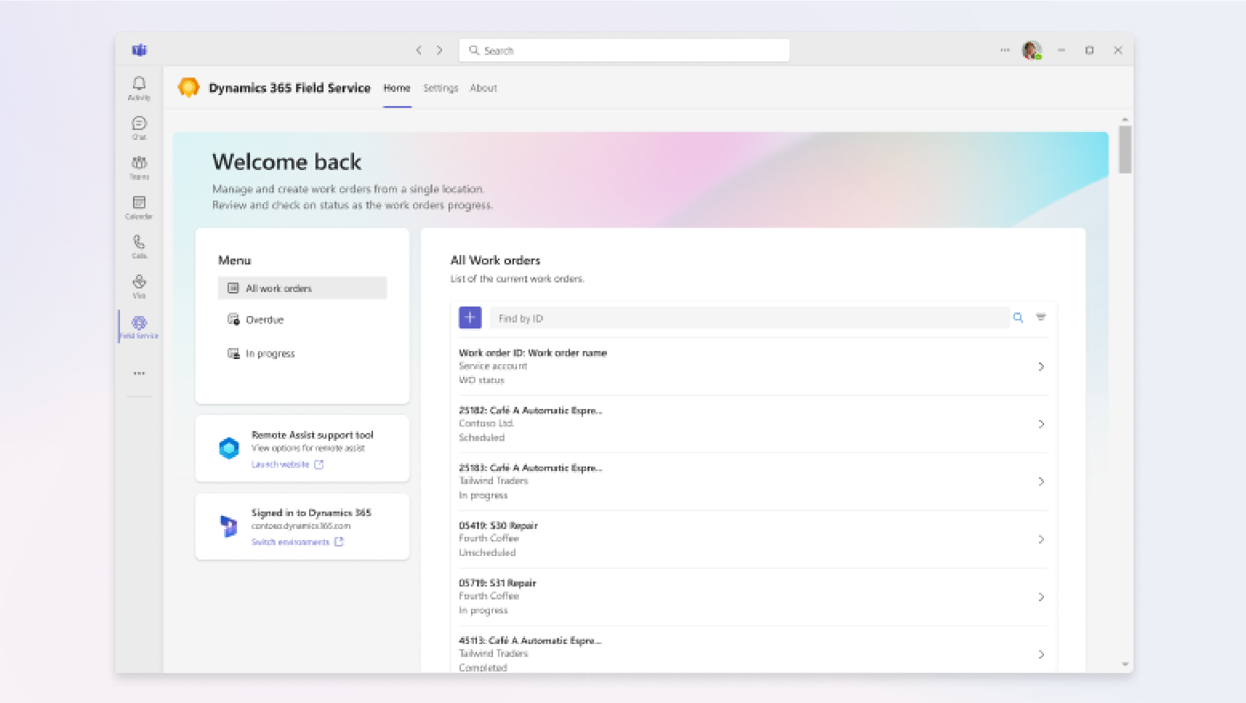
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 9, 2023	-	✔ Dec 5, 2023

Business value

Streamline the user interface for managing work orders, reducing the number of tabs and apps needed to navigate through the Dynamics 365 Field Service Teams app. The new homepage also simplifies the setup process by reducing the number of required apps that admins need to install.

Feature details

The newly refreshed homepage in the Dynamics 365 Field Service Teams app allows frontline managers and frontline workers to manage work orders easily within Microsoft Teams. Create, view, and edit work orders without having to click through multiple apps. Users can open the homepage directly from the Microsoft Teams app or continue to use the same Viva Connections dashboard, depending on the organization's preference. The homepage works on Teams Mobile, Teams Web, and Teams Desktop.



Geographic areas

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

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

See also

Field Service (Preview) Teams app for the frontline manager (docs)

Integrations with Microsoft 365 apps for existing Field Service customers

Article • 01/12/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Aug 9, 2023	-	✔ Dec 5, 2023

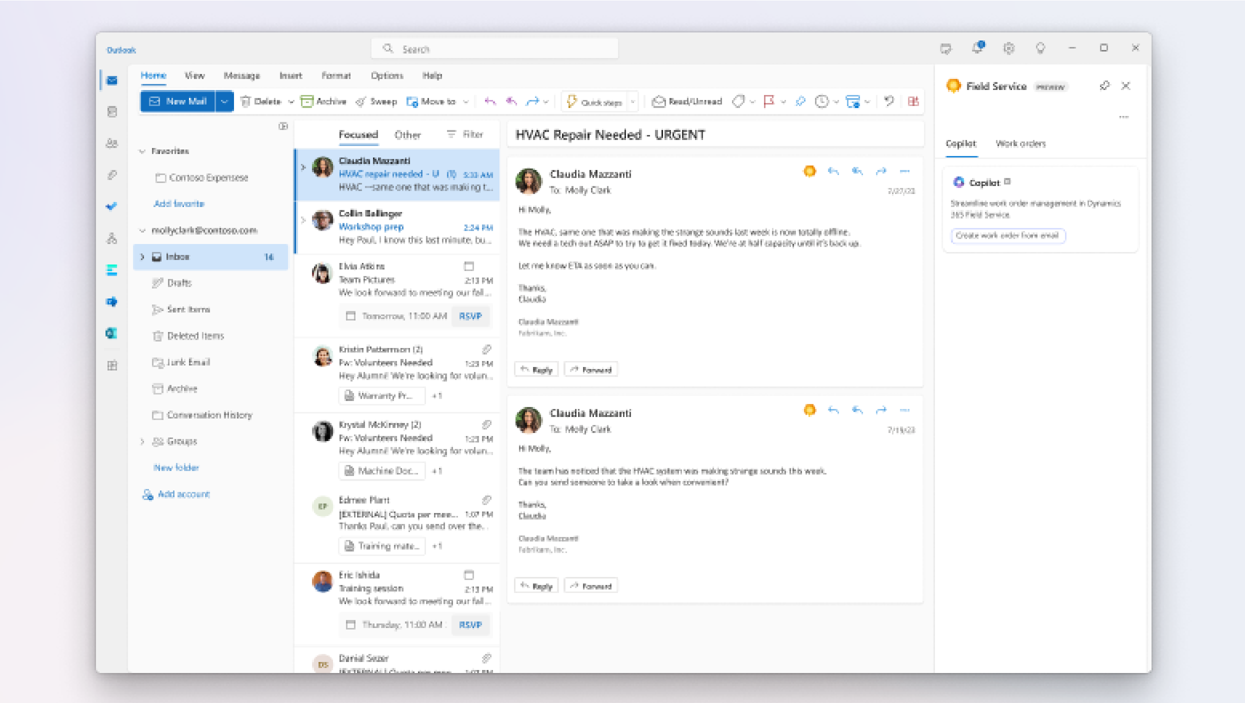
Business value

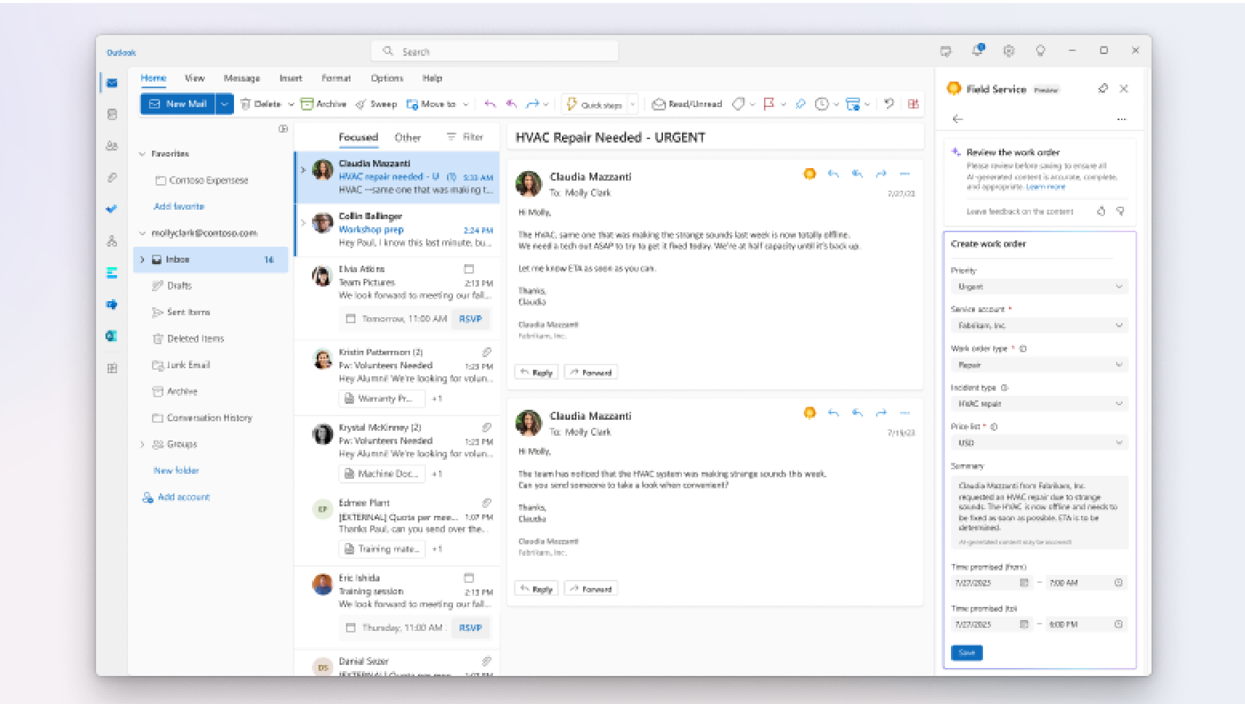
Frontline workers and managers can use Microsoft 365 applications, including Teams and Outlook, to manage work orders. These work orders will sync to Field Service as the system of record.

Feature details

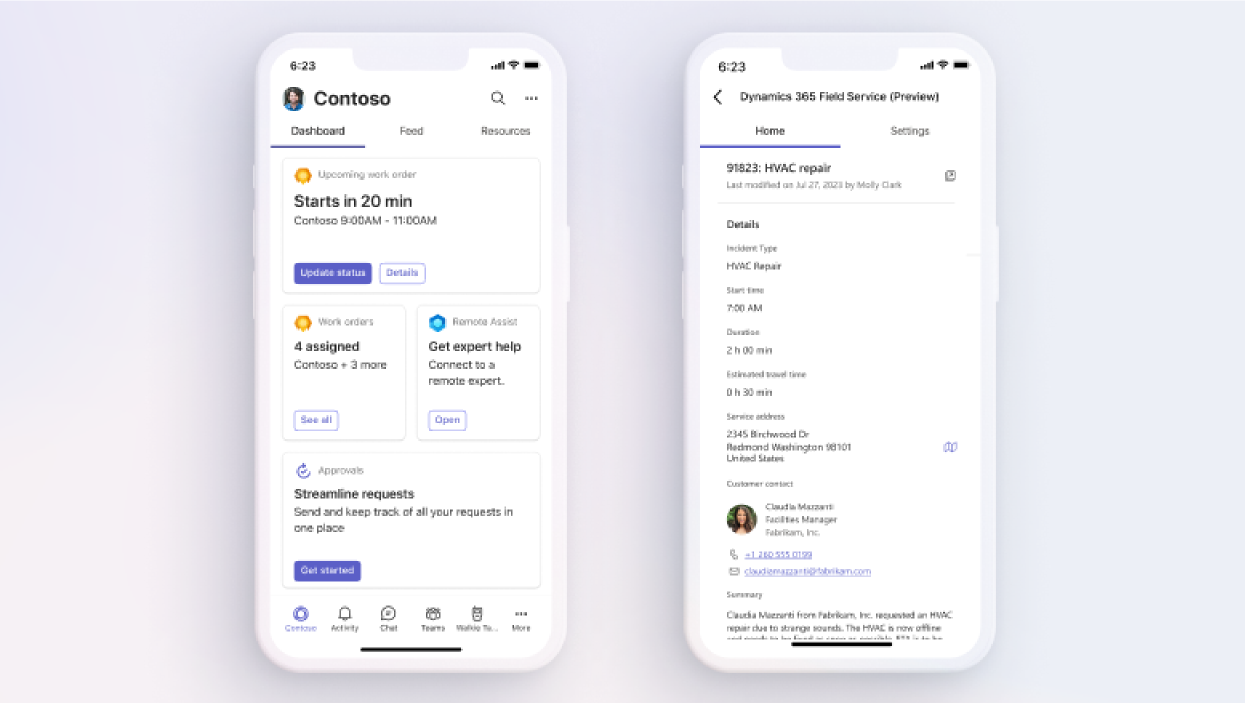
Frontline workers and managers can create, view, and manage work orders within Microsoft 365 applications, including Microsoft Teams and Outlook.

A Viva Connections homepage in Teams allows frontline workers to get an at-a-glance view of their workday and frontline managers to view and create work orders. Additionally, an Outlook add-in allows frontline managers to view and create work orders in Outlook, so they can quickly respond to service requests and questions.





Existing Dynamics 365 Field Service customers can use these Microsoft 365 apps as an extension to their Field Service workflow within Outlook and Teams, along with seamless collaboration and communications experiences.



Geographic areas

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

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

See also

Microsoft 365 integrations for Field Service (docs)

Optimize service operations

Article • 12/21/2023

ⓘ Important

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

Optimizing service operations is all about enabling organizations, admins, and service managers to increase productivity and streamline field service operations.

Our brand-new work order user experience with embedded copilot capabilities and enhanced work order lifecycle management makes it easier than ever for service managers to manage work orders and ensure customer requirements are met on time. We're also improving client management and location capabilities and enable a seamless quote to work order process, making it simple for service managers to manage clients and locations. Additionally, service managers can use enhanced characteristics to define skills of resources.

Get ready to experience the power of Field Service and take your service processes to the next level.

Complete bookings while preserving end time

Article • 12/06/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓ Jul 31, 2023	✓ Oct 2, 2023

Business value

Improve the tracking of work progress and resource utilization by allowing users to finalize bookings on behalf of an assigned resource while maintaining the original end-time value after a booking is set to **completed**.

Feature details

Dispatchers or service managers no longer need to use complicated workarounds when completing a booking on behalf of a technician. With this enhancement, if a user updates a booking status to **Completed** on behalf of an assigned resource, the booking's end time will preserve the previous end time value.

Thank you for your idea

Thank you for submitting this idea:

- Toggle for "Update End Time" (Y/N) on the Booking Status

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Generate booking journals (docs)

Complete work orders based on status

Article • 01/11/2024

Expand table

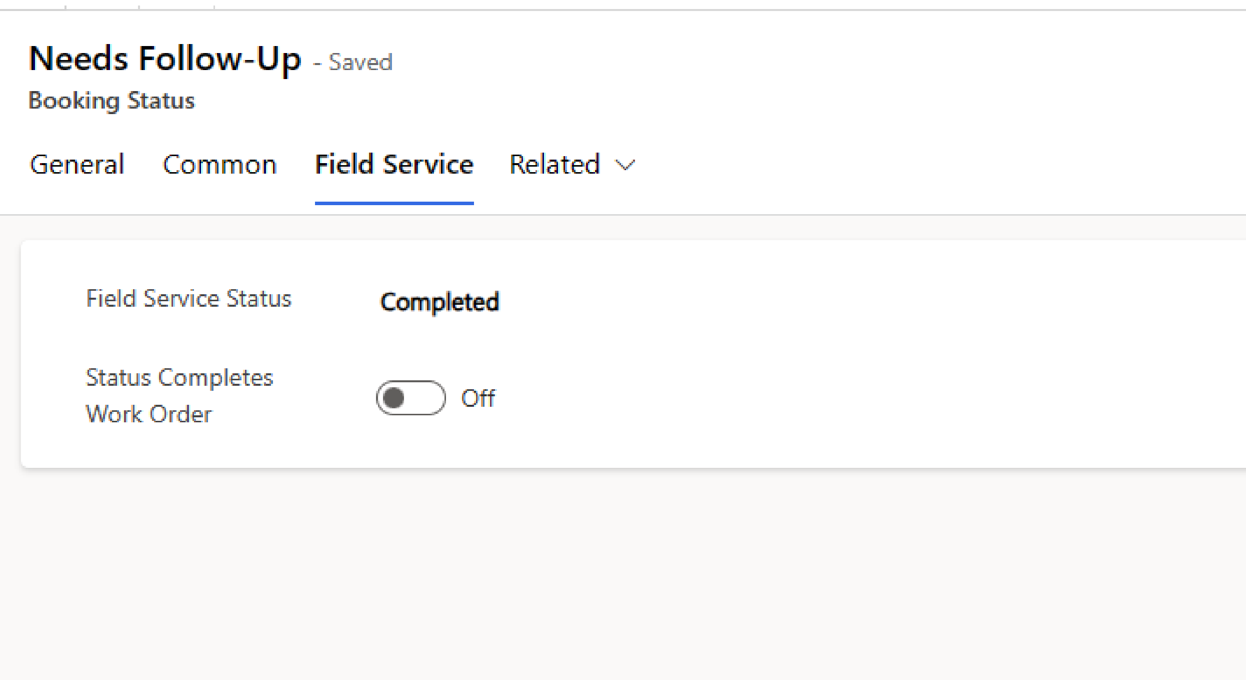
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✓ Dec 6, 2023

Business value

This feature adopts a status-driven approach to enhance flexibility in work order management. Save time to duplicate work orders that require follow-up by returning them to an unscheduled state after completing a booking.

Feature details

Frontline workers can now use a completed booking status to signal the need for follow-up work, returning the associated work order status to an unscheduled state. By optimizing the booking workflow, this feature ensures accurate work order statuses and simplifies the booking process. It introduces greater flexibility into the work order lifecycle, helping your booking data accurately reflect work order states, and keeping all team members informed and up to date.



Thank you for your idea

Thank you for submitting this idea:

- Allow for Completed Bookings to Keep Work Order Open

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Create follow-up work order for a completed booking (docs)

Empower your workforce with mixed reality

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	✔ Nov 15, 2023

Business value

Unlock efficiency and expertise. In today's dynamic business landscape, efficiency and expertise are paramount for field service operations. Dynamics 365 Field Service customers now enjoy a significant advantage with the inclusion of Dynamics 365 Guides and Remote Assist capabilities, all without incurring additional costs.

Feature details

This integration revolutionizes the way technicians access and utilize organizational knowledge, empowering them with immersive insights on their mobile devices and HoloLens. Moreover, the technicians can effortlessly connect with experts using Remote Assist to ensure that challenges are swiftly overcome. Dive into the details of these game-changing enhancements below:

- **Dynamics 365 Guides Integration**: Dynamics 365 Field Service now seamlessly integrates with Dynamics 365 Guides, empowering technicians with easy access to organizational knowledge. This information is presented in an immersive format, accessible on mobile phones and HoloLens devices, enhancing troubleshooting and decision-making in the field.
- **Remote Assist Integration**: Technicians facing challenges can tap into expert support using Remote Assist, ensuring minimal downtime and sustaining high first-time fix rates. Expert guidance is just a call away, reducing service disruptions and boosting productivity.
- **Cost-Efficient**: These integrated capabilities come at no additional cost to Field Service customers. Administrators can simply install and configure the products,

and users won't require extra licenses; everything is covered by the Field Service license.

See also

Overview of Field Service integrations (docs)

Expedite service delivery with extended customer details

Article • 12/06/2023

Expand table

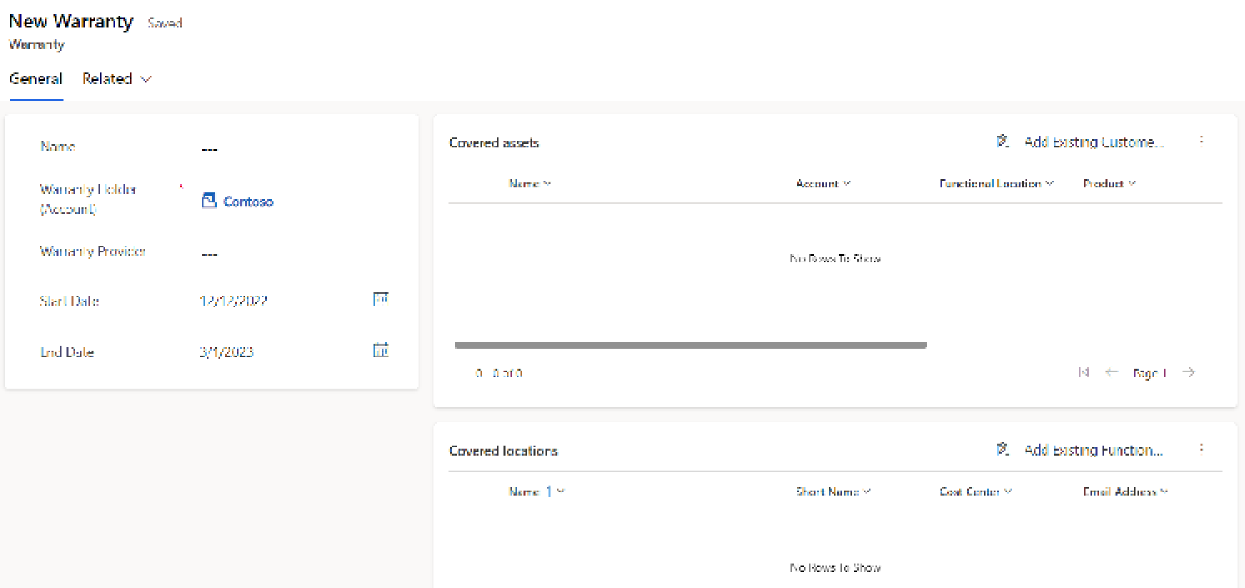
Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 31, 2023	✔ Oct 31, 2023

Business value

Capture manufacturer warranties, tag assets, and note location contact information to give frontline workers a comprehensive view of the asset they need to service, including where it is, if it's covered under warranty, and contacts where it's located.

Feature details

Improve your organization's ability to provide exceptional service to customers with extended customer information. By capturing manufacturer warranties, your frontline workers can provide service for covered assets without having to invoice the customer, streamlining the process for both parties. With the use of asset tags, you always know where assets are and can track down their comprehensive service history and manufacturer warranty coverage. By capturing location contact information and cost center information, your frontline workers will always know who to contact and how to bill for services rendered.



See also

Create warranties and define coverage (docs)

Integrate financial and inventory management

Article • 12/06/2023

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Nov 15, 2023	-	To be announced

Business value

Service organizations require a front to back application in which financials, inventory, and procurement are tightly coupled with service delivery. Field Service organizations generate financial data with every transaction of their system. Every work order represents cost and revenue. Every resource generates profit and loss. Every customer interaction adds entries on the general ledger. The integration between Finance and Operations and Field Service greatly reduces the effort required to connect the two apps.

Service organizations can now seamlessly integrate work order-related financial and inventory data without additional effort, cost, or complexity.

Feature details

This feature enables the seamless integration between Field Service, Finance, and Supply Chain Management by simply enabling a toggle.

We aim to provide an end-to-end service that organizations can use to digitally transform their entire operation. Most Field Service organizations require robust financial capabilities for billing, payments, and accounting scenarios. This integration offers a unified experience between Field Service and Finance and Operations.

- Sync real-time pricing and costing information from work orders into Finance and Operations.
- Automatically update Finance and Operations as work orders are executed for real-time financial and inventory integration.
- Take advantage of all Finance and Operations has to offer for invoicing, accounting, inventory management, and more.

See also

Field Service integration with finance and operations applications (docs)

Maintain customer facilities with enhanced capabilities

Article • 12/06/2023

Expand table

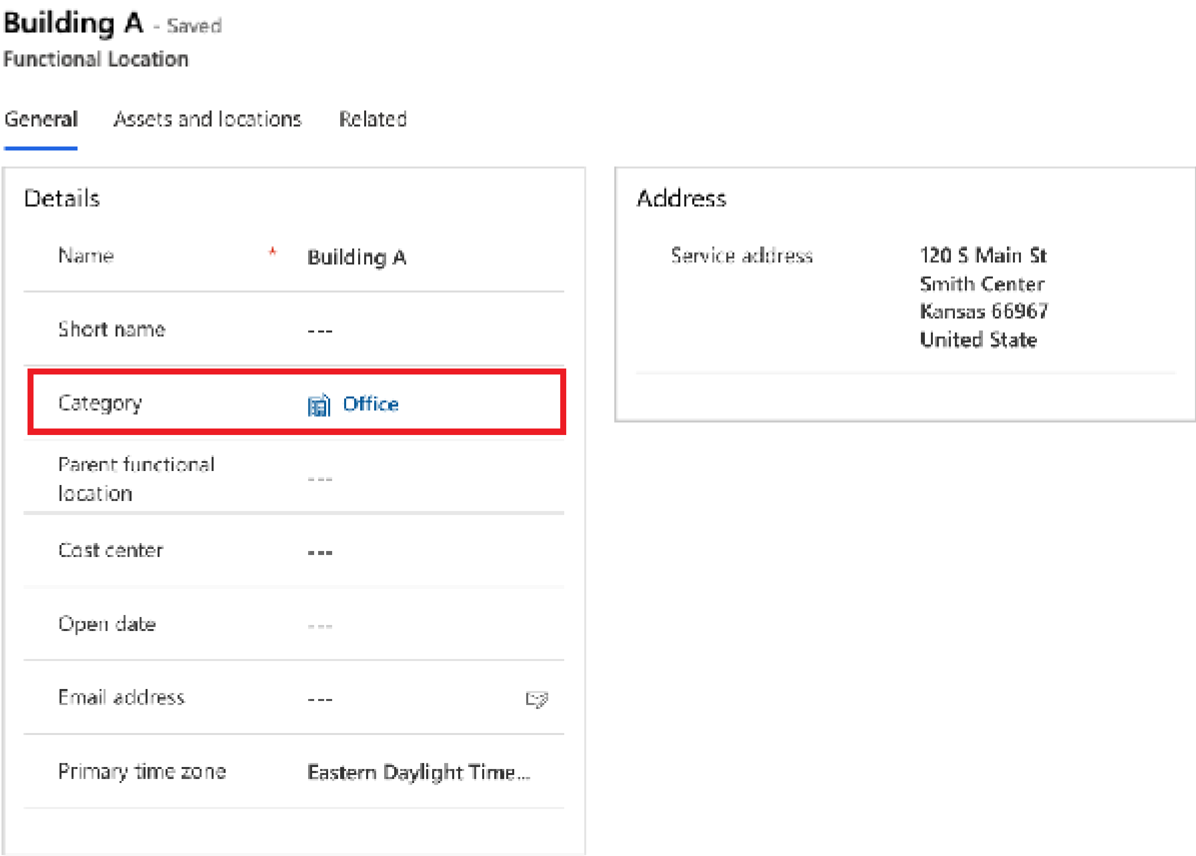
Enabled for	Public preview	Early access	General availability
Users, automatically	-	✓ Jul 31, 2023	✓ Oct 31, 2023

Business value

Representing and managing locations is critical to ensure the frontline workers get to the correct location and asset with the right information every time. New location types allow organizations to better manage complex buildings, campuses, and factories and location properties enable service providers to capture and organize critical location information.

Feature details

A more detailed understanding of customer locations and their unique properties prepares front-line workers for service appointments, enabling them to complete their jobs more efficiently, increase customer satisfaction, and provide a better overall service experience. With location types and properties, you communicate critical information your frontline workers need for success. For example, a campus may require parking in a specific lot, a single-family home requires confirming the owner will be home before departing, and the square footage of the home informs the frontline worker on the amount of supplies and time they'll need to service the area. Capturing these critical details via location types and properties will enhance your service delivery without having to build logic to show location-specific information dynamically.



See also

Create and assign functional location types (docs)

Manage frontline worker certifications

Article • 12/06/2023

Expand table

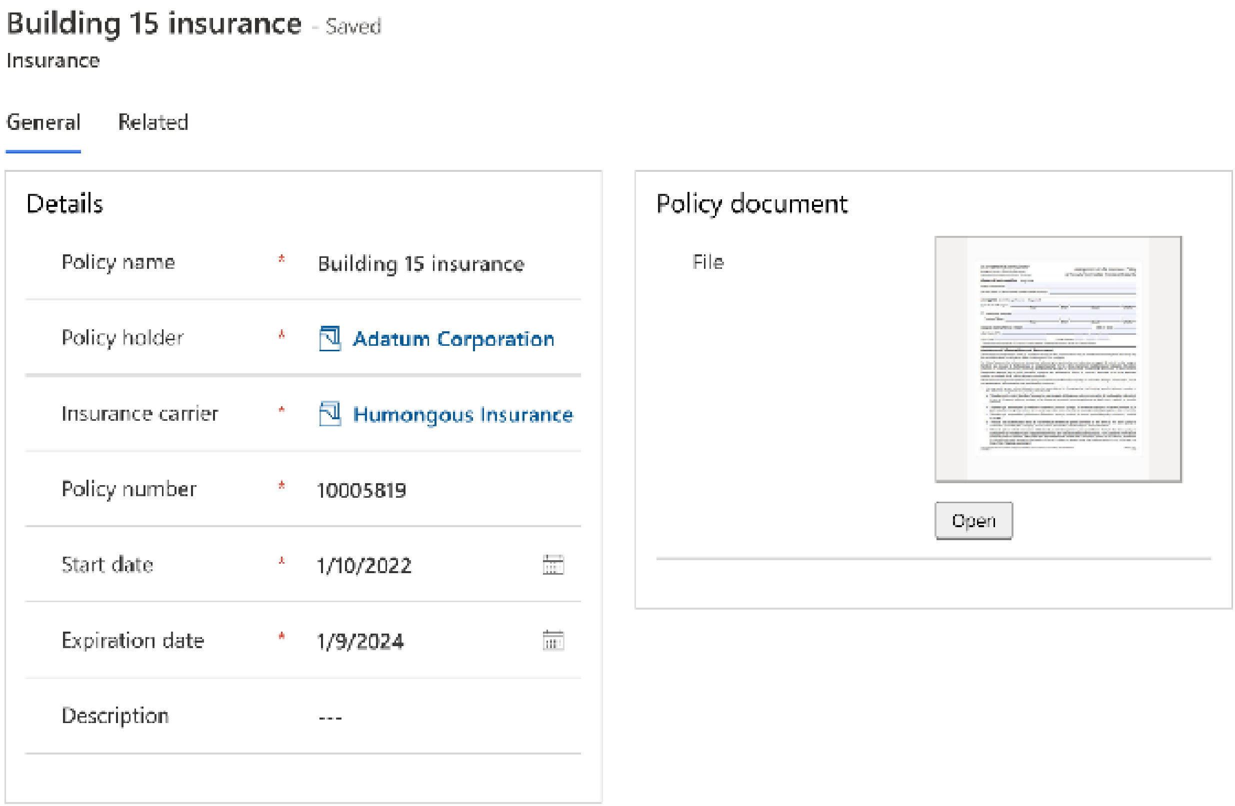
Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Jul 31, 2023	✔ Oct 31, 2023

Business value

Managing frontline worker documentation is essential for maintaining a service-ready workforce. Organizations can track insurance, licenses, and certifications for frontline workers to ensure they can complete work at the quality customers expect and in compliance with legislation.

Feature details

Don't let missing documentation hold your business back from providing top-notch service to your customers. You can now easily capture insurance, license, and certification documentation for your frontline workers. This ensures that they are fully prepared to deliver exceptional service with safety, efficiency, and regulatory compliance in mind. Whether you're working with full-time employees or trusted vendors, our solution makes it easy to keep all your critical information in one place, giving you peace of mind and allowing you to focus on what really matters - your customers.



See also

Enhanced characteristics (docs)

New and improved work order experience

Article • 12/21/2023

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Aug 9, 2023	-	✔ Nov 15, 2023

Business value

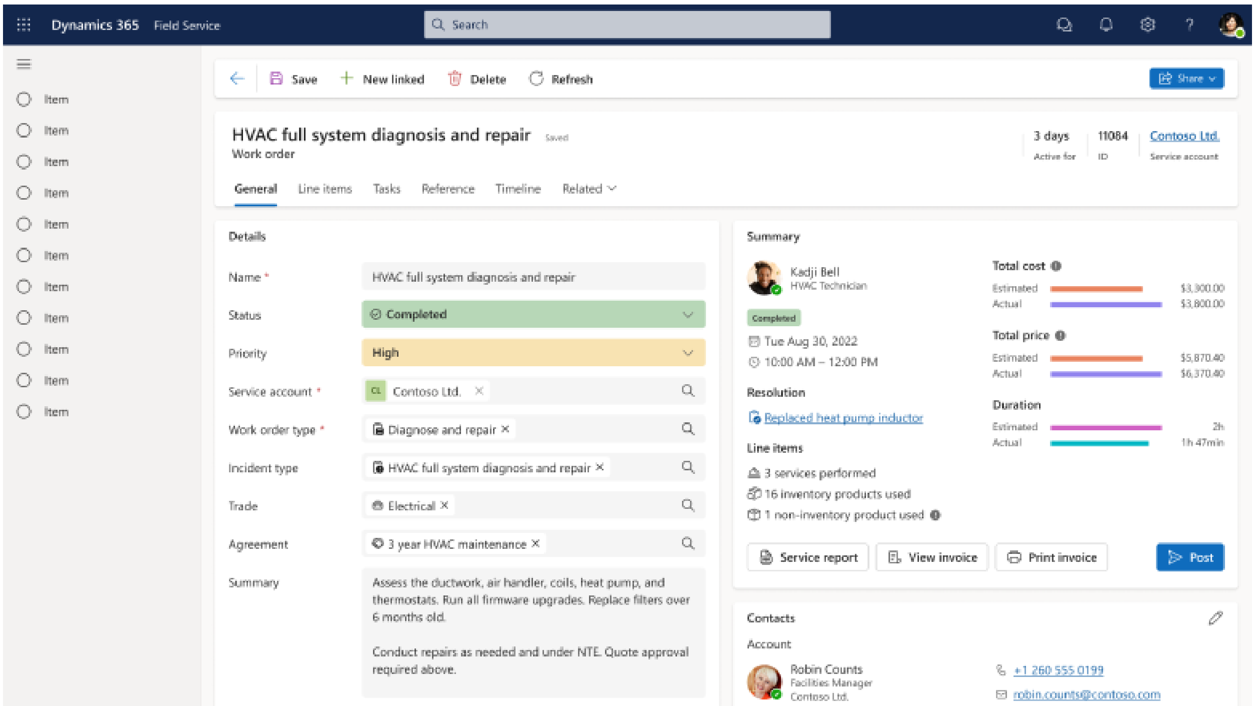
Our new work order enhancements are designed to make your life easier. With reduced time and effort required to understand the current state of work orders, you can provide quick updates to customers, ensure that frontline workers have the information they need for on-site service, and easily track high-priority work. Plus, our dynamic card feature allows you to take action and move work orders through each stage seamlessly, while our redesigned tasks experience and reference tab streamline the knowledge-sharing process for everyone involved.

Feature details

We're excited to announce our redesigned work order experience which offers a modern look and feel, maps to typical daily activities, reduces information overload, minimizes clicks, and streamlines the user experience for service managers.

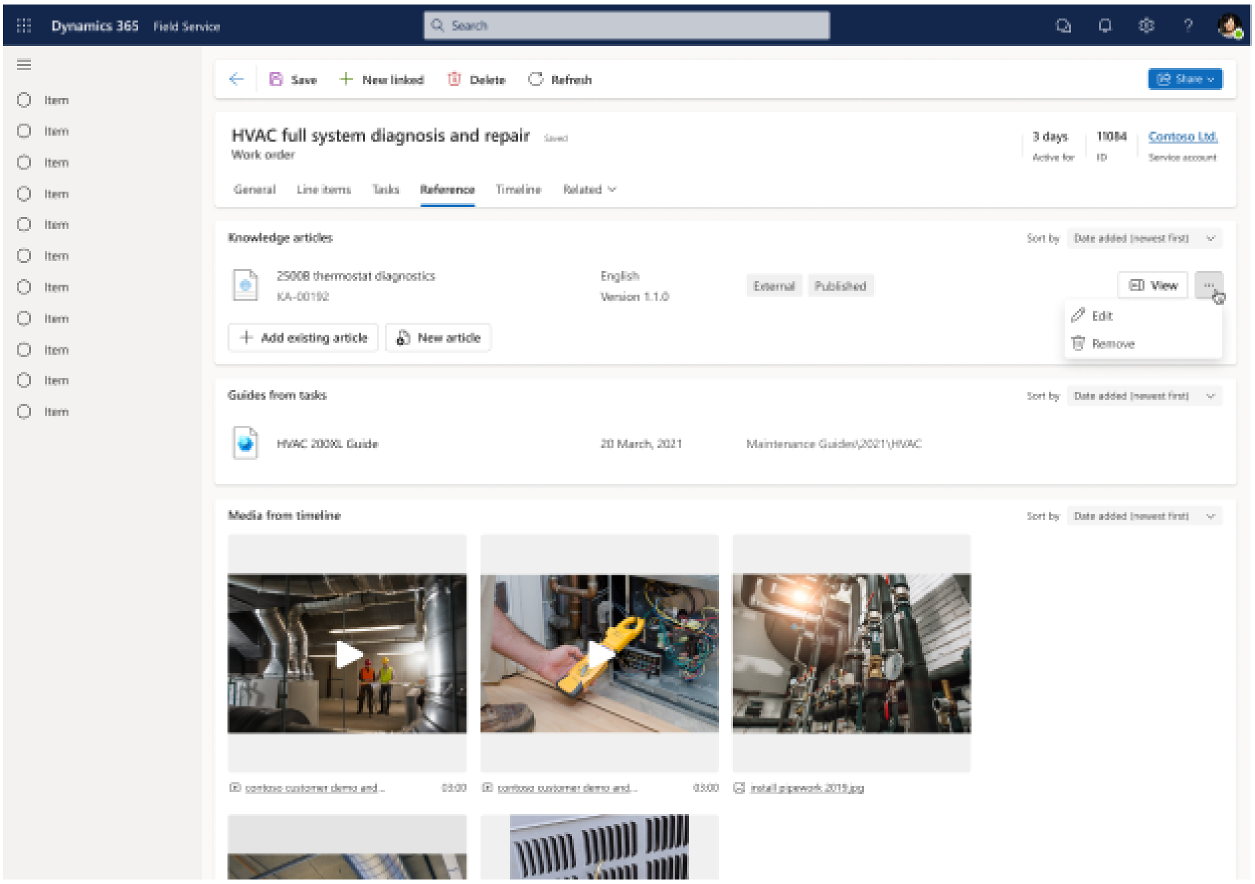
The work order list page now gives you a visual queue of what's important, which work orders require attention, and enables quick inline edits in a newly introduced side panel. Meanwhile, the refreshed user experience for the work order form surfaces up the most important information about a work order on the main tab and also enables inline updates without leaving the experience.

Our dynamic card is the new key signature experience empowering end users to easily take the next action. It changes based on the current status within the work order lifecycle. Built-in booking suggestions with prominently displayed customer commitments allows a service manager to move the work order into the scheduled stage, A card to display booking information to quickly understand who the assigned technician is and when they're expected to arrive helps the service manager when the work order is in progress. Once work is complete, you can see a summary of the work order without having to navigate through different sections.



We've also redesigned and brought together the products and services experience into a unified interface to help you summarize total cost and price, see not-to-exceed (NTE) warnings, and make updates to prices and product/service status right inline. The redesigned tasks experience enables service managers to ensure that the right tasks and associated inspection templates and guides have been associated with the work order.

Finally, our new reference tab is the evolved home for knowledge articles, where you can see, edit, or create new knowledge articles from within the page without having to navigate away. We've extended this interface to also showcase linked guides to tasks, as well as media that has been added via notes on the timeline.



The redesigned work order experience will help ensure that frontline workers have the information they need to resolve work orders on the first visit.

Thank you for your ideas

Thank you for submitting these ideas:

- Move Field Service Section Headers Below the Section Separator Line
- Bulk Edit
- WorkOrder not refreshed after resource booking
- Embedded Knowledge Search for Work Order

We listened to your ideas, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Work order form and component experience (docs)

Plan and prepare for Dynamics 365 Finance in 2023 release wave 2

Article • 12/21/2023

ⓘ **Important**

The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Finance**.

Overview

https://aka.ms/ReleaseHighlight/2023W2/Finance

To support their growth strategies, organizations require business agility, particularly in the face of increased competition and cost-cutting pressures. A solution that facilitates rapid decision-making is essential for companies seeking to reduce risk, obtain actionable insights quickly, and achieve cost savings. These factors are non-negotiable for CFOs.

This release of Dynamics 365 Finance focuses on achieving rapid innovation through automation, creating high-performing teams that can work smarter with AI, and optimize costs and take action faster with planning, forecasting, analytics, and insights.

Updates to Microsoft Dynamics 365 Finance 2023 release wave 2 include:

- General availability of extended planning and analysis, which brings together operational and financial planning to continuously plan, act, and analyze.
- General availability of business performance analytics, which streamlines financial reporting by centralizing data from multiple business processes and in an easy-to-use interface.
- Further enhancements to invoice capture and AP automation with a new AP clerk workspace and support for the invoice journal.
- Enhancements to bank foreign currency revaluation, bank statement importing, and bank statement management.
- Expanding country coverage to additional LATAM countries of Bolivia, Dominican Republic, Ecuador, Guatemala, Peru, and Venezuela.
- Integration of Tax Calculation service with Project Operations and invoice registers, approvals, and pools.

- Delivery of regulatory updates to comply with tax digitization requirements including e-invoicing and SAF-T for Denmark, e-reporting for France, and e-invoicing for Australia, New Zealand, and Spain.

Updates to Dynamics 365 Finance 2023 release wave 2

Investment areas

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

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

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

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

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

For more information on Globalization Studio, go to Globalization Studio documentation.

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

Check out the release plan

For application administrators

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

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

Get the most out of Finance

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
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.

What's new and planned for Dynamics 365 Finance

Article • 01/19/2024

This topic lists features that are planned to release from October 2023 through March 2024. 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 2023 release wave 1 plan.

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

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

Business performance

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

Expand table

Feature	Enabled for	Public preview	General availability
Manage administrative tasks, find information, and create reports with generative AI	Users by admins, makers, or analysts	Feb 2024	To be announced
Use Excel add-in for planning	Users by admins, makers, or analysts	-	Feb 2024

Core financials

Automation, AI, and enhancements to core financials.

Expand table

Feature	Enabled for	Public preview	General availability
Use bank foreign currency revaluation enhancements	Users by admins, makers, or analysts	-	✔ Oct 2, 2023
Check out new AP clerk workspace capabilities	Users by admins, makers, or analysts	Jan 2024	To be announced
Handle periodically recurring invoices	Users by admins, makers, or analysts	-	✔ Dec 29, 2023
Post new transactions directly from bank reconciliation	Users by admins, makers, or analysts	-	✔ Oct 2, 2023
Import bank statement automatically	Users by admins, makers, or analysts	-	✔ Oct 27, 2023
Support more complex bank reconciliation matching rules	Users by admins, makers, or analysts	-	✔ Oct 2, 2023
Support customer refunds with credit transfer format	Users, automatically	-	✔ Oct 2, 2023
Business performance analytics – record to report data model	Users by admins, makers, or analysts	✔ Apr 28, 2023	Feb 2024
Archive general ledger posted data	Admins, makers, marketers, or analysts, automatically	Feb 2024	To be announced
Generate payment journal, settle open invoices directly from bank reconciliation	Users by admins, makers, or analysts	✔ Jan 12, 2024	-
Calculate foreign currency during ledger settlement	Users by admins, makers, or analysts	-	Feb 2024
Business performance planning for Dynamics 365	Users, automatically	-	✔ Dec 20, 2023
Business performance analytics	Users by admins, makers, or analysts	✔ Apr 28, 2023	Feb 2024
Business performance analytics - reporting hub and base reports on data	Users by admins, makers, or analysts	✔ Apr 28, 2023	Feb 2024
Business performance analytics - security	Users by admins, makers, or analysts	✔ Apr 28, 2023	Feb 2024

Feature	Enabled for	Public preview	General availability
Archive data	Users by admins, makers, or analysts	Feb 2024	-
Use deferral schedules with stocked materials	Users by admins, makers, or analysts	-	Mar 2024
Net customer and vendor balances	Users by admins, makers, or analysts	✓ Nov 2, 2023	To be announced
Check number validation	Users by admins, makers, or analysts	-	✓ Oct 2, 2023
Calculate gain/loss for reporting currency only	Users by admins, makers, or analysts	-	✓ Oct 6, 2023
Integration with custom prebuilt model in Invoice capture	Users by admins, makers, or analysts	-	Jan 2024
Capturing additional fields from the result of prebuilt models	Users by admins, makers, or analysts	✓ Oct 31, 2023	✓ Nov 24, 2023

Globalization Studio

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

Expand table

Feature	Enabled for	Public preview	General availability
Electronic invoicing – Waybill (Carta Porte) update to version 3	Users by admins, makers, or analysts	-	✓ Dec 15, 2023
Use electronic invoicing in Poland	Users by admins, makers, or analysts	-	Mar 2024
Electronic invoicing – German XRechnung format update to version 3	Users by admins, makers, or analysts	-	✓ Dec 14, 2023
Support more tax registration numbers for Italy	Users by admins, makers, or analysts	-	Mar 2024

Feature	Enabled for	Public preview	General availability
Use electronic invoicing in Australia and New Zealand	Users by admins, makers, or analysts	-	✔ Oct 2, 2023
Use Tax Audit SAF-T for Denmark	Users by admins, makers, or analysts	-	✔ Oct 2, 2023
Expand localization for LATAM countries - Chile	Users by admins, makers, or analysts	-	✔ Nov 30, 2023
Expand localization for LATAM countries - Costa Rica	Users by admins, makers, or analysts	-	✔ Nov 30, 2023
Expand localization for LATAM countries - Nicaragua	Users by admins, makers, or analysts	-	✔ Nov 30, 2023
Expand localization for LATAM countries - Panama	Users by admins, makers, or analysts	-	✔ Nov 30, 2023
Expand localization for LATAM countries - Colombia	Users by admins, makers, or analysts	✔ Dec 22, 2023	To be announced
Expand localization for LATAM countries - Paraguay	Users by admins, makers, or analysts	✔ Dec 22, 2023	To be announced
Expand localization for LATAM countries - Uruguay	Users by admins, makers, or analysts	✔ Dec 22, 2023	To be announced
Expand localization for LATAM countries - Guatemala	Users by admins, makers, or analysts	✔ Dec 22, 2023	To be announced
Electronic Invoicing service - Global e-invoicing ISV last-mile connector	Users by admins, makers, or analysts	-	✔ Dec 15, 2023
Simplify integration with tax solution ISVs	Users by admins, makers, or analysts	Feb 2024	-
Use the Tax Calculation service in Project Operations	Users by admins, makers, or analysts	-	Feb 2024
See new capabilities in the Tax Calculation service	Users by admins, makers, or analysts	-	✔ Oct 2, 2023
Enable the electronic reporting format destinations dialog box	Admins, makers, marketers, or analysts, automatically	✔ Jul 31, 2023	✔ Oct 2, 2023
Use Tax Audit SAF-T for Norway	Users by admins, makers, or analysts	-	Mar 2024

Feature	Enabled for	Public preview	General availability
Apply updates to tax declaration package for Poland	Users by admins, makers, or analysts	-	Mar 2024

- You are able to opt into some features as part of early access on July 31, 2023, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

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

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

Business performance

Article • 12/21/2023

ⓘ Important

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

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

Use Excel add-in for planning

Article • 02/21/2024

ⓘ Important

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

Expand table

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

Business value

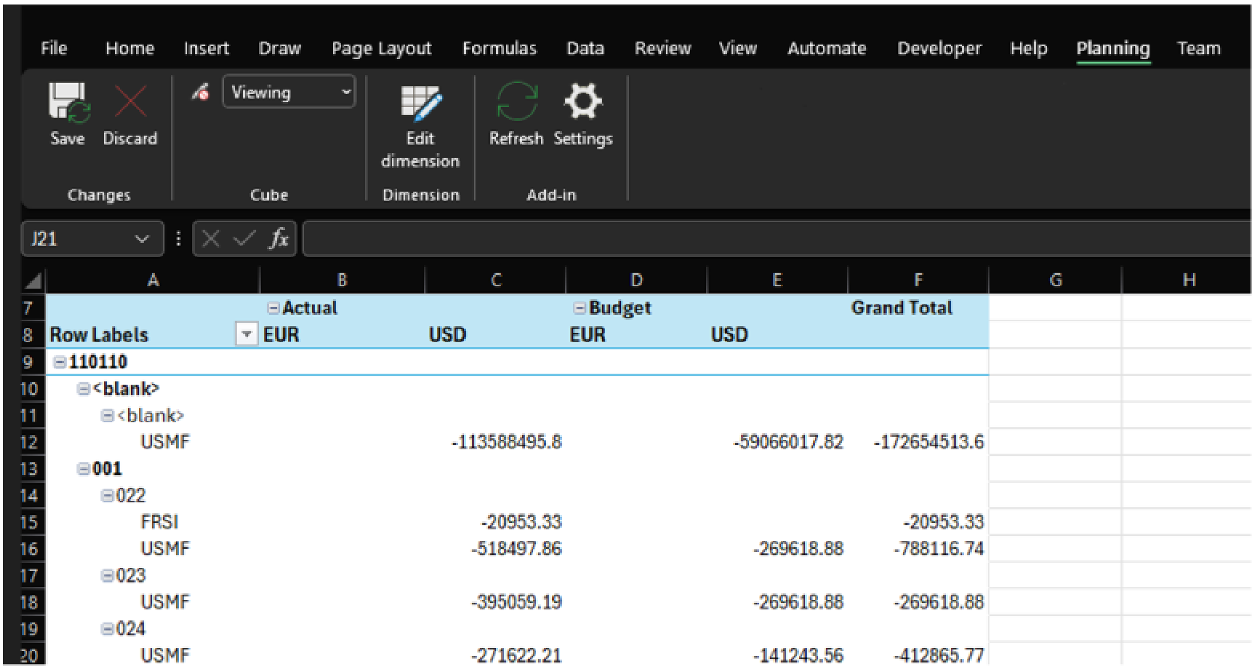
An Excel add-in provides users with familiarity and increases user adoption by allowing them to contribute and collaborate to their plans using Excel.

Feature details

Users have the option to use Excel to contribute and interact with planning. Working with an Excel add-in helps users with:

- **Familiarity and user adoption**: Excel is a widely used and familiar tool among finance professionals. Adding Excel capabilities to an ERP system ensures that users can leverage their existing Excel skills, leading to quicker adoption of the ERP's financial planning and analysis features.
- **Data integration and efficiency**: Financial planning and analysis professionals often spend a significant amount of time importing data from various sources or manually entering data into Excel, leading to errors and inefficiencies.
- **Ad-hoc analysis**: The add-in allows for quick data retrieval and analysis, helping financial planning and analysis professionals respond more efficiently to urgent requests.
- **Audit trail**: Excel provides audit trails and version control, aiding data accuracy and traceability.

- **Streamlined workflow**: The add-in streamlines the entire financial planning and analysis workflow. From data integration to reporting (Excel out-of-the-box feature of creating pivot table reports for analysis), saving time and effort.
- **Advanced modeling and scenarios**: Excel has powerful out-of-the-box features for financial modeling and scenario planning. Finance professionals can build complex financial models, perform "what-if" analysis, and create multiple scenarios to evaluate different outcomes.
- **Reduced dependency on IT**: Finance teams can become more self-reliant with Excel add-ins, reducing their dependence on IT or technical staff for ad hoc reporting and analysis tasks.



	A	B	C	D	E	F
7		Actual		Budget		Grand Total
8	Row Labels	EUR	USD	EUR	USD	
9	110110					
10	<blank>					
11	<blank>					
12	USMF		-113588495.8		-59066017.82	-172654513.6
13	001					
14	022					
15	FRSI		-20953.33			-20953.33
16	USMF		-518497.86		-269618.88	-788116.74
17	023					
18	USMF		-395059.19		-269618.88	-269618.88
19	024					
20	USMF		-271622.21		-141243.56	-412865.77

Core financials

Article • 12/21/2023

ⓘ Important

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

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

Business performance planning for Dynamics 365

Article • 01/17/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Dec 20, 2023

Business value

Enable companywide planning for finance and operations to drive agile decision-making using a Power BI and Excel user experience.

Feature details

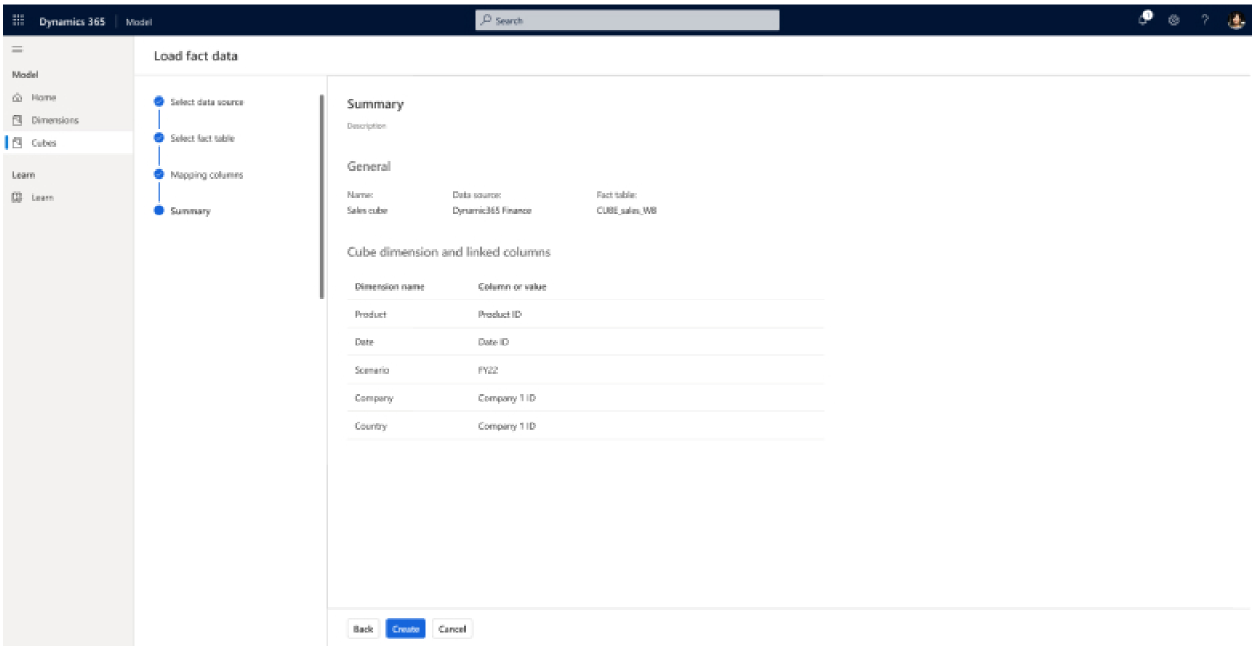
Perform financial analysis, forecasting, budgeting, and driver-based planning in extended planning and analysis for Dynamics 365. This release contains an integration to Dynamics 365 Finance and allows users to model, contribute, and approve financial plans and forecasts using Power BI and Excel. By connecting operational planning with financial impact, organizations can continuously plan, act, and analyze in a preferred experience.

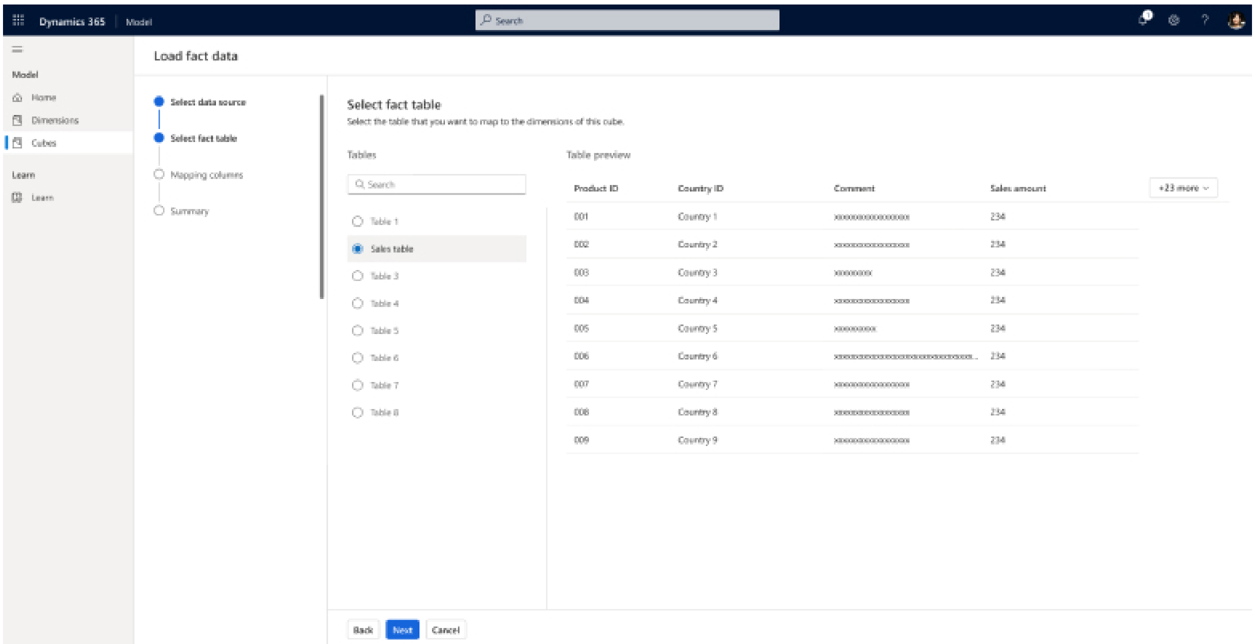
Create companywide budgets and perform continuous planning to drive agile decision making and competitive advantage with planning for:

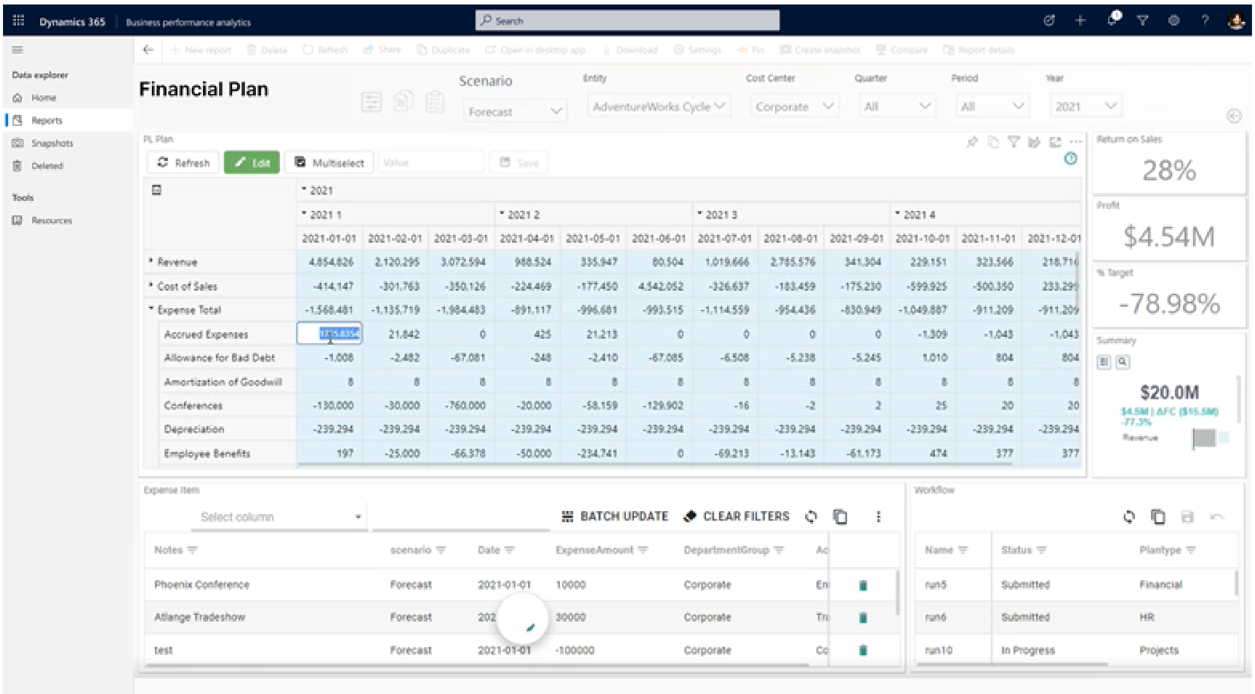
- Revenue and expense
- Bottoms up and top down
- Driver-based
- Short- and long-term planning with what-if scenarios
- Human resources and sales

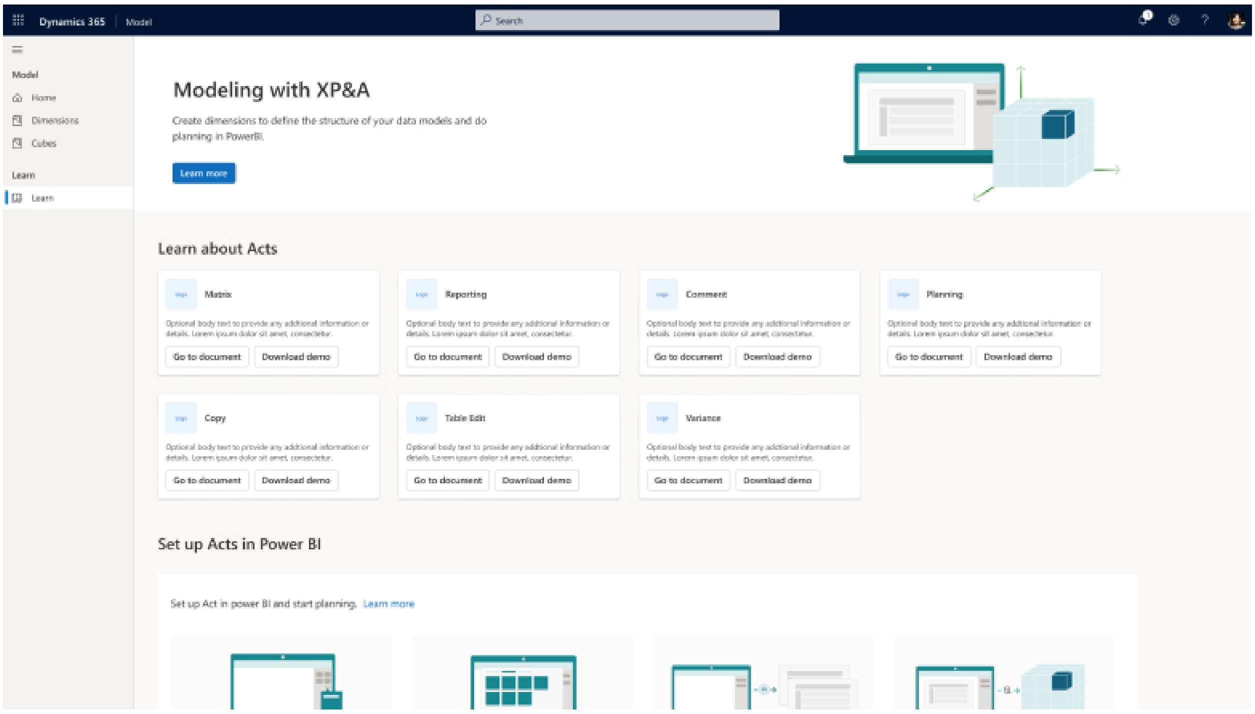
Capabilities include:

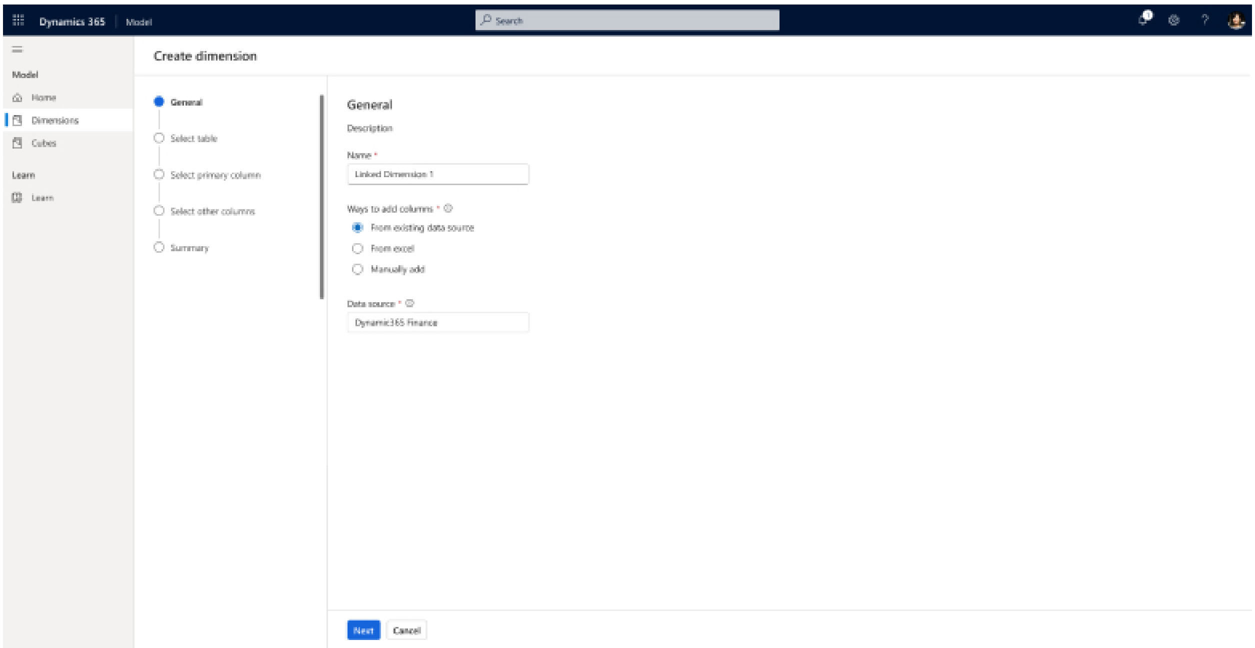
- Direct connection and integration of Dynamics 365 Finance.
- Copy plans to run what-if scenarios to accelerate business decision making and reduce risk.
- Familiar user experience using Power BI.

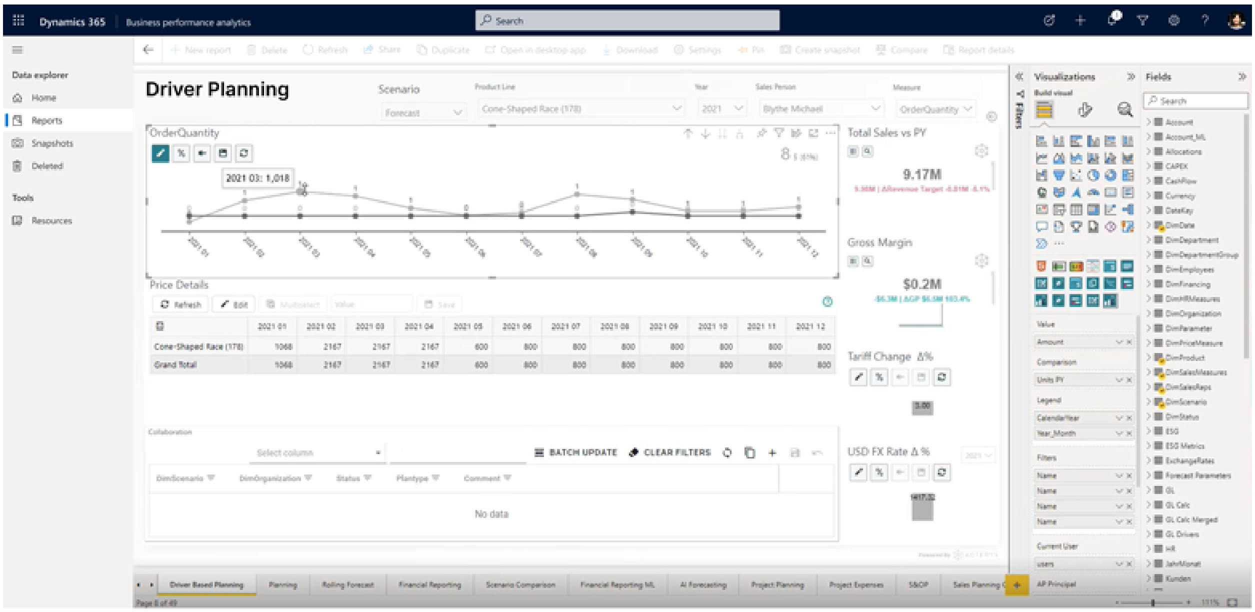


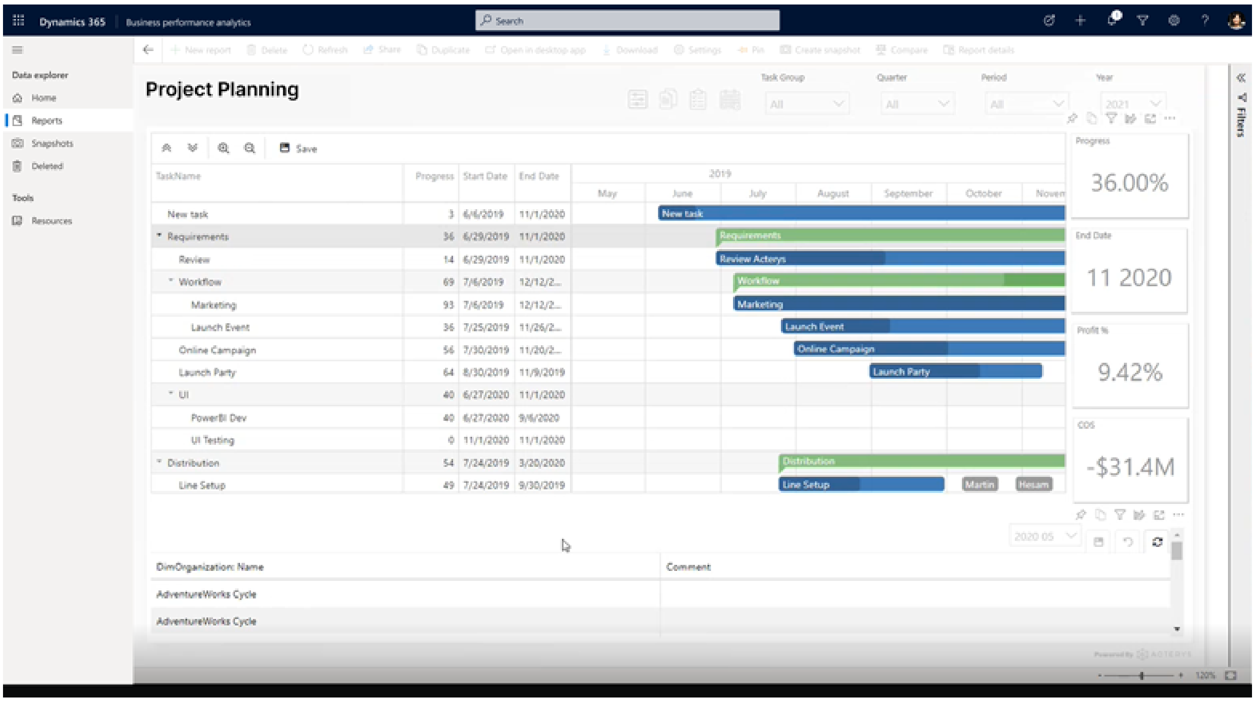



Dynamics 365
Business performance analytics
Search
Data explorer
Home
Reports
Snapshots
Deleted
Tools
Resources
Financial Plan
Scenario
Forecast
Entity
AdventureWorks Cycle
Cost Center
Corporate
Quarter
All
Period
All
Year
2021
PL Plan
Refresh
Edit
Multiselect
Value
Save
Revenue
Cost of Sales
Expense Total
Accrued Expenses
Allowance for Bad Debt
Amortization of Goodwill
Conferences
Depreciation
Employee Benefits
Return on Sales
28%
Profit
$4.54M
% Target
-78.98%
Summary
$20.0M
Expense Item
Select column
BATCH UPDATE
CLEAR FILTERS
Notes
scenario
Date
ExpenseAmount
DepartmentGroup
Phoenix Conference
Forecast
2021-01-01
10000
Corporate
Atlange Tradeshow
Forecast
30000
Corporate
test
Forecast
2021-01-01
-100000
Corporate
Workflow
Name
Status
Plantype
run5
Submitted
Financial
run6
Submitted
HR
run10
In Progress
Projects

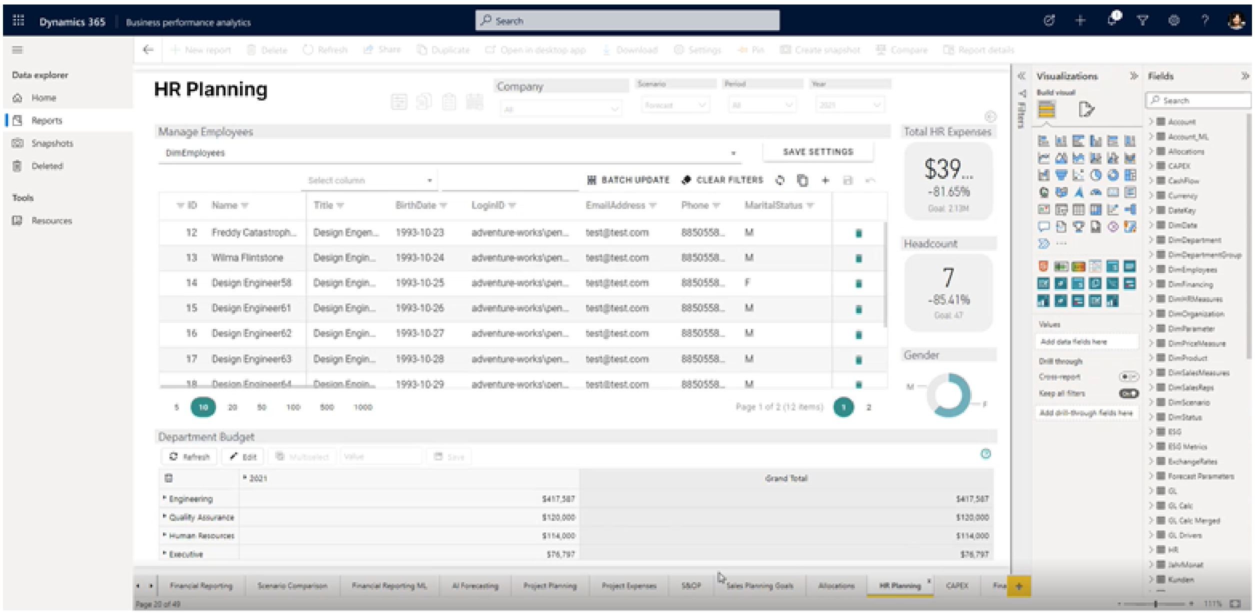

Dynamics 365
Model
Search
Model
Home
Dimensions
Cubes
Learn
Learn
Modeling with XP&A
Create dimensions to define the structure of your data models and do planning in PowerBI.
Learn more
Learn about Acts
Matrix
Reporting
Comment
Planning
Copy
Table Edit
Variance
Go to document
Download demo
Set up Acts in Power BI
Set up Act in power BI and start planning. Learn more







Dynamics 365
Business performance analytics
Search
Data explorer
Home
Reports
Snapshots
Deleted
Tools
Resources
Project Planning
Task Group
Quarter
Period
Year
Save
TaskName
Progress
Start Date
End Date
2019
New task
Requirements
Review
Workflow
Marketing
Launch Event
Online Campaign
Launch Party
UI
PowerBI Dev
UI Testing
Distribution
Line Setup
Progress
36.00%
End Date
11 2020
9.42%
-$31.4M
DimOrganization: Name
Comment
AdventureWorks Cycle
AdventureWorks Cycle



Dynamics 365
Business performance analytics
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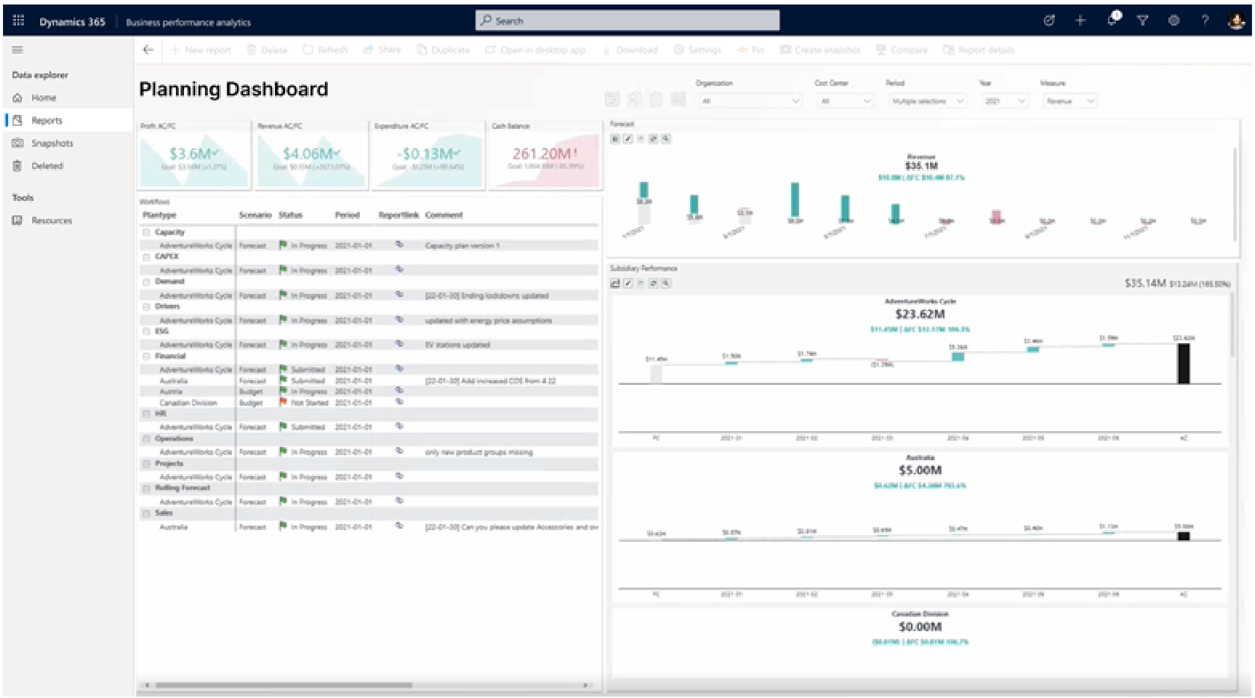
Data explorer
Home
Reports
Snapshots
Deleted
Tools
Resources
HR Planning
Company
Manage Employees
DimEmployees
SAVE SETTINGS
BATCH UPDATE
CLEAR FILTERS
ID
Name
Title
BirthDate
LoginID
EmailAddress
Phone
MaritalStatus
Freddy Catastroph...
Wilma Flintstone
Design Engineer58
Design Engineer61
Design Engineer62
Design Engineer63
Total HR Expenses
$39...
-81.65%
Headcount
7
-85.41%
Gender
Department Budget
Refresh
Edit
2021
Grand Total
Engineering
Quality Assurance
Human Resources
Executive
$417,587
$120,000
$114,000
$76,797
Visualizations
Fields
Financial Reporting
Scenario Comparison
AI Forecasting
Project Planning
Project Expenses
HR Planning
CAPEX


Dynamics 365
Business performance analytics
Search
Data explorer
Home
Reports
Snapshots
Deleted
Tools
Resources
Planning Dashboard
$3.6M
$4.06M
-$0.13M
261.20M
Revenue
$35.1M
$35.14M
AdventureWorks Cycle
$23.62M
Australia
$5.00M
Canadian Division
$0.00M

Calculate foreign currency during ledger settlement

Article • 07/18/2023

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

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

Business value

Currently, ledger settlement is on the accounting currency amounts. If the accounting currency is not in balance (debits do not equal credits) for matched transactions in the ledger settlement, the ledger settlement isn't completed. No validation is done to determine if the reporting currency amounts are in balance. If the accounting currency amounts are in balance, the ledger settlement will be permitted even if the reporting currencies amounts are not in balance. No gain or loss is posted for the reporting currency, either.

This feature addresses both of these gaps by posting a gain or loss for the accounting and reporting currency as necessary to ensure the amounts are in balance. This speeds up period-end closing by eliminating the need to first post the gain/loss in the accounting and reporting currency in order to complete the ledger settlement.

Feature details

The new feature will come in stages. First, ledger settlement will continue to be done on the accounting currency. If transactions are fully settled in the accounting currency (debits equal credits), validation will be added to the reporting currency and post a gain or loss if they are not in balance.

Next, ledger settlement will be changed to the transaction currency. The determination will be similar to AR and AP settlement where if the transaction currency is the same and the ledger amounts are in balance, the difference in the accounting and reporting currency will be posted as a gain or loss. If the transaction currencies are different when settling the ledger transactions, we will settle the accounting currency and determine if a gain or loss is necessary for the reporting currency.

For both stages, the gain or loss posting only occurs for ledger settlement accounts that are marked as eligible for recognition of gain/loss posting during ledger settlement. This is to ensure that a gain or loss isn’t calculated during AR and AP settlement and again during ledger settlement. Partial settlements currently aren't supported but will be in later releases.

Calculate gain/loss for reporting currency only

Article • 01/17/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 6, 2023

Business value

Currently, if the accounting currency is in balance (debits = credits) for matched transactions in ledger settlement, no realized gain/loss is posted if the reporting currency doesn't balance to zero. This feature addresses that gap by posting a gain/loss in the reporting currency if the accounting currency is in balance. This speeds up period-end closing by eliminating the need to first post the gain/loss in the reporting currency if it isn't already posted through accounts payment, accounts receivable settlement, or a manual reporting currency adjustment journal.

Feature details

This feature uses the accounting currency for matching within ledger settlement. If the accounting amounts are balanced in the accounting currency, the ledger settlement will post a gain/loss when necessary for the reporting currency. The gain/loss posting only occurs for main accounts that don't already have a gain/loss posted through the AR/AP settlement.

This is the first step to fully supporting gain/loss posting during ledger settlement. Other scenarios will be added in the future where gains and losses can be posted for the accounting currency. Partial settlement is not supported and will be in future releases.

See also

Set up currencies and conversions (learn)

Capturing additional fields from the result of prebuilt models

Article • 12/06/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 31, 2023	✔ Nov 24, 2023

Business value

This feature helps rectify mapping inaccuracies between the prebuilt model and invoice in Invoice capture. This can reduce the workload on AP clerks, streamlining processes, enhancing touchless rates, and boosting overall efficiency in invoice processing. It also supports adding new mappings and extracting and transferring business-required data from invoice capture to Dynamics 365 Finance for improved decision-making and operational excellence.

Feature details

With the introduction of this feature, accounts payable can switch the document preview pane to a mapping mode in the side-by-side viewer. All the available fields that can be mapped are highlighted. Clerks can decide to correct the existing mapping by selecting the right field and choosing the mapped invoice field from the list, or by adding a new mapping by the same steps.

After exiting the mapping mode, the mapping relationship is going to be built and the value will be automatically updated to the corresponding invoice fields. The correct value will be extracted for the subsequent invoices when the invoice is getting transferred. The feature enhances the touchless rate in the invoice capture process. Additionally, it supports extracting and transferring the additional information to meet the customer's own needs. This can streamline the invoice process between Invoice capture and Dynamics 365 Finance.

Check number validation

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 2, 2023

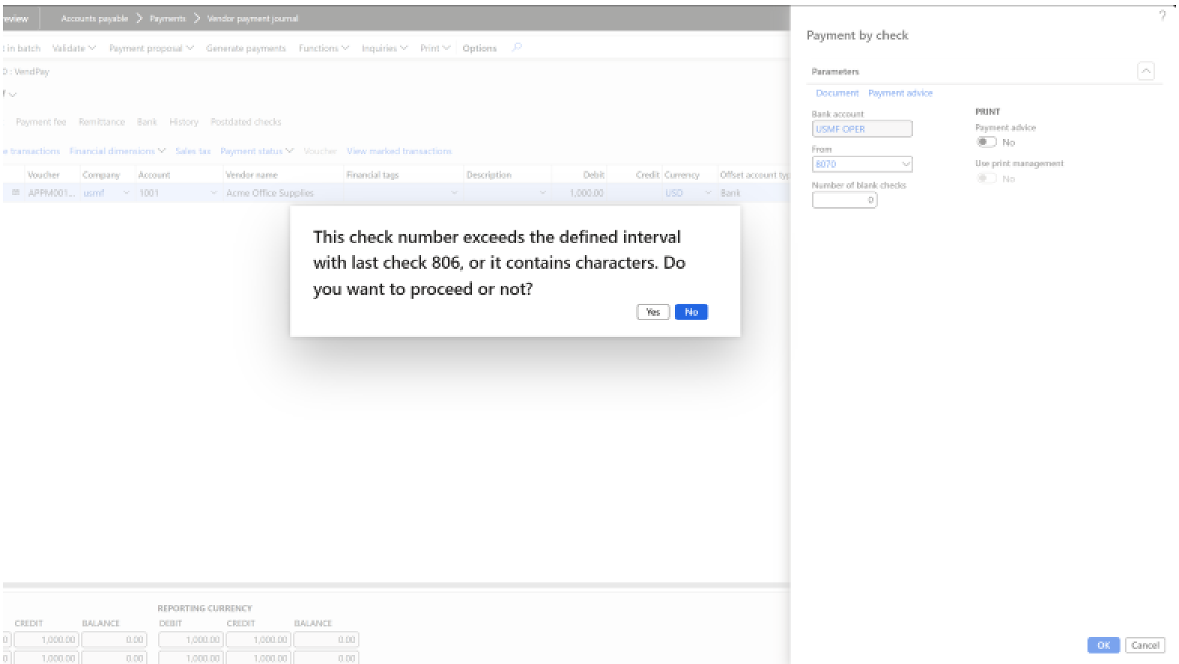
Business value

Check number validation helps ensure that a check is valid and can be processed. It reduces the risk of errors in processing the check. This can help to prevent delays and additional fees associated with returned or rejected checks.

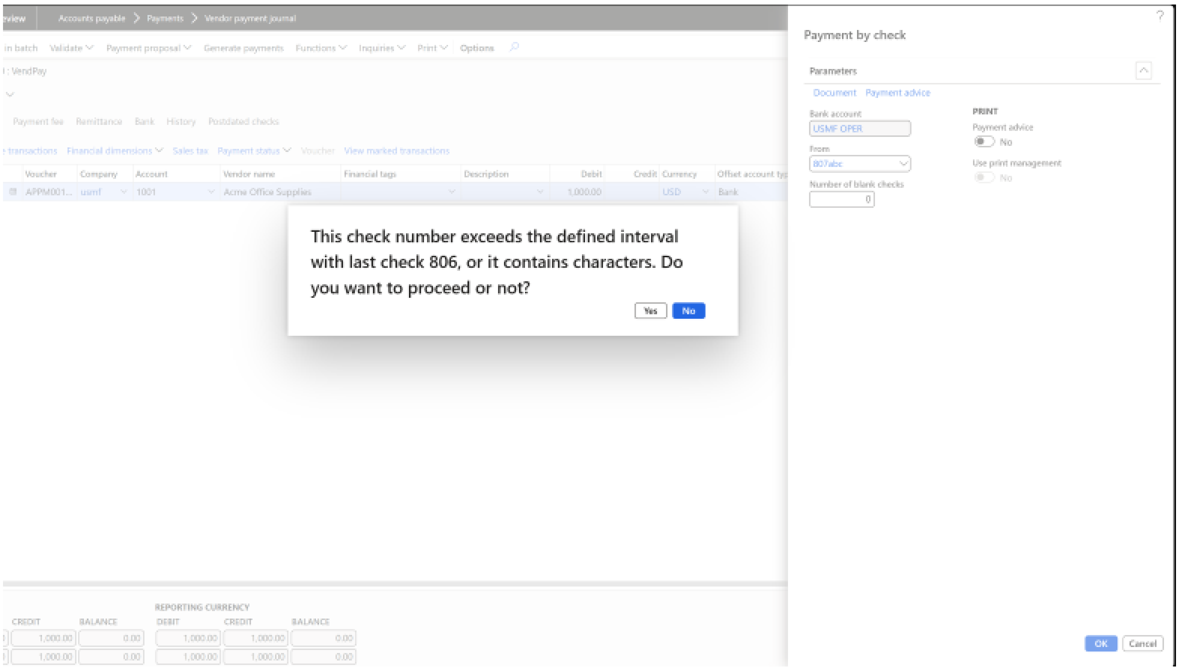
Feature details

Two check number validation options are available:

- **Interval validation**: You can set up the default check number interval in cash and bank management parameters. If the check number exceeds the defined interval with the last check number during payment generation, confirm the check number to reduce errors.



- **Character validation**: If there is any character in the check number, the check number should be confirmed to reduce errors.



See also

Configure electronic reporting in Dynamics 365 Finance (learn)

Check out new AP clerk workspace capabilities

Article • 12/21/2023

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2024	To be announced

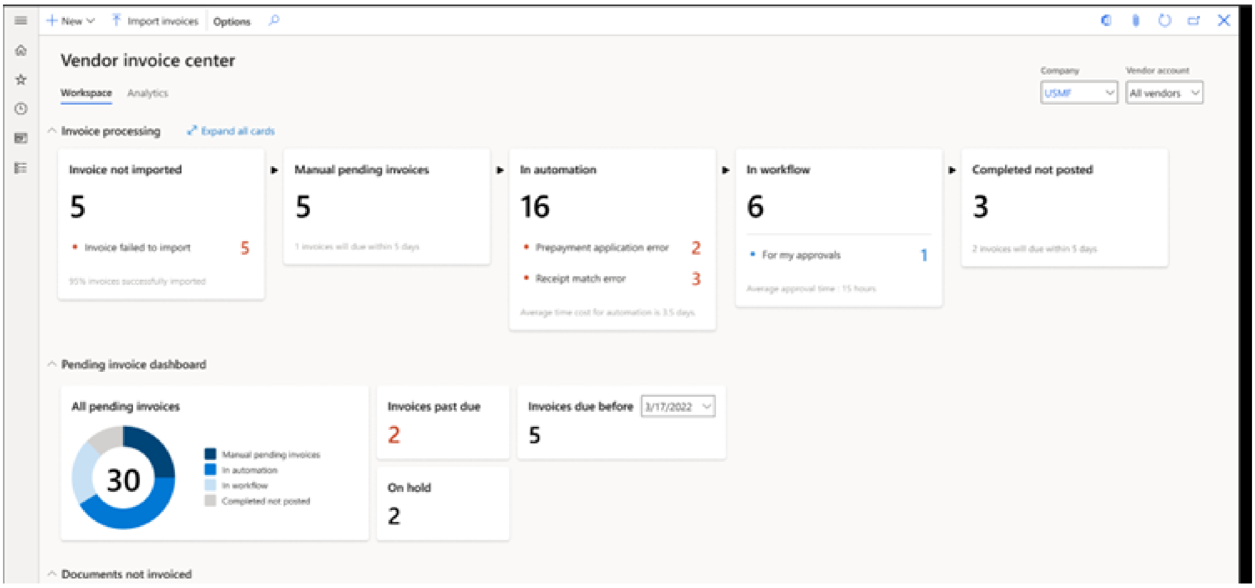
Business value

Our goal is to provide customers with a comprehensive vendor invoice automation solution. While the invoice automation can handle the majority of invoices, there are still some exceptional cases that require user intervention. Our new workspace will provide an intuitive view of all the pending vendor invoices in various processing status, allowing accounts payable clerks to easily identify and correct exceptional invoices.

Feature details

The workspace will be the central place for accounts payable clerks to do their routine work. Different features will be added piece by piece.

In 2023 release wave 2, the workspace can display all pending vendor invoices with various statuses during invoice automation. Accounts payable clerks can quickly identify exceptional invoices and make corrections. In future releases, the workspace will include invoice journals and provide better insight about the automation rate of invoice processing.


New
Import invoices
Options
Vendor invoice center
Workspace
Analytics
Company
USMF
Vendor account
All vendors
Invoice processing
Expand all cards
Invoice not imported
5
Invoice failed to import
5
Manual pending invoices
5
In automation
16
Prepayment application error
2
Receipt match error
3
In workflow
6
For my approvals
1
Completed not posted
3
Pending invoice dashboard
All pending invoices
30
Manual pending invoices
In automation
In workflow
Completed not posted
Invoices past due
2
Invoices due before
3/17/2022
5
On hold
2
Documents not invoiced

Net customer and vendor balances

Article • 11/15/2023

ⓘ Important

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Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 2, 2023	To be announced

Business value

Netting can minimize the exchange of money between an organization and the customer/vendor party. It can help a company avoid making unnecessary payments or receipts, and save on transaction fees, by consolidating the company's customer and vendor balances.

Feature details

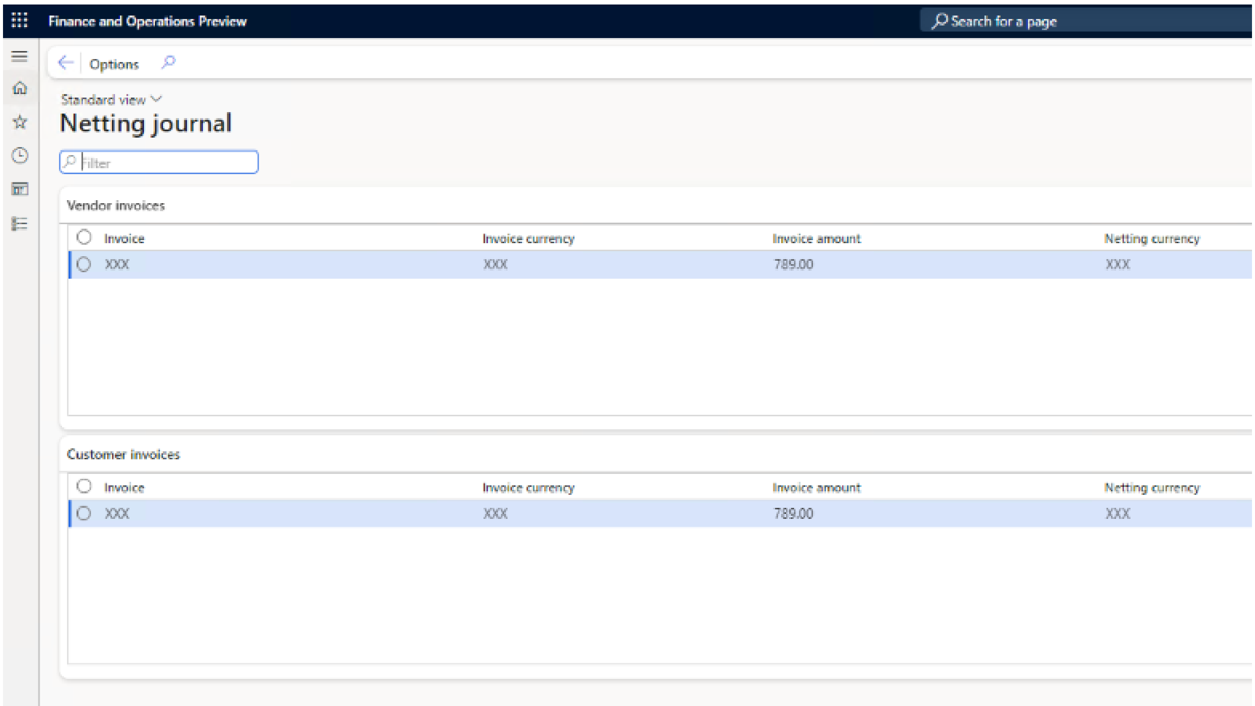
Customer and vendor balance netting is a process where the balances for a vendor and customer are netted against each other because the vendor and customer are the same party. Currently, to process a netting in Dynamics 365 Finance, cash clerks have to manually calculate the correct netting amount, create dummy payment journals, and settle open customer invoices and open vendor invoices with the dummy payment journals.

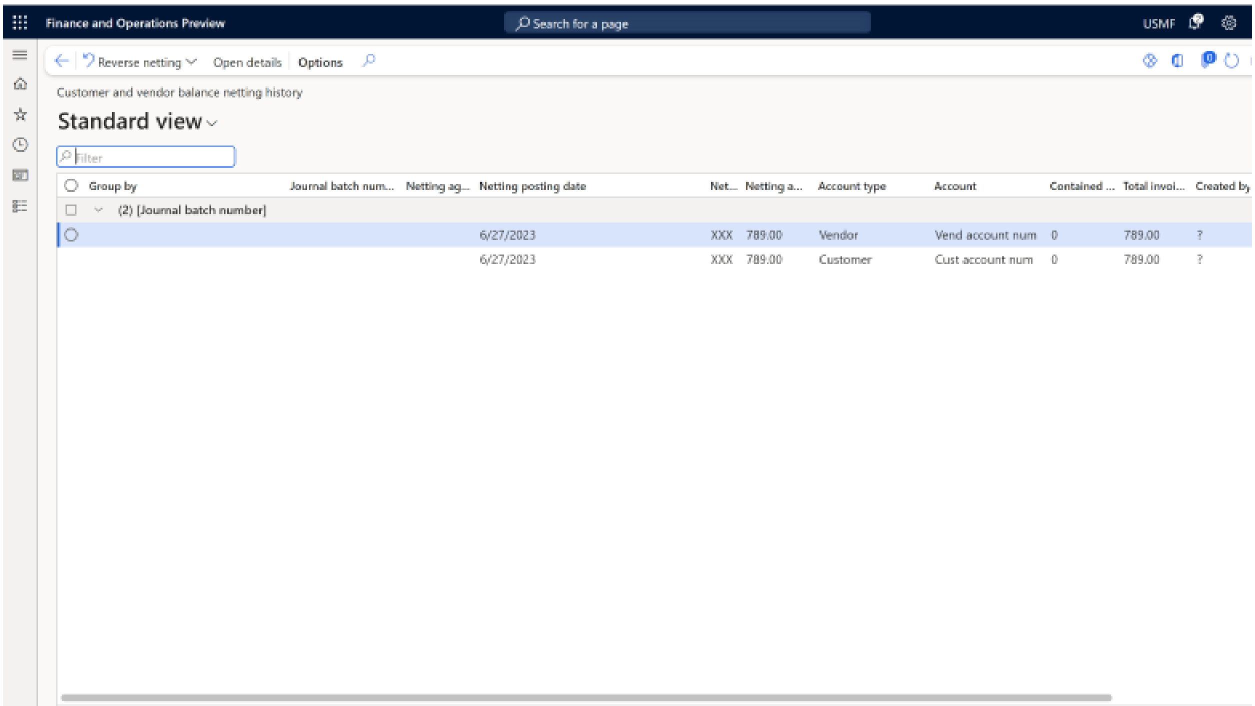
This feature provides standard netting capability in Dynamics 365 Finance. It automates the netting process by calculating the netting amount based on the selected customer and vendor invoices, posting netting journal, settling the netting journal with selected customer invoices and vendor invoices.

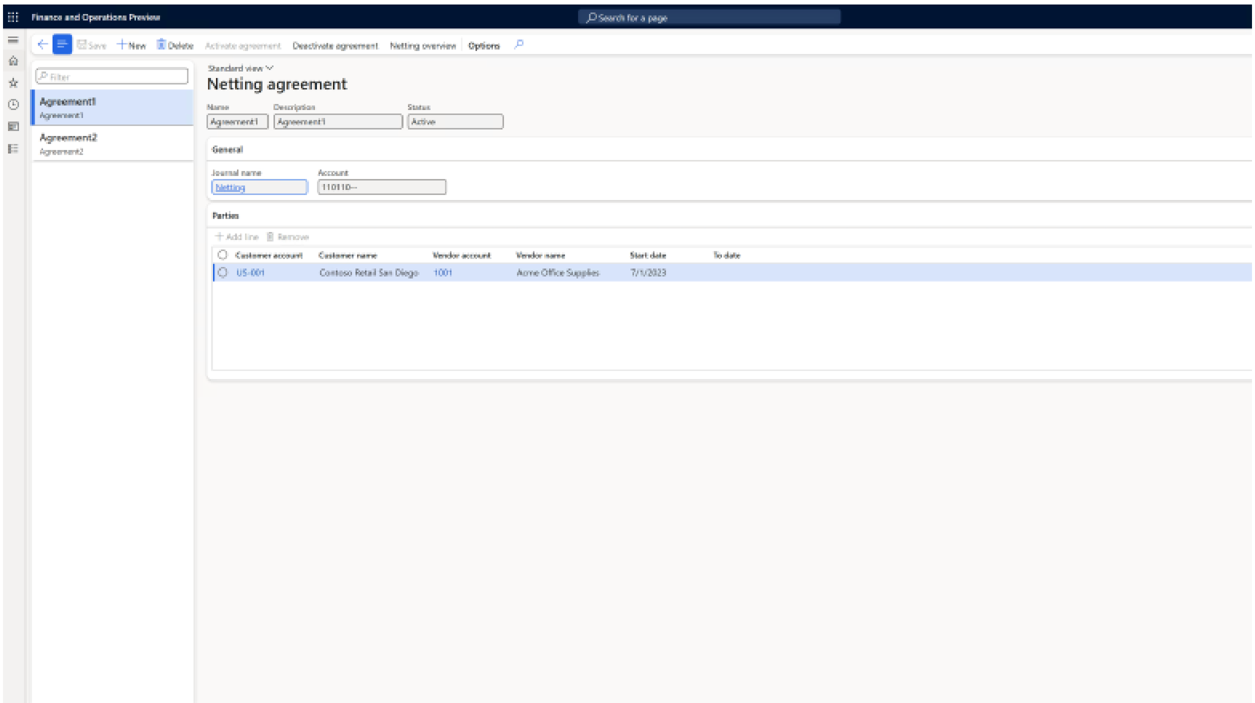
The following functions are provided in this feature for all countries and regions:

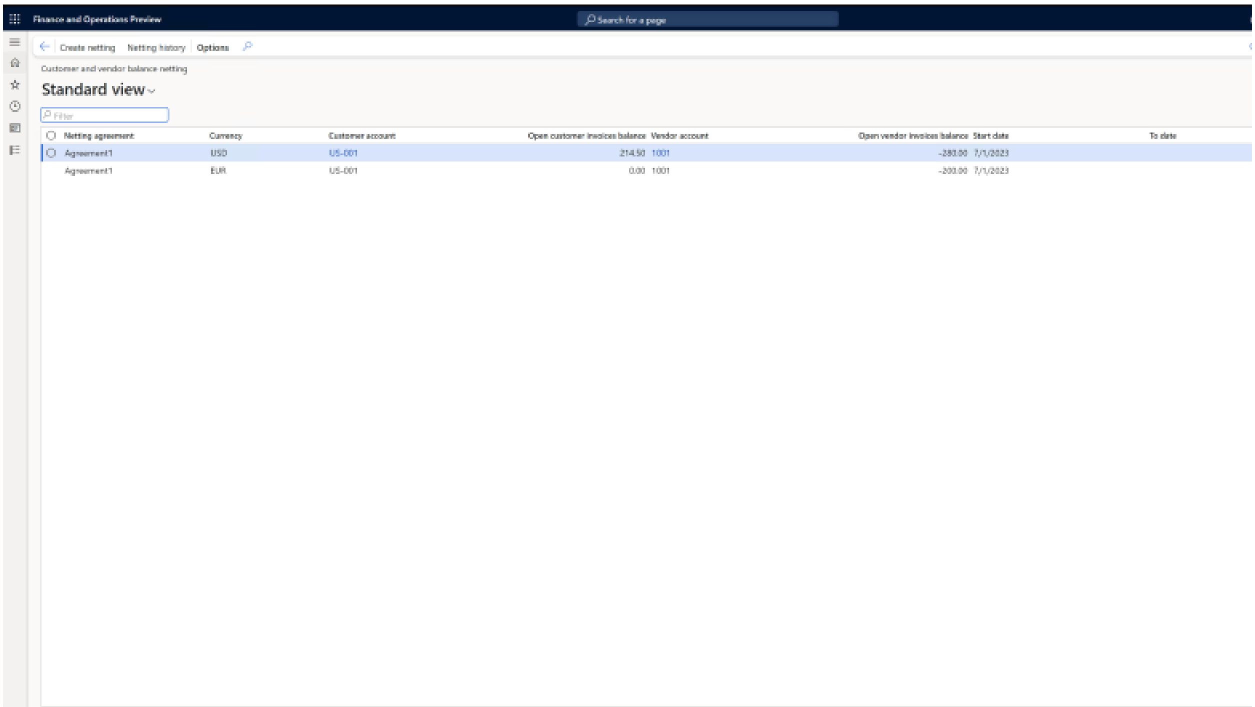
- **Netting agreement**: Netting agreement allows users to specify the customer and vendor pair for netting, and other parameters like effective date range, netting sequence to automate the netting process and minimize compliance risks.

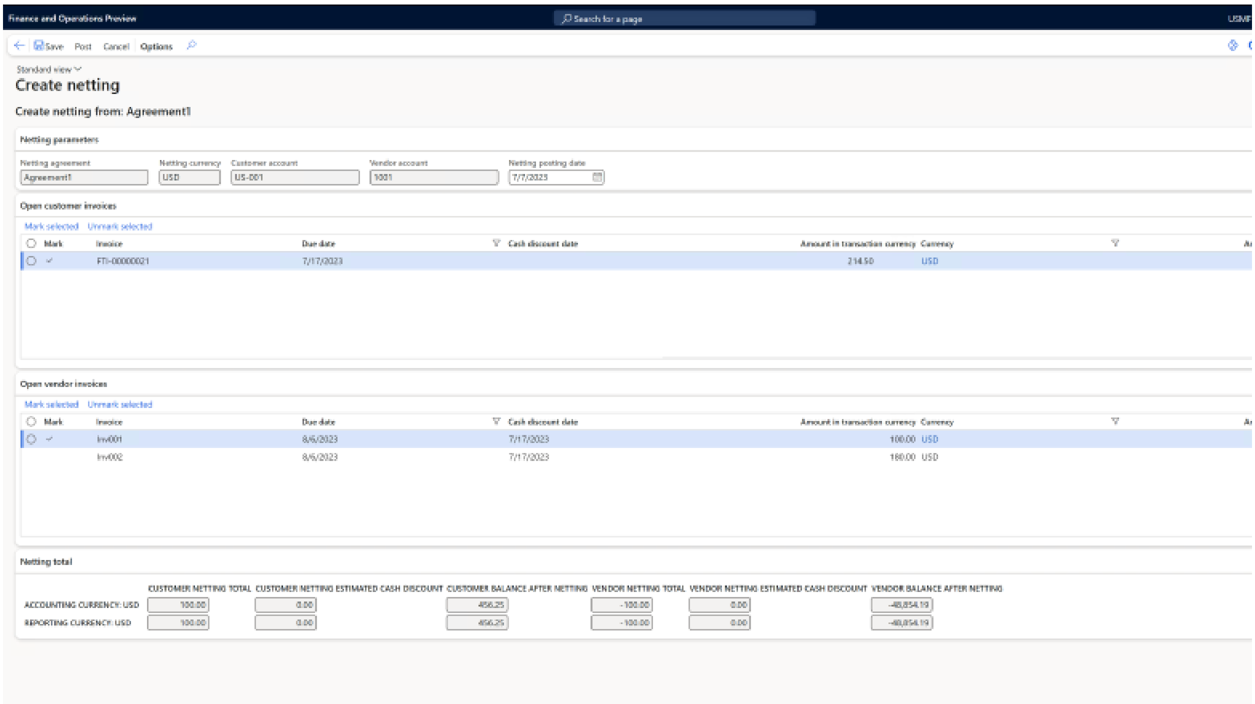
- **Netting overview**: Netting overview allows users to query all the available customer invoices and vendor invoices for netting.
- **Manual netting**: Users can manually select the customer invoices and vendor invoices for netting. A netting journal will be posted automatically and settle the open invoices.
- **Automatic netting**: Users can run periodical task and process automation to trigger the netting process automatically.
- **Netting history**: A page will be available to query all the netting history.
- **Netting details**: A page will be available to view netting relations between customer invoices and vendor invoices.
- **Netting advice**: A report will be available to print the netting relation details between customer invoices and vendor invoices.








Finance and Operations Preview
Search for a page
Create netting
Netting history
Options
Customer and vendor balance netting
Standard view
Filter
Netting agreement
Currency
Customer account
Open customer invoices balance
Vendor account
Open vendor invoices balance
Start date
To date
Agreement1 USD US-001 214.50 1001 -280.00 7/1/2023
Agreement1 EUR US-001 0.00 1001 -200.00 7/1/2023


Finance and Operations Preview
Search for a page
Save
Post
Cancel
Options
Standard view
Create netting
Create netting from: Agreement1
Netting parameters
Netting agreement
Netting currency
Customer account
Vendor account
Netting posting date
Agreement1
USD
US-001
1001
7/7/2023
Open customer invoices
Mark selected
Unmark selected
Mark
Invoice
Due date
Cash discount date
Amount in transaction currency
Currency
FTI-00000021 7/17/2023 214.50 USD
Open vendor invoices
Mark selected
Unmark selected
Mark
Invoice
Due date
Cash discount date
Amount in transaction currency
Currency
Inv001 8/6/2023 7/17/2023 100.00 USD
Inv002 8/6/2023 7/17/2023 180.00 USD
Netting total
CUSTOMER NETTING TOTAL
CUSTOMER NETTING ESTIMATED CASH DISCOUNT
CUSTOMER BALANCE AFTER NETTING
VENDOR NETTING TOTAL
VENDOR NETTING ESTIMATED CASH DISCOUNT
VENDOR BALANCE AFTER NETTING
ACCOUNTING CURRENCY: USD 100.00 0.00 456.25 -100.00 0.00 -48,854.19
REPORTING CURRENCY: USD 100.00 0.00 456.25 -100.00 0.00 -48,854.19

Netting advice

Date of compensation 7/1/2023

Customer account DE-010

A.Datum Corporation

Lilienweg 9
24103 Kiel
deu

Vendor account DE-001

Opal Audio

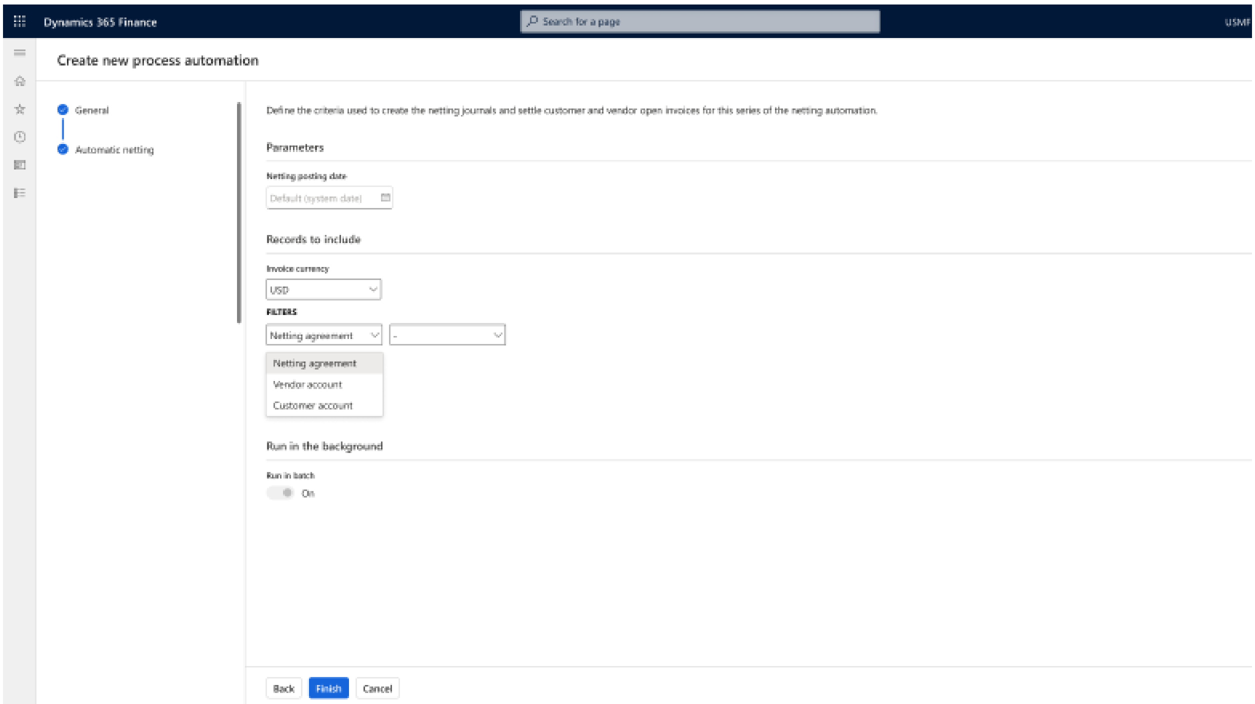
Rebhuhnweg 45
79539 Berlin
DEU

Customer transactions

Invoice	Transaction date	Due date	Voucher	Transaction text	Currency	Amount currency	To settle	Settled
CIV-000163	1/18/2017	2/17/2017	INV-10000162		EUR	2,082.33	2,082.33	571.39
						Total	2,082.33	571.39

Vendor transactions

Invoice	Transaction date	Due date	Voucher	Transaction text	Currency	Amount currency	To settle	Settled
TESTINT001	7/4/2023	7/14/2023	PIV-110000056		EUR	-571.39	-571.39	-571.39
						Total	-571.39	-571.39
						Netting amount		571.39



Tell us what you think

Help us improve Dynamics 365 Finance by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://experience.dynamics.com/ideas/idea/?ideaid=c1f0b1fc-0c8a-ea11-99e5-0003ff68a4b4 .

Generate payment journal, settle open invoices directly from bank reconciliation

Article • 01/15/2024

ⓘ Important

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

Expand table

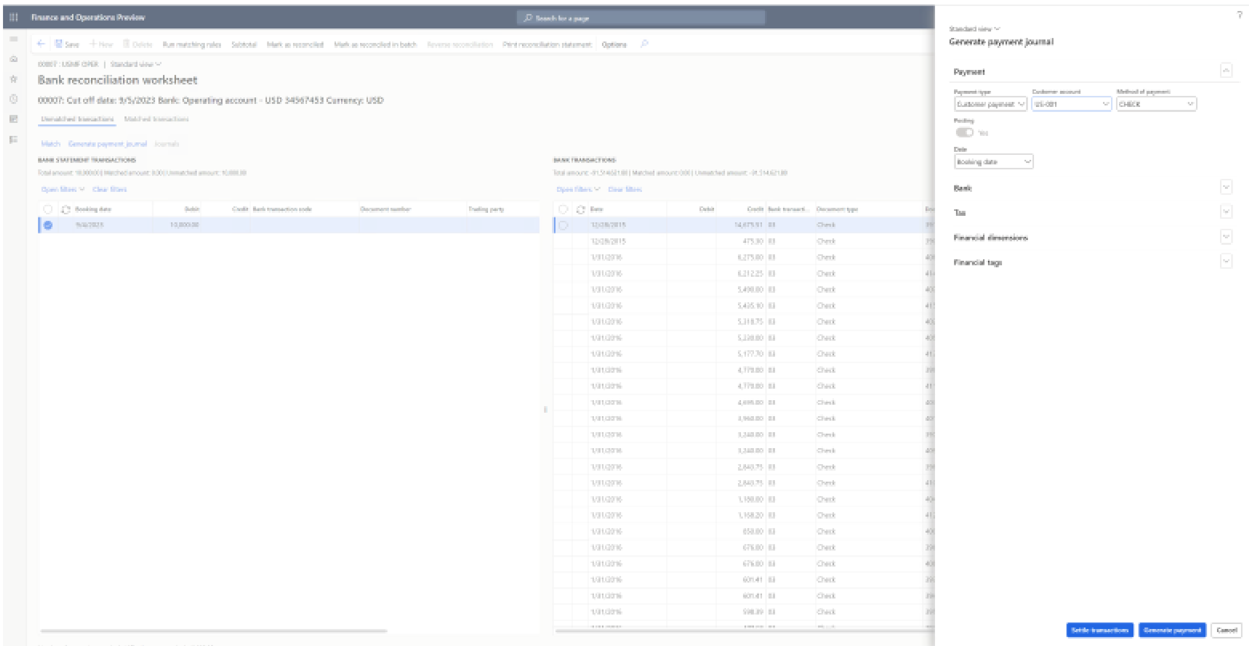
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jan 12, 2024	-

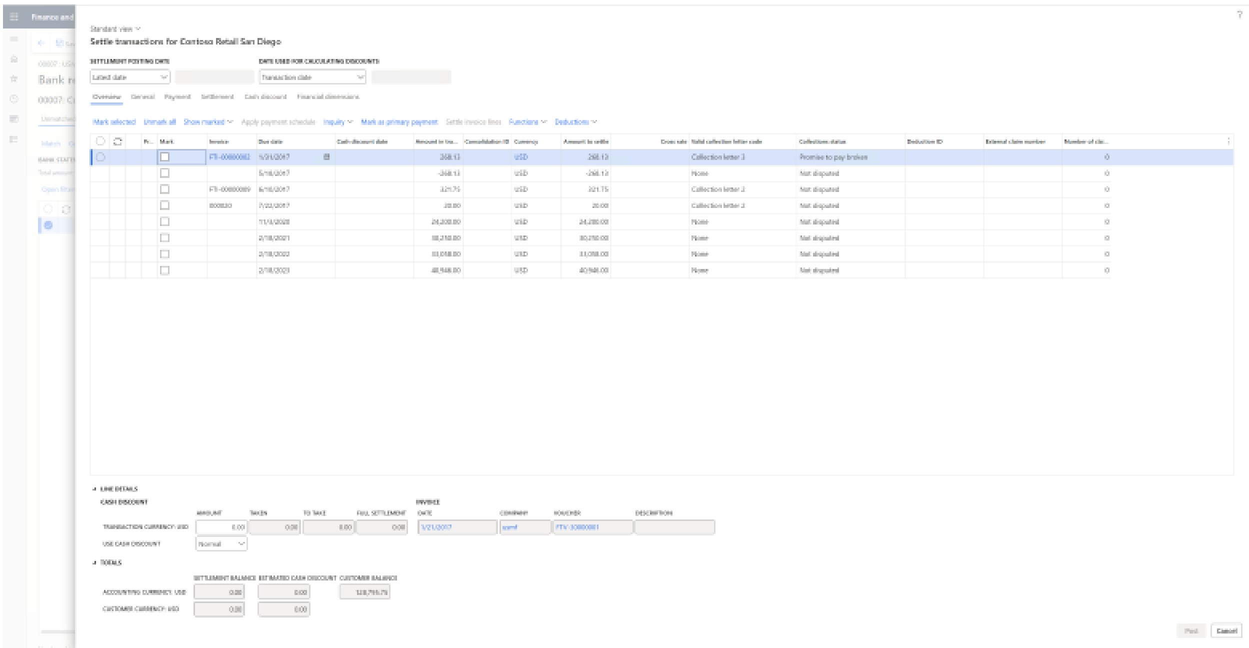
Business value

This feature greatly improves the usability of bank reconciliation by reducing the number of manual steps.

Feature details

In bank reconciliation worksheets, this feature lets users generate customer payment journals and vendor payment journals, and settle open customer invoices directly. There's no need to navigate back to the accounts payable or accounts receivable modules to post and settle payment journals manually, then reconcile the records in cash and bank module. It reduces the number of manual steps and allows users to complete an end-to-end scenario in a single location.


Finance and Operations Preview
Bank reconciliation worksheet
Generate payment journal
Payment
Bank
Tax
Financial dimensions
Financial tags
Settle transactions
Generate payment
Cancel


Settle transactions for Contoso Retail San Diego
Post
Cancel

Handle periodically recurring invoices

Article • 01/19/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Dec 29, 2023

Business value

This feature eliminates a large functional gap about recurring invoices in accounts payable. Customers will be able to handle periodically recurring invoices, like monthly electricity prepayment invoices or monthly insurance.

Feature details

This feature allows users to set up recurring automatic Accounts Payable invoices. The setup includes options for specifying the frequency and amount of the recurring invoice. Once set up, an Accounts Payables invoice will be automatically generated and posted according to the specified schedule, without requiring any manual intervention.

Import bank statement automatically

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 27, 2023

Business value

With this feature, manual upload of bank statements can be replaced by a batch job. This will save considerable effort for the accounting team.

Feature details

Before, when bank statement files arrived, users had to upload them manually. With this new feature, bank statement files can be shared in a SharePoint folder. A periodical batch job can be scheduled to pick up the bank statement files and upload them automatically.

See also

Set up cash and bank management parameters (learn)

Integration with custom prebuilt model in Invoice capture

Article • 01/17/2024

ⓘ Important

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Expand table

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

Business value

This feature allows customers to replace the default prebuilt model by using a custom prebuilt one, improving the recognition for complex invoices, extracting the additional custom fields, increasing the overall touchless rate for the invoice processing and seamline process between invoice capture and Dynamics 365 Finance.

Feature details

This feature gives the administrator the capability to replace the out-of-the-box prebuilt model in Invoice capture with a custom prebuilt model for OCR recognition. Customers often receive the invoices with complex layout and the prebuilt model can't return an accurate recognition result. Accounts payable has to spend a lot of effort to review and correct such invoices. To improve the ability of recognizing such complex invoices, administrators can create a custom prebuilt model in AI Builder document processing by completing the steps of uploading the sample invoices, tagging the fields, and training and publishing the model. When the custom prebuilt model is ready, the prebuilt model can be replaced by selecting the one from the dropdown list.

Moreover, the custom prebuilt model empowers users to define and extract additional fields that are not provided by the default prebuilt model. The additional field mapping between model and invoice is required to be built in the configuration. The fields can then be automatically extracted and seamlessly transferred from Invoice capture to Dynamics 365 Finance to meet the needs of their unique business.

Post new transactions directly from bank reconciliation

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 2, 2023

Business value

This feature greatly improves the usability of bank reconciliation by reducing the number of manual steps.

Feature details

With this new feature, in bank reconciliation worksheets, users can mark new transactions like bank fees and interest and directly post them. There's no need to navigate back to the bank statement. Users will be able to check the posted vouchers directly in the bank reconciliation worksheet.

See also

Use cash and bank processes (learn)

Support customer refunds with credit transfer format

Article • 12/19/2023

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Oct 2, 2023

Business value

This feature eliminates a functional gap in customer refunds. Before, customers used a manual and time-consuming workaround. There wasn't a way to refund clients directly from the customer payments journal when it came to the ISO 20022 credit transfer format. In such cases, users are compelled to go through multiple steps to generate payment files from accounts payable transactions. This new feature generates payment files for customers in the ISO 20022 credit transfer format based on accounts payable transactions. You may use ISO 20022 credit transfer formats if you need to generate SEPA or generic ISO 20022 payments.

Feature details

With this feature, users can issue customer refunds and generate payment files with ISO 20022 credit transfer format in customer payments journals.

The ISO 20022 credit transfer is a messaging standard developed by the ISO for financial transactions and defining a format for electronic payment instructions. Messages in ISO 20022 credit transfer format are used to transfer funds from one bank account to another. The standard allows banks and financial institutions to transmit payment instructions in a consistent and structured way with a reduced number of errors and increased efficiency.

The ISO 20022 credit transfer messages can be used for both domestic and cross-border payments and can be sent using various communication channels such as SWIFT, XML, and web services. The adoption of ISO 20022 credit transfer messages is becoming increasingly widespread, and many countries and financial institutions are migrating to this standard to improve their payment processing systems.

This feature introduces **ISO 20022 credit transfer** format in the **Customer payments journal** in the following scenarios:

- Refund or reimbursement with credit note.
- Refund of prepayment by using payment proposal.
- Manual refund.

See also

Deposits and refunds (learn)

Support more complex bank reconciliation matching rules

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 2, 2023

Business value

Bank reconciliation helps the matching between bank statement lines and bank transactions to track and verify the accounting entry and transaction detail. With matching rules, bank reconciliation can be automated. In earlier releases, only a 1:1 matching rule is supported, which can cover only a small ratio of automation. With more complex matching rules, the reconciliation process can be further automated.

Feature details

With this new feature, users can define more complex matching rules between multiple bank statement lines and multiple bank account transactions. Automatic bank reconciliation matching will be done for the following scenarios:

- 1:N - One bank statement line matches with multiple bank transactions
- N:1 - Multiple bank statement lines match with one bank transaction
- M:N - Multiple bank statement lines match with multiple bank transactions

See also

Use cash and bank processes (learn)

Use bank foreign currency revaluation enhancements

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 2, 2023

Business value

The bank foreign currency revaluation (bank FCR) will be enhanced in two ways. First, we will allow an organization to define whether to use all or no financial dimensions when calculating the unrealized gain or loss. This is one of the top 10 feature requests for the Cash and bank management module. This will reduce the number of lines included in the accounting entries for each bank FCR.

Second, the calculation of the unrealized gain or loss will change. The change will allow organizations to give a clear definition of the calculation to their auditors, while also preventing the scenario for some organizations where large amounts were posted to different dimensions as the result of all debits for cash being posted to one dimension but the credits being posted to a different dimension. This will also ensure that a gain or loss is calculated correctly for periods where no new transactions are posted for a specific set of dimensions.

Feature details

The new feature allows an organization to select either **All** or **None** for which dimensions should be used for calculating the unrealized gain or loss. Because the bank FCR calculates the gain/loss on the total of the bank account, and not per transaction like AR and AP, the choice of using **All** or **None** is defined at a setup level. After selecting the dimension level and completing the change, a cleanup process must be run to reverse the gain or loss balance from the previous FCRs.

The cleanup process can also be run if the dimension setting isn't changed but instead your organization had large amounts distributed to different dimension values due to cash being debited to one dimension value but credited to a different dimension value. The process will reverse the large amounts, bringing the gain or loss to zero. It's important to note that this cleanup process does not reverse any accounting entries from previous revaluations. It simply gets the gain or loss amount to zero, giving a clean slate for the calculation when the next bank FCR is run.

The second change is to the calculation method for the revaluation. The calculation will now determine the balance of the bank account, either with all financial dimensions or no financial dimensions, and then calculate the unrealized gain or loss per ledger account. Previously, the calculation would determine the total gain or loss and then allocate the amount to each set of financial dimensions.

Globalization Studio

Article • 11/20/2023

ⓘ **Important**

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

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

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

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

For more information on Globalization Studio, go to Globalization Studio documentation.

Electronic invoicing – German XRechnung format update to version 3

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Dec 14, 2023

Business value

Global and local customers who deploy Dynamics 365 Finance and Dynamics 365 Supply Chain Management in Germany can access a configurable electronic invoice in an updated format that meets local German requirements.

Feature details

This feature satisfies the German-specific requirements for implementing XRechnung version 3. You can export a customer invoice created from a sales order, free text invoice, or project invoice proposal into XML format that complies with updated German electronic invoicing standards.

Electronic Invoicing service - Global e-invoicing ISV last-mile connector

Article • 01/11/2024

Expand table

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

Business value

Electronic invoicing is a fast-growing market, driven by tax digitization and invoice automation. While we deliver end-to-end automated regulatory e-invoicing that integrates directly with the government services in several countries, some governments require intermediate certified operators to exchange electronic invoice documents with tax authorities and between businesses. This connector provides a fully automated end-to-end experience so that you only need one global e-invoice last-mile provider.

Feature details

This feature delivers a connector with a global ISV's e-invoice connectivity services to:

- Provide a fully automated end-to-end regulatory e-invoicing experience for the countries where governments require intermediate certified operators.
- Extend e-invoicing coverage for non-Microsoft localized countries.
- Provide access to the E-Invoicing Exchange Frameworks, such as Open PEPPOL in Europe, to route electronic invoices created by using the Electronic Invoicing service.

Electronic invoicing – Waybill (Carta Porte) update to version 3

Article • 01/11/2024

Expand table

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

Business value

Global and local customers who deploy Dynamics 365 Finance and Dynamics 365 Supply Chain Management in Mexico can use the updated version 3.0 of Waybill (Carta de Porte) Complement integrated into the current electronic invoices (CFDI) to meet legal Mexican requirements.

Feature details

This feature satisfies the Mexican requirements for electronic invoicing (CFDI) implementing a new version 3.0 of Waybill (Carta de Porte) Complement integrated into the current electronic invoices (CFDI).

Enable the electronic reporting format destinations dialog box

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jul 31, 2023	✔ Oct 2, 2023

Business value

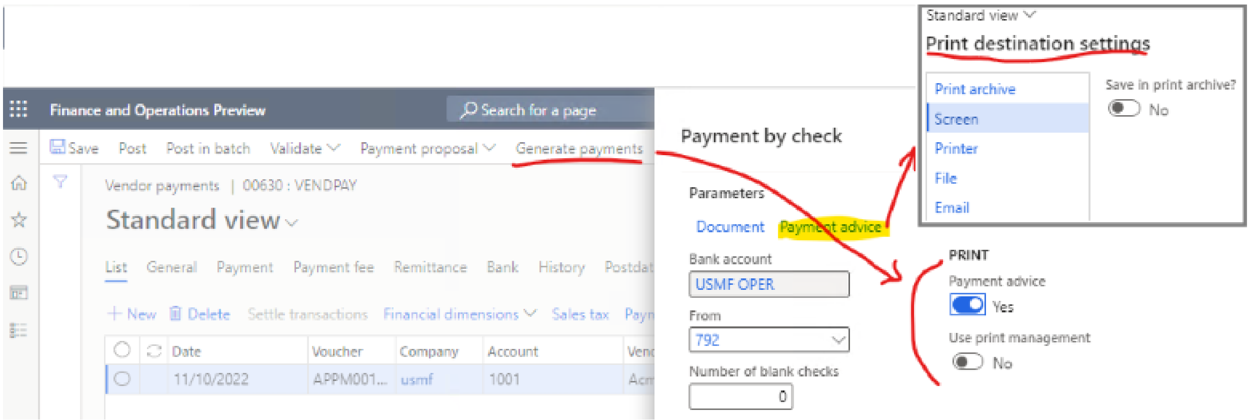
There are times when a business document needs a specific destination other than those destinations that were configured for the running electronic reporting (ER) format. For some transactions, you may need to overwrite the ER destination setup by sending the document to a different email recipient or using a different ER destination.

Feature details

This feature enables selecting ER destinations for the next set of supported out-of-the-box configurable business documents, covering all of Accounts Receivable. The following documents are covered:

- Customer invoice
- Sales quotation
- Sales quotation confirmation
- Sales order packing slip
- Sales order confirmation
- Sales agreement confirmation
- Picking list

To learn more about the original set of documents where this functionality had been enabled, see Change action-dependent ER destinations at runtime.


Finance and Operations Preview
Search for a page
Save
Post
Post in batch
Validate
Payment proposal
Generate payments
Vendor payments | 00630 : VENDPAY
Standard view
List
General
Payment
Payment fee
Remittance
Bank
History
New
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Settle transactions
Financial dimensions
Sales tax
Date
Voucher
Company
Account
11/10/2022
usmf
1001
Payment by check
Parameters
Document
Payment advice
Bank account
USMF OPER
From
792
Number of blank checks
0
Standard view
Print destination settings
Print archive
Screen
Printer
File
Email
Save in print archive?
No
PRINT
Payment advice
Yes
Use print management
No

Expand localization for LATAM countries - Colombia

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 22, 2023	To be announced

Business value

Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.

Feature details

We continue to extend the scope of the supported countries in LATAM to address the needs of multiple global and local customers. Out-of-the box localization for Colombia is available for preview. While the country localization will provide the following capabilities, not all of them might be available for preview.

Country-specific features for Colombia

- 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 reporting
        - Declaration reports trial balance
        - Declaration reports General ledger
        - File export file format 1001 - PAGOS O ABONOS EN CUENTA Y RETENCIONES PRACTICADAS
        - File export file format 1003 - RETENCIONES EN LA FUENTE QUE LE PRACTICARON
        - File export file format 1005 - IMPUESTO A LAS VENTAS POR PAGAR - DESCONTABLE
        - File export file format 1006 - IMPUESTOS A LAS VENTAS POR PAGAR (GENERADO) E IMPUESTO AL CONSUMO
        - File export file format 1007 - INGRESOS RECIBIDOS
        - File export file format 1008 - SALDOS POR CUENTAS A COBRAR
        - File export file format 1009 - SALDOS POR CUENTAS A PAGAR
        - File export file format 1012 - INFORMACION DE LAS DECLARACIONES TRIBUTARIAS, ACCIONES Y APORTES E INVERSIONES EN BONOS, CERTIFICADOS, TITULOS Y DEMAS INVERSIONES TRIBUTARIAS

See also

Colombia overview (docs)

Expand localization for LATAM countries - Guatemala

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 22, 2023	To be announced

Business value

Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.

Feature details

We continue to extend the scope of the supported countries in LATAM to address the needs of multiple global and local customers. Out-of-the box localization for Guatemala is available for preview. While the country localization will provide the following capabilities, not all of them might be available for preview.

Country-specific features for Guatemala

- Invoicing
  - Electronic Invoicing
    - Electronic Invoice format
  - Other invoicing

- Invoicing from sales order invoice, free text invoice, and project invoice

- Reporting
  - General ledger and tax reports
    - Declaration reports general ledger
    - Declaration reports trial balance
    - Declaration reports sales VAT book
    - Declaration reports purchases VAT book

See also

Guatemala overview (docs)

Expand localization for LATAM countries - Paraguay

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 22, 2023	To be announced

Business value

Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.

Feature details

We continue to extend the scope of the supported countries in LATAM to address the needs of multiple global and local customers. Out-of-the box localization for Paraguay is available for preview. While the country localization will provide the following capabilities, not all of them might be available for preview.

Country-specific features for Paraguay

- 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 sales VAT book
        - Declaration reports purchases VAT book
        - Declaration reports trial balance

See also

Paraguay overview (docs)

Expand localization for LATAM countries - Uruguay

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 22, 2023	To be announced

Business value

Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.

Feature details

We continue to extend the scope of the supported countries in LATAM to address the needs of multiple global and local customers. Out-of-the box localization for Uruguay is available for preview. While the country localization will provide the following capabilities, not all of them might be available for preview.

Country-specific features for Uruguay

- 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 trial balance
    - Declaration reports General ledger
    - Purchase VAT book
    - Sales VAT book

See also

Uruguay overview (docs)

Expand localization for LATAM countries - Chile

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Nov 30, 2023

Business value

Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.

Feature details

We continue to extend the scope of the supported countries in LATAM to address the needs of multiple global and local customers. Out-of-the box localization for Chile is available. The country localization provides the following capabilities.

Country-specific features for Chile

- Invoicing
    - Electronic invoicing
        - Ability to emit a DTE receival reply
        - Ability to import a purchase invoice from a vendor (Factura de Compras)
        - Electronic Invoice format (Factura de Ventas)
        - Export Invoice (Factura de Exportación)
        - Shipment (Guía de Despacho)
        - Debit and credit note - Export (Nota de Débito & Crédito Exportación)
        - Debit note and credit note (Nota de Débito & Nota de Crédito)
    - Other invoicing
        - Invoice layout for sales order invoice, free text invoice, and project invoice

- Reporting
    - General ledger and tax reporting
        - Numbered General ledger book
        - Numbered ledger book
        - T8 Columns trial balance
        - Inventory and balance sheet book
        - Fees certificate report
        - Purchase VAT book
        - Sales VAT book
        - Sales per branch VAT book
        - Withholdings book

Expand localization for LATAM countries - Costa Rica

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Nov 30, 2023

Business value

Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.

Feature details

We continue to extend the scope of the supported countries in LATAM to address the needs of multiple global and local customers. Out-of-the box localization for Costa Rica is available. The country localization provides the following capabilities.

Country-specific features for Costa Rica

- 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 trial balance
    - Declaration reports general ledger
    - Declaration reports purchases VAT book
    - Declaration reports sales VAT book

Expand localization for LATAM countries - Nicaragua

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Nov 30, 2023

Business value

Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.

Feature details

We continue to extend the scope of the supported countries in LATAM to address the needs of multiple global and local customers. Out-of-the box localization for Nicaragua is available. The country localization provides the following capabilities.

Country-specific features for Nicaragua

- Reporting
  - General ledger and tax reporting
    - Declaration reports General ledger
    - Declaration reports sales VAT book
    - Declaration reports purchases VAT book
    - Declaration reports trial balance

Expand localization for LATAM countries - Panama

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Nov 30, 2023

Business value

Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.

Feature details

We continue to extend the scope of the supported countries in LATAM to address the needs of multiple global and local customers. Out-of-the box localization for Panama is available. The country localization provides the following capabilities.

Country-specific features for Panama

- 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 sales VAT book
    - Declaration reports purchases VAT book
    - Declaration reports trial balance

See new capabilities in the Tax Calculation service

Article • 11/15/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 2, 2023

Business value

The digitalization of tax and the steady stream of indirect tax regulations that global businesses encounter, such as sales tax, VAT, and GST, have further complicated existing processes by introducing new industry and compliance risks that challenge leaders in every global enterprise.

The Tax Calculation service allows you to improve compliance with associated local regulations. The new, configurable microservice enhances the tax determination and calculation capabilities in Dynamics 365 Finance. Tax calculation is fully integrated out of the box, and enables you to:

- Automate and standardize tax determinations and calculations across countries or regions.
- Use a configurable tax determination matrix and flexible calculation designer to configure and execute complex tax determination rules and calculations by using formulas and conditions.
- Simplify compliance maintenance for local tax regulations.

With the integration between the Tax Calculation service and the invoice register, invoice approval, and invoice pool, you can leverage the existing and future tax determination and calculation features on these transactions.

Feature details

The Tax Calculation service integrates with the following Dynamics 365 Finance transactions to provide the full capabilities of enhanced tax determination and calculation:

- Invoice register
- Invoice approval
- Invoice pool

Thank you for your idea

Thank you for submitting this idea:

- Support invoice register/approval/pool in Tax Calculation service

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Tax Calculation overview (docs)

Simplify integration with tax solution ISVs

Article • 11/15/2023

ⓘ Important

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

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

Business value

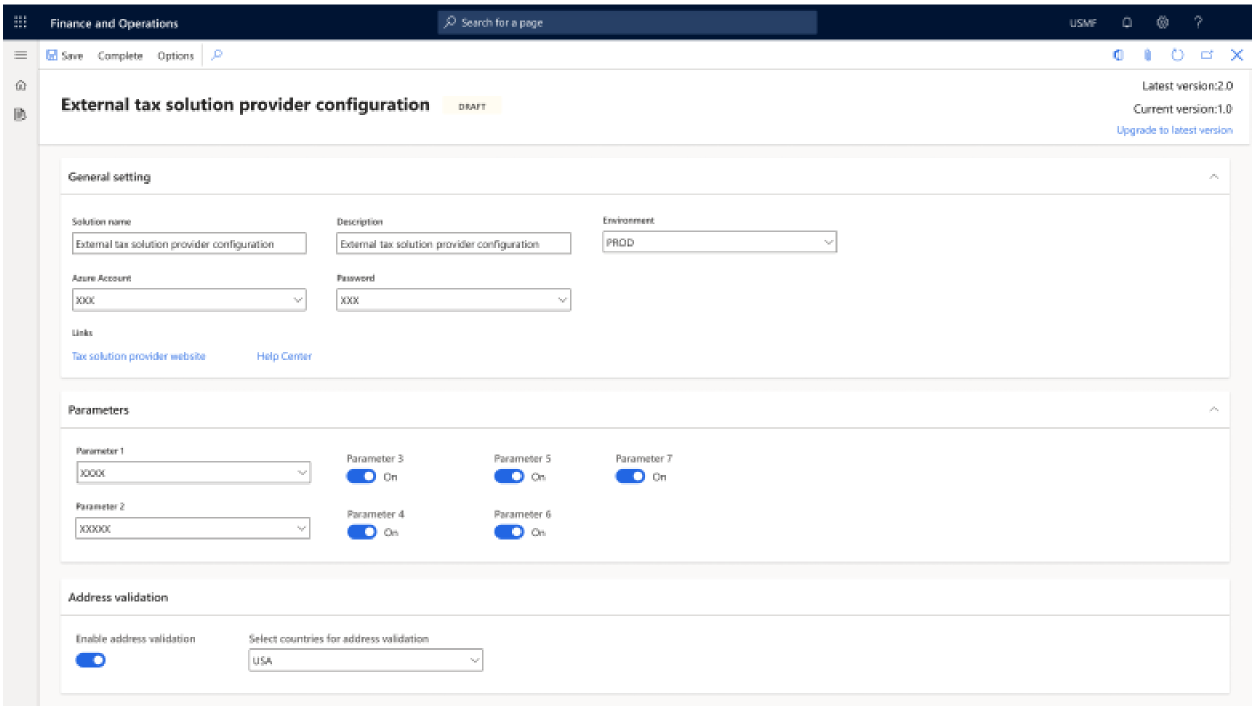
Implementors in countries like the United States, and enterprise customers operating in many different tax jurisdictions, must often manage a large variety of tax rates and complex tax determination rules. In these cases, customers may look for ISV tax solutions with automatic tax rate determination and tax amount calculation. These tax solution providers build the integration with Dynamics 365 Finance to automate the tax determination and calculation. This feature provides one generic tax calculation API to ISV tax solution providers, which can significantly simplify the complexity of the integration, reduce the entry bar for ISV tax solution providers to build their own connectors, and provide Dynamics 365 Finance customers with more options.

Feature details

The following functions are supported in the Tax Calculation service to support tax determination and calculation with external tax solution providers:

- External tax rates API based on a unified tax data model. This data model can be extended.
- An ISV can configure the Tax Calculation service to define endpoints, parameters, mappings, and other required components to connect with an ISV tax solution.
- Configure credentials with Azure Key Vault, ISV tax solution parameters, and other required information to enable the ISV tax solution.
- Address validation.

- Tax tolerance validation for purchase invoices.



Thank you for your idea

Thank you for submitting this idea:

- External interface with tax rate providers

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Use electronic invoicing in Australia and New Zealand

Article • 10/09/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 2, 2023

Business value

Electronic invoicing makes it easy to configure invoices in countries and regions that your business is moving into or is already doing business in. You can use electronic invoicing where there's an opportunity to process invoices in a more automated manner. With this feature, all companies can create electronic invoices that comply with PEPPOL extensions for Australia and New Zealand.

Feature details

The Australian government (Department of Treasury) has taken initiative with the Business e-Invoicing Right (BER) to push for the adoption of business-to-business (B2B) e-invoicing in Australia. While electronic invoice receipt has been mandated for government agencies in Australia since July 2022, all companies in Australia and New Zealand will be gradually encouraged to exchange e-invoices in the PEPPOL format.

With this feature, e-invoices are generated as XML files as specified for Austalia and New Zealand. These e-invoices are an extension to the PEPPOL format.

See also

Customer electronic invoices in Australia and New Zealand (docs)

Use Tax Audit SAF-T for Denmark

Article • 11/15/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 2, 2023

Business value

Businesses can use this feature to remain compliant with digital tax reporting laws in Denmark.

Feature details

In July 2022, the Danish Bookkeeping Act introduced requirements of tax audit reporting as digital files in a format of SAF-T. Businesses are expected to use this functionality to report details of their tax transactions as required by Danish tax office SKAT. This functionality also fulfills requirements for digital bookkeeping systems to become registered in Denmark as lawful accounting tools.

Thank you for your idea

Thank you for submitting this idea:

- Sales tax registration numbers in multiple European countries in one legal entity

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Standard Audit File for Tax (SAF-T) for Denmark (docs)

Use the Tax Calculation service in Project Operations

Article • 07/19/2023

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

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

Business value

The digitalization of tax and the steady stream of indirect tax regulations that global businesses encounter, such as sales tax, VAT, and GST, have further complicated existing processes by introducing new industry and compliance risks that challenge leaders in every global enterprise.

Tax Calculation allows you to improve compliance with associated local regulations. The new, configurable microservice enhances the tax determination and calculation capabilities in Dynamics 365 Finance. Tax Calculation is fully integrated out of the box. It enables you to:

- Automate and standardize tax determinations and calculations across countries or regions.
- Use a configurable tax determination matrix and flexible calculation designer to configure and execute complex tax determination rules and calculations by using formulas and conditions.
- Simplify compliance maintenance for local tax regulations.

With the integration between the Tax Calculation service and Project Operations, you can leverage the existing and future tax determination and calculation features on project transactions.

Feature details

The Tax Calculation service integrates with the following project transactions to provide the full capabilities of tax determination and calculation:

- Project invoice proposal
- Project journal
- Project integration journal

Plan and prepare for Microsoft Copilot for Finance in 2023 release wave 2

Article • 03/26/2024

> ⓘ **Important**
>
> The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. In this article, you'll find the product overview and what's new and planned for **Microsoft Copilot for Finance**.

Overview

Microsoft Copilot for Finance accelerates time-to-impact for finance professionals by surfacing insights to support strategic decision-making and reduce the time spent on manual, repetitive work. Copilot empowers finance professionals to stay in the flow of work by seamlessly connecting productivity tools, such as Microsoft Excel, with existing financial systems, such as ERP, to support critical business processes and generate insights and actions in real time. With the assistance of Microsoft Copilot for Finance, common financial tasks can now be completed in Excel and Outlook to reduce the need to sign in to ERP systems, while still maintaining financial data integrity and compliance. Copilot for Finance is integrated natively within Dynamics 365 Finance ERP and is independently adaptable to provide the flexibility to integrate with existing investments in third-party ERP and finance solutions like SAP.

Microsoft Copilot for Finance will be released for public preview as a part of 2023 release wave 2. With this release, Copilot for Finance will support the collections process and enable more streamlined data reconciliation. Users can connect to Dynamics 365 Finance directly from Outlook for easy access to valuable insights from customer data in ERP, to get help when crafting email responses, and to save communication summaries and action items for scaled impact. Users also get Copilot support to reconcile their financial data using Excel, including intelligent prompts when comparing financial data structures, automated reconciliation report creation, and auto-generated insights and suggestions on possible ways to address discrepancies. The reconciliation report summary and documented action items are automatically prepared and available for saving for future reference and audit.

Investment areas

Microsoft Excel experiences
Microsoft Copilot for Finance helps finance professionals work with financial data in Microsoft Excel without jeopardizing financial data integrity in ERP systems. Finance professionals will be able to reconcile their financial data with next-generation AI support from Copilot for Finance to compare financial data structures, create reconciliation reports, and troubleshoot and correct discrepancies.

Microsoft Outlook experiences
Microsoft Copilot for Finance experiences in Microsoft Outlook empower the accounts receivable department employees to effectively communicate with their customers. Finance professionals will be able to connect to their ERP system directly from Outlook while communicating with their customers, get valuable insights into customer data that's in ERP, get help when crafting email responses, and save communication summaries and action items back into their ERP system.

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

Check out the release plan

For application administrators

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

Features that must be enabled by application administrators
This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the

complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.

Get the most out of Microsoft Copilot for Finance

Expand table

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

What's new and planned for Microsoft Copilot for Finance

Article • 03/26/2024

This topic lists features that are planned to release from October 2023 through March 2024. 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 next wave's release plans, go to 2024 release wave 1 plan.

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

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

Microsoft Excel experiences

Microsoft Copilot for Finance enables finance professionals to perform their tasks in Microsoft Excel.

Expand table

Feature	Enabled for	Public preview	General availability
Use Excel to reconcile financial data	Users by admins, makers, or analysts	✔ Feb 29, 2024	To be announced

Microsoft Outlook experiences

Microsoft Copilot for Finance enables finance professionals to review customer financial information and communicate more efficiently using Microsoft Outlook.

Expand table

Feature	Enabled for	Public preview	General availability
Manage accounts receivable communications in Outlook	Users by admins, makers, or analysts	✔ Feb 29, 2024	To be announced

- You are able to opt into some features as part of early access on July 31, 2023, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Microsoft Excel experiences

Article • 03/26/2024

ⓘ Important

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

Microsoft Copilot for Finance helps finance professionals work with financial data in Microsoft Excel without jeopardizing financial data integrity in ERP systems. Finance professionals will be able to reconcile their financial data with next-generation AI support from Copilot for Finance to compare financial data structures, create reconciliation reports, and troubleshoot and correct discrepancies.

Use Excel to reconcile financial data

Article • 03/26/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 29, 2024	To be announced

Business value

With Microsoft Copilot for Finance, users will get support to reconcile their financial data using Excel, including intelligent financial data structures comparison, automated reconciliation report creation, insights, and suggestions on possible ways to address discrepancies. The reconciliation report summary and documented action items are automatically prepared and available for saving for the future reference and audit.

Account reconciliation is a process completed on a recurring basis (monthly, quarterly, and annually/year-end) as a part of financial period closure where we need to prove or confirm the accounting entries used are correct. Reconciliation ensures that financial records are accurate and free from errors or fraud. Control allows organizations to detect and rectify discrepancies promptly.

There are many dedicated tools to perform reconciliation, but none is as well known as Excel. With this feature, users will get support to reconcile their financial data using Excel. This includes intelligent support when comparing financial data structures, automated reconciliation report creation, and insights and suggestions on possible ways to address discrepancies. The reconciliation report summary and documented action items are automatically prepared and available for saving for future reference and audit.

Feature details

Microsoft Copilot for Finance will support the following capabilities for financial data reconciliation:

- Start a new reconciliation project.
- Get Copilot-suggested relations between data structures for reconciliation.
- Perform comparison of data structures per given auto-suggested or user-defined criteria.
- Analyze reconciliation results in the system-prepared ready report that highlights any discrepancies.
- Get support and guidance on troubleshooting and resolving any discrepancies.

Geographic areas

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

- United States

See also

Reconciliation in Excel (docs)

Microsoft Outlook experiences

Article • 03/26/2024

ⓘ Important

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

Microsoft Copilot for Finance experiences in Microsoft Outlook empower accounts receivable employees to effectively communicate with their customers. Finance professionals will be able to connect to their ERP system directly from Outlook while communicating with their customers, get valuable insights into customer data that's in ERP, get help when crafting email responses, and save communication summaries and action items back into their ERP system.

Manage accounts receivable communications in Outlook

Article • 03/26/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 29, 2024	To be announced

Business value

Microsoft Copilot for Finance is revolutionizing the collections experience for accounts receivable (AR) personnel. By integrating with Outlook, it enhances customer communications through several key features:

- Provides a summary of customer information directly from the source ERP, eliminating the need for manual data retrieval.
- Offers a summarization of inbound emails in Outlook, streamlining the communication process.
- Assists in crafting customer communication emails, ensuring clarity and professionalism.
- Serves as a single source of truth storage in the ERP for critical updates such as transactions, contact information, action items, and relevant customer communication.

This holistic approach not only optimizes the collections experience but also fosters efficiency and accuracy in AR operations.

Steady and predictable cash flow is the lifeblood of a healthy business, providing the necessary liquidity for day-to-day operations and facilitating strategic investment for growth. An effective collections process in accounts receivable plays a critical role in this context, ensuring timely inflow of revenue and thereby driving the predictability essential for financial planning and stability.

Accounts receivable professionals spend a lot of time in Microsoft Outlook responding to customer balance inquiries. They are switching between Outlook and ERP to gather the required details to perform their work and updating information back to ERP such as follow-up actions, updated contact information, and promise-to-pay dates.

Professionals in the accounts receivable department frequently toggle between Microsoft Outlook and their ERP system to respond to customer balance inquiries, gather necessary details, and update information such as follow-up actions, contact updates, and promised payment dates.

However, Microsoft Copilot for Finance aims to streamline this process significantly. It will enable employees to connect directly to their ERP system from within Outlook. While communicating with customers, accounts receivable personnel can access valuable ERP customer data, receive assistance in crafting email responses, and conveniently save communication summaries and action items back in the ERP system all while avoiding the toll of switching.

Feature details

Copilot for Finance is a game-changer for collections coordinators, offering a suite of capabilities that streamline and enhance the collections process. Integrated with Microsoft Outlook, Copilot for Finance provides an immersive experience that allows coordinators to avoid context switching while remaining in the tool they often spend most of their time in.

Here are the key capabilities of Copilot for Finance:

- **Customer insights**: Understand customer's payment behavior and preferences through a Copilot sidecar experience in Outlook.
- **Content generation for emails**: Dynamically generate business-focused email to address common inquiries or specific customer correspondence including attachments of customer invoices and customer balance summaries.
- **Save communications and notes**: Maintain a history of searchable customer communications and notes that can be related to each customer.
- **Customer contact maintenance**: Create and update contacts related to a customer directly from the copilot experience.
- **Invoice updates**: Update the payment due date and dispute status of any outstanding invoice.

Geographic areas

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

- United States

See also

Collections in Outlook overview (docs)

Plan and prepare for Dynamics 365 Supply Chain Management in 2023 release wave 2

Article • 12/21/2023

ⓘ **Important**

The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. 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/2023W2/SupplyChain

Dynamics 365 Supply Chain Management provides capabilities for end-to-end processes that manufacturers, distributors, consumer product groups, and retailers require to meet their supply chain needs. Functionality ranges from product information management, planning, inventory, sales, and procurement to complex manufacturing, asset maintenance, warehousing, and transportation management.

The investments in this release wave focus on optimizing and enhancing business processes to provide companies with the agility and resilience needed to navigate an increasingly complex business environment.

- The addition of compound charges, order classes, and advanced order holds increases the agility of the sales process.
- New export control capabilities help companies manage compliance with export restrictions.
- Businesses with sales processes spanning Dynamics 365 Sales and Supply Chain Management benefit from these being expanded to include the management of prospects.
- A new, reimagined approval experience for purchase orders and purchase requisitions makes the approval process broadly accessible and increases the agility of the procurement process.
- Manufacturers that need to comply with multiple inventory accounting practices across multiple currencies continue to benefit from enhancements being made to

the Global Inventory Accounting Add-in.

- Enhancements in material picking and handling last-minute manufacturing changes increase agility on the shop floor.
- Increased efficiency of warehouse operations is driven by the optimization and automation of key processes related to counting, customer returns, product receipts, and the re-waving of orders.
- New interfaces and streamlined processes allow companies to deploy Dynamics 365 Supply Chain Management and use only the warehouse management capabilities, making these broadly available to companies using third-party ERP or order management systems.

Updates to Dynamics 365 Supply Chain Management 2023 release wave 2

Investment areas

Copilot and AI innovation Dynamics 365 Supply Chain Management provides a rich set of capabilities for supporting organizations' business processes. The breadth of functionality means that, like most business applications, users require initial training to get started with the application and require a fair amount of experience with the product before they become proficient. With innovative in-product, generative AI-based contextual help, users are empowered to rapidly unlock the full potential of Dynamics 365 Supply Chain Management.

Inventory and logistics The inventory and logistics capabilities of Dynamics 365 Supply Chain Management enable businesses to manage their sales and fulfillment processes efficiently while ensuring inventory availability that matches the desired service levels. Investments in this area continue to focus on helping businesses gain more visibility, efficiency, and resiliency in their 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. Investments are focused on increasing flexibility and agility. Manufacturers having requirements for compliance with multiple inventory accounting practices across multiple currencies continue to benefit from enhancements to the Global Inventory Accounting Add-in. Improvements in material picking and handling last-minute manufacturing changes increase the agility on the shop floor.

Planning Planning Optimization provides significantly improved performance and scalability, which enables near real-time insights into requirement changes. We introduce a next-generation intelligent demand planning capability that is powered by best-in-class forecasting algorithms and models, offers immersive user experiences, and provides intelligent reports and analytics.

Procurement Investments in the procurement and sourcing area continue to be targeted at making organizations more agile and resilient in their supply chain operations.

Product information management Product information management enables companies to centrally manage information about products and product variants throughout their lifecycle, including the attributes, configurations, documentation, and identifiers needed for supporting critical business processes. Investments in this area are focused on helping companies that trade internationally navigate and verify compliance with the increasingly complex rules governing the export of products.

Warehouse Management The Warehouse Management solution in Dynamics 365 Supply Chain Management provides a rich and flexible set of capabilities that can be combined and configured to support many warehouse layouts and operational scenarios.

Investments continue to focus on driving efficiencies in warehouse operations through optimization and automation of key processes, including counting, customer returns, product receipts, and re-waving of orders. New interfaces and streamlined processes allow companies to deploy Dynamics 365 Supply Chain Management and use only the warehouse management capabilities, making these broadly available to companies using third-party ERP or order-management 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.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
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.

What's new and planned for Dynamics 365 Supply Chain Management

Article • 01/19/2024

This topic lists features that are planned to release from October 2023 through March 2024. 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 2023 release wave 1 plan.

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

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

Copilot and AI innovation

Reimagine the Dynamics 365 Supply Chain Management experience by leveraging generative AI.

Expand table

Feature	Enabled for	Public preview	General availability
Summarize purchase order changes for better decision making	Users by admins, makers, or analysts	✔ Jun 15, 2023	✔ Dec 4, 2023
Empower users with conversational product help and guidance	Users by admins, makers, or analysts	✔ Nov 15, 2023	-
Use natural language to check inventory with Copilot	Users by admins, makers, or analysts	Jan 2024	-
Add an AI inventory chatbot to your app or website	Users by admins, makers, or analysts	✔ Nov 14, 2023	-

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
Enhanced order processing in Pricing management	Users by admins, makers, or analysts	✔ Oct 27, 2023	-
Sell and price multiple items as a bundle	Users by admins, makers, or analysts	✔ Jul 31, 2023	✔ Oct 2, 2023
Apply compound charges to quotations and sales orders	Users by admins, makers, or analysts	✔ Oct 26, 2023	✔ Jan 12, 2024
Enable prospects in prospect-to-cash with dual-write	Users by admins, makers, or analysts	-	Mar 2024
Find products and on-hand information by attribute	Users by admins, makers, or analysts	✔ Nov 20, 2023	Jan 2024
Offset Inventory Visibility adjustments	Users by admins, makers, or analysts	Jan 2024	Mar 2024
Inventory and logistics feature state updates for 10.0.36	Users by admins, makers, or analysts	✔ Jul 31, 2023	✔ Oct 2, 2023
Manage prices with the pricing management workspace	Users by admins, makers, or analysts	✔ Oct 2, 2023	-
Integrate transportation management with Microsoft Cloud for Sustainability	Users by admins, makers, or analysts	✔ Dec 4, 2023	-
View and manage inventory with a new mobile app	Users by admins, makers, or analysts	✔ Nov 15, 2023	Feb 2024
Integrate Inventory Visibility with Dynamics 365 Commerce	Users by admins, makers, or analysts	✔ Sep 1, 2023	✔ Nov 3, 2023
Evaluate discrete manufacturing costs using standard cost	Users by admins, makers, or analysts	Feb 2024	-

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
Detect spikes and deviations in sensor data	Users by admins, makers, or analysts	✓ Oct 2, 2023	-
Manufacturing feature state updates for 10.0.36	Users by admins, makers, or analysts	✓ Jul 31, 2023	✓ Oct 2, 2023
React to last-minute changes in production	Users by admins, makers, or analysts	✓ Oct 13, 2023	✓ Jan 12, 2024
Over-pick materials for production orders and batch orders	Users by admins, makers, or analysts	✓ Oct 2, 2023	✓ Oct 20, 2023

Planning

Planning Optimization enhancements add support for additional manufacturing scenarios.

Expand table

Feature	Enabled for	Public preview	General availability
Planning feature state updates for 10.0.36	Users by admins, makers, or analysts	✓ Jul 31, 2023	✓ Oct 2, 2023
Forecast with intelligence for validated demand plans	Users by admins, makers, or analysts	✓ Oct 31, 2023	To be announced

Procurement

Procurement and sourcing capabilities help organizations increase resiliency in their supply chain.

Expand table

Feature	Enabled for	Public preview	General availability
Inform vendors about when to ship items	Users by admins, makers, or analysts	✓ Oct 13, 2023	✓ Jan 12, 2024

Feature	Enabled for	Public preview	General availability
Procurement and sourcing feature state updates for 10.0.36	Users by admins, makers, or analysts	✓ Jul 31, 2023	✓ Oct 2, 2023

Product information management

Centrally manage information about products throughout their lifecycle, including attributes and identifiers needed to manage your business processes.

Expand table

Feature	Enabled for	Public preview	General availability
Product information management feature state updates for 10.0.36	Users by admins, makers, or analysts	✓ Jul 31, 2023	✓ Oct 2, 2023

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
Operate warehouses connected to external order management systems	Users by admins, makers, or analysts	✓ Oct 27, 2023	-
Optimize the customer returns process	Users by admins, makers, or analysts	✓ Oct 13, 2023	Jan 2024
Automatically re-wave to add unfulfilled lines to new waves	Users by admins, makers, or analysts	✓ Dec 20, 2023	✓ Jan 12, 2024
Warehouse management feature state updates for 10.0.36	Users by admins, makers, or analysts	✓ Jul 31, 2023	✓ Oct 2, 2023
Optimize the inbound receiving process	Users by admins, makers, or analysts	✓ Oct 13, 2023	✓ Jan 12, 2024
Automatically update documents when	Users, automatically	✓ Sep 1,	✓ Oct 20,

Feature	Enabled for	Public preview	General availability
receiving purchase orders		2023	2023

- You are able to opt into some features as part of early access on July 31, 2023, 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.

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Copilot and AI innovation

Article • 12/21/2023

ⓘ Important

Some of the functionality described in this release plan has 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. The breadth of functionality means that, like most business applications, users require initial training to get started with the application and require a fair amount of experience with the product before they become proficient. With innovative in-product, generative AI-based contextual help, users are empowered to rapidly unlock the full potential of Dynamics 365 Supply Chain Management.

Add an AI inventory chatbot to your app or website

Article • 01/04/2024

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Nov 14, 2023	-

Business value

Customers who want to build their own copilot search experience on third-party apps or websites can easily adopt the natural language search APIs provided by inventory visibility. The APIs support natural language input and respond with products and inventory availability. They even let you check for alternative products and availability at other locations if the product is out of stock.

Feature details

This feature provides APIs that support natural-language input for product inquiries and provide information about inventory levels across locations. Many businesses run their own e-commerce websites where a conversational search experience can help customers identify the products they need, check whether they're in stock, and, when a product is out of stock, find alternative products. With natural-language APIs for product and inventory search, you can build a chatbot for your website.

Geographic areas

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

- United States

See also

Inquire into inventory with Copilot (docs)

Empower users with conversational product help and guidance

Article • 01/11/2024

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 15, 2023	-

Business value

Dynamics 365 Supply Chain Management provides a rich set of capabilities for supporting organizations' business processes. The breadth of functionality means that, as with most business applications, users require training to get started and need to acquire a fair amount of experience before they can become proficient. In the meantime, users must rely on the availability of experts, and support from partners or Microsoft along the learning journey. Now, with Copilot and innovative in-product, AI-based, contextual help, users can quickly find the information they need in their natural language to rapidly unlock the full potential of Supply Chain Management.

Feature details

Contextual, generative AI-based, in-product help will transform the user experience while catering to each user's role and daily tasks.

Users can use plain language to ask how to complete various tasks, such as:

- *How can I send my sales order to the warehouse for picking?*
- *How can I reopen a closed inventory period?*
- *How can I commence cycle counting?*

Users may also ask for help to configure business processes; for example:

- *Which fields should I fill out for an item before adding it to a sales order?*
- *How can I set up lead-time management?*

It's also possible to get information about key concepts in Supply Chain Management, such as:

- *What are storage dimensions used for?*

Copilot data processing is available in the United States and Europe, can be enabled in most countries, and supports multiple languages.

Geographic areas

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

- United States
- Europe

See also

Generative help and guidance with Copilot (docs)

Summarize purchase order changes for better decision making

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jun 15, 2023	✔ Dec 4, 2023

Business value

Every day, businesses receive many purchase order responses (often including changes) that purchasing agents must manually manage and accept. It can take time for agents to research the relevant impact information and collaboration with other stakeholders. As a result, agents may become overwhelmed and fail to fully understand and identify the impact of changes. This can lead to suboptimal decisions and failure to prevent the ripple effects of changes. Microsoft Copilot in Dynamics 365 Supply Chain Management uses AI to help prevent these issues by making purchase order changes easier to overview and manage.

Feature details

Copilot summarizes purchase order changes as they arrive in responses from vendors. It helps purchasing agents make better decisions by summarizing the downstream impact of changes, such as by identifying which planned downstream sales, production, or maintenance work orders won't be able to start as planned due to changed delivery dates. This release is available in the United States and Europe and supports major languages.

Geographic areas

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

- Germany
- Norway
- Singapore
- South Africa

- Switzerland
- United States
- Europe
- United Kingdom
- Australia
- South America
- Canada
- India
- France

See also

Review and accept changes to confirmed purchase orders (docs)

Use natural language to check inventory with Copilot

Article • 01/11/2024

ⓘ Important

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Expand table

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

Business value

Query omnichannel inventory stock levels using natural-language chat with Copilot though the Inventory Visibility service. Ask about inventory stock levels and availability just as easily as when chatting with a colleague, without needing to remember any exact specifications, IDs, or navigation paths.

Feature details

Now you can quickly check the stock levels and availability of products without signing into a separate app or memorizing complex API interactions. Instead, you can simply type a question in common English or any other supported language, just as if you were chatting with a friend.

For example, you could enter "Find all the 18-inch tires in my store" or "Check the availability of the green crystal bag-limited edition across all orgs" and get instant results. You don't need to navigate through menus, tabs, or fields, and you don't need to know the exact product IDs, location IDs, or dimensions. Just use natural language and get the information you need in seconds. Because this feature is powered by Inventory Visibility, it also provides easy access to cross-organization stock information. It provides a smart and convenient way to check your omnichannel inventory across all channels and organizations.

Geographic areas

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

- United States

See also

Inquire into inventory with Copilot (docs)

Inventory and logistics

Article • 12/21/2023

ⓘ Important

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The inventory and logistics capabilities of Dynamics 365 Supply Chain Management enable businesses to manage their sales and fulfillment processes efficiently while ensuring inventory availability that matches the desired service levels. Investments in this area continue to focus on helping businesses gain more visibility, efficiency, and resiliency in their supply chain operations.

Apply compound charges to quotations and sales orders

Article • 01/04/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✅ Oct 26, 2023	Jan 2024

Business value

Calculate surcharges based on a percentage of the full order price (including previously applied surcharges) rather than calculating from the original base amount. This capability is critical for many scenarios where the base amount on which to calculate a surcharge is dynamic and must include previously added surcharges. Companies can also set minimum surcharges to cover costs such as those associated with delivery to customers. To ensure all costs are covered and to encourage efficient ordering practices, companies can set a minimum surcharge or delivery fee for some of their customers on deliveries made on any day.

Feature details

Certain industries have complex requirements for surcharges. To address this need, support for *compound surcharges* and *minimum surcharges* is now available for sales quotations and sales orders.

Compound surcharges

Several types of compound surcharges are now supported, of which the main ones are *sequence*, *compound*, *value base*, *include tax in value base*, and *unit specific line charge*.

You can change the value base by which an auto charge is calculated by setting the charge to *compound*. When calculating a compound auto charge, the system adds all charges with a lower sequence number (as defined in the auto-charge setup) to the amount upon which the compound charge is calculated. This impacts the value of percentage-based header charges and includes line charges and the net amount across sales order and quotation lines. You can configure whether the value base includes line charges. The value base can include specific sales taxes calculated for the lines and line charges and can include other header charges and the sales tax for such charges.

You can set up an auto charge at the line level with a charge type of *Specific unit of measure* to make it possible to select a specific unit of measure (UoM) upon which a charge is applied. The specific UoM is compared with the sales order line UoM, and if UoM conversion exists, then the amount is applied relative to the UoM conversion. You can also require a specific UoM match.

Minimum surcharges

Minimum surcharges now support the concept of *period charges*. Period charges let you charge customers for orders invoiced over a specific period that did not meet certain criteria. The feature supports setting up period charge rules that identify such invoices and define applicable charges. Charges can be calculated upon minimum charge amount (such as minimum delivery fee), minimum order quantity, or a combination of both. Minimum surcharges include support for three variants of period charges: *monetary threshold*, *quantity threshold*, and *quantity threshold minimum amount*. They work as follows:

- **Monetary threshold** – When the total amount of delivery fees charged at the line level for goods supplied over a period doesn't meet the minimum delivery fee value for that period, a fee will be charged on a free-text invoice for any shortfall between the charged amount and the minimum threshold.
- **Quantity threshold** – When quantities ordered by a customer for a period don't meet a minimum quantity threshold for that period, a flat fee will be charged on a free-text invoice.
- **Quantity threshold minimum amount** – Combines *monetary threshold* and *quantity threshold* criteria and generates a free-text invoice to cover any shortfalls.

See also

Auto charge compounding and sequencing (docs)

Enable prospects in prospect-to-cash with dual-write

Article • 11/02/2023

ⓘ Important

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

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

Business value

Companies that orchestrate the opportunity and quotation process in Dynamics 365 Sales with the quotation process integrated with Dynamics 365 Supply Chain Management can now use prospects seamlessly in the opportunity and quotation process. Many companies that use Dynamics 365 Sales to manage the sales lead, opportunity, and quotation process also make use of prospects as an inherent part of this process. To better support this process, when Dynamics 365 Sales is integrated with Dynamics 365 Supply Chain Management, it's now possible to use prospects seamlessly within the integrated solution.

Feature details

This feature enables prospects to be synchronized between Dynamics 365 Sales and Dynamics 365 Supply Chain Management when using prospect-to-cash with dual-write. It can seamlessly convert a prospect into a customer account in scenarios where the sales quotation lifecycle is controlled either by Sales or Supply Chain Management.

Enhanced order processing in Pricing management

Article • 11/15/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 27, 2023	-

Business value

Pricing management now provides enhanced functionality and improved calculation performance. If you have relatively simple pricing rules, then you can now work more efficiently by skipping the order-completion process. Implementation is now easier to manage because you can roll out Pricing management on a per-company basis.

Feature details

Pricing management has been enhanced to provide the following improvements:

- Price calculations now complete more quickly.
- Until now, Pricing management has always required the extra step of running an order-completion process to indicate that order entry is finished. However, companies that use simple pricing rules can now streamline the order-entry process by opting out of this step. This includes companies that only apply discounts based on sales order lines and don't use funds for discount budgeting.
- You can now roll out Pricing management on a per-company basis.
- Sales managers can now apply margin-component price adjustments to sales trade agreement prices that aren't based on attributes.

Find products and on-hand information by attribute

Article • 12/06/2023

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 20, 2023	Jan 2024

Business value

Quickly and easily find the inventory you need to serve customers and optimize your operations. With attribute-based inventory inquiry, you can search for on-hand inventory details by entering or selecting descriptive terms such as product name, brand, size range, expiry date range, and so on. You can also check inventory across organizations with just one click without specifying each organization ID. This feature eliminates the need for costly and complex customizations or workarounds to map attribute inquiries to product IDs and dimensions.

Feature details

This feature for Inventory Visibility makes it fast and easy to find storage and quantity information for on-hand inventory within a single organization or across multiple organizations. You just need to describe the products you're looking for by specifying any part of the following information:

- Product attributes (such as description, name, or brand).
- Batch attributes (such as disposition code or expiry date).
- Storage dimensions (such as site or warehouse) by value selection or ID.
- Inventory dimensions (such as color, size, or style) by value selection or by ID.

You can also specify a range of values to search for, using operators such as *greater than*, *less than*, or *between*. You can choose to view the inventory results for single, multiple, or all organizations, sites, and warehouses.

See also

Search for products using the Inventory Visibility app (docs)

Integrate Inventory Visibility with Dynamics 365 Commerce

Article • 01/11/2024

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 1, 2023	✔ Nov 3, 2023

Business value

Accurate inventory availability information is crucial for any retailer running an omnichannel business. Until now, retailers using both Dynamics 365 Supply Chain Management and Dynamics 365 Commerce have relied on asynchronous methods to update inventory changes between systems, which means that discrepancies can occur that may cause revenue loss or customer dissatisfaction. This problem has now been solved by connecting key commerce-associated inventory changes to Inventory Visibility so that whenever a commerce channel requests real-time inventory data from a Dynamics 365 Commerce Scale Unit (CSU), or makes inventory changes, it's reflected and obtained from the Inventory Visibility service in real time.

Feature details

Inventory Visibility for Dynamics 365 Supply Chain Management now integrates with Dynamics 365 Commerce Scale Units (CSU) to offer channel-side inventory availability calculations with near-real-time and holistic inventory accuracy across channels and locations for retailers. The integrated solution provides the following capabilities:

- **Provider**: Commerce offers an Inventory Visibility provider and Supply Chain Management (using the same Inventory Visibility service) provides default integration settings that are enabled by the provider.
- **Inventory query**: Users can query real-time inventory from Inventory Visibility using CSU-powered channels.
- **Inventory reservation**: Commerce users can post inventory reservations to Inventory Visibility when a customer order is created, update inventory reservations when an order is edited, and revert a reservation when an order is canceled.

- **Inventory adjustment**: Commerce users can adjust inventory in Inventory Visibility when creating cash-and-carry orders and fulfilling customer orders.
- **Inventory offset**: When Commerce customer orders are synchronized to Supply Chain Management to update inventory statuses and quantities, an automatic offset is triggered from Supply Chain Management to Inventory Visibility to offset inventory changes that were previously posted to Inventory Visibility.

See also

Overview of Inventory Visibility (learn)

Integrate transportation management with Microsoft Cloud for Sustainability

Article • 01/11/2024

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 4, 2023	-

Business value

A sustainable transportation management solution can help companies reduce their carbon footprint by optimizing routes, reducing fuel consumption, minimizing empty miles, and increasing the use of lower-emission transportation modes. Companies can achieve better visibility, control, and automation over their transportation operations. By reducing fuel consumption and carbon emissions, companies can minimize their environmental impact and play a part in combating climate change. Furthermore, by demonstrating a commitment to sustainability, companies can improve their brand image and attract environmentally conscious customers.

Feature details

Dynamics 365 Supply Chain Management integrates with Microsoft Cloud for Sustainability to offer a sustainable transport management solution that calculates carbon emissions.

System integration

Microsoft Cloud for Sustainability empowers organizations to accelerate sustainability progress and business growth by bringing together a set of environmental, social, and governance capabilities across the Microsoft cloud portfolio plus solutions from our global ecosystem of partners.

The transportation management (TMS) module for Dynamics 365 Supply Chain Management integrates with the Microsoft Cloud for Sustainability using REST APIs. This allows data to flow between the two systems seamlessly, enabling organizations to track sustainability metrics alongside their other business processes.

Carbon emission calculation

By using the route data from TMS, Microsoft Cloud for Sustainability offers a variety of data models and services that can help organizations calculate and analyze transportation-related carbon emission. The route data can be used to calculate emissions from different modes of transportation, including cars, trucks, planes, and ships.

Route planning

After Microsoft Cloud for Sustainability returns the calculated emissions for each mode of transportation, you can compare them to determine which mode emits the least carbon dioxide. Use the TMS rate and route workbench to choose the most eco-friendly route based on the emissions calculation or choose the mode of transportation with the lowest carbon emissions.

See also

Integrate with Microsoft Sustainability Manager (docs)

Inventory and logistics feature state updates for 10.0.36

Article • 10/02/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 31, 2023	✔ Oct 2, 2023

Business value

Turning on features by default helps ensure that your system stays current with the latest inventory and logistics capabilities of Dynamics 365 Supply Chain Management.

Feature details

Features becoming mandatory with the 10.0.36 release

These features have become mandatory and can no longer be disabled.

Cost management

- **Cost calculation level**: Adds a new BOM level named *Cost calculation level*, which excludes production and batch orders from its calculations. The system will use this new level when running cost calculations in costing versions. The system will continue to use the existing *Costing level* BOM level in processes such as recalculation and inventory close.
- **Enable user-defined batch number setup for inventory closing reverse**: Reversing an inventory closing creates batch jobs for each impacted item, which might throttle the batch server if there are too many items. This feature enables the process to use extra batch helpers, which are currently used by the inventory closing process. You can adjust the setting to optimize performance based on your environment.

- Inventory aging report storage

Inventory management

- **Inventory on-hand report data cleanup**: Provides a way to clean up the data that is used to create inventory on-hand report storage reports.
- **Using unit of measure and unit quantity in inventory journals**: Enables the use of unit of measure and unit quantity in inventory journal lines.

Rebate management

- Rebate management

Sales and marketing

- **Calculate line net amount on import**: Allows you to control whether the system should recalculate line totals when you import data through the *Sales order lines*, *Sales quotation lines*, or *Return order lines* entities using OData or dual-write. It only has an effect when you also have trade agreement evaluation policies in place that restrict changes to the **Net amount** field for sales order lines, sales quotation lines, and/or return order lines.
- **Calculate sales totals using multiple threads**: Helps improve system performance by using parallel processing when calculating sales totals in batch.
- **Default broker contract tax information on vendor invoice lines**: Introduces logic to set default values for the **Sales tax** and **Item sales tax** fields on broker contract vendor invoice lines. This logic is applied only when the charge type on the broker contract line is ledger/ledger. The item sales tax group will take its default value either from the brokerage procurement category (if it's set up) or from the charge type. The sales tax group will take its default value from the vendor account.

Transportation management

- **Allow unmatching of freight bills from freight invoice lines without a posted vendor invoice journal**: Enables unmatching of freight bills from freight invoice lines without a posted vendor invoice journal even though there are other vendor invoice journals that are posted, but which are related to other freight invoice lines in the same freight invoice header.

Features becoming enabled by default with the 10.0.36 release

These features will be turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2024 release wave 1.

Cost management

- Landed cost

Inventory management

- **Enable intercompany on-hand to only show nonzero on-hand quantity**: Lets you choose whether items with zero on-hand quantity should be included in the intercompany on-hand list. You can control this option using the **Don't show items with zero on-hand quantity in the intercompany on-hand list** setting, which this feature adds to the **Inventory and warehouse management parameters** page.
- Enable warehouse items in Inventory Visibility
- **Inventory Visibility integration**: Provides the functionality to integrate Supply Chain Management with the Inventory Visibility add-in, which posts all on-hand changes made in Supply Chain Management to Inventory Visibility.

Rebate management

- **Cancel posted rebate provision with a posting date**: Lets you cancel a posted rebate provision with a specified posting date and reverse the original transactions and documents. Rebate provision transactions already posted before this feature was enabled can only be reversed by generating opposite provision transactions with a specific date and the current deal setup. Once this feature is enabled, newly posted rebate provision transactions can be fully reversed with a specific date regardless of current deal setup.
- **Enable auto negative tier in rebate management**: Enables the negative tier to be set up automatically for each deal line. The system will then calculate rebates automatically as needed.
- **Rebate management sold-to customers posting**: Enables users to select sold-to customers as an option for the rebate management posting account source. With the introduction of this new account source type, users can use sold-to customers as an extension type of a deal line account, and use this posting profile on any rebate lines. When this option is selected, date transactions will be split and grouped together per account when rebate management is processed. Those transactions will also be posted to the same account accordingly.

Sales and marketing

- **Adjusting reverse match for a settlement process**: When this feature is enabled, the *Reverse match* action for trade allowances in the deduction workbench will correctly bring back the previously matched amount to the open transaction. Without this feature, reversing a match for a deduction transaction against an open transaction will correctly put the deduction transaction back to the open status (if fully unmatched). However, the amount for the open transactions won't be updated with the reverse match value.

- **Integrate Sales Quotation lifecycle with Dynamics 365 Sales**: This feature applies when Supply Chain Management is integrated with Dynamics 365 Sales. It changes the way sales quotations in Dynamics 365 Sales integrate with sales quotations in Supply Chain management. Once enabled, state and status transitions throughout the lifecycle of sales quotations are mapped between the two applications. A policy of ownership is applied to control the actions available for a sales quotation when working in Dynamics 365 Sales or Supply Chain Management.
- **Process Dynamics 365 Sales integration related events**: This feature requires the *Integrate Sales Quotation lifecycle with Dynamics 365 Sales* feature. It enables events related to the integration to be processed asynchronously using the message processor framework. This can improve the performance of integrated sales orders and quotations in some scenarios, such as when transitioning the status of a sales quotation when creating a quotation journal or quotation confirmation journal.
- Sales order details performance enhancement
- **Sales quotation details performance enhancement**: Improves performance when opening sales quotation details.
- **Settle customer payment deductions using the matching invoice**: Adds an option that lets you settle customer payment deductions by using the invoice that is selected for each deduction. When you use this option, the system automatically settles deduction transactions by using the matching invoice, provided an open balance exists for that invoice. Otherwise, the deduction isn't automatically settled. If you don't use this option, the system settles deduction transactions by using the open amount for payment invoices, as was the standard behavior in Supply Chain Management version 10.0.24 and earlier.

Features becoming generally available with the 10.0.36 release

These features are now generally available. They are not turned on by default and must be enabled manually. Some features can be disabled again after being turned on, and these are targeted to become enabled by default with 2024 release wave 1. All features are targeted to become mandatory with 2024 release wave 2.

Cost management

- Enable shipping container creation and update in batch mode
- Enable split vendor invoice journal line per cost type code and voyage id from multiple voyages

- **Generate data manually on voyage editor**: Lets you manually generate data for the **Voyage editor** page as needed. Because data is no longer generated each time a filter value is changed, this feature helps improve system performance and the user experience.
- **Performance improvements for post receipt function in Landed Cost**: Improves performance of the Landed cost module by reducing the amount of information queried and updated when posting product receipts for large purchase orders.

Sales and marketing

- **Sales history cleanup performance improvements**: Sales history cleanup can take a long time if run infrequently on environments with a high volume of sales updates. To reduce duration and improve reliability, this feature splits the clean-up operation into batches that run for a limited duration. Where possible, database capabilities will be leveraged to minimize locking and avoid joining transactional tables during cleanup.

Transportation management

- **Assign shipments to related route segments**

See also

Supply Chain Management 10.0.36 October 2023 (docs)

Manage prices with the pricing management workspace

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 2, 2023	-

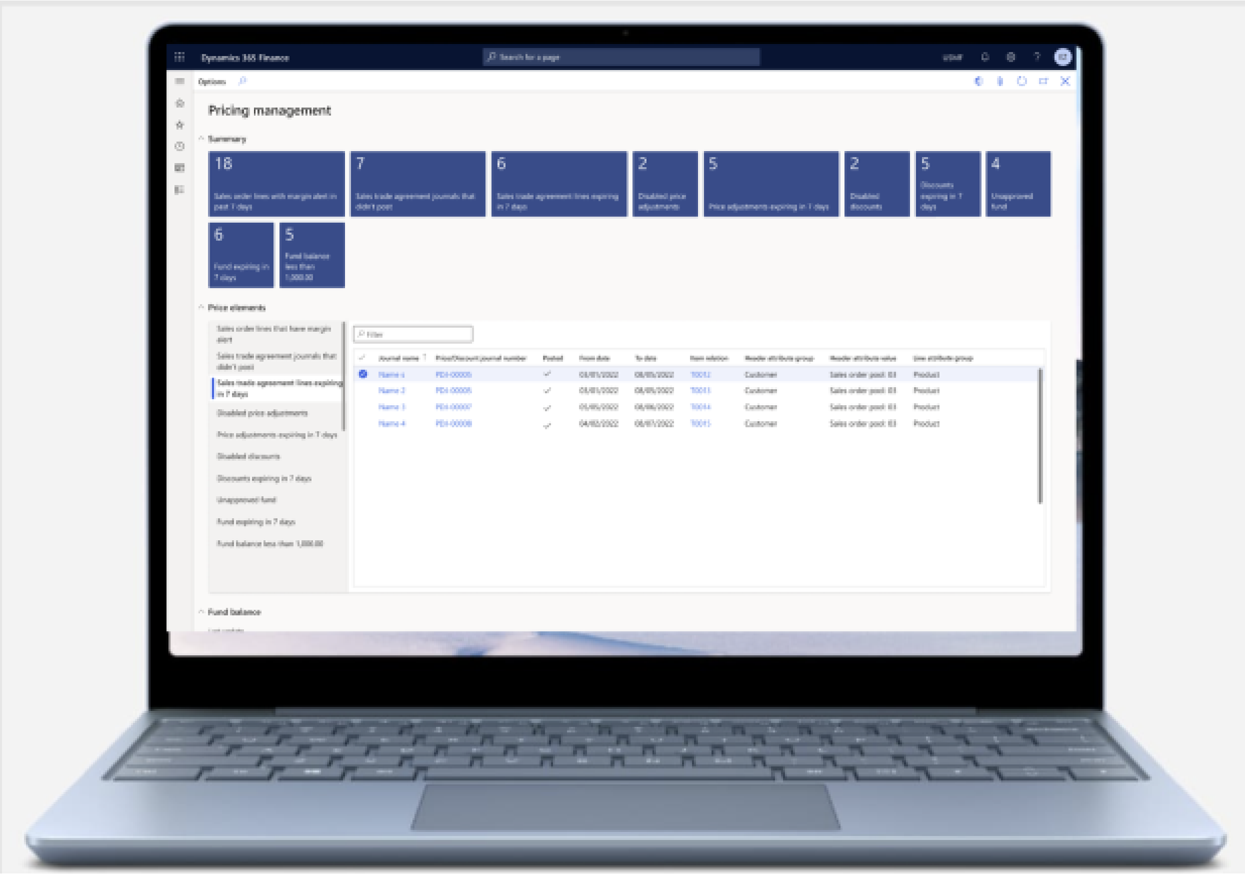
Business value

The pricing management workspace enables sales managers to review impending price rule status changes and lets them choose how to modify pricing policies. Sales managers can perform light tasks to enable or disable pricing rules without leaving the workspace.

Feature details

Dynamics 365 Supply Chain Management provides a workspace that enables sales managers to view the impact of pricing changes and easily enable and adjust pricing records. The workspace provides the following features:

- Provides a collection of tiles that summarize the price records that require attention, such as when a record's expiration date is coming up soon.
- Provides a tabbed list section, which provides a list of impacted price records for each price component type.
- Lets you quickly enable price records or open a record to adjust its pricing rules.


Dynamics 365 Finance
Pricing management
Summary
18
7
6
2
5
2
5
4
6
5
Price elements
Fund balance

Offset Inventory Visibility adjustments

Article • 09/13/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2024	Mar 2024

Business value

It's common for omnichannel business operators to update inventory using the inventory adjustment API in the Inventory Visibility service for real-time inventory tracking. Then, they create sales orders or inventory journals in Supply Chain Management core modules such as inventory management and sales and marketing. It is, therefore, necessary to reconcile or offset the update in Supply Chain Management to the Inventory Visibility service so that an inventory change that has been adjusted in Inventory Visibility won't be duplicated when data is synchronized between the systems. This feature provides out-of-box offset configuration and synchronization in Supply Chain Management for transactions that could use inventory adjustments in the Inventory Visibility service.

Feature details

Configure offsets for inventory changes generated by transactions in Supply Chain Management (such as sales orders, the invitatory adjustment journal, or inventory movement journal) to prevent duplicate data from being synchronized with the Inventory Visibility service. This feature enables you to do the following:

- Configure offset trigger points, the offset data source, and the physical measure mapping.
- Exclude tracking dimensions such as batch IDs and serial numbers from the offset mapping.
- Run out-of-box offset data synchronization from Supply Chain Management to the Inventory Visibility service.

The feature is intended for businesses that use the APIs `/api/environment/{environmentId}/onhand` and `/api/environment/{environmentId}/onhand/bulk` to update Inventory Visibility with quantity changes.

Sell and price multiple items as a bundle

Article • 01/11/2024

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 31, 2023	✔ Oct 2, 2023

Business value

Product bundles allow businesses to group multiple items into product bundles to price and sell them together. It's an easy way to enable and ensure that the correct items are always sold and priced together while allowing the individual items included in the bundle to be shipped individually with revenue recognized against the shipped items.

Feature details

A product bundle consists of two or more items that are sold and priced together. A product bundle comprises a parent item and multiple component items. Order entry is quick and efficient because users can add the whole bundle to a sales order by adding the parent item. Picking lists and packing slips will list the component items of a product bundle, but sales confirmations and sales invoices will show only the parent item.

Each product bundle is represented by a physical item, but on sales order confirmation, the bundle is exploded into its component items, and the selling price is allocated proportionally from the parent item to the individual component items making up the bundle. Once exploded into its component items, the product bundle construct ensures that the sum of the component items equals the bundle net amount, so the customer is always invoiced the correct amount for the product bundle.

This product bundle feature replaces the previous bundle feature (deprecated in April 2023), which was part of the revenue recognition module.

See also

Product bundles overview (docs)

Set up item pricing (learn)

View and manage inventory with a new mobile app

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 15, 2023	Feb 2024

Business value

Store sales and operations managers are always on the move, so a mobile app that provides real-time inventory visibility across multiple locations can help simplify inventory management tasks and improve the productivity of store and field workers. Accurate stock availability information enhances their customer service level and increases customer satisfaction.

Feature details

A new mobile app is now available for managing inventory in Dynamics 365 Supply Chain Management. It can check on-hand stock, item availability, and batch details across legal entities and locations, replacing the deprecated Inventory on-hand mobile workspace. The new mobile app provides the following features:

- **Action Menu**: Select a legal entity, view notifications, and set individual preferences. This streamlines your inventory management process, saves time, and reduces errors by defaulting to the most frequently used legal entity, storage sites, and warehouse sites.
- **Initial Search**: Use fuzzy logic search to find product IDs, find product names, and specify a search range for the default storage location. You can easily view key

information about the found items, including physical inventory and unit of measure, on the same screen as the initial search results.

- **Inventory Details**: Drill down to individual product inventory details and filter by site, warehouse, location, batch ID, or status. You can also filter by inventory measures such as physical inventory, available physical, total available, and physical reserved quantity.
- **Connectivity**: The app leverages the Power Apps framework and seamlessly connects with Supply Chain Management to retrieve inventory data.

See also

Inventory On-hand mobile app (docs)

Inventory Visibility inventory allocation (learn)

Manufacturing and asset management

Article • 11/20/2023

ⓘ Important

Some of the functionality described in this release plan has 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. Investments are focused on increasing flexibility and agility. Manufacturers having requirements for compliance with multiple inventory accounting practices across multiple currencies continue to benefit from enhancements to the Global Inventory Accounting Add-in. Improvements in material picking and handling last-minute manufacturing changes increase the agility on the shop floor.

Detect spikes and deviations in sensor data

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 2, 2023	-

Business value

To keep operations running smoothly, businesses need to maximize the uptime of all equipment and act fast when required to prevent damaging failures. By fitting equipment and other assets with automatic electronic sensors, companies can monitor how each asset performs over time. Sensor Data Intelligence for Dynamics 365 Supply Chain Management now includes an anomaly detector that selects the best anomaly algorithm for each type of sensor data. It can detect spikes, dips, and other deviations to identify and predict problems before they become urgent.

Feature details

The new anomaly detector for Sensor Data Intelligence provides the following capabilities:

- Collect details from machines and equipment to detect anomalies to predict and prevent issues before they become urgent.
- Set up the solution using a simple onboarding wizard rather than manually installing and configuring its components from Lifecycle Services.
- Configure, scale, and extend the solution to meet your unique business needs. The business logic runs on Azure components managed using your own Azure subscription, which provides the flexibility required to customize the solution as needed.

See also

Anomaly detection scenario (docs)

Manufacturing feature state updates for 10.0.36

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 31, 2023	✔ Oct 2, 2023

Business value

Turning on features by default helps customers stay current with the latest manufacturing capabilities of Dynamics 365 Supply Chain Management.

Feature details

Features becoming mandatory with the 10.0.36 release

These features have become mandatory and can no longer be disabled.

- **Auto-picking of warehouse enabled materials for auto-posted picking lists**: Lets you auto-pick and resolve inventory dimensions for auto-posted, derived, and backflushed picking list journals.
- **Copy generic routes**: Enhances the *copy route* function to allow users to copy routes that aren't item specific. It enables the system to update all relevant information (such as *site*, *route group*, *resource requirements*, and various times) after the *copy route* function has been used to overwrite a route that is not yet assigned to an item.
- **Enable partial receipt of subcontracted items and fix an issue with the calculation of scrap for BOM lines of type Vendor**: Enables partial receipt of subcontracted items. Before, when reporting a partial quantity on a purchase order for a subcontracted service item, the full quantity was updated on the related picking list journal on the production order. Now, the correct partial received quantity is updated. This feature also fixes an issue with an incorrect updated scrap quantity when using BOM lines of type Vendor.
- **My jobs tab on the production floor execution interface**: The **My jobs** tab lets workers easily view all unstarted and unfinished jobs that are assigned specifically to them.

- **Production teams in the production floor execution interface**: When multiple workers are assigned to the same production job, they can now nominate one worker as a *pilot*. The remaining workers automatically become assistants to that pilot. For the resulting team, only the pilot must register job status, whereas time records apply to all team members. This feature also supports the *assist resource* scenario, where a worker can register as an assistant to another worker, who then becomes the pilot for the newly formed group.
- **Update related resource requirements when a route operation is changed**: This feature enables the system to update the related resource requirements after a user changes the operation of an existing route step.

Features becoming enabled by default with the 10.0.36 release

These features will be turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2024 release wave 1.

- **Additional configuration on the production floor execution interface**: Adds the following options to the Configure production floor execution page:
  - **Auto-open start dialog when completing search**: When this option is enabled, the **Start job** dialog box is automatically opened when workers use the search bar to find the job.
  - **Auto-open report progress dialog when completing search**: When this option is enabled, the **Report progress** dialog box for the job is automatically opened when workers use the search bar to find the job.
  - **Default remaining quantity in the report progress dialog**: When this option is enabled, the **Report progress** dialog box shows the remaining quantity to report on a production job.
- **Enable use of a numpad in the sign-in page**: Lets admins add a numpad control to the sign-in page for production floor execution. Workers can then sign in by using the numpad to enter their badge ID or personal number.
- **Improved user experience for the Report progress dialog in the Job Card Device**: Provides the user a more guided and intuitive user interaction. All controls have been optimized for touch interaction and a numeric keyboard has been introduced, so no external keyboard is needed.
- **On-hand information in production orders to release page**: Adds a column for the on-hand inventory quantity for the line item in the lines section on the **Production orders to release** page.
- Report on catch weight items from the production floor execution interface

Features becoming generally available with the 10.0.36 release

These features are now generally available. They are not turned on by default and must be enabled manually. Some features can be disabled again after being turned on, and these are targeted to become enabled by default with 2024 release wave 1. All features are targeted to become mandatory with 2024 release wave 2.

- **Make finished goods physically available before posting to journals**

See also

Supply Chain Management 10.0.36 October 2023 (docs)

Over-pick materials for production orders and batch orders

Article • 01/11/2024

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Oct 2, 2023	✓ Oct 20, 2023

Business value

Manufacturers can now secure efficient and flexible warehouse operations by empowering their workers to pick the full contents of nearly empty locations when selecting materials for production orders (including batch orders), thereby freeing up space. Over-picking can also be relevant in situations where it is more efficient for workers to over-pick by rounding up to the nearest packing unit.

Feature details

Warehouse managers can now configure Dynamics 365 Supply Chain Management to permit over-picking raw materials and set limits on over-picking. Over-picking occurs when a worker picks slightly more material than specified for production. Workers using the Warehouse Management mobile app can now over-pick raw materials for production orders as needed. Workers will be notified if they exceed the over-picking thresholds defined by the warehouse manager.

Thank you for your idea

Thank you for submitting this idea:

- Over pick raw material picking (production orders)

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Over-pick materials for production and batch orders (docs)

Use warehouse management for manufacturing (learn)

React to last-minute changes in production

Article • 01/12/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 13, 2023	✔ Jan 12, 2024

Business value

Manufacturers often need to react to last-minute changes to production orders. Such changes may occur due to updated items, updated routes, added margins, or scheduling changes introduced to make better use of on-hand inventory. Dynamics 365 Supply Chain Management now supports the flexibility needed to accommodate these kinds of changes.

Feature details

Maintaining agility in production can be difficult in the face of supply shortages, rapidly changing demands, and last-minute changes to production orders. Supply Chain Management now offers the following new capabilities that can help streamline the process of responding to such changes.

- **Add margins to manual scheduling** – Insert buffer time between production orders by adding an issue margin, receipt margin, and/or reorder margin when rescheduling production orders. This is especially useful for orders with deep bills of material or when you have several related production orders, where having a buffer between orders can help ensure on-time delivery.
- **Make the best use of on-hand inventory and planned receipts** – Increase your order fulfillment rate by using on-hand inventory and planned receipts for last-

minute orders. Master planning will suggest creating a new planned order when an item is needed outside of its lead time while using existing supply if it's needed within the lead time. You can control this using the new **Dynamic positive days** parameter.

- **Avoid releasing to warehouse when materials are missing** – You can choose to prevent production orders that require full reservation from being released to the warehouse unless all materials are available for pickup.
- **Change items on production orders** – Substitute items in scheduled production orders, finish stock of discontinued products based on the registered time of discontinuation or make changes based on the available stock.
- **Change routes on production orders** – Replace routes on multiple scheduled production orders when changes are needed for setup, run time, or resources.

Planning

Article • 12/21/2023

ⓘ Important

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

Planning Optimization provides significantly improved performance and scalability, which enables near real-time insights into requirement changes. We introduce a next-generation intelligent demand planning capability that is powered by best-in-class forecasting algorithms and models, offers immersive user experiences, and provides intelligent reports and analytics.

Forecast with intelligence for validated demand plans

Article • 11/15/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 31, 2023	To be announced

Business value

Inaccurate forecasts can lead to lost revenue and inefficiency in the supply chain, but providing forecasts infused with intelligence will lead to more accurate and effective demand plans. The direct impact can be measured in improved revenue and fewer stockouts. Operating expenses are reduced in supply chains that require fewer fire drills.

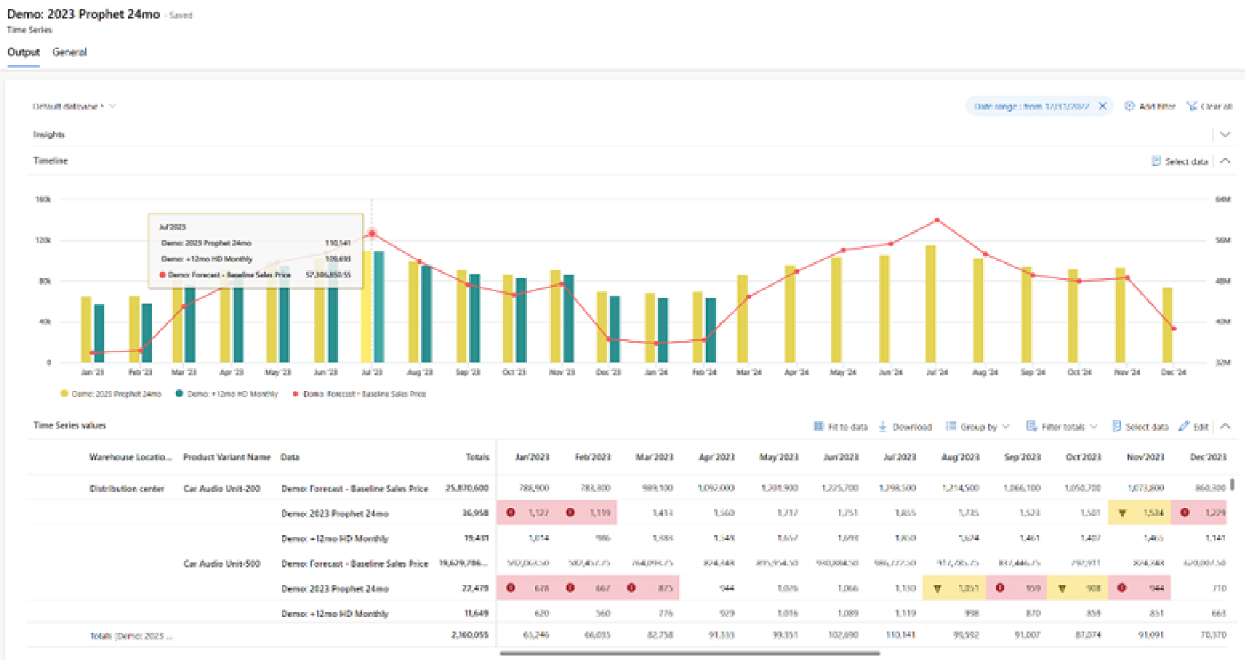
Feature details

This is Microsoft's next-generation collaborative demand-planning solution for Dynamics 365 Supply Chain Management, powered by best-in-class forecasting algorithms and models, and offering immersive user experiences, intelligent reports, and analytics. It empowers organizations to build an agile, resilient, and sustainable demand-planning practice fueled by intelligence and collaboration. It offers:

- **A no-code approach** to demand modelling and planning configuration. Flexible building blocks enable the vast majority (over 85%) of demand planners who are not data scientists to do what-if planning and analyze, optimize, and compare scenarios in minutes.
- **Seamless, on-the-fly aggregation and disaggregation**, which enable planners to edit forecasts on a corporate or product-group level, then zoom in and instantly see the impact on the regional and stock keeping unit (SKU) level.
- **Improved forecast accuracy** with automatic artificial intelligence (AI) parameter tuning, which helps ensure accurate forecasting and preprocessing. External signals

enable superior forecast accuracy by considering promotions or stockouts.

- **Disruption readiness** with interactive and fast what-if analysis. Version history allows tracking, evaluating forecast changes, and using the lessons learned to improve the decision-making process.
- **Effective collaboration throughout the planning cycle** made possible by Microsoft Teams in-context communication, in-product commenting, and restorable versions of forecast values throughout the planning process.
- **Increased agility through integrated planning and execution flow** with native integration to Supply Chain Management, customizable worksheets, and exception-based planning.



See also

Demand planning home page (docs)

Planning feature state updates for 10.0.36

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Jul 31, 2023	✓ Oct 2, 2023

Business value

Turning on features by default helps customers stay current with the latest planning capabilities of Dynamics 365 Supply Chain Management.

Feature details

Features becoming mandatory with the 10.0.36 release

These features have become mandatory and can no longer be disabled.

- **Azure Machine Learning Service for demand forecasting**: Enables the Azure Machine Learning Service to generate demand forecasts based on historical data.
- **Group transactions in Planning Optimization**: This feature can help reduce the number of planned orders that are generated to supply a single sales order line when you're using Planning Optimization. When this feature is turned on, Planning Optimization will group all inventory transactions for an order line into a single requirement for the full quantity. (This behavior matches the built-in planning engine behavior.) Supply and demand are grouped separately. Therefore, the feature helps reduce the transaction volume when you have split transactions and when you use dimensions (such as batch numbers or serial numbers) that aren't coverage dimensions.
- Infinite capacity scheduling for Planning Optimization
- Make-to-order supply automation
- Priority-driven MRP support for Planning Optimization

Features becoming enabled by default with the 10.0.36 release

These features will be turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2024 release wave 1.

- CTP for Planning Optimization
- DDMRP for Planning Optimization
- **Consider inventory lead time when creating a planned transfer order**: When a planned transfer order is created, this feature causes the system to consider the inventory lead time that is specified in the item's default order settings when it calculates the receipt date of a planned transfer order (when using a lead time type of *None* or *Sales*). When a specific transfer lead time is set, that value will be used for the receipt date calculation and transport days will be disregarded.
- Process manufacturing support for Planning Optimization
- **Restart and resume logic for the forecast generation batch process**: This feature enables the forecast generation batch process to be restarted or resumed after an infrastructure failure occurs.
- Source products and materials from multiple vendors using Planning Optimization

Features becoming generally available with the 10.0.36 release

These features are now generally available. They are not turned on by default and must be enabled manually. Some features can be disabled again after being turned on, and these are targeted to become enabled by default with 2024 release wave 1. All features are targeted to become mandatory with 2024 release wave 2.

- **Forecast demand plan import service**: Allows multiple threads for importing forecast demand plan lines.
- **Average daily usage for distribution scenarios**: Ensure that average daily usage (ADU) is based on actual sales order dates and quantities. This is useful in distribution scenarios or when transitioning from MRP to DDMRP. It calculates the ADU based on sales order dates and quantities and manufacturing consumption across the distribution network, disregarding transfer orders.

See also

Supply Chain Management 10.0.36 October 2023 (docs)

Procurement

Article • 11/20/2023

ⓘ Important

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

Investments in the procurement and sourcing area continue to be targeted at making organizations more agile and resilient in their supply chain operations.

Inform vendors about when to ship items

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 13, 2023	Jan 2024

Business value

If you have vendors without specific delivery terms, such as delivery duty paid, delivery at place, or delivery at place unloaded, you must tell them when they should ship. This feature adds a new ship date field to purchase orders, calculated according to the configured transport dates.

Feature details

Purchase orders in Dynamics 365 Supply Chain Management currently include a *delivery date*, which specifies when the order should be received at your company's location. This feature adds a *ship date*, specifying the date the vendor should ship from their location.

The system calculates the ship date according to the new transportation days setup, which lets you define the number of days needed to transport items between a vendor's location and your locations. When master planning suggests a date for placing a planned order, it will also consider the transportation days setup to help make sure the goods will arrive at your location on time.

You can also choose to set up a vendor ship calendar to define the days a vendor can ship. When some goods need to be expedited, and a vendor makes an exception on their vendor ship calendar, you can accommodate this by changing or removing the vendor ship calendar for the relevant purchase order lines.

Thank you for your idea

Thank you for submitting this idea:

- Shipment date on Purchase order

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Calculate requested ship dates for purchase orders (docs)

Procurement and sourcing feature state updates for 10.0.36

Article • 10/02/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 31, 2023	✔ Oct 2, 2023

Business value

Turning on features by default helps customers stay current with the latest procurement and sourcing capabilities of Dynamics 365 Supply Chain Management.

Feature details

Features becoming mandatory with the 10.0.36 release

These features have become mandatory and can no longer be disabled.

- **Add Quantity ordered field to the Posting product receipt page**: Adds a new field called **Quantity ordered** to the **Posting product receipt** page. The new field appears on the receipt **Lines** grid before the **Quantity** field. The feature also copies the **Deliver remainder** field to the grid and positions it after the **Quantity** field.
- Charges setup with site and warehouse
- **Check unit precision for not-stocked items**: Check unit precision for not-stocked items.
- **Consolidate multiple purchase requisitions into a single purchase order by accounting date**: Allows multiple purchase requisitions to be consolidated into a single purchase order if the different purchase requisitions have different accounting dates. Purchase order creation and demand consolidation purchasing policy rules can be set up to automate the decision for grouping requisition lines

by accounting date on the purchase order level. Purchase order consolidation by accounting date is not supported if budget control is enabled because the accounting date is used for budget reservations and encumbrance. Therefore, it should be retained during the transition from purchase requisition to purchase order.
- **Enable resetting procurement related workflows**: Allows you to reset the following workflows to draft status: *Purchase order*, *Vendor change*, and *Purchase requisitions*.
- **Limit the number of purchase order lines per batch task**: Helps you optimize system performance when posting confirmations and product receipts by limiting the number of purchase order lines processed by each batch task.
- **Post registered quantities of stocked products and remainders of not-stocked products for receipts and vendor invoices**: Changes how quantities of not-stocked products (such as services) are posted when processing vendor invoices and inbound shipments against purchase orders. The *Registered and services* quantity option now works like the *Registered quantity and not-stocked products* option and aligns with the similarly named option already available for posting quantities for sales packing slips.
- **Prevent overconsumption of general budget reservations when multiple purchase requisitions are in workflow**: Improves error checking when users submit and approve purchase requisitions that exceed the remaining balance of a general budget reservation line. This helps prevent overconsumption of general budget reservations when multiple purchase requisitions are in workflow.
- **Prevent updates to intercompany sales order line requested dates in header to lines update scenario when derived**: Prevents updating intercompany sales order line requested dates in a header-to-lines scenario when an intercompany sales order line is created from the purchase order and therefore is derived. Previously, when updating either confirmed or requested dates on an intercompany sales order header, both requested and confirmed sales order line dates would be updated when **Transfer settings from the header to the lines ship and receipt dates, update ship and receipt dates**, is *Yes*. When this feature is enabled, then only the sales order line confirmed dates are updated in the header-to-lines update scenario.
- **Purchasing card processing**: Lets you track purchases and expenses that your agency incurs while using purchasing cards.
- **RFQ reference link added to PO**: (Public sector) Adds a reference link from the purchase order lines back to the corresponding RFQ lines they originated from.
- Sealed bidding for RFQs
- **Synchronize tracking dimensions on intercompany sales and purchase order lines**: Lets you control whether serial and batch number tracking dimensions are

synchronized across intercompany sales and purchase order lines. It adds new settings to both the **Purchase order policies** and **Sales order policies** tabs of the **Intercompany** setup page for customers and vendors. It also updates the names of a few related, nearby settings for clarity. If you are using warehouse management processes (WMS), then be aware that this feature will only synchronize batch and serial numbers when those dimensions are above location in the target destination reservation hierarchy.

- **Update prices and discounts entered manually for intercompany**: Enables manual change policy functionality for intercompany. It includes transferring manual change policies between intercompany sales and purchase orders. Previously, this only worked for non-intercompany orders. When this feature is enabled, the **Update price and discounts** dialog option will be displayed after making changes to intercompany orders. This can be used to either update or keep pricing and discount details on intercompany orders.

Features becoming enabled by default with the 10.0.36 release

These features will be turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2024 release wave 1.

- Assess supply risks to prevent supply chain disruptions
- **Display legacy default RFQ reply field settings**: This feature reintroduces the legacy default request for quotation (RFQ) reply field settings, which were previously removed from the user interface. These settings don't provide any functionality out of the box but can be customized to provide it as required. Enable this feature if your organization has already added functionality for the default RFQ reply field settings or is planning to. When this feature is enabled, you can access the settings by going to the **Procurement and sourcing parameters** page, opening the **Request for quotation** tab, and selecting **Default request for quotation reply fields**.
- **Purchase agreement matching policy**: Enables you to define a matching policy on purchase agreements that all associated documents will adhere to.
- **Purchase order delivery date**: (Public sector) Adds the ability to calculate the delivery date.
- **Request for quotation amendment and cancellation email framework options**: Lets you send RFQ amendment and RFQ cancelation emails using either SSRS reports or the email distributor framework. This feature adds new settings to both the **Amendment** and **Cancelation** field groups on the **Request for quotation** tab of the **Procurement and sourcing parameters** page. When this feature is enabled, new **Send email using** options become available and let you set a preferred way of

sending emails. Select the *SSRS report* option to send an email while generating the SSRS report (this is the default setting). This option should be used if only a few people should receive the email or if the report should be delivered as an attachment to the email. Select the *Email distributor* option to send an email using the email distributor framework. With the *Email distributor* option, the email can be monitored in the batch email sending status. This option should be used when sending emails to many recipients. When using the *Email distributor* option, the report can't be sent as an attachment. Without this feature, the system always sends email while generating the SSRS report.

Features becoming generally available with the 10.0.36 release

These features are now generally available. They are not turned on by default and must be enabled manually. Some features can be disabled again after being turned on, and these are targeted to become enabled by default with 2024 release wave 1. All features are targeted to become mandatory with 2024 release wave 2.

- **Purchase order workflow submission and approval performance enhancement**: Improves the performance of the purchase order workflow submission dialog and the approval dialog, which is most noticeable on purchase orders with larger number of lines. When this feature is enabled, purchase order totals and accounting distributions are calculated and validated by a workflow. Validation errors surface in the workflow history. This feature is not supported when budget control is enabled.
- **Auto-create direct delivery intercompany orders originating from purchase order creation**: Automates the creation of both intercompany direct delivery sales and intercompany direct delivery purchase orders when a purchase order is created in another legal entity. When this feature is disabled, intercompany direct delivery purchase order creation is deferred until an intercompany direct delivery sale is opened in the sales order details page. When the feature is enabled, intercompany direct delivery purchase orders are created without having to open an intercompany direct delivery sales order from the sales order details form.
- **Unit of measure for line level charges**: Enables you to specify a unit of measure (UoM) for which a line-level auto charge applies. You can set up an auto charge for customers and vendors so that it only applies to lines that use the exact UoM configured for the charge, or you could choose to allow the charge to apply proportionally based on an applicable UoM conversion factor (if one exists). This feature supports customer and vendor line-level charges and applies for sales quotation and sales order lines, request for quotation, purchase requisition, and purchase order lines.

See also

Supply Chain Management 10.0.36 October 2023 (docs)

Product information management

Article • 11/20/2023

ⓘ Important

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

Product information management enables companies to centrally manage information about products and product variants throughout their lifecycle, including the attributes, configurations, documentation, and identifiers needed for supporting critical business processes. Investments in this area are focused on helping companies that trade internationally navigate and verify compliance with the increasingly complex rules governing the export of products.

Product information management feature state updates for 10.0.36

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 31, 2023	✔ Oct 2, 2023

Business value

Turning on features by default helps customers stay current with the latest product information management capabilities of Dynamics 365 Supply Chain Management.

Feature details

Features becoming mandatory with the 10.0.36 release

These features have become mandatory and can no longer be disabled.

- **Clean up product attribute values**: Adds a periodic task called *Clean up product attribute values*, which cleans up product attribute value records that are no longer associated with any product via a product category.
- Engineering Change Management
- Manage changes to formulas and their ingredients
- **Populate product attribute values**: Adds a periodic task that is named *Populate product attribute values*. This new periodic task creates missing product attribute value records for attributes that are associated with products via a product category.

Features becoming enabled by default with the 10.0.36 release

These features will be turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2024 release wave 1.

- Display product info in user’s language.

See also

Supply Chain Management 10.0.36 October 2023 (docs)

Warehouse Management

Article • 11/20/2023

ⓘ Important

Some of the functionality described in this release plan has 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 can be combined and configured to support many warehouse layouts and operational scenarios.

Investments continue to focus on driving efficiencies in warehouse operations through optimization and automation of key processes, including counting, customer returns, product receipts, and re-waving of orders. New interfaces and streamlined processes allow companies to deploy Dynamics 365 Supply Chain Management and use only the warehouse management capabilities, making these broadly available to companies using third-party ERP or order-management systems.

Automatically re-wave to add unfulfilled lines to new waves

Article • 01/19/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 20, 2023	✔ Jan 12, 2024

Business value

Waved lines can occasionally fail due to a lack of on-hand inventory at the picking location, a problem with the item attributes, or other reasons. Although this is normal behavior, the challenge is that, until now, each exception must be handled manually by adding the failed lines to a new wave and then processing them. Dynamics 365 Supply Chain Management now automates this process so that the failed lines are assigned to the same wave templates and then re-waved without human involvement. This feature adds flexibility and saves time, improving outbound warehouse operations efficiency.

Feature details

A shipment line may fail to complete the waving process for any of the following reasons:

- Production is delayed and didn't report inventory as finished, so the wave can't allocate inventory.
- Goods are in quarantine and not available.
- Goods are still at the inbound bay and aren't yet available at the picking locations.

Users can configure the automatic re-waving process, which will reprocess shipment lines that didn't complete during previous wave processing, thereby removing any manual human involvement.

Automatically update documents when receiving purchase orders

Article • 01/11/2024

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2023	✔ Oct 20, 2023

Business value

This feature streamlines the process of receiving purchase orders by allowing the system to automatically update the relevant purchase documents after inventory has been received in the warehouse. It will save time, improve efficiency, and remove the need to manage purchase order updates manually after inventory is received.

Feature details

As part of the Warehouse Management mobile app receiving process, purchase order line transactions are moved into a *Registered* state. Until now, the process would pause here without updating the cost, so to advance the process to the next state, a user needed to manually assign a product receipt number. With this feature, the system can now update purchase order documents automatically after the inventory has been received in the warehouse, thereby removing the manual step.

See also

Mark a load as receive complete (docs)

Inbound operations (learn)

Operate warehouses connected to external order management systems

Article • 11/15/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 27, 2023	-

Business value

Businesses can now take advantage of the core warehouse management (WMS) functionality offered by Dynamics 365 Supply Chain Management while continuing to leverage their existing investments in third-party ERP and order-management systems. Regardless of which ordering or ERP systems you have in place, you can now rapidly deploy our advanced WMS without having to set up or maintain areas of Supply Chain Management that you don't need. Then you'll be ready to benefit from advanced WMS features such as automation integration, carrier integration, the Warehouse Management mobile app, and more.

Feature details

The integration of Supply Chain Management WMS functionality with external ERP and ordering systems is made possible by new, lightweight source documents dedicated to inbound and outbound shipment orders. These new documents focus on warehouse management and can replace multiple types of previously used documents (such as sales, purchase orders, transfers, and more) from a pure warehouse-management perspective.

See also

Warehouse management only mode overview (docs)

Optimize the customer returns process

Article • 11/15/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 13, 2023	Jan 2024

Business value

Processing customer returns can be very difficult and time consuming because it requires users to create return order lines and manually generate return merchandise authorization (RMA) numbers before items can be returned to the warehouse. Supply Chain Management has now been enhanced to make customer returns much easier to process.

Feature details

The customer return process in Supply Chain Management now provides an improved user experience. Users can manage returns more efficiently and print return labels automatically or on demand. When return items arrive at the warehouse, workers can process them right away using the Warehouse Management mobile app. These enhancements will save time and effort, making it easier for companies to manage customer returns.

The customer returns process has been streamlined and optimized in multiple ways, including:

- It's now possible to use a mobile device to create return order lines with RMA numbers.
- When a sales order is released to the warehouse and processed, return labels can be printed as part of the packing process.
- Return labels can also be created and printed on-demand.

- When an item is returned, workers can scan the RMA number using the Warehouse Management mobile app, and the returned items are shown on the device for verification.

Optimize the inbound receiving process

Article • 01/19/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 13, 2023	✔ Jan 12, 2024

Business value

The process of receiving large quantities of serial- or batch-tracked items on license plates can be time consuming. Dynamics 365 Supply Chain Management now provides features that optimize this process and improve the visibility provided by the Warehouse Management mobile app of inventory that is ready to be put away.

Feature details

Dynamics 365 Supply Chain Management now provides features that optimize the process of receiving shipments that include order lines with many license plates or many tracking dimensions. For example, you may have an order line that specifies 20 pallets, each of which is tracked as a license plate and contains several thousand SIM cards, each of which is tracked with a serial number. The system now provides better performance when processing these operations, thereby reducing the time needed to complete them.

See also

Mark a load as receive complete (docs)

Warehouse management feature state updates for 10.0.36

Article • 10/02/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 31, 2023	✔ Oct 2, 2023

Business value

Turning on features by default helps customers stay current with the latest warehouse management capabilities of Dynamics 365 Supply Chain Management.

Feature details

Features becoming mandatory with the 10.0.36 release

These features have become mandatory and can no longer be disabled.

- **Change the error to a warning when releasing a load where sufficient quantity isn't available**: This feature lets you change the error to a warning when a user tries to release a load for an order where sufficient quantity isn't available.
- **Enhanced parser for GS1 barcodes**: Enables the use of an enhanced parser for GS1 symbol data. The parser implements the GS1 General Specification algorithm for parsing GS1 symbols and includes stronger validations of data correctness.
- **Evaluate work header breaks before work header maximums during work creation**: This feature enables more optimal work header grouping during work creation, which can lead to a smaller number of created work headers. This is accomplished by changing the order in which the work header maximums and work header breaks are evaluated during work creation. When this feature is

enabled, the work header breaks will be evaluated before the work header maximums.

- **Goods in Transit Receiving and Put away**: Allows the goods-in-transit item receiving and putaway processes to receive goods using the legacy codes instead of the process guide framework.
- **Include Confirmed ship and Confirmed receipt dates into date filters on Load planning workbench**: This feature expands the existing filtering capability of the **Ship date** and **Receipt date** fields on the **Load Planning Workbench** to include the sales order line's **Confirmed ship** and **Confirmed receipt** dates to determine lines to add to a load. If those dates are blank, order lines will be filtered based on the **Requested ship** and **Requested receipt** dates respectively.
- License plate receiving enhancements
- License plate validation on source document lines
- Line reservation enhancements for the batch number reservation form feature
- **Over receipt of load quantities**: This feature lets you choose whether to allow or prevent over receipt of inbound load quantities. Over receipts occur when a worker registers a quantity that is greater than the remaining unregistered quantity for a selected load (adjusted for over delivery percentage).
- Packing work for packing stations
- **Parent license plates cannot be target license plates**: This feature enforces the use of a new target license plate when processing work picking from a parent license plate. This applies for sales, inventory movements, transfer issue and production picking.
- Pick line grouping
- Post on-hand adjustments using configurable reason codes connected to offset accounts
- **Purchase order quantity left to load calculation using registered quantities**: With this feature, the calculation of **Quantity left to load** for a purchase order line is replaced with a view that shows the registered quantity marked with a load.
- **Sales order packing slip corrections/cancellation transaction status change**: With this feature, the processing of a sales order packing slip cancellation/correction will cause the inventory transaction status to become *OnOrder* when the transaction is not linked to a warehouse management load line.
- Work policy enhancements for inbound work

Features becoming enabled by default with the 10.0.36 release

These features will be turned on by default but can still be manually disabled. These are all targeted to become mandatory with 2024 release wave 1.

- Auto-submit detour steps for the Warehouse Management mobile app
- **Catch weight product processing with warehouse management**: Provide support for catch weight products within warehouse management processes. Catch weight products are often used in industries where products vary by weight and/or size, such as the food industry. Catch weight products use two units of measure—an inventory unit (such as kg, lb, or oz) and a catch weight unit (such as box, each, or pallet). The inventory unit is the unit of measure in which the product is weighed and invoiced. The catch weight unit is the unit in which the products are handled, such as received, transferred, and shipped.
- Hazardous materials enhancements
- **Inventory status changes for catch weight products**: Adds support for changes to inventory status for catch weight-enabled products. The following inventory status changes will be enabled:
  - Inventory status change (periodic).
  - Quality order validation (inventory status change).
  - Inventory status change from on-hand by location form.
  - Inventory status change via warehousing app movement work.
- **Item consolidation location utilization**: The new location utilization form serves as a tool for warehouse managers to easily view and filter the volumetric utilization of location across the warehouse. If deemed necessary, the user can select locations and create inventory movement work straight from the form in order to consolidate items, better utilizing warehouse space.
- **Location directive scopes**: Introduces a rich configuration experience for location directives with four new scopes to replace "Multiple SKU". This gives more freedom when designing location directives and makes it possible to reduce redundant configurations.
- Multilevel detours for the Warehouse Management mobile app
- **Multiple product receipt postings per load**: Adds flexibility to the inbound load receiving process by allowing multiple product receipt postings for the same load. This lets warehouse managers keep a load open even after running the product receipt posting job, thereby allowing additional registrations for the same load. This enables quantities to be registered and product-receipt updated to the ledger on an ongoing basis.
- **Options for updating the mode of delivery for sales order lines when creating loads**: This feature lets you use accounts receivable options to control whether sales order lines are assigned a matching mode of transportation the first time you create a load for one or more lines belonging to a sales order. This feature ensures that when you create a load for a sales order line, the system will respect the accounts receivable setting for updating lines based on sales order header changes.

- **Options for validating ingredient batch expiration dates**: This feature lets you choose which date is used to validate the expiration of an ingredient batch when making a physical reservation from a bill of material (BOM) or formula line.
- Pack containers using the Warehouse Management mobile app
- **Use existing catch weight tags when reporting production orders as finished**: Adds support for reporting as finished a production order via the warehousing app when having catch weight tags registered to the appropriate order in advance.

Features becoming generally available with the 10.0.36 release

These features are now generally available. They are not turned on by default and must be enabled manually. Some features can be disabled again after being turned on, and these are targeted to become enabled by default with 2024 release wave 1. All features are targeted to become mandatory with 2024 release wave 2.

- Warehouse-specific inventory transactions

See also

Supply Chain Management 10.0.36 October 2023 (docs)

Plan and prepare for Dynamics 365 Project Operations in 2023 release wave 2

Article • 12/21/2023

> ⓘ **Important**
>
> The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. 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/2023W2/Finance

In one application, Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams so they can win more deals, accelerate delivery, empower employees, and maximize profitability. The application provides the necessary visibility, collaboration, and agility across the project lifecycle to drive success for project-centric businesses. Powered by Microsoft Power Platform, customers are provided with an unmatched set of capabilities that enable everyone to analyze, act, and automate across their organization to transform their services business from the ground up. It's everything you need to run your project operations, from deal management to financials, all in one application.

For 2023 release wave 2, we're delivering functionally rich experiences in the following areas:

- Increase WBS task limits to 1000.
- Improvements in pricing for labor using cost-plus and contribution-margin-based models.
- Copy quote, contract, and opportunities across Legal Entities
- Improvements to project budgeting to support revenue forecasting and summarization options when importing from estimates.
- Progress-based billing projects.
- Subcontracting to Purchase Order integration that will light up vendor retention and Pay-when-paid functionality.
- Support for prospects on quotes.

- Support for intercompany vendor invoice.
- Integration of Print management for billing schedules using "Post invoice automatically.
- Improvements in usability and performance in specific areas across Project Operations.
- Investments in generative AI to help with core operational workflows like time and expense entry creation and submission.

Updates to Dynamics 365 Project Operations 2023 release wave 2

Investment areas

Copilot in Project Operations With every new release wave, AI and Automation investments through Copilot empower consultants, sales personnel, project and resource managers, as well as project accountants in Dynamics 365 Project Operations, providing them with intelligent, natural-language interactions. These enhancements extend beyond business applications to productivity tools like Microsoft Teams, Microsoft Outlook, and Microsoft Excel, meeting employees where they are most productive. Copilot features in Project Operations streamline and expedite workflows from the frontline to the back office, ultimately optimizing operational efficiency for service delivery organizations.

Optimize project operations In one application, Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams so they can win more deals, accelerate delivery, empower employees, and maximize profitability. Every release wave, Project Operations continues to invest in capabilities to improve usability, performance, and scale across critical areas of the product like project sales, planning, resourcing, budgeting and tracking, invoicing, and core transaction processing flows. The core processes in outsourcing and purchasing will get the spotlight with enhancements to service procurement scenarios with integration to Purchase Order, support for vendor retention, pay-when-paid, intercompany vendor invoices, and 3-way vendor invoice match functionality in Dynamics 365 Finance. Project contracting and pricing models will see new scenarios enabled with units, progress and subscription billing and contracting models, cost-plus and contribution-based pricing models. Intelligent resource recommendations will make project staffing easier by providing resource suggestions using past experience and a multidimensional prioritization of criteria like costs, utilization, skill match, and availability.

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.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
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.
Product trials	Get started with Project Operations.

What's new and planned for Dynamics 365 Project Operations

Article • 01/19/2024

This topic lists features that are planned to release from October 2023 through March 2024. 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 2023 release wave 1 plan.

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

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

Copilot in Project Operations

Introducing copilot capabilities in Dynamics 365 Project Operations.

Expand table

Feature	Enabled for	Public preview	General availability
Generate project plans using project manager copilot	Users by admins, makers, or analysts	✔ Jun 15, 2023	✔ Nov 10, 2023
Generate status reports with project manager Copilot	Users by admins, makers, or analysts	✔ Jun 15, 2023	✔ Nov 10, 2023
Assess issues and risks using project manager Copilot	Users by admins, makers, or analysts	✔ Jun 15, 2023	✔ Nov 10, 2023

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
Support historical tracking using project sales budget	Users by admins, makers, or analysts	Mar 2024	To be announced
Create budgets with summarization during estimate import	Users by admins, makers, or analysts	Mar 2024	To be announced
Easily summarize budget lines in Dynamics 365 apps	Users by admins, makers, or analysts	Mar 2024	To be announced
Explore advanced subcontract capabilities	Users by admins, makers, or analysts	Jan 2024	Mar 2024
Support for intercompany vendor invoices in resource and non-stocked based scenarios	Users by admins, makers, or analysts	-	Feb 2024
Project budget management and time-phased forecasting	Users by admins, makers, or analysts	✔ Aug 31, 2023	Mar 2024
Get recommendations on best resources for your project	Users by admins, makers, or analysts	-	Mar 2024
Cancel PO receipts with connected item requirements	Users by admins, makers, or analysts	-	✔ Oct 20, 2023
Use deferrals for stock or production project scenarios	Users by admins, makers, or analysts	✔ Apr 21, 2023	✔ Jan 12, 2024
Remove team member limits for externally scheduled projects	Users by admins, makers, or analysts	-	Mar 2024
Progress-based billing on fixed-price contracts	Users by admins, makers, or analysts	-	Mar 2024
Increase WBS limits to 1,000 tasks	Users by admins, makers, or analysts	-	Mar 2024
Display save status notification for WBS changes	Users by admins, makers, or analysts	-	Mar 2024
Enable default financial dimensions for bookable resources	Users by admins, makers, or analysts	-	Mar 2024
Support prospects on quotes	Users by admins, makers, or analysts	✔ Jan 1, 2024	Mar 2024
Provide time zone agnostic fields on projects, tasks, and scheduling tables	Users by admins, makers, or analysts	Jan 2024	Mar 2024

Feature	Enabled for	Public preview	General availability
Copy quotes and contracts across legal entities	Users by admins, makers, or analysts	Jan 2024	Mar 2024
Support cost-plus pricing for resource time	Users by admins, makers, or analysts	Jan 2024	Mar 2024
Block vendor payments for vendor invoices until PM approval	Users by admins, makers, or analysts	-	✔ Nov 3, 2023
Improved Project invoicing usability and performance	Users by admins, makers, or analysts	-	Mar 2024
Use the expense mobile app for intuitive expense entry	Users by admins, makers, or analysts	✔ May 31, 2023	✔ Nov 10, 2023

- You are able to opt into some features as part of early access on July 31, 2023, including all mandatory changes that affect users. To learn more, go to Early access FAQ .

Description of **Enabled for** column values:

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

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

Copilot in Project Operations

Article • 12/21/2023

ⓘ Important

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

With every new release wave, AI and Automation investments through Copilot empower consultants, sales personnel, project and resource managers, as well as project accountants in Dynamics 365 Project Operations, providing them with intelligent, natural-language interactions. These enhancements extend beyond business applications to productivity tools like Microsoft Teams, Microsoft Outlook, and Microsoft Excel, meeting employees where they are most productive. Copilot features in Project Operations streamline and expedite workflows from the frontline to the back office, ultimately optimizing operational efficiency for service delivery organizations.

Assess issues and risks using project manager Copilot

Article • 12/06/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jun 15, 2023	✔ Nov 10, 2023

Business value

Assessing the risks and staying on top of issues is one of the main activities that takes up a project manager's time. For a project manager that is managing five to six projects simultaneously, timely alerting the appropriate stakeholders of the risks, putting together a mitigation plan, and staying on top of the outstanding issues for each project becomes an enormously challenging task when put in context with the other responsibilities that are equally critical for a project manager. With the help of generative AI, this task can be automated where generative AI recommends a set of risks that require a mitigation plan and proposes a mitigation plan that the project manager can review and edit to save the project manager a lot of time and be one less thing to worry about.

Feature details

Periodically, the project manager copilot can assess the project for any risks and issues. This assessment can be tied to a periodicity that results in creating risk and issues related data in the issues and risks tables in Project Operations. Copilot can also generate mitigation for every risk that it identifies. The project manager can review and edit the mitigation plan to meet their needs. When generating a status report for the project using generative AI, issues and risks and corresponding mitigation plans can be added to the status reports as sections.

Geographic areas

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

- Switzerland

- United States
- Europe
- Australia
- India
- Japan

See also

Project management Copilot overview (docs)

Generate project plans using project manager copilot

Article • 12/06/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jun 15, 2023	✔ Nov 10, 2023

Business value

The most time-consuming step in project creation is developing a task breakdown structure or project plan. Established divisions can rely on the luxury of best practices that have been incorporated into project plan templates. However, for newer organizations and teams, creating project plan templates can be a daunting task due to the lack of knowledge and best practices for the type of work required on the project. Generative AI can create a work breakdown structure for a project, using the natural language description of the project, to help project managers and reduce their learning curve, making this step less daunting.

Feature details

On a project, a project manager can generate the work breakdown structure using generative AI. Once the project is described, generative AI can produce a hierarchical task structure for the project with durations. The project manager can then edit the task plan for any changes, add or remove tasks, edit durations, and add dependencies between tasks with a great starting point.

Geographic areas

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

- Switzerland
- United States
- Europe
- Australia
- India

- Japan

See also

Project management Copilot overview (docs)

Generate status reports with project manager Copilot

Article • 12/06/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jun 15, 2023	✔ Nov 10, 2023

Business value

Project managers are required to send project status reports to internal and external project stakeholders periodically. A project status report contains valuable information about the projects' work progress and financial targets. It takes 2-3 hours for a project manager to gather this information and present it succinctly in the status report. Considering that a typical project manager manages 5 to 10 projects at any given time, this can add up to several hours each period for the project manager. With generative AI, project managers can create project status reports with the click of a button. The status report is created with all the key highlights on the project KPIs and the commentary that is to-the-point and well-articulated. Project manager can also edit these descriptions as needed and send the report to the internal and external stakeholders.

Feature details

Every project manager must send status reports periodically. Usually, these reports contain information relating to the progress of work, budgets, and schedule tracking. With generative AI, this currently manual task and overhead can be automated to the delight of project managers who are the hero personas in project management. The status report generated should have nicely worded text and charts with the ability to configure what components can go into the status report for internal vs external stakeholders. The topics in the status report will cover the following and more:

- Budget tracking
- Vendor and employee productivity
- Work progress and deliverable tracking
- Profitability and revenue targets
- Invoicing status

Geographic areas

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

- Switzerland
- United States
- Europe
- Australia
- India
- Japan

See also

Project management Copilot overview (docs)

Optimize project operations

Article • 12/21/2023

ⓘ Important

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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. Every release wave, Project Operations continues to invest in capabilities to improve usability, performance, and scale across critical areas of the product like project sales, planning, resourcing, budgeting and tracking, invoicing, and core transaction processing flows. The core processes in outsourcing and purchasing will get the spotlight with enhancements to service procurement scenarios with integration to Purchase Order, support for vendor retention, pay-when-paid, intercompany vendor invoices, and 3-way vendor invoice match functionality in Dynamics 365 Finance. Project contracting and pricing models will see new scenarios enabled with units, progress and subscription billing and contracting models, cost-plus and contribution-based pricing models. Intelligent resource recommendations will make project staffing easier by providing resource suggestions using past experience and a multidimensional prioritization of criteria like costs, utilization, skill match, and availability.

Block vendor payments for vendor invoices until PM approval

Article • 12/06/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Nov 3, 2023

Business value

This feature helps organizations hold subcontractor payments, even after recording the invoices, until the Project Manager approves them in Dataverse. This feature helps the Accounts Payable clerk mark the invoices for payment blockers when payment approval is required.

Feature details

This feature:

1. Allows the accounts payable clerk to record the subcontractor invoice but holds the payments for project manager approval.
2. Ensures the project manager approves the subcontractor invoices, performs three-way matching in Dataverse, and reconciles the invoice with the services delivered.
3. After the project manager approval, the accounts payable team is able to make the subcontractor payments using payment journals or the payment proposal process.

Cancel PO receipts with connected item requirements

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 20, 2023

Business value

This feature provides a streamlined process for canceling product receipts that are associated with project item requirements. You can perform this action using the **Product receipt cancellation** function.

Feature details

When this feature is enabled, the system allows you to use the **Product receipt cancellation** function for **Project purchase orders** that are associated with item requirements that have not been invoiced.

Upon selection, the system will:

- Cancel any posted item requirement packing slips and create posted project transaction reversals. The original entry and reversal entry are connected and aren’t available for further adjustments.
- Cancel the selected product receipt.

Copy quotes and contracts across legal entities

Article • 07/18/2023

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

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2024	Mar 2024

Business value

When quotes and contracts are created, a legal entity is associated with these records for customers who deploy the resource and non-stocked scenarios. When a copy is required, it may need to be recreated in a new legal entity to reflect an alternate delivery model.

Feature details

The feature empowers you with the capability to explicitly indicate and define the desired target legal entity, customer, and business unit during the process of duplicating or replicating a quote or contract. With this functionality, our platform ensures you have complete control and flexibility in specifying the precise entities and units involved in the replication process, thereby enhancing efficiency and accuracy in managing quotes and contracts within their respective contexts.

Create budgets with summarization during estimate import

Article • 08/31/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2024	To be announced

Business value

This feature enhances the import from estimates experience during budget creation, where summarized budget lines are created to make budget tracking easier at a dimension level, like task or role.

Feature details

A project budget can be created from estimates by importing the estimates into budget lines. When estimates are created at a granular level, like an estimate created for every resource associated with a task, the number of budget lines created makes it difficult to track costs at such a granular level.

Summarization during import enables a recap of the estimate lines, for example, at a task level, where the quantity and amount of all time estimate lines associated with a task are summarized and budgeted against the task.

This summarization helps keep the number of budget lines at a manageable hierarchy, so tracking actuals against the budget lines is easier for you to manage.

Display save status notification for WBS changes

Article • 10/09/2023

ⓘ Important

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

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

Business value

This feature saves changes in Project for the web data in Project Operations asynchronously and includes a notification that displays the status for the save operation and date it was last saved. These changes ensure that users can trust that the data they are looking at is accurate and up to date, and they are aware of when a save operation completes.

Feature details

This feature notifies you about the last time a project was saved, or displays the status of an ongoing save operation to anyone viewing the project in Project Operations. The notification displays under the project's name.

Easily summarize budget lines in Dynamics 365 apps

Article • 08/31/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2024	To be announced

Business value

This feature enables flexible forecast line creation from budgets by summarizing budget lines at a task, role, or contract level for better forecast management in finance and operations apps.

Feature details

In a resource non-stocked deployment type, forecasts at finance and operations can be created from budget lines in addition to the existing capability of creating forecasts from estimates.

When estimates are created at a granular level, such as for each resource associated with a task, the resulting number of budget lines can make it challenging to track forecasts at such a detailed level. To address this, summarization during transfer to finance and operations apps allows for consolidating budget lines, such as at a task level. This means the quantity and amount of all-time budget lines associated with a task will be summarized and created as a forecast against the task.

This capability is relevant and will be enabled in resource non-stocked deployment as part of the 2023 release wave 2. It helps to manage the number of budget lines within a manageable hierarchy, making it easier to track and manage forecasts in finance and operations apps.

Enable default financial dimensions for bookable resources

Article • 10/10/2023

ⓘ Important

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

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

Business value

Financial dimensions will be defaulted onto hours-based transactions that are based on the financial dimension specified on the employee. This data will add additional cost details related to that labor.

Feature details

This feature will recognize the financial dimensions specified on the employee from time entries and will bring the employee reference into the integration journal. The employee's financial dimensions will apply to the integration journal, and costs will be posted with the employee's financial dimensions to both the project subledger and the associated general ledger voucher.

Explore advanced subcontract capabilities

Article • 12/26/2023

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2024	Mar 2024

Business value

The subcontracts feature provides better visibility across the organization, from the project manager to the accounts payable clerk who records vendor invoices. Vendor-reported time, expense, and material consumption are automatically registered to streamline the three-way match process and ensure that the correct vendor invoices are posted and the project cost is always up to date. This feature helps the finance team generate projected cash flow for the subcontract purchase orders.

Feature details

Project manager-created and managed subcontracts are visible to the accounts payable department as a purchase order. Receipts for those purchase orders are automatically created by the system when the subcontractor reports completion of work. The accounts payable clerk will be able to match the vendor invoice to the reported work by leveraging existing three-way match policy configuration capabilities in Microsoft Dynamics 365 Finance. This feature helps ensure incorrect vendor invoices aren't accepted by the accounts payable clerk.

Get recommendations on best resources for your project

Article • 07/18/2023

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

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

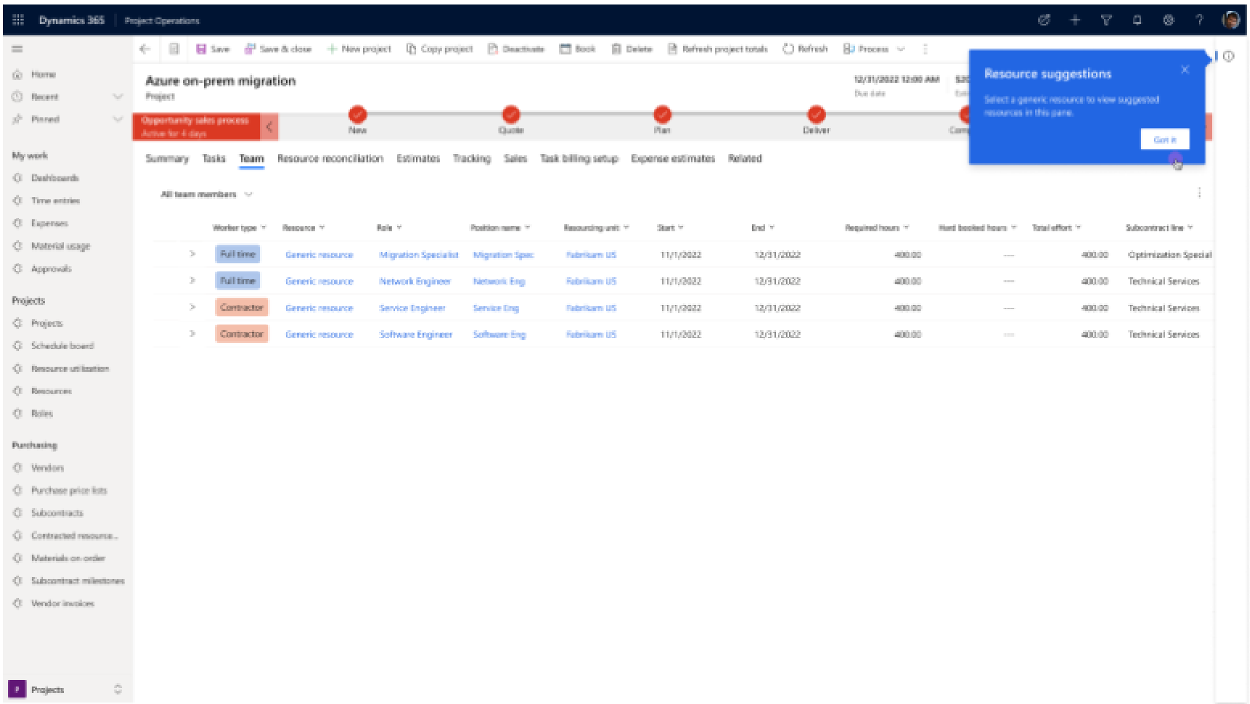
Business value

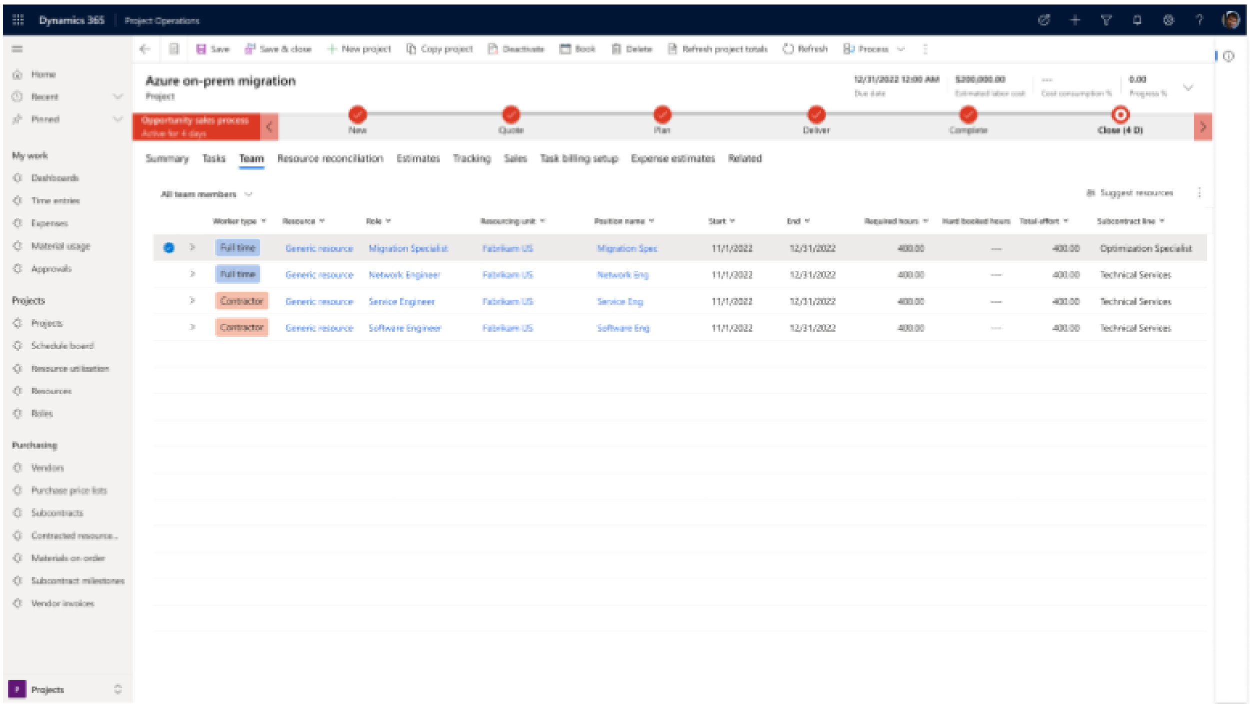
This feature helps make the role of project managers easier by understanding the status and challenges of a project at a specific time and recommending staffing choices for resources. Recommendations are provided after the application analyzes the cost, availability, experience, skill match, and utilization of employees and subcontractors. Each proposal is assigned a score that helps project managers understand each choice's pros and cons and helps make staffing decisions easier.

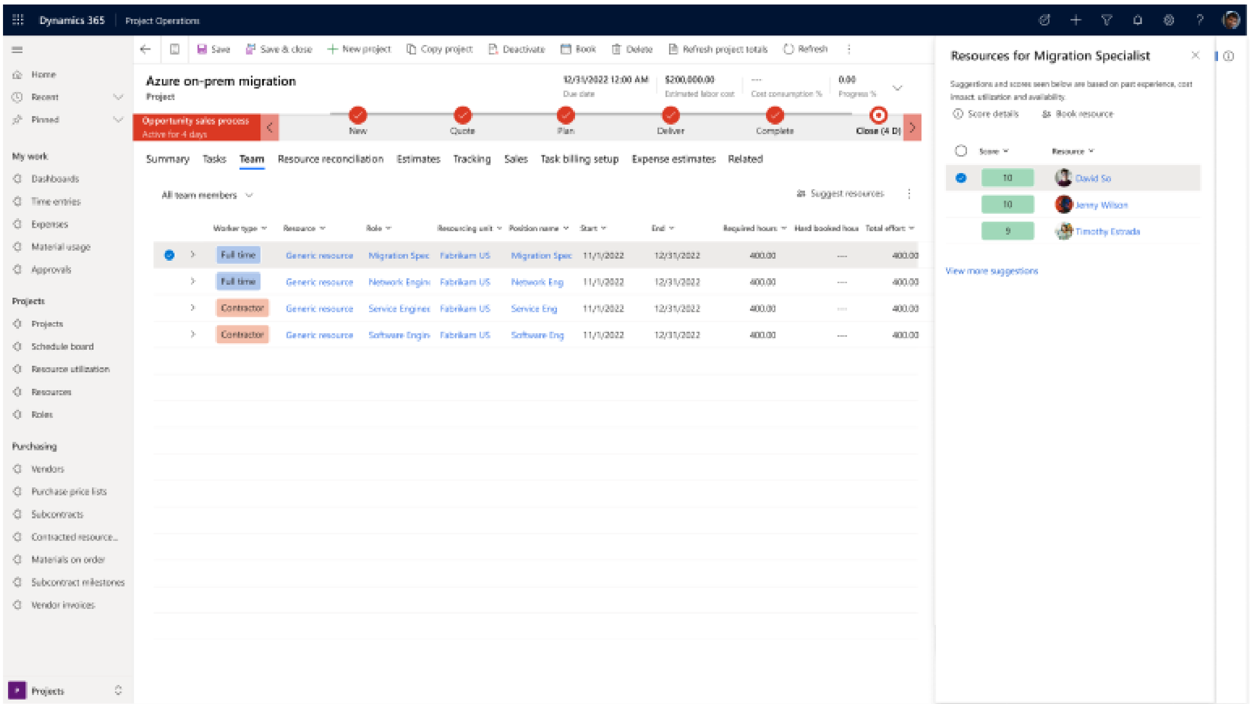
Feature details

Finding the right team continues to be one of the biggest challenges for Project managers in nearly every project-based organization across industry verticals. At a generic level, availability and skill match are challenges that apply to any resource scheduling problem. With resource talent distributed across employees and contractors, the problem exacerbates and requires Project managers to balance the concerns of cost and utilization with availability and skill match. This may pose conflicting priorities when each becomes more important depending on the status of the project at that point in time. Specifically, in project-based organizations, making the choice between an employee or an external resource can deeply influence the viability and profitability of the business. Also inherent to project-based work, because it requires close collaboration, is the need to have smooth working relationships among team members.

Project Operations will have a combination of an AI-powered and heuristics-based recommendation engine that takes into account these considerations and recommends the best resources for the project. With the use of AI, for the first time, the experience level of a resource will be part of the factors considered by staff team members on a project. The vision for this engine is to learn over time to correlate the successful completion of projects and the resources that worked on that project to suggest a specific mix of people for a project based on the type of work it involves. The engine leverages the AI infrastructure in Microsoft Power Platform and the rich project and resource data in CDS to drive resource recommendations.



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Improved Project invoicing usability and performance

Article • 07/19/2023

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

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

Business value

It's common for project-based companies to create an invoice for a large team that is working on a project with a recurring lifespan. Each invoicing period can involve thousands of transactions across time, expense, and material usage activity for projects that will need to be reviewed and confirmed before generating a customer-facing invoice. This process of reviewing is an essential function to ensure a quick invoice and maintain healthy operational metrics. Keeping a clean, intuitive, and performant experience for reviewing and making corrections for the project manager will add strong business value to ensure the smooth running of a service-centric practice.

Feature details

Key enhancements include:

1. Usability investments to ensure that a Project Manager can:

   - Review the billing backlog for the next invoice cycle with lines, details, and the proposed invoice total with the fewest clicks possible.
   - Make edits to billable hours and chargeable aspects of transactions.
   - Add transactions to the invoice when reviewing it.
   - Easily evaluate the impact of any of these changes on the amount to be invoiced.

2. Enhance the creation of proforma invoice entry points by improving the control and selection of which transactions in the billing backlog are okay to include on an invoice.

3. Leverage xMultiple paradigms and parallelize CRUD options in the invoicing context to improve the scale and throughput of invoicing operations.

Increase WBS limits to 1,000 tasks

Article • 10/09/2023

ⓘ Important

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

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

Business value

Customers running large, complex projects across various industry verticals often require detailed project plans to sequence and assign their work with a level of granularity designed to mitigate project risks and to drive clarity in each work package. While task checklists provide a means by which program managers can append additional detail, they are not schedule-impacting and aren't always a suitable alternative.

Feature details

This feature provides you with an enhanced capability to generate comprehensive work breakdown structures. It empowers you to create structures that are twice as extensive as the current limit to allow you to have a significantly greater number of project tasks. This feature enhances the flexibility and complexity of project planning and management.

Progress-based billing on fixed-price contracts

Article • 07/18/2023

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

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

Business value

This feature supports additional progress-based contracting models for project-based companies.

Feature details

Microsoft Dynamics 365 Project Operations currently supports a milestone-based billing schedule so that companies can invoice their customers at predetermined amounts and dates during the course of the project. However, a variation of this exists where a portion of the milestone is invoiced each period instead of the whole milestone. This feature enables project managers to split the value of the contract into a distinct schedule of values that are invoiced based on the progress of the work.

Project budget management and time-phased forecasting

Article • 11/15/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Aug 31, 2023	Mar 2024

Business value

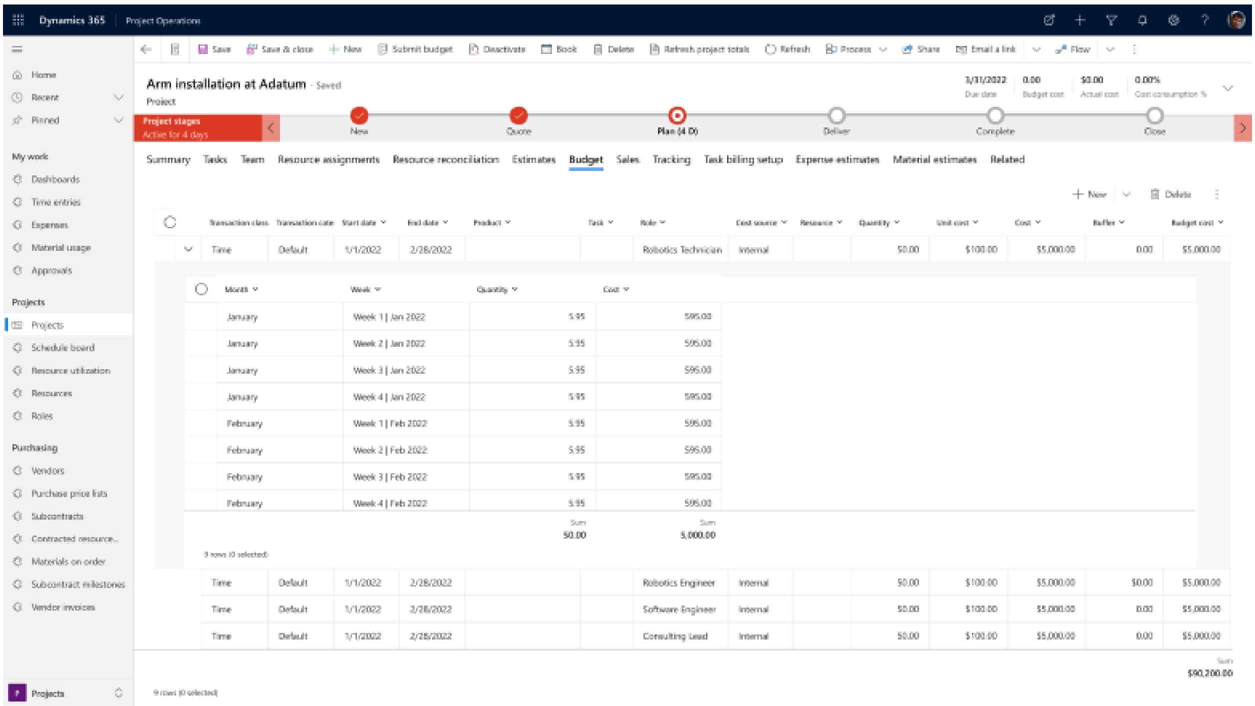
This feature provides better control over the status of spend and work progress and helps project managers forecast trends for the future duration of the project. Comparison of actual spending to budgeted and forecasted spending will help project managers come up with earned value analysis for their project to understand the schedule and financial progress. Project managers can also revise the project budget based on the new scope or changed reality and track the actuals against the revised budget going forward.

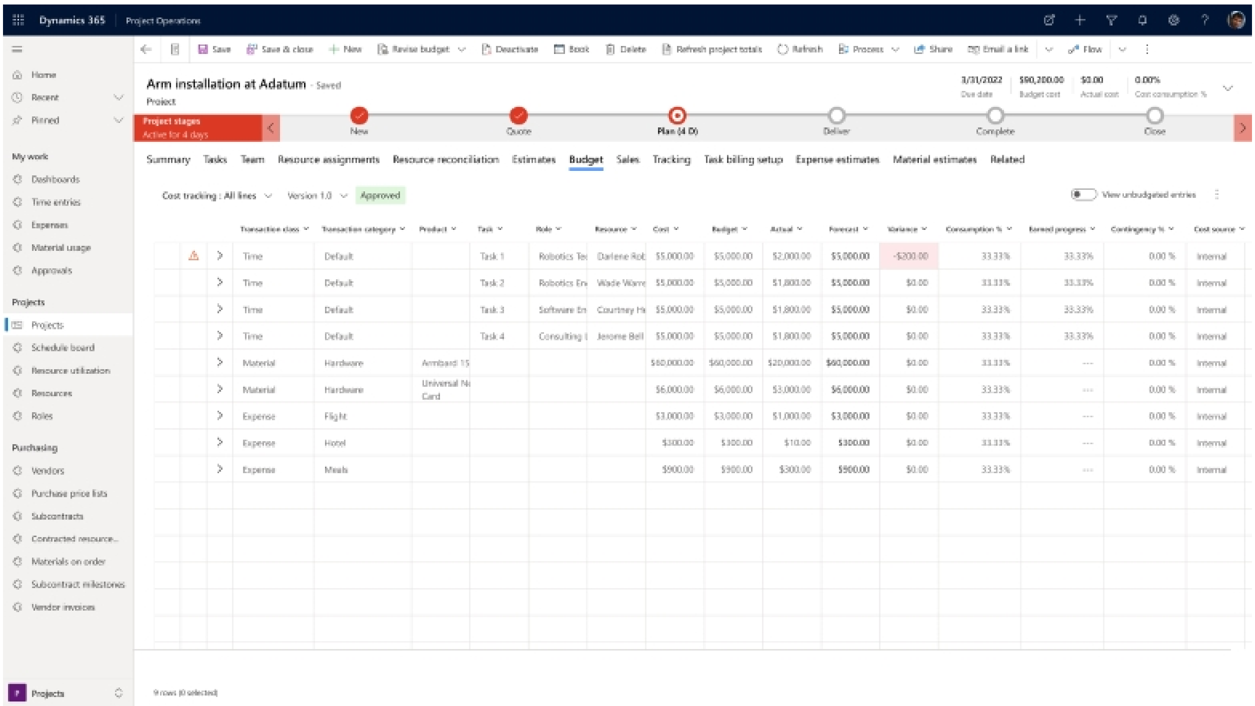
Feature details

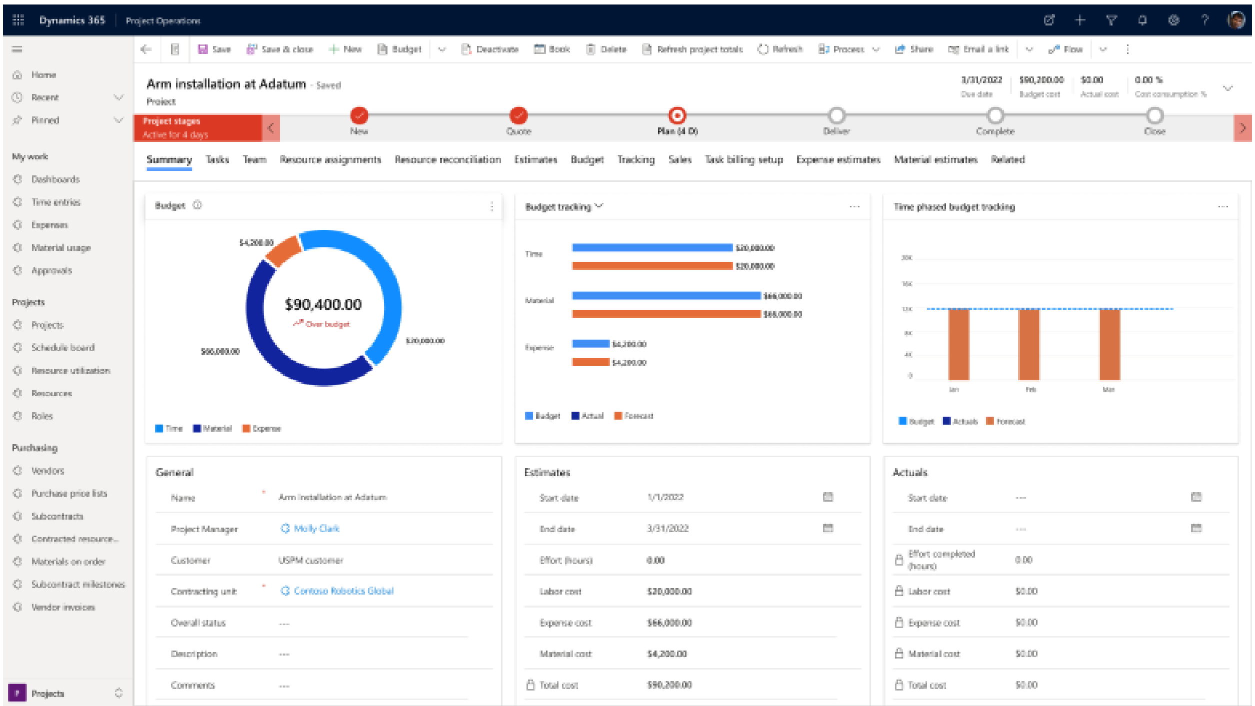
A project budget is a versioned snapshot of the financial estimation of time, expenses, and materials required on the project. Project managers can create these snapshots at different periods during the project lifecycle based on revisions and re-estimations of project scope and work.

The latest snapshot represents the best-known scope of the project at any given time. All monitoring of spend and consumption will be tracked against the latest snapshot. Project Operations adds this key capability to help the project manager get a clear view of how they are tracking to their spending and progress targets. This provides the ability to add forecasts based on current spending trends and follows these within a desired granularity of periods configured using project calendars and working days.

With this release, time-phased forecasting would be added to Project Operations Lite deployment and the whole feature would be enabled for Project Operations for resource/nonstocked deployment.







See also

Use time-phased project cost budget lines (docs)

Remove team member limits for externally scheduled projects

Article • 10/09/2023

ⓘ Important

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

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

Business value

Project Operations has a current limit of 300 team members per project. This limitation is imposed by the task planning engine of Project for the web. Some customers have projects that don't require advanced project planning and WBS capabilities, but may require many team members. For these projects, a typical usage paradigm is to manage them as "externally scheduled" projects because that removes the need for planning the project using Project for the web.

This feature removes the limit on the number of team members on externally scheduled projects. For example, this can be used to manage a project for team members' time off. Here team members can log time against the project so the customer can track time off across the organization, but no WBS or tasks are needed. In this case, the entire staff may be assigned to one project, and this feature removes the limit on the number of team members on this type of project.

Feature details

This feature allows customers using externally scheduled projects to assign more than 300 team members per externally scheduled project. This limit was designed to accommodate Project for the web and is not required for projects that use other project management tools.

Support cost-plus pricing for resource time

Article • 10/09/2023

ⓘ Important

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

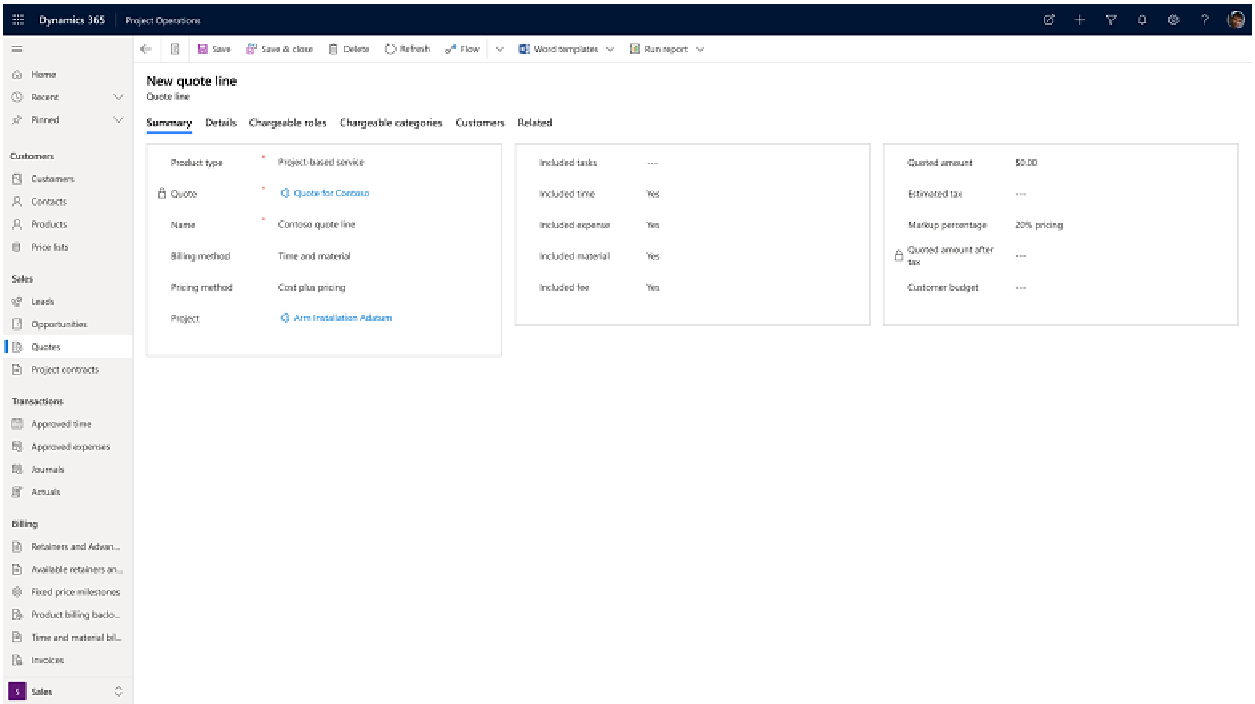
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2024	Mar 2024

Business value

Many professional services organizations derive their bill rates as a function of the associated cost rate of a resource. Empowering organizations to derive these prices directly in Microsoft Dynamics 365 Project Operations saves time, provides flexibility, and eliminates the need for external tracking sheets sometimes used to perform these calculations.

Feature details

Currently, Project Operations supports the ability to define a bill rate across multiple dimensions. However, the cost is presently not a supposed configuration. This new feature provides the ability to define line items in a sales price rate as a function of a related cost rate. Enabling these capabilities supports less risk-averse contracting models such as cost plus.


Dynamics 365
Project Operations
Save
Save & close
Delete
Refresh
Flow
Word templates
Run report
Home
Recent
Pinned
Customers
Customers
Contacts
Products
Price lists
Sales
Leads
Opportunities
Quotes
Project contracts
Transactions
Approved time
Approved expenses
Journals
Actuals
Billing
Retainers and Advan...
Available retainers an...
Fixed price milestones
Product billing backlo...
Time and material bil...
Invoices
Sales
New quote line
Quote line
Summary
Details
Chargeable roles
Chargeable categories
Customers
Related
Product type
Project-based service
Quote
Quote for Contoso
Name
Contoso quote line
Billing method
Time and material
Pricing method
Cost plus pricing
Project
Arm Installation Adatum
Included tasks

Included time
Yes
Included expense
Yes
Included material
Yes
Included fee
Yes
Quoted amount
$0.00
Estimated tax

Markup percentage
20% pricing
Quoted amount after tax

Customer budget

Support for intercompany vendor invoices in resource and non-stocked based scenarios

Article • 09/21/2023

ⓘ Important

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

Business value

The implementation of this feature brings significant business value by empowering the accounts payable team to efficiently document and manage intercompany invoices for Dynamics 365 Project Operations integrated scenario received from suppliers.

Feature details

Project Operations resource-based scenarios require support for intercompany vendor invoices. This feature allows the accounts payable team to record the intercompany invoice received from the supplier. There are scenarios where a supplier provides services to more than one legal entity and creates one invoice as required by the terms and conditions.

Support historical tracking using project sales budget

Article • 07/18/2023

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

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2024	To be announced

Business value

This feature enhances control over billed sales status and enables accurate revenue forecasting for project managers.

In the 2023 release wave 2, we are introducing this capability to the lite deployment type of Dynamics 365 Project Operations. This establishes the necessary infrastructure to support this feature in subsequent release waves for customers utilizing Dynamics 365 Project Operations for resource/non-stocked deployment.

Feature details

A project sales budget serves as a versioned snapshot of the estimated billed sales or revenue for a project. Project managers have the flexibility to create these snapshots at various stages of the project lifecycle, accommodating revisions and re-estimations of project scope and work.

The latest snapshot represents the most up-to-date revenue forecast for the project, serving as a benchmark for tracking billed sales. This key capability provided by Project Operations enables project managers, accountants, and other stakeholders to gain a clear overview of their progress toward the projected revenue target at the project level. By comparing actual revenue to the budgeted and forecasted figures, project managers can perform revenue analysis for their projects. Furthermore, project managers can revise the project sales budget when encountering new scopes or changes in reality, enabling ongoing tracking of billed sales against the updated budget.

Support prospects on quotes

Article • 01/19/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jan 1, 2024	Mar 2024

Business value

This feature reduces complexity on the backend system as accounts are separated between prospects and customers. It improves performance, minimizes storage consumption, costs, and simplification, and aligns the system with ideal behavior.

Feature details

When salespeople are in the process of generating a quote, they might encounter a situation where they need to provide a quote for an account categorized as a prospect in terms of its relationship status. However, as of today, our system exclusively supports the relationship type of customer for scenarios involving resources or non-stocked items. To address this limitation and enhance our platform's functionality, we have implemented a new feature that introduces intelligent mechanisms to handle the conversion of prospective accounts into customer accounts. This feature entails the introduction of user interface components and validation logic, which work together to facilitate a seamless transition from prospect status to customer status, thereby enabling the salesperson to generate accurate and comprehensive quotes for a wider range of accounts.

Use deferrals for stock or production project scenarios

Article • 01/12/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 21, 2023	✔ Jan 12, 2024

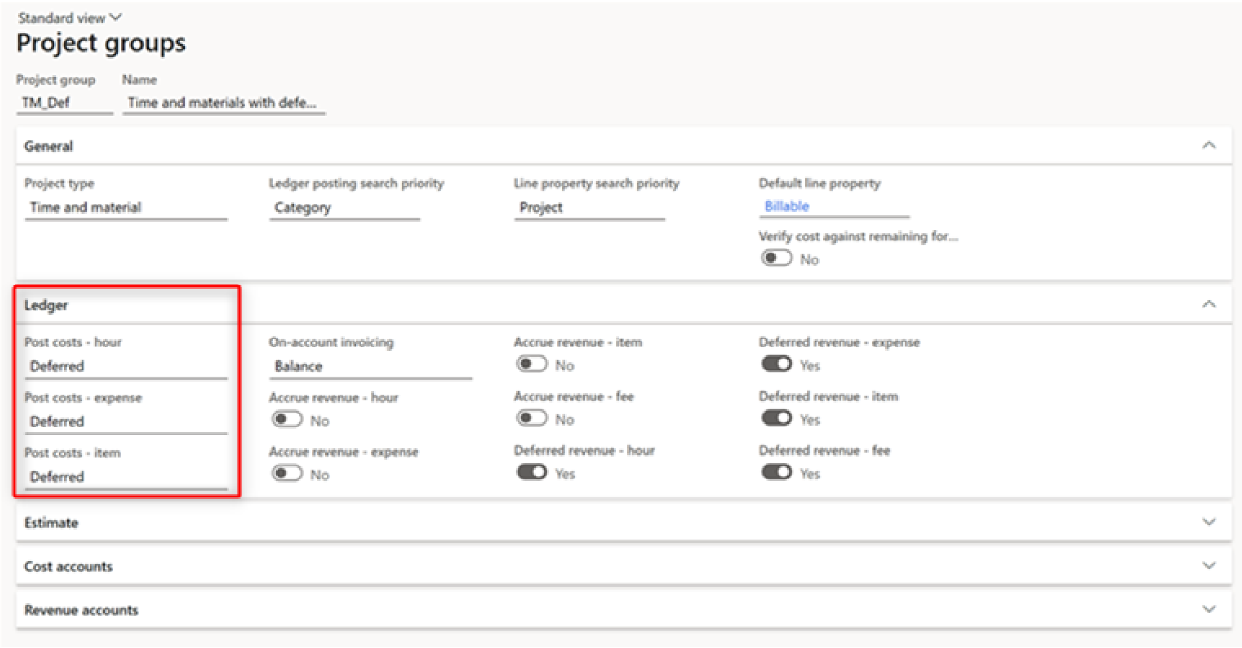
Business value

There's an increasing trend within modern organizations to transform their business models to sell project-based work and subscription-based services in a consolidated contractual agreement. Microsoft Dynamics 365 Finance has released new features to help manage subscription-based services. These features include the ability to configure and use advanced cost and revenue deferrals. With this update, Microsoft Dynamics 365 Project Operations for production or stocked scenarios will support these features.

Feature details

This feature includes the following capabilities:

- Configure cost and revenue deferrals for different project transaction types.
- Record deferred cost and revenue to the project subledger.
- Adjust project transactions with cost and revenue deferrals.



See also

Project deferrals (docs)

Use one grid for material and expense estimates

Article • 03/26/2024

ⓘ Important

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

Expand table

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

Business value

Replacing the grid within expense and material estimates provides a clean experience when creating and editing estimates. The enhanced grid experience provides easy filtering, deletion, and lookup functionality. This change ensures extensibility and improves performance.

Feature details

This feature brings together the new grid support into Project's expense and material estimate grids. Today these custom grids are not performant and lack extensibility and capabilities. This feature enables the capabilities of the new modern grid to improve the overall experience for end users.

These enhancements include:

- Improved grid with a view switcher.
- Improved grid allowing extensibility.
- Task sorting by work breakdown structure.
- Quick create experience to easily add expense and material estimates.

Use the expense mobile app for intuitive expense entry

Article • 12/06/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ May 31, 2023	✓ Nov 10, 2023

Business value

This feature provides an intuitive expense mobile app that is effortless to use, accelerates the reimbursement process for the employee, and increases user productivity. A business user can itemize expense entries such as hotel costs, confirm expenses, and receive expense-related notifications on the go when using the expense mobile application.

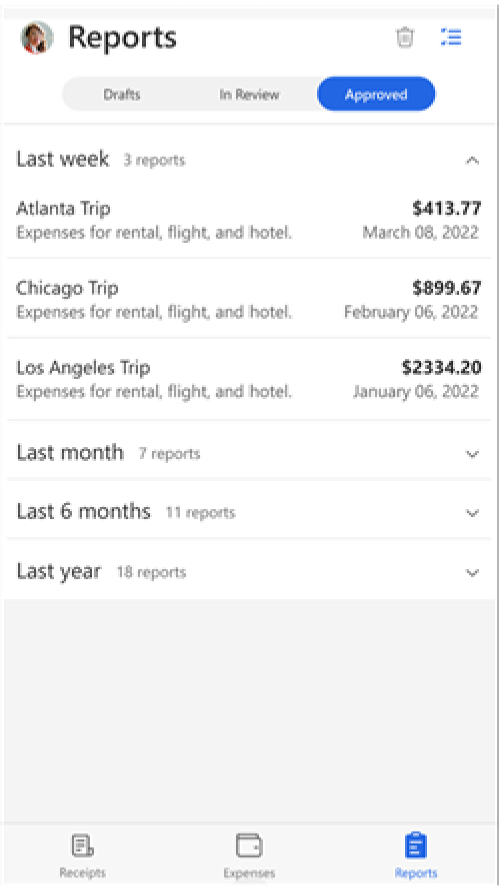
Feature details

The new expense mobile app lets you easily enter expense details on the go. You can capture receipts using the camera on your phone, and then match them with credit card or cash expenses. The expense mobile app will be available both on iOS and Android mobile devices.

Our new expense mobile app will be further improved with the following capabilities:

- Review and approve/reject expense reports that are submitted to you.
- Support for mileage expenses.

We will continue to enhance the application with additional capabilities after general availability.



See also

Expense mobile app overview (docs)

Plan and prepare for Dynamics 365 Human Resources in 2023 release wave 2

Article • 12/21/2023

> ⓘ **Important**
>
> The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. 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/2023W2/Finance

How we work and the workplace has fundamentally changed—yet, for many businesses, HR processes have not. Today, people are connected via mobile devices, plugged into their network, have higher career path expectations, and want to work for organizations aligned with their values.

Legacy HCM systems are disconnected, and data is siloed across HR architectures, typically comprised of multiple vendor solutions. Many processes are still manual, and the employee experience needs to be connected. Employee disruption ultimately impacts the organization by lacking product innovation, expensive operational errors, less satisfied customers, and suboptimal financial results.

We aim to help limit the number of manual processes and connect your employee experiences. We also aim to bring systems together to ensure data is readily available and not siloed. Our goal is to enable employees to focus on their work, inspire managers to help employees grow and help HR business partners focus on strategic areas of the organization.

For 2023 release wave 2, our focus will be on:

- **Improve recruiting experiences** with functionally rich and intuitive experiences that target recruiters, candidates, and hiring managers.
- **Expand the HCM ecosystem** to include learning management system integration through public APIs leveraging Dataverse along with expanding our payroll partner network.

- **Build better together experiences** that cross the Dynamics 365 space.

Updates to Dynamics 365 Human Resources 2023 release wave 2

Investment areas

Optimize human resource operations Every new release wave of the Dynamics 365 Human Resource application brings new enhancements for corporations to optimize their human resource operations from personnel management, compensation, benefits, and performance management. Improvements in recruiting operations, skills and competency management, and succession management bring efficiencies in the hire-to-retire lifecycle. Core employee experiences around leave and absence, learning, and training management will benefit from investments bringing core HR data and processes to meet employees where they are.

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

Check out the release plan

For application administrators

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

Features that must be enabled by application administrators
This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the

complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.

Get the most out of Human Resources

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
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.

What's new and planned for Dynamics 365 Human Resources

Article • 01/19/2024

This topic lists features that are planned to release from October 2023 through March 2024. 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 2023 release wave 1 plan.

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

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

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
Access employee leave and absence in Teams for Dynamics 365 Human Resources (merged infrastructure)	Users by admins, makers, or analysts	✔ Dec 8, 2023	-

- You are able to opt into some features as part of early access on July 31, 2023, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

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

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

Optimize human resource operations

Article • 12/21/2023

ⓘ Important

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

Every new release wave of the Dynamics 365 Human Resource application brings new enhancements for corporations to optimize their human resource operations from personnel management, compensation, benefits, and performance management. Improvements in recruiting operations, skills and competency management, and succession management bring efficiencies in the hire-to-retire lifecycle. Core employee experiences around leave and absence, learning, and training management will benefit from investments bringing core HR data and processes to meet employees where they are.

Access employee leave and absence in Teams for Dynamics 365 Human Resources (merged infrastructure)

Article • 01/19/2024

ⓘ Important

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

Expand table

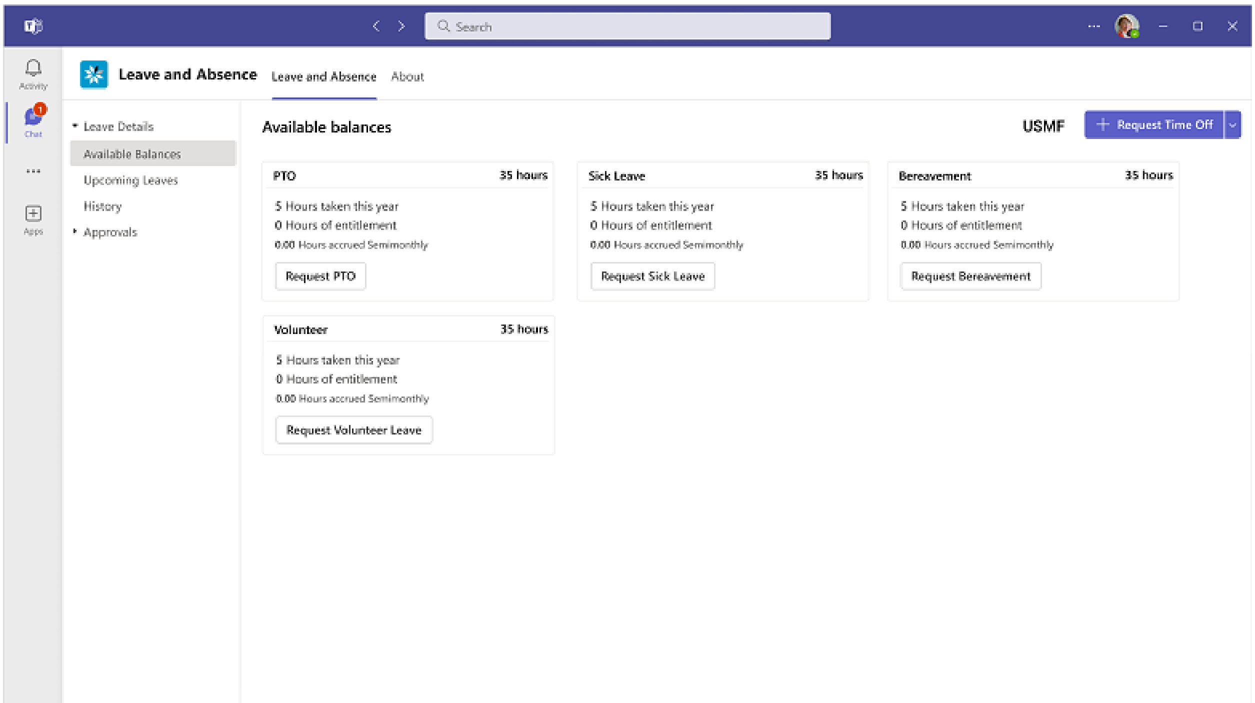
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 8, 2023	-

Business value

Employees can view time-off balances and submit leave requests from within Microsoft Teams for Dynamics 365 Human Resources (merged infrastructure). It saves time and effort, as employees don't have to navigate to separate systems or fill out paper forms. Having this information readily available within a platform you already use improves transparency. Overall, managing leave is easier and more efficient.

Feature details

Quickly view time-off balances and submit leave requests right within Microsoft Teams. The Dynamics 365 Human Resources (merged infrastructure) takes the guesswork out of requesting leave. Employees can quickly access leave balance and request information right within Teams, where they already do much of their collaboration. In addition, managers also have the ability to act on leave requests needing their attention in Teams. The app is tightly integrated with Human Resources, so employees can view the progress of their leave requests in real time.



Search
Activity
Chat
Apps
Leave and Absence
Leave and Absence
About
Leave Details
Available Balances
Upcoming Leaves
History
Approvals
Available balances
USMF
Request Time Off
PTO
35 hours
5 Hours taken this year
0 Hours of entitlement
0.00 Hours accrued Semimonthly
Request PTO
Sick Leave
35 hours
5 Hours taken this year
0 Hours of entitlement
0.00 Hours accrued Semimonthly
Request Sick Leave
Bereavement
35 hours
5 Hours taken this year
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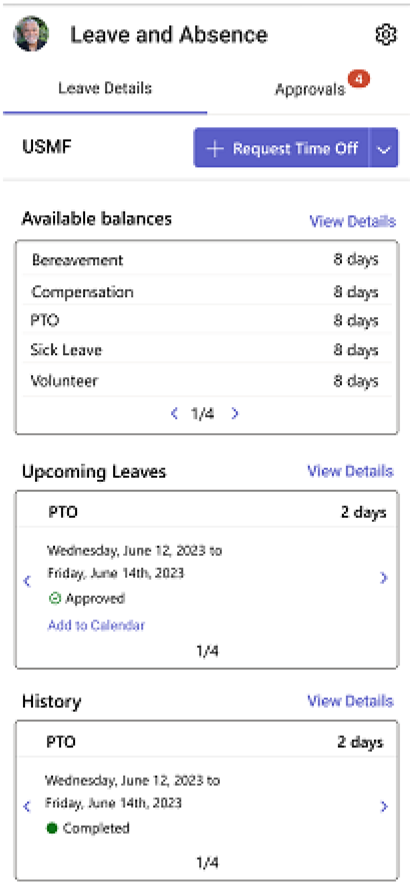
0.00 Hours accrued Semimonthly
Request Volunteer Leave



Leave and Absence
Leave Details
Approvals
4
USMF
Request Time Off
Available balances
View Details
Bereavement 8 days
Compensation 8 days
PTO 8 days
Sick Leave 8 days
Volunteer 8 days
1/4
Upcoming Leaves
View Details
PTO 2 days
Wednesday, June 12, 2023 to
Friday, June 14th, 2023
Approved
Add to Calendar
1/4
History
View Details
PTO 2 days
Wednesday, June 12, 2023 to
Friday, June 14th, 2023
Completed
1/4

Plan and prepare for Dynamics 365 Commerce in 2023 release wave 2

Article • 12/21/2023

ⓘ **Important**

The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Commerce**.

Overview

https://aka.ms/ReleaseHighlight/2023W2/CustomerExperience

Retail, wholesale, and manufacturing organizations continue to face significant challenges due to evolving consumer buying habits and ongoing economic uncertainty. The industry has seen decreasing brand loyalty as customers gravitate toward more flexible digital commerce and easy, seamless, in-store, and curbside shopping experiences. At the same time, organizations must contend with inflationary pressures, supply chain challenges, increased employee turnover, and labor shortages as they attempt to drive revenue growth in an increasingly competitive retail landscape.

Dynamics 365 Commerce meets these challenges with an end-to-end solution that delivers seamless commerce across all channels by encompassing sales, mobility, intelligence, and productivity in a single platform to help customer-facing businesses achieve more. The solution enables comprehensive support to operate a broad range of business processes, including point of sale (POS), call center, e-commerce, clienteling, merchandising, inventory, and channel management while providing a unified and immersive customer experience for B2B and B2C engagements across physical and digital channels.

Organizations can leverage Commerce to drive better business outcomes by:

- **Engaging customers across channels**: Give your customers or partners the option to purchase when, how, and where they want—on any device—by delivering a frictionless and consistent engagement across physical and digital channels.
- **Building your e-commerce presence**: Grow your business with an integrated, end-to-end, unified digital commerce solution.

- **Modernizing retail stores and streamlining operations**: Create personalized and friction-free commerce experiences through user-friendly applications powered by robust back-office operations.
- **Gaining agility and scalability through a natively headless solution**: Support traditional and emerging channels by using an agile, API-driven headless commerce engine to help adapt to current and emerging needs. Employ a configurable and extensible platform that expands and grows to fit your business needs.

Key features for this release include:

- **AI innovation with copilot**: Leverage the power of AI to create engaging product enrichment marketing content for e-commerce sites.
- **B2B investments**: Distributors can view, accept, or reject orders, and buyers get a simpler, more streamlined signup experience.
- **Inventory and pricing**: Real-time inventory status is now available across channels via integration with Dynamics 365 Supply Chain's Inventory Visibility Service to optimize sales and fulfillment. Contextual and flexible dynamic pricing capabilities enable new targeted pricing strategies.
- **Localization**: Streamline rollout of Store Commerce app in additional markets with deployment of localization features in Sweden and Eastern Europe.

Updates to Dynamics 365 Commerce 2023 release wave 2

Investment areas

AI innovation with Copilot Investments in this area will introduce AI-powered capabilities to enhance customer experiences and streamline operations. To leverage these capabilities, retailers can converse using natural language with Copilot in Dynamics 365 Commerce to accomplish tasks more swiftly and efficiently to better engage with their shoppers.

Digital Commerce Investments in this release include streamlining site management and design and adding key features and capabilities for digital sales channels.

Intelligent Order Management Built on a modern, open platform, Dynamics 365 Intelligent Order Management provides the flexibility companies need to capture orders from any order source, including e-commerce, marketplace, mobile apps, or traditional sources like electronic data interchange (EDI). Companies can fulfill those orders from their own warehouses, third-party logistics (3PL) providers, stores, or drop-ship with vendors or other delivery fulfillment partners using out-of-the-box, prebuilt connectors from an ecosystem of more than 200 Microsoft Power Platform connectors.

Intelligent Order Management leverages an integrated, real-time inventory visibility service, and a microservice built on Microsoft Dataverse that is highly scalable and extensible, providing a single, global view of the inventory positions across systems. Intelligent Order Management also uses distributed order management (DOM) to give real-time recommendations for each order, so they are fulfilled accurately and in a more cost-effective manner, improving supply chain efficiency to better meet customer expectations.

With Intelligent Order Management, brand owners gain real-time visibility into each step of the order journey, and fulfillment insights in real time through customizable and integrated dashboards that enable their supply chain team to overcome constraints and improve operational efficiency.

Omnichannel Commerce Investments in this release enable end-to-end omnichannel capabilities and unified back-office management and operations.

Store Commerce Investments in this wave enable the rollout of the Store Commerce app in Sweden and Eastern Europe and address market-specific needs.

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

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Get the most out of Commerce

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
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.

What's new and planned for Dynamics 365 Commerce

Article • 01/19/2024

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AI innovation with Copilot

Dynamics 365 Commerce investments to bring breakthrough AI-powered capabilities leveraging Copilot.

Expand table

Feature	Enabled for	Public preview	General availability
Generate product enrichment content for e-commerce sites with Copilot in site builder	Users by admins, makers, or analysts	✔ Sep 29, 2023	Feb 2024
Integrate AI Copilot to provide Data Q and A	Admins, makers, marketers, or analysts, automatically	✔ Oct 31, 2023	-

Digital Commerce

Provide fully integrated e-commerce storefronts for Dynamics 365 Commerce customers.

Expand table

Feature	Enabled for	Public preview	General availability
Host a B2B platform for distributors and business buyers	Users by admins, makers, or analysts	✔ Oct 31, 2023	Feb 2024

Intelligent Order Management

Intelligent Order Management on Microsoft Supply Chain Center allows you to capture and fulfill orders from an omnichannel source.

Expand table

Feature	Enabled for	Public preview	General availability
Enable purchase order orchestration	Users, automatically	✔ Oct 16, 2023	To be announced
Run automatic orchestration based on business events	Users, automatically	✔ Oct 16, 2023	Mar 2024
Provide carting options to e-commerce platforms	Users, automatically	✔ Oct 16, 2023	Mar 2024
Try real-time inventory dashboards	Users by admins, makers, or analysts	-	Mar 2024
Expose inventory capabilities as microservices	Users, automatically	✔ Apr 30, 2023	✔ Oct 31, 2023
Enable flexible DOM constraints and processing strategies for effective fulfillment	Users, automatically	✔ Apr 30, 2023	✔ Oct 31, 2023
Look up inventory in real time	Users, automatically	✔ Oct 16, 2023	Mar 2024
See a unified order view from cart to door	Users, automatically	✔ Oct 16, 2023	Mar 2024
Enable estimated dates for customer fulfillments	Users, automatically	✔ Oct 16, 2023	Mar 2024
Try new order types that support your business	Users, automatically	✔ Oct 31, 2022	✔ Oct 16, 2023

Omnichannel Commerce

New features across channels for Dynamics 365 Commerce customers.

Expand table

Feature	Enabled for	Public preview	General availability
Simplify product media management with integrated workflows	Admins, makers, marketers, or analysts, automatically	✔ Aug 8, 2023	✔ Oct 23, 2023
Enable real-time inventory with Inventory Visibility	Admins, makers, marketers, or analysts, automatically	✔ Sep 1, 2023	✔ Nov 3, 2023
Roll out pricing strategies with flexible pricing rules	Users by admins, makers, or analysts	Mar 2024	-
Use integrated omnichannel media management features	Admins, makers, marketers, or analysts, automatically	✔ Aug 8, 2023	✔ Oct 23, 2023

Store Commerce

New features and capabilities for customers using Dynamics 365 Commerce point of sale.

Expand table

Feature	Enabled for	Public preview	General availability
Fiscal integration support for stores in Sweden	Users by admins, makers, or analysts	-	✔ Oct 2, 2023
Print advance invoices for stores in Eastern Europe	Users by admins, makers, or analysts	-	✔ Oct 2, 2023

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AI innovation with Copilot

Article • 12/21/2023

ⓘ **Important**

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Investments in this area will introduce AI-powered capabilities to enhance customer experiences and streamline operations. To leverage these capabilities, retailers can converse using natural language with Copilot in Dynamics 365 Commerce to accomplish tasks more swiftly and efficiently to better engage with their shoppers.

Integrate AI Copilot to provide Data Q and A

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 31, 2023	-

Business value

Integrate copilot into Intelligent Order Management to provide a rich data Q&A experience for admin and fulfillment operator personas. This feature boosts productivity and prioritizes workloads by eliminating unnecessary clicks. The copilot efficiently addresses business questions, quickly removes obstacles, and paves the way for intelligent fulfillment and on-time delivery. This feature is initially scoped to data in Intelligent Order Management.

Feature details

The new copilot data Q&A capability enhances productivity for admins and order fulfillment analysts in the following ways:

- **Improves troubleshooting of provider and orchestration errors**: By asking simple questions related to provider errors, this feature eliminates the need for admins to go into time-consuming Power Automate flows for troubleshooting purposes and gets the most needed information in front of the users.

- **Prioritizes workloads of fulfillment persona**: By asking simple questions related to order, inventory, and fulfillment, the fulfillment analyst can prioritize their workloads by acting on the most critical orders to advance fulfillment.

- **Provides order and delivery tracking**: By asking simple questions related to orders, the fulfillment analyst can get accurate information related to the last-mile tracking of the orders to make informed decisions and communicate with the customers.

Generate product enrichment content for e-commerce sites with Copilot in site builder

Article • 01/17/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 29, 2023	Feb 2024

Business value

Merchandisers with large product catalogs want an efficient way to enrich products. With Copilot in site builder, merchandisers can create content quickly, while ensuring the AI-generated market content created by copilot is aligned to their target audience and brand tone. Copilot in site builder will help merchandisers achieve higher conversion rates with less effort.

Feature details

Creating marketing and storytelling content for a product for e-commerce sites is key to driving customer engagement and sales, but can be time-consuming and challenging. The new copilot capability in Commerce is built for the product enrichment workflow in site builder. With Copilot for site builder, you can generate persuasive, compelling, and engaging product enrichment and marketing content for your e-commerce websites quickly and efficiently. This feature will offer the following capabilities:

- **Jump-start the creative process**: Copilot creates content that is based on basic product information such as name, description, attributes, and dimensions. You can use the generated content to spark further ideas.

- **Optimize for search engines (SEO)**: Optimize your product marketing content for search engines so that it ranks higher in Internet search results and thereby helps generate more organic growth.
- **Craft the tone of message**: Select the voice that best fits your brand and audience. You can specify a unique tone for each product. The tone of message for a product can be adventurous, casual, luxurious, formal, informational, educational, and more.
- **Craft a tailored message**: Select the intended audience to tailor the message for the specific buyers, such as new parents, graduates, senior citizens, health-care workers, and more.
- **Amplify with key highlights**: Augment your content with key highlights specific to the product in a natural language-based and interactive manner. Generate engaging text snippets that help amplify key highlights for your product.
- **Make basic modifications**: Easily make basic text modifications using an inline rich text editor or by providing key prompts to format the text using natural language.

Digital Commerce

Article • 12/21/2023

ⓘ Important

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

Investments in this release include streamlining site management and design and adding key features and capabilities for digital sales channels.

Host a B2B platform for distributors and business buyers

Article • 12/06/2023

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 31, 2023	Feb 2024

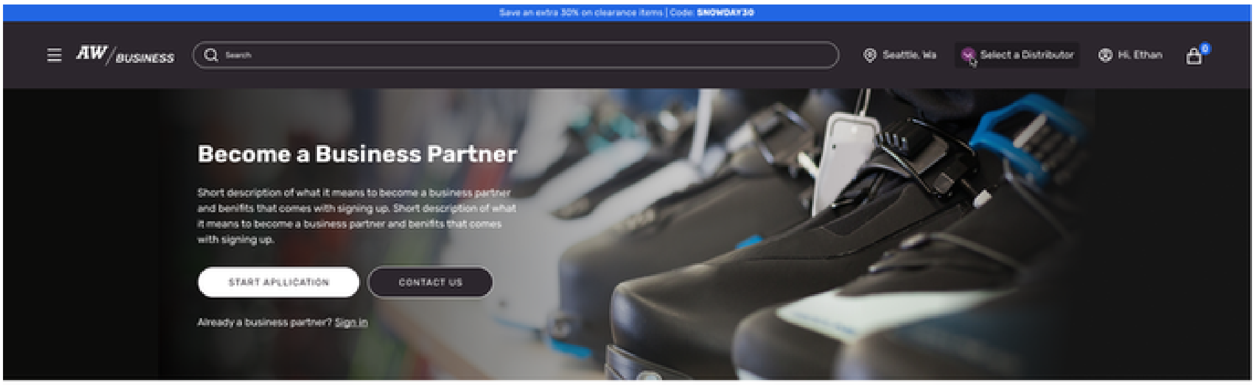
Business value

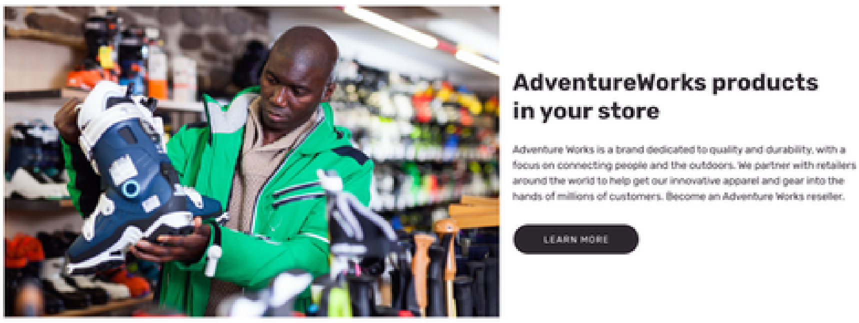
New distributor capabilities enable manufacturers to provide a self-service platform that simplifies distributor operations and builds meaningful, long-lasting business relationships through efficient and transparent transactions.

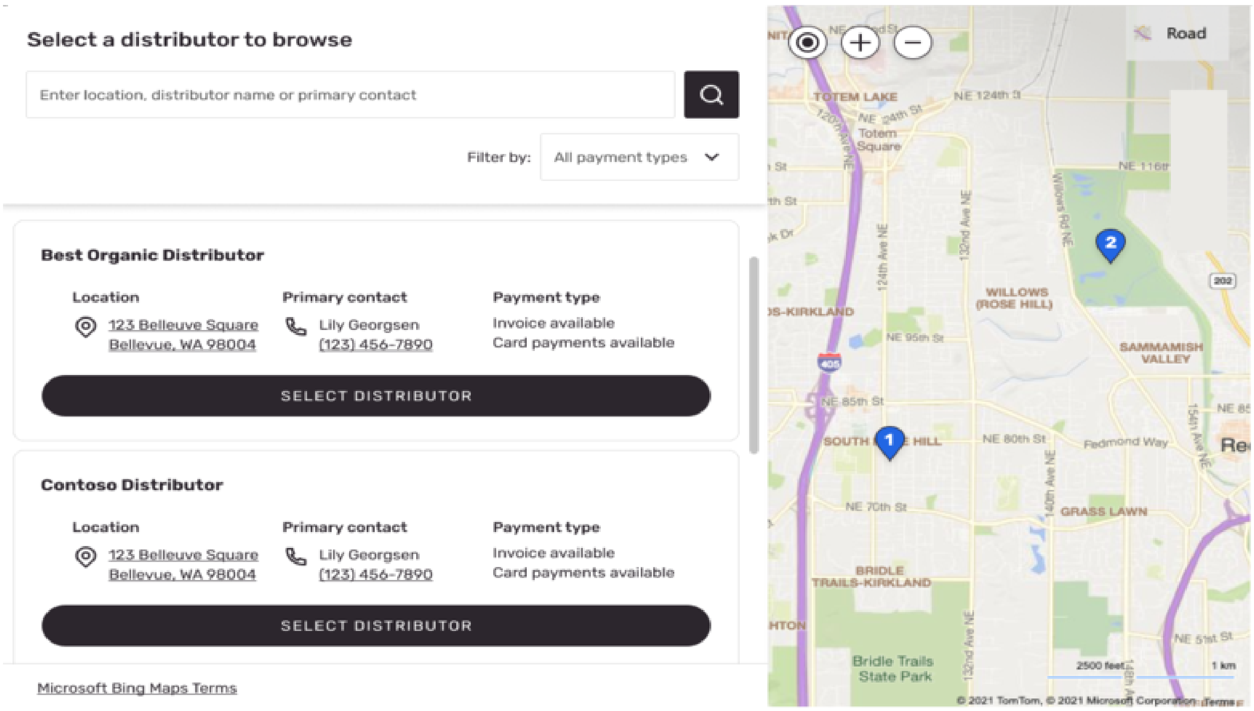
Feature details

The following capabilities will be enabled:

- Manufacturers can invite distributors to use their self-service platform.
- Distributors can easily view products and place orders directly with the manufacturer through a self-service portal.
- Outlet buyers can purchase directly from the manufacturer or a preferred set of distributors through the self-service portal.
- Distributors can review and fulfill orders assigned to them via Headless Commerce APIs.
- Distributors can manage their inventory information via Headless Commerce APIs.







See also

[Place B2B website orders quickly](#) (docs)

Intelligent Order Management

Article • 12/21/2023

ⓘ **Important**

Some of the functionality described in this release plan has 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, open platform, Dynamics 365 Intelligent Order Management provides the flexibility companies need to capture orders from any order source, including e-commerce, marketplace, mobile apps, or traditional sources like electronic data interchange (EDI). Companies can fulfill those orders from their own warehouses, third-party logistics (3PL) providers, stores, or drop-ship with vendors or other delivery fulfillment partners using out-of-the-box, prebuilt connectors from an ecosystem of more than 200 Microsoft Power Platform connectors.

Intelligent Order Management leverages an integrated, real-time inventory visibility service, and a microservice built on Microsoft Dataverse that is highly scalable and extensible, providing a single, global view of the inventory positions across systems. Intelligent Order Management also uses distributed order management (DOM) to give real-time recommendations for each order, so they are fulfilled accurately and in a more cost-effective manner, improving supply chain efficiency to better meet customer expectations.

With Intelligent Order Management, brand owners gain real-time visibility into each step of the order journey, and fulfillment insights in real time through customizable and integrated dashboards that enable their supply chain team to overcome constraints and improve operational efficiency.

Enable estimated dates for customer fulfillments

Article • 11/15/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 16, 2023	Mar 2024

Business value

This feature enables consumers to select a fulfillment option that meets their needs.

Feature details

This feature provides functionality that determines the estimated dates from carriers, and the shipping rates for a service that the customer selected during the carting experience. This enables consumers to select an option that caters to their needs for fulfillment of an order.

Enable flexible DOM constraints and processing strategies for effective fulfillment

Article • 11/15/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Apr 30, 2023	✔ Oct 31, 2023

Business value

This feature in Intelligent Order Management enables business users to configure multiple rules that enhance their fulfillment strategies and enable priority rule-based constraints that can be reprocessed for better optimization.

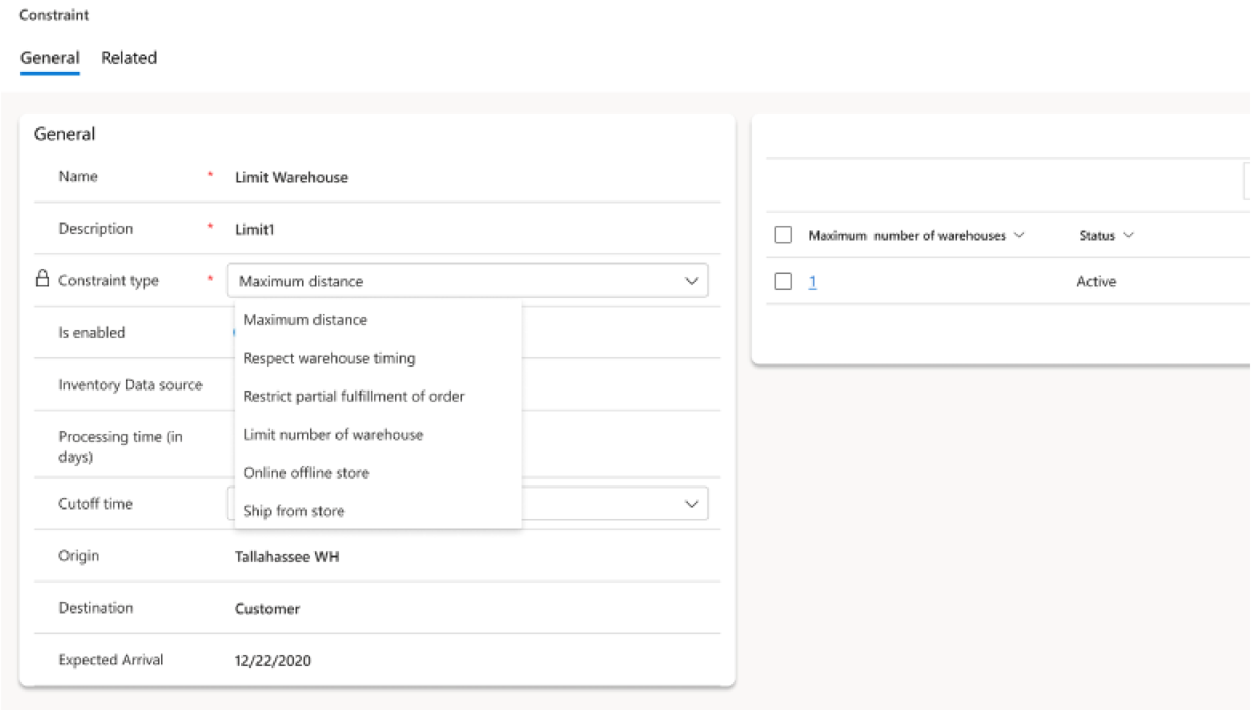
Feature details

Dynamics 365 Intelligent Order Management will enable customers to configure the prioritization for fulfillment options. The new capability will allow customers to define constraints as soft or hard, providing more flexibility to distributed order management (DOM) processing.

Customers will also be able to split deliveries and set order amount restrictions on fulfillments.

This feature enhances DOM with the following additional constraints:

- DOM constraints for maximum rejects, minimum inventory levels
- Maximum order constraints
- Time-based optimization
- Online/offline stores
- Ship from store eligibility


Constraint
General
Related
General
Name
Limit Warehouse
Description
Limit1
Constraint type
Maximum distance
Maximum distance
Respect warehouse timing
Restrict partial fulfillment of order
Limit number of warehouse
Online offline store
Ship from store
Is enabled
Inventory Data source
Processing time (in days)
Cutoff time
Origin
Tallahassee WH
Destination
Customer
Expected Arrival
12/22/2020
Maximum number of warehouses
Status
1
Active

Enable purchase order orchestration

Article • 11/15/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 16, 2023	To be announced

Business value

Leverage the power of low code and no code to create Purchase Order orchestrations that allow for B2B scenarios and execution of creating purchase orders that are based on changing business needs.

Feature details

- Ability to orchestrate Purchase and Transfer Orders in Intelligent Order Management so policies, actions, and custom providers can be created with these entities.
- Ability to raise an action from sales order orchestration to create purchase orders when inventory availability could not be found.
- Dual-write support to enable the synchronization of the orchestrated purchase and transfer orders to Dynamics 365 Supply Chain Management.
- Ability to view the open sales order products for purchase order products in a singular view.

Expose inventory capabilities as microservices

Article • 11/15/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Apr 30, 2023	✔ Oct 31, 2023

Business value

Enable inventory capabilities as microservices to get updates from different e-commerce systems or ERPs.

Feature details

These microservices allow updates from different e-commerce systems or ERPs for the following areas:

- Inventory Query
- Inventory reservation
- Inventory ATP
- Inventory allocation
- Inventory On hand schedule changes

Look up inventory in real time

Article • 11/15/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users, automatically	✓ Oct 16, 2023	Mar 2024

Business value

Improve your productivity by surfacing inventory ubiquitously across multiple places to allow multiple roles, like CSRs, to take orders and provide quicker updates for their consumers.

Feature details

This feature provides:

- Simplified add or edit products or look up inventory (and add/edit products).
- The ability to view inventory for one or more products from the **Sales order** header or **Sales order products** page.
- Improved user experience of the **Operational visibility query** page (without having to enter multiple input data).
- Filterable listings.

See also

Inventory operations visibility (docs)

Provide carting options to e-commerce platforms

Article • 11/15/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 16, 2023	Mar 2024

Business value

This capability provides customers with a way to directly reduce their cost of goods sold, leverage stores as a fulfillment point, and give shipping options to the consumer.

Feature details

We will now support BOPIS as part of the fulfillment optimization calculation. This calculation will be available to consumers when they are checking out their cart on an e-commerce store.

The current set of problems this feature aims to address are:

- Customers are unable to provide fulfillment options in the cart based on their incoming inventory through purchase and transfer orders.
- Customers lack the ability to provide a pickup-in-store option for products that are shipped to stores from DCs based on demand (BOSS).
- Customers are unable to get a new fulfillment plan when the store rejects the order.

Run automatic orchestration based on business events

Article • 11/15/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users, automatically	✓ Oct 16, 2023	Mar 2024

Business value

The introduction of business events across all Order Management entities allows businesses to set up and run workflows automatically. This feature helps create dynamic workflows, and significantly improves productivity by freeing up the need to monitor events and then remediate them.

Feature details

Business event orchestration steps run based on state changes for any Order Management entity. This orchestration is tied into a custom or an out-of-the-box provider state that allows external systems integration.

This feature provides the ability to update header states—for example, the Sales Order header—based on rules that are derived from the Sales Order Line state. This allows for a release to WH process and ensures more consistent reporting.

See a unified order view from cart to door

Article • 11/15/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 16, 2023	Mar 2024

Business value

This feature provides a unified view of orders. This view reduces the time needed to navigate across multiple parts of the application and improves its usability.

Feature details

This release includes a new unified view of an order's lifecycle. Seamlessly view the fulfillment and delivery status of an order without needing to navigate across multiple entities in the Site Navigation bar. For example, you won't need to select **Order** > **Fulfillment Order** > **Fulfillment Plan** > **Fulfillment Order Tracking**.

See also

Dynamics 365 Intelligent Order Management Power Automate flows (docs)

Try new order types that support your business

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 31, 2022	✔ Oct 16, 2023

Business value

This new functionality in Dynamics 365 Intelligent Order Management enables support for different order types so customers can complete various order fulfillment scenarios.

Feature details

This feature provides support for:

- **Backorders and preorders**:
  - Place an order as a backorder when inventory is unavailable and provide regular checks so that the order is placed back in for fulfillment when inventory becomes available.
  - Place an order to be reserved for a later date.
- **Manual orders**: Create and update an order and enable the order to be orchestrated in Intelligent Order Management.
- **Return orders**: Enable returns through the bidirectional integration between Intelligent Order Management and finance and operations apps.

Omnichannel Commerce

Article • 12/21/2023

ⓘ Important

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

Investments in this release enable end-to-end omnichannel capabilities and unified back-office management and operations.

Enable real-time inventory with Inventory Visibility

Article • 12/06/2023

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 1, 2023	✔ Nov 3, 2023

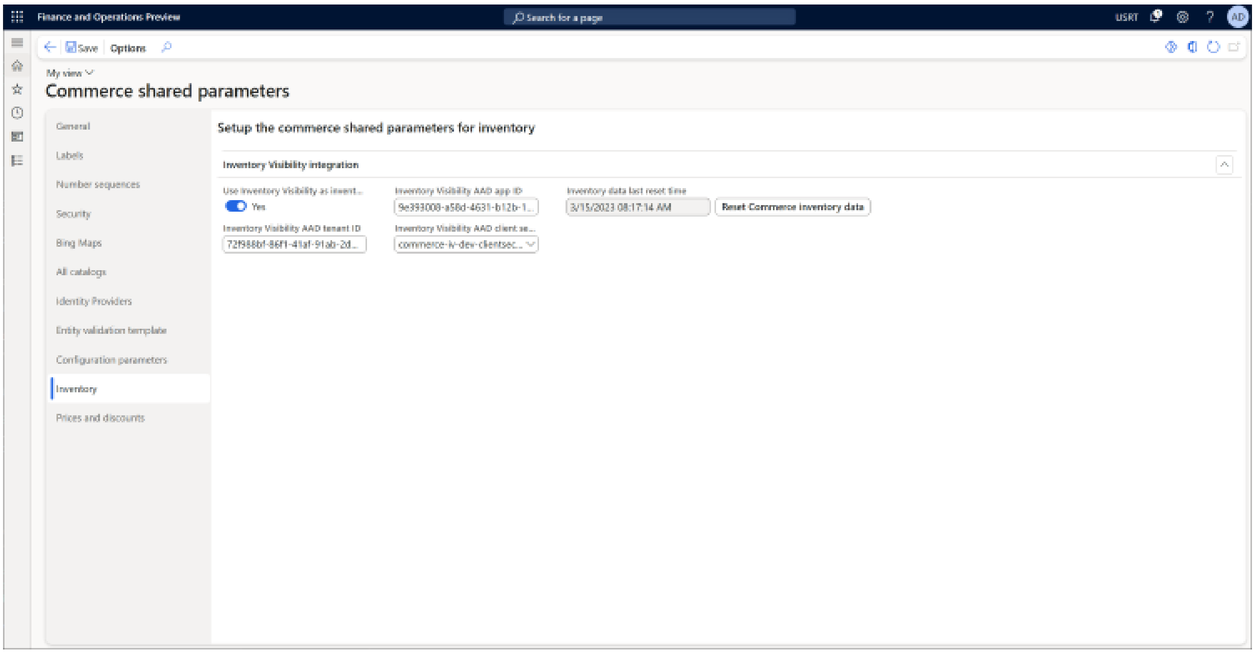
Business value

The accuracy and performance of inventory availability information is crucial for an omnichannel business. Retailers expect a holistic view of inventory data across channels and the ability to query, reserve, and adjust on-hand inventory in a performant manner and as real-time as possible. This feature enables native integration between Commerce and Inventory Visibility (IV), a Dynamics 365 Supply Chain Management microservice, to increase sales and optimize fulfillment based on real-time inventory data.

Feature details

With this feature, customers who are licensed to both Dynamics 365 Supply Chain Management and Dynamics 365 Commerce will have the option to enable Inventory Visibility as the inventory data provider to serve commerce scenarios. After enabling the Inventory Visibility service:

- On-hand inventory can be queried in real-time from the Store Commerce app, e-commerce website, or other integrated channels using headless commerce APIs.
- On-hand inventory can be reserved in real-time when a customer order is created, edited, or canceled.
- On-hand inventory can be adjusted in real-time during order fulfillment or return scenarios.
- Organizations can configure additional inventory data sources and define custom on-hand inventory calculation formulas to fit specific business needs.


Finance and Operations Preview
Search for a page
USRT
Save
Options
My view
Commerce shared parameters
General
Labels
Number sequences
Security
Bing Maps
All catalogs
Identity Providers
Entity validation template
Configuration parameters
Inventory
Prices and discounts
Setup the commerce shared parameters for inventory
Inventory Visibility integration
Use Inventory Visibility as invent...
Yes
Inventory Visibility AAD app ID
Inventory data last reset time
3/15/2023 08:17:14 AM
Reset Commerce inventory data
Inventory Visibility AAD tenant ID
Inventory Visibility AAD client se...
commerce-iv-dev-clientsec...

Simplify product media management with integrated workflows

Article • 11/15/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 8, 2023	✔ Oct 23, 2023

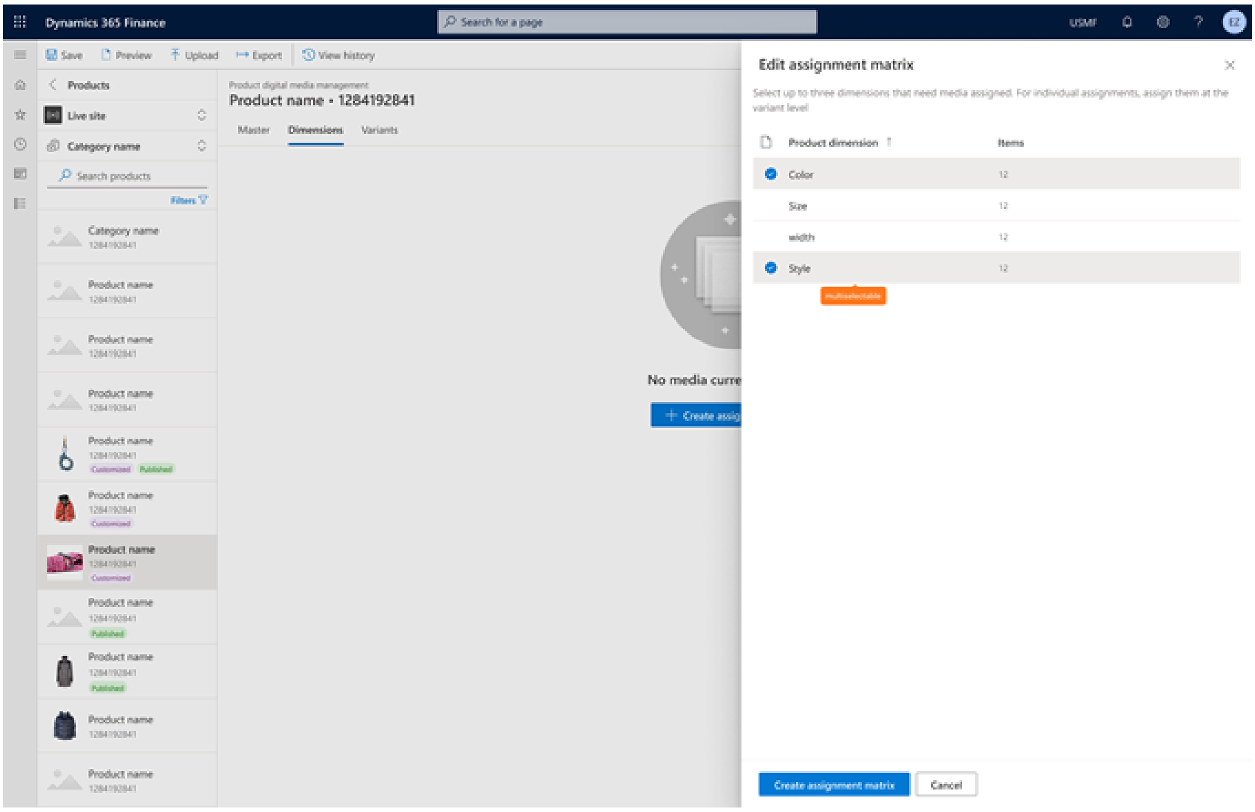
Business value

To improve efficiency, merchandisers need a streamlined interface that combines product information and product media management tasks in one place. Dynamics 365 Commerce now provides native media management features shared between Commerce headquarters and the site builder. This capability streamlines media asset management workflows by placing them directly where merchandising occurs in Commerce headquarters, reducing complexity for both integrators and merchandisers by providing an omnichannel media management option that works right out of the box.

Feature details

These features provide the following capabilities:

- Management tasks are simplified by unifying product information management and media management in one user interface.
- Ability to reuse media across products, dimensions, and variants to reduce duplication and simplify media management.
- Ability to assign any of over 100+ supported media types to a product or product variant, including videos, PDFs, 3D visualizations, and more.
- Better bulk upload support with manifests that enable customers to assign media to products and take other actions at the time of upload.


Dynamics 365 Finance
Search for a page
USMF
Save
Preview
Upload
Export
View history
Products
Live site
Category name
Search products
Filters
Product digital media management
Product name • 1284192841
Master
Dimensions
Variants
No media curre
Create assig
Edit assignment matrix
Select up to three dimensions that need media assigned. For individual assignments, assign them at the variant level
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multiselectable
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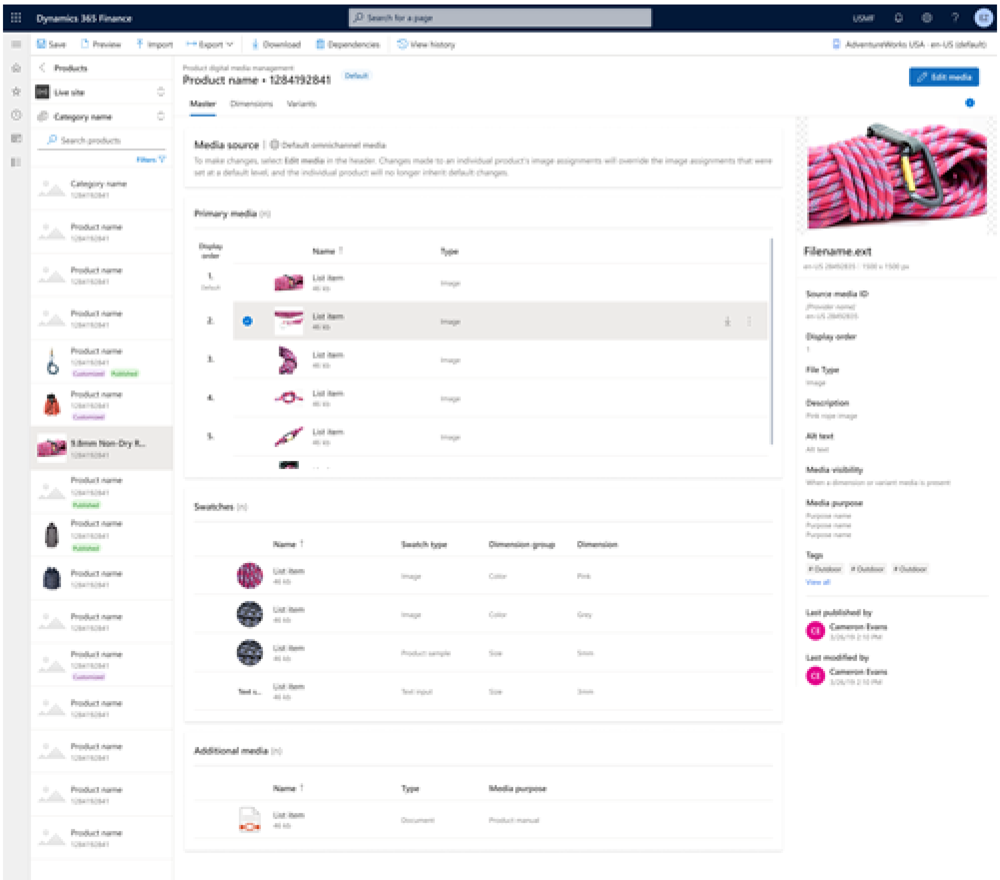
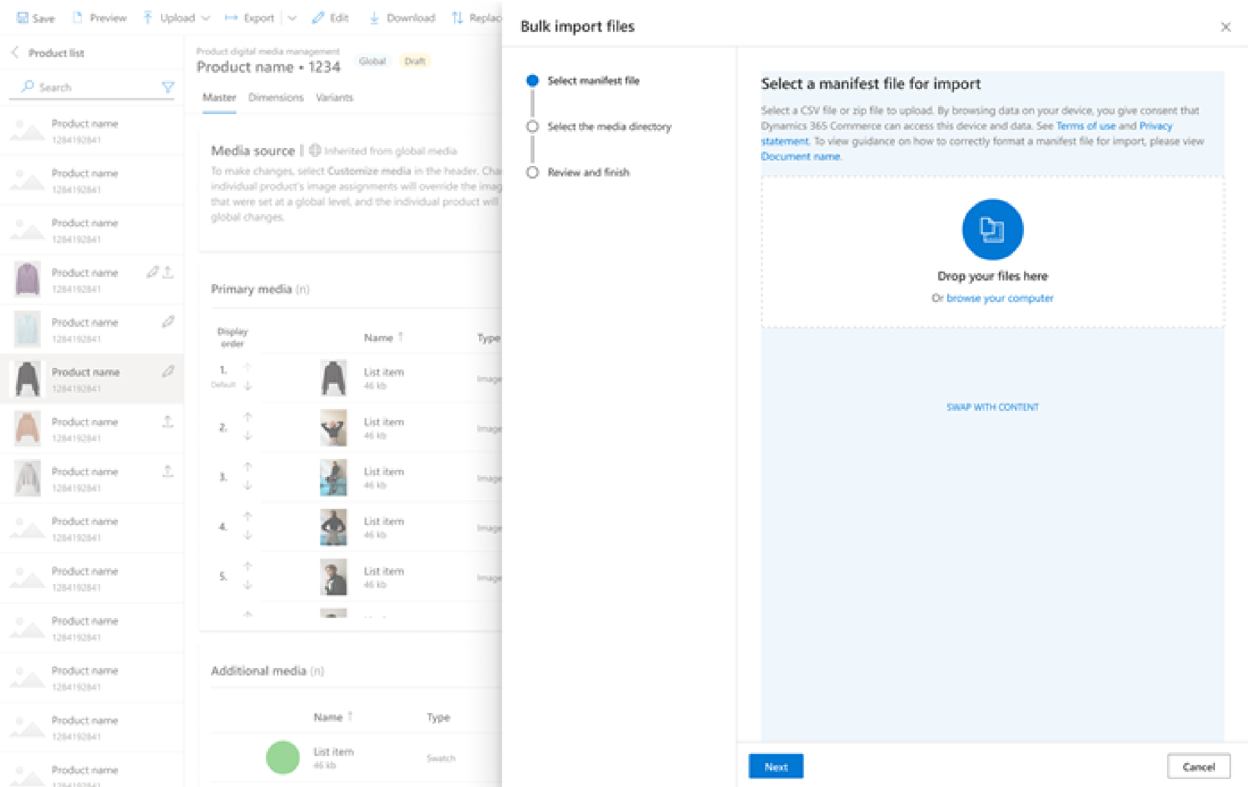
Cancel


Dynamics 365 Finance
Search for a page
Product name • 1284192841
Edit media
Master
Dimensions
Variants
Media source
Primary media
Swatches
Additional media
Filename.ext



See also

Omnichannel media management overview (docs)

Use integrated omnichannel media management features

Article • 11/15/2023

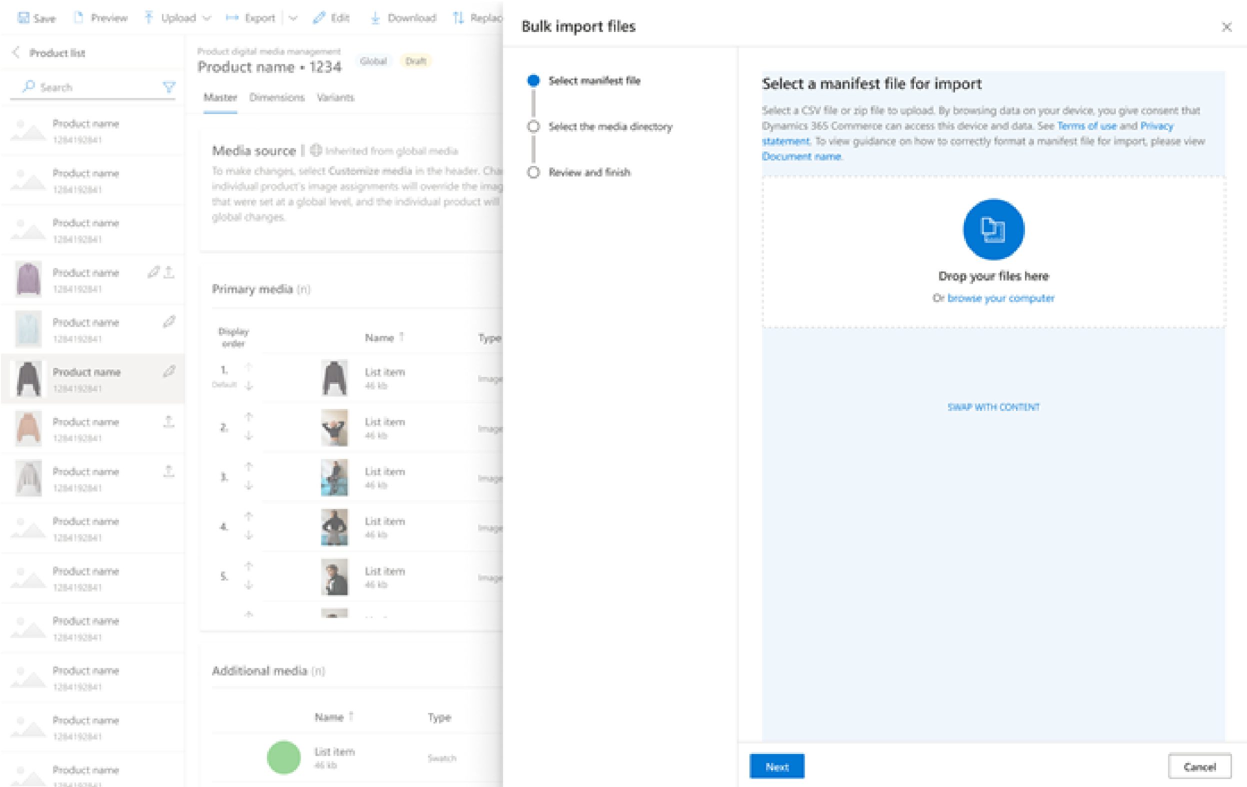
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 8, 2023	✔ Oct 23, 2023

Business value

Dynamics 365 Commerce now provides native media management features shared between Commerce headquarters and site builder. This capability streamlines media asset management workflows by placing them directly where merchandising occurs in Commerce headquarters, reducing complexity for both integrators and merchandisers by providing an omnichannel media management option that works right out of the box.

Feature details

This feature addresses the need for integrated omnichannel media asset management within Commerce merchandising workflows. Functionality includes native media asset workflows to upload, choose, define metadata, and manage media assets such as product images directly within the omnichannel product merchandising workflow. The improvements work seamlessly with the point of sale and e-commerce channels and solve many product merchandising workflow issues that are difficult for detached media management implementation architectures. The improvements also provide the ability to associate video, PDF, Word, Excel, and other types of documents to a product.


Save
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Export
Edit
Download
Product list
Search
Product digital media management
Product name • 1234
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Draft
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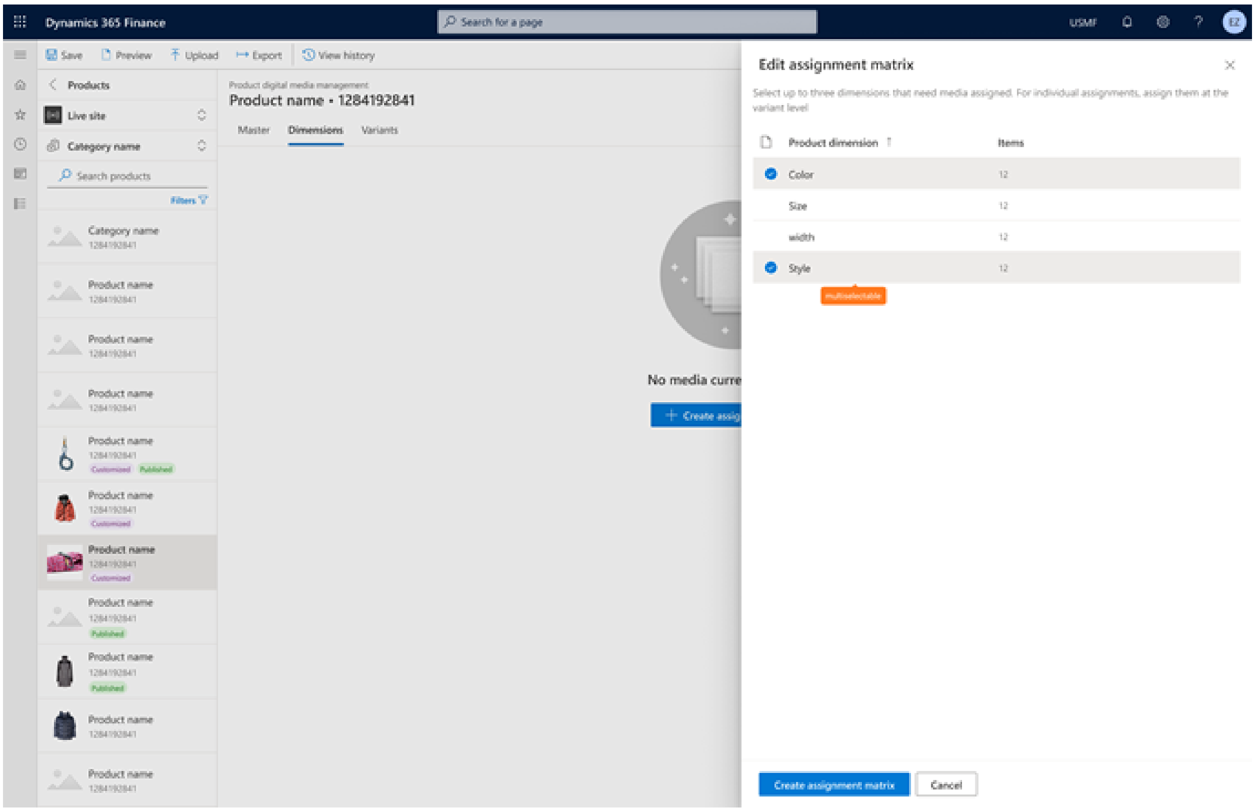
Dimensions
Variants
Media source
Primary media (n)
Additional media (n)
Bulk import files
Select manifest file
Select the media directory
Review and finish
Select a manifest file for import
Drop your files here
Or browse your computer
SWAP WITH CONTENT
Next
Cancel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Live site
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Search products
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Product digital media management
Product name • 1284192841
Master
Dimensions
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No media curre
Edit assignment matrix
Select up to three dimensions that need media assigned. For individual assignments, assign them at the variant level
Product dimension
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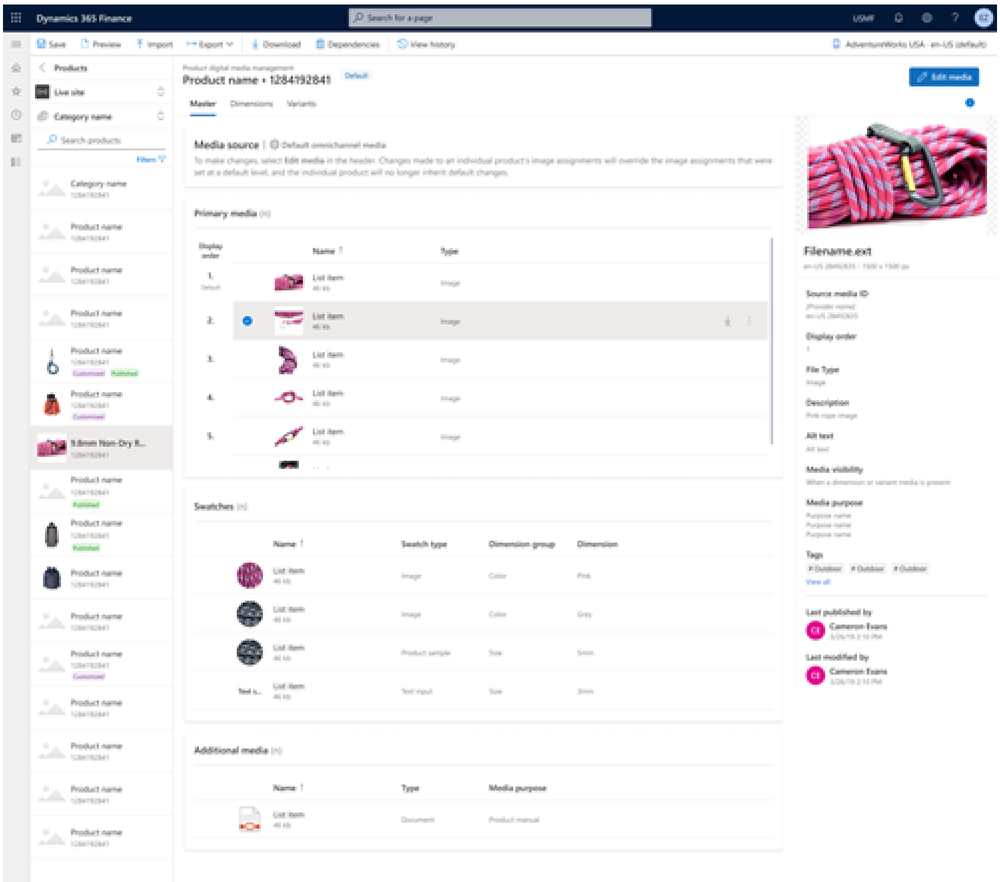

Dynamics 365 Finance
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Dependencies
View history
Products
Live site
Category name
Search products
Product digital media management
Product name • 1284192841
Default
Edit media
Master
Dimensions
Variants
Media source
Default omnichannel media
Primary media
Display order
Name
Type
List item
Swatches
Swatch type
Dimension group
Dimension
Additional media
Media purpose
Filename.ext
Source media ID
Display order
File Type
Description
Alt text
Media visibility
Media purpose
Tags
Last published by
Cameron Evans
Last modified by
Cameron Evans

Store Commerce

Article • 11/20/2023

ⓘ Important

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

Investments in this wave enable the rollout of the Store Commerce app in Sweden and Eastern Europe and address market-specific needs.

Fiscal integration support for stores in Sweden

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 2, 2023

Business value

The fiscal integration sample for Sweden is now included in the new Commerce SDK. The sample supports the independent packaging model, which reduces Commerce deployment, configuration, and maintenance efforts. This addition also enables the adoption of the Store Commerce app by Commerce customers in Sweden.

Feature details

Commerce localization features for Sweden are included in the Commerce SDK on GitHub as an end-to-end sample solution. You can use the modern independent packaging and extension approach to implement the solution. You can also use the Commerce localization features for Sweden with the Store Commerce app.

Print advance invoices for stores in Eastern Europe

Article • 11/15/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 2, 2023

Business value

Commerce localization features for Eastern Europe can now be enabled from the Commerce headquarters by using the feature management framework and parameters. This feature also allows Commerce customers in Eastern Europe to migrate from MPOS to the Store Commerce app.

Feature details

Printing advance invoices for Eastern Europe from the point of sale is included in the core Commerce solution. You no longer need to enable the feature by using extension configuration files. You also don't have to rebuild the point of sale when you enable this feature. Instead, allow the feature from Commerce headquarters by selecting **Enable posting advance invoices from POS** in the **Feature management** workspace. You can also use the feature with the Store Commerce app.

See also

Advance invoices for Commerce for Eastern Europe (docs)

Plan and prepare for Dynamics 365 Business Central in 2023 release wave 2

Article • 12/21/2023

> ⓘ **Important**
>
> The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Business Central**.

Overview

Business Central is a business management application for small and mid-sized organizations that automates and streamlines business processes. Highly adaptable and rich with features, Business Central enables companies to manage their finances, supply chain, manufacturing, shipping, projects, services, and more. Companies can easily add functionality that's relevant to their region of operation and customize the app to support highly specialized industries. Business Central is fast to implement and easy to configure, and simplicity guides innovations in product design, development, implementation, and usability.

This release takes our investment in Copilot to the next level. We're providing more capabilities for people to optimize their processes and complete tasks faster with the guidance of Copilot. Developers are already enjoying Copilot in Visual Studio Code and the AL experience, and there's more to come in that area.

We've improved the ability to consolidate financial data and engage in intercompany partnerships for multiple companies in multiple Business Central environments.

We've reduced the time it takes to onboard new customers. It's easier to understand why certain errors occur, and the messages suggest ways to resolve the issue and continue working. We'll help organizations to focus on their primary business while staying compliant with various government regulations by automating regulatory tasks. Usability is always a focus, and this release boosts efficiency when working with lines on documents by introducing key tips for faster keyboard access. We've also introduced a capability that lets you peek at editable fields for quicker insight into data without having to drill down.

We're investing in productivity by enabling consultants and developers to launch the Visual Studio Code editor, or a debugger linked to the source code in the GitHub repository, directly from the Business Central web client.

Additional updates in 2023 release wave 2 include:

- **Adapt faster with Microsoft Power Platform**: It's easier to set up workflows in Business Central. We're delivering templates that support more scenarios out of the box, so that you can automate more processes to be more productive. Additionally, you can consume business events with the Business Central Power Automate connector.

- **Application**: The intercompany and consolidation features now work across environments, which allows broader use of the multicompany capabilities. The supply chain capabilities in Business Central are improved with several optimizations and enhancements that let you run your inventory and warehouse processes more efficiently. For example, we've improved the picking process, fulfillment suggestions, and SKU management, and added granular warehouse configuration for manufacturing and jobs.

- **Country and regional**: We've expanded the global availability of the service. Business Central is now available in more than 130 countries and regions.

- **Development**: We've moved entirely to Visual Studio Code, where we continue to invest in areas that enhance productivity for developers. We're modernizing processes for testing dependent extensions by making sure that AL GO can handle these tests for customers, VARs, and ISVs who manage dependencies. All required tests run on the latest released versions of ISV apps without manual intervention.

- **Governance and administration**: Business Central delivers a set of additional self-service features to help administrators manage more granular administrative rights.

- **Legislation**: This release offers new audit formats for digital reporting, such as SAF-T in Denmark and FAC for France, and better support for e-invoicing and local legislation.

- **Onboarding**: Tooltips on fields provide better Learn More links to content that explains values that are too complex to cover in a short text.

- **Productive with Microsoft 365**: We're improving the efficiency of collaborative business processes in Microsoft Teams by investing in the capability to unfurl a card without installing the Business Central Teams app.

- **Reporting and data analysis**: We're adding more capabilities to Analysis mode, enriching reports, and an overview that lets you explore all reports in Business Central.

- **Service and platform**: We're continuing to invest in the fundamentals of our service, focusing on performance, stability, resource governance, security, and compliance.

Updates to Dynamics 365 Business Central 2023 release wave 2

Investment areas

Adapt faster with Power Platform Business Central's seamless integration with Power Platform lets you improve efficiency in your organization by automating repetitive tasks. Use Power Automate templates to automate workflows that optimize your business processes for your unique requirements. We'll continue to invest in a tight integration with Power Platform to make it more powerful and give you more ways to use your business data effectively. For example, you can use the Copilot capabilities for cloud flows in the Power Platform products to create connected business workflows and experiences. What's more, you can do so through quick and easy natural language expressions.

Application To determine what goes into the application in every release, we prioritize the top requests from customers and respond to market trends. For example, our investment in helping customers use Copilot to optimize their business processes.

For the last couple of releases, we've invested in multicompany capabilities because an increasing number of businesses are using Business Central across borders and to manage multiple companies. We'll continue to improve the experience of using Business Central to manage multiple companies. We'll invest throughout the application, improve experiences in inventory management, service and project management, and improve our integrations with other Dynamics 365 applications.

Copilot and AI innovation According to our recent survey on business trends, nearly 9 out of 10 workers hope to use AI to reduce repetitive tasks in their jobs. But until recently, AI has been a commodity that few SMBs could truly invest in.

Microsoft Dynamics 365 Copilot enables professionals to perform their day-to-day work with the assistance of cutting-edge AI by their side. With Copilot in Business Central, our customers empower their workers with intuitive AI tools to get more done with less effort, without needing to become data scientists.

This wave expands on our use of Copilot capabilities, in order to boost productivity for a broader set of SMB roles.

Country and regional Business Central continues to become available to businesses in more countries and regions. This expansion happens largely through partner-led localizations. Our partners create and maintain apps for specific countries and regions, and publish their apps on AppSource. In combination with built-in language offerings, Business Central is available to serve customers in more than 155 countries and regions worldwide. Additionally, in the countries where Microsoft is responsible for the localization, we provide updates for all regulatory features.

Development To empower AL developers and increase their productivity, we've laid the foundation for introducing namespace support in the platform and application. Namespace support makes it easier to structure apps, create better object names, and avoid identifier clashes. As apps mature, the need to refactor is inevitable, so we've added the ability to move ownership of a table and its data between extensions. Additionally, developers can hide specific variable data so that other parties can't access it during debugging, which protects internal data.

When it comes to data analysis and reporting, developers have more control. For example, you can turn off Analysis Mode on pages and specify how to embed content from Power BI.

Consultants and developers can easily open Visual Studio Code for a production or sandbox environment to investigate and understand objects across installed extensions, view code for owned extensions, and perform troubleshooting—all without having to set up Visual Studio Code manually. Similarly, we've improved profiling from the client and Visual Studio Code so it's easier to find database-related performance issues.

AppSource publishers can sell through CSPs, and better handling for AppSource runtime packages gives seamless development and troubleshooting across app dependencies for publishers and resellers.

Governance and administration We're giving Business Central administrators more tools for managing environments, apps, and data migrations. The goal is for administrators to be self-sufficient, able to solve their customer needs, and handle a wide variety of administrative scenarios.

- More granular administrator roles to give more control over the access granted to (delegated) administrators.
- Improved processes for minor update releases.
- The ability to link Business Central and Power Platform environments to set up integrations consistently and to apply Power Platform environment settings to Business Central.
- The ability to cancel Cloud Migration replication runs.

Legislation Business Central offers updates to regulatory features based on popular requests for improvements and ever-changing requirements from local authorities. To give our customers peace of mind and enable them to focus on their core business, we automate many processes and ensure that features comply with the regulations set by government agencies. For example, if local regulations require that you create vouchers that serve as proof of transactions and a detailed audit trail, you can automate the process. Business Central can automatically generate and attach vouchers to general ledger entries, so that accountants can rest assured that they're compliant, without extra steps. The retention policy features let you specify how long you need to store vouchers before you clean them up, giving you more control over the amount of data you store.

We're working to make regulatory features a standard part of Business Central, so that we can deliver improvements out of the box across the countries and regions where they're relevant. For example, the E-documents module is a foundation that supports processes for sales and purchase invoicing, and it's easy for partners to extend by building country-specific apps for e-invoicing.

Onboarding It's important that customers can quickly get up and running with Business Central. Their daily business doesn't stop just because they're adopting a new business management application. We're committed to delivering a speedy transition, and we'll keep building on the onboarding framework and continue to invest in tools and resources that enable partners to onboard faster to Business Central.

Reporting and data analysis In the modern world, data has become an invaluable resource, forming the foundation of decision-making and progress across all sectors. Recent advances in AI technology and data analytics tools bring radically new ways for businesses to distill complex information into actionable intelligence, reveal hidden patterns, trends, and find correlations that were previously concealed. The critical insights gained from data analysis empower organizations to optimize their strategies, enhance customer experiences, identify potential risks, gain unprecedented insights into the details of their operations and environments, and innovate in ways that were once inconceivable.

As data continues to fuel innovation and drive transformative advancements, harnessing its potential has become essential for staying competitive and shaping a more efficient and sustainable future for SMBs.

Our reporting strategy revolves around building universal BI and analytics within the Business Central experience. We aim to seamlessly integrate in-context, rich, and immersive BI and analytics content from 1st and 3rd parties into Business Central. Alongside flexible self-service capabilities, you can effortlessly access and leverage your data for maximum value.

Service and platform Users have fewer interruptions, Business Central generally feels faster, and web services and certain scenarios are noticeably so. We're continuing to invest in the fundamentals of our service, with a focus on performance, stability, resource governance, security, and compliance. This focus lets Business Central continue to grow in scale along with our customers' needs.

To enhance the overall experience, sign-ins for interactive users are more stable and users experience fewer interruptions in their sessions. We're optimizing our language (AL) runtime to minimize database locking and the effect of table extensions on performance.

Additionally, we're fine-tuning several application scenarios that our customers frequently use.

User experiences Business Central offers a broad portfolio of user interfaces that enable our customers to work with their data from anywhere, and on any device. User interfaces include an installable desktop app, a browser-based web app, and mobile apps. Whether you need to enter data at high speed, casually update entries, or analyze relational data, Business Central offers numerous features that are easy to get started with and powerful when needed.

Every release includes enhancements to usability, accessibility, performance, and reliability. In this release wave, we're boosting efficiency when you're working with actions across selections in lists of records and viewing summarized data to help you easily fix data entry mistakes.

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

Check out the release plan

For application administrators

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

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

Get the most out of Business Central

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.

Helpful links	Description
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Business Central.
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.

What's new and planned for Dynamics 365 Business Central

Article • 01/19/2024

This topic lists features that are planned to release from October 2023 through March 2024. 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 2023 release wave 1 plan.

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

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

Adapt faster with Power Platform

We're continuously investing in a seamless experience for customers who use Business Central together with Power Apps, Power Automate or Power BI.

Expand table

Feature	Enabled for	Public preview	General availability
Get control over how to view Power BI embedded content	Admins, makers, marketers, or analysts, automatically	✔ Sep 1, 2023	✔ Oct 3, 2023
Consolidated Power Automate flow creation from Business Central templates	Admins, makers, marketers, or analysts, automatically	✔ Sep 1, 2023	✔ Oct 3, 2023
Business Central virtual tables fully supported on Microsoft Dataverse	Users by admins, makers, or analysts	-	✔ Nov 1, 2023
Manage work orders in Field Service, invoice them in Business Central	Users by admins, makers, or analysts	Mar 2024	To be announced
Enable specific virtual tables when you connect to Dataverse	Users by admins, makers, or analysts	✔ Sep 6, 2023	✔ Oct 2, 2023

Feature	Enabled for	Public preview	General availability
Create Power Automate flows that dynamically support different companies	Admins, makers, marketers, or analysts, automatically	✔ Sep 4, 2023	✔ Oct 3, 2023
Power Pages support via Business Central virtual tables on Dataverse	Users by admins, makers, or analysts	✔ Nov 1, 2023	-
Use virtual tables to expose more Business Central data in Dataverse	Users by admins, makers, or analysts	Mar 2024	To be announced
Get list of companies using Business Central connector in Power Automate	Admins, makers, marketers, or analysts, automatically	✔ Sep 1, 2023	✔ Oct 3, 2023
Support business events in Business Central connector for Power Automate	Admins, makers, marketers, or analysts, automatically	✔ Jul 20, 2023	✔ Oct 3, 2023
Synchronize more fields in your integration with Dataverse and Dynamics 365 Sales	Users, automatically	-	✔ Oct 2, 2023
Simplified Power Automate approval flow experience	Users, automatically	✔ Sep 1, 2023	✔ Oct 3, 2023
Change modification limits for triggering flows and bulk updates	Admins, makers, marketers, or analysts, automatically	✔ Jul 20, 2023	✔ Oct 3, 2023

Application

Core application functionality is a key investment area for us. It's what helps companies optimize their business processes. 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
Sync document and posting dates for sales and purchases	Users by admins, makers, or analysts	✔ Sep 8, 2023	✔ Oct 2, 2023
Navigate easier between order, receipt, and invoice documents	Users, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023

Feature	Enabled for	Public preview	General availability
Archive projects	Users by admins, makers, or analysts	Mar 2024	To be announced
Usability improves for service and projects	Users, automatically	Mar 2024	To be announced
Make intercompany transactions across Business Central environments	Users, automatically	✔ Sep 1, 2023	✔ Oct 2, 2023
Use deferral codes in purchase and sales journals	Users, automatically	Mar 2024	To be announced
Improved processes for inventory counts and adjustments	Users, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023
Add more columns to pages for better insight	Users, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023
Define a service invoice posting policy for various users	Users by admins, makers, or analysts	Mar 2024	To be announced
Usability improves for warehouse and inventory	Users, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023
Suggest the next step for sales and production orders	Users, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023
Reverse a customer and vendor ledger entry with a realized gain or loss entry	Users, automatically	-	✔ Oct 2, 2023
Generate a customer statement only with open entries	Users, automatically	✔ Sep 19, 2023	✔ Oct 2, 2023
Define default location for project or project phase	Users, automatically	Mar 2024	To be announced
Block item, item variant or service item from use in service management transactions	Users, automatically	Mar 2024	To be announced
Use directed pick and put-away suggestions in basic warehouse configurations	Users by admins, makers, or analysts	✔ Sep 8, 2023	✔ Oct 2, 2023
Connect Business Central with Shopify B2B	Admins, makers, marketers, or analysts, automatically	Mar 2024	To be announced

Feature	Enabled for	Public preview	General availability
Availability overview helps you calculate quantities in your warehouse	Users by admins, makers, or analysts	✓ Sep 8, 2023	✓ Oct 2, 2023
Adjust exchange rates easily, replace the built-in batch job	Users by admins, makers, or analysts	✓ Sep 6, 2023	✓ Oct 2, 2023
Use different general ledger accounts for payables, receivables	Users by admins, makers, or analysts	✓ Sep 6, 2023	✓ Oct 2, 2023
Simpler Shopify connection	Users, automatically	Mar 2024	To be announced
More control over general journal approvals	Users, automatically	✓ Sep 6, 2023	✓ Oct 2, 2023
Troubleshoot Shopify integration issues	Users by admins, makers, or analysts	✓ Sep 8, 2023	✓ Oct 2, 2023
Receive more items than ordered by using inventory put-away documents	Users by admins, makers, or analysts	✓ Sep 8, 2023	✓ Oct 2, 2023
Identify and track items easier with item references	Users, automatically	✓ Sep 8, 2023	✓ Oct 2, 2023
Configure how to handle different warehouse operations	Users by admins, makers, or analysts	✓ Sep 8, 2023	✓ Oct 2, 2023
Use general ledger account revaluation for more accurate financial statements	Users, automatically	Mar 2024	To be announced
Print and scan barcodes	Users, automatically	✓ Sep 8, 2023	✓ Oct 2, 2023
Include approvals for intercompany general journals in your workflows	Users, automatically	✓ Sep 1, 2023	✓ Oct 2, 2023
Get more productive while entering time sheets	Users, automatically	Mar 2024	To be announced
Use General Ledger Allocations to distribute costs and revenue more efficiently	Users, automatically	✓ Sep 1, 2023	✓ Oct 2, 2023
Edit in Excel on item journals and warehouse worksheets	Users, automatically	✓ Sep 8, 2023	✓ Oct 2, 2023

Feature	Enabled for	Public preview	General availability
Create projects that you can invoice to multiple customers	Users, automatically	Mar 2024	To be announced
Assemble to project	Users, automatically	Mar 2024	To be announced
Invoice a customer for multiple projects	Users, automatically	Mar 2024	To be announced
Consolidate financial information across environments in multicompany setups	Users, automatically	✔ Sep 1, 2023	✔ Oct 2, 2023
Block item variants	Users, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023
Use standard terminology for project management	Users, automatically	Mar 2024	To be announced
Include only open entries on customer statements	Users, automatically	✔ Sep 5, 2023	✔ Oct 2, 2023
Use currencies when posting employee transactions	Users, automatically	Mar 2024	To be announced

Copilot and AI innovation

This wave expands on our first Copilot capability, marketing text suggestions, boosting productivity for a broader set of SMB roles.

Expand table

Feature	Enabled for	Public preview	General availability
Chat with Copilot	Users by admins, makers, or analysts	Feb 2024	-
Get marketing text suggestions with Copilot	Users by admins, makers, or analysts	-	✔ Nov 13, 2023
Complete bank account reconciliation faster with Copilot	Users by admins, makers, or analysts	✔ Nov 10, 2023	To be announced

Feature	Enabled for	Public preview	General availability
Easily integrate generative AI with your AL solutions	Admins, makers, marketers, or analysts, automatically	-	✔ Dec 11, 2023

Country and regional

We've made Business Central available in more countries and regions around the world in this release wave.

Expand table

Feature	Enabled for	Public preview	General availability
Direct transfer - Czechia	Users, automatically	✔ Sep 1, 2023	✔ Oct 2, 2023
E-submission of VAT return in Denmark	Users, automatically	-	✔ Dec 1, 2023
Intercompany posting cues to the Accountant Role Center - Czechia	Users, automatically	✔ Sep 1, 2023	✔ Oct 2, 2023
Registration and notification functionality for Denmark	Users, automatically	-	✔ Nov 1, 2023
New design for report Language and Region settings	Users by admins, makers, or analysts	✔ Sep 1, 2023	✔ Oct 2, 2023
Iceland localization app - delocalization	Users, automatically	-	✔ Dec 1, 2023
Supporting more countries and regions	Users, automatically	✔ Nov 1, 2023	✔ Dec 1, 2023
Responsibility Centers are supported for Advance Payments in Czechia	Users, automatically	✔ Oct 2, 2023	✔ Oct 2, 2023
Advance payment and a posting preview of tax documents - Czechia	Users, automatically	✔ Sep 1, 2023	✔ Oct 2, 2023
E-invoicing with NemHandel in Denmark	Users, automatically	✔ Dec 1, 2023	✔ Jan 1, 2024
New Intrastat - Czechia	Users, automatically	✔ Sep 1, 2023	✔ Oct 2, 2023

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
Use Azure Files with Azure File Service API module	Users, automatically	-	✔ Jan 10, 2024
Get IntelliSense for adding variables in Visual Studio Code AL debugger console	Admins, makers, marketers, or analysts, automatically	✔ Aug 16, 2023	✔ Oct 2, 2023
Easier management of System Application permissions	Users, automatically	-	✔ Oct 2, 2023
Turn off data analysis mode on pages and queries	Users by admins, makers, or analysts	✔ Sep 8, 2023	✔ Oct 2, 2023
Set the default folder location for new AL projects	Admins, makers, marketers, or analysts, automatically	✔ Aug 16, 2023	✔ Oct 2, 2023
Get inlay hints in source editor for AL method parameters and return types	Admins, makers, marketers, or analysts, automatically	✔ Aug 13, 2023	✔ Oct 2, 2023
Define multi-worksheet datasets for Excel reports	Users by admins, makers, or analysts	✔ Oct 2, 2023	✔ Nov 1, 2023
Use the built-in rich text editor to enter data	Users by admins, makers, or analysts	✔ Sep 6, 2023	✔ Oct 2, 2023
Add teaching tooltips on queries and report request pages	Admins, makers, marketers, or analysts, automatically	✔ Oct 2, 2023	✔ Oct 2, 2023
Get smarter method signature recommendations in IntelliSense	Admins, makers, marketers, or analysts, automatically	✔ Aug 16, 2023	✔ Oct 2, 2023
Get the AL Language extension in prerelease versions on Visual Studio Code Marketplace	Admins, makers, marketers, or analysts, automatically	✔ Jul 1, 2023	✔ Oct 2, 2023

Feature	Enabled for	Public preview	General availability
AppSource ISV publishers can preview their AppSource apps with select customers	Admins, makers, marketers, or analysts, automatically	Feb 2024	Feb 2024
Use the AL Language extension for Linux in preview	Admins, makers, marketers, or analysts, automatically	✔ Aug 17, 2023	✔ Oct 2, 2023
Get syntax highlighting for AL in Azure DevOps	Admins, makers, marketers, or analysts, automatically	✔ Oct 2, 2023	✔ Oct 2, 2023
Call Microsoft Graph with AL Microsoft Graph module	Admins, makers, marketers, or analysts, automatically	-	✔ Jan 10, 2024
Extend general ledger posting aggregations	Users by admins, makers, or analysts	-	✔ Nov 3, 2023
Show list of keys while working on AL code	Admins, makers, marketers, or analysts, automatically	✔ Aug 17, 2023	✔ Oct 2, 2023
Handle multiple file uploads and file drop zones	Users, automatically	Mar 2024	To be announced
Segment AL code and reduce naming conflicts with namespaces	Admins, makers, marketers, or analysts, automatically	✔ Aug 17, 2023	✔ Oct 2, 2023
Use SecretText type to protect credentials and sensitive textual values from being revealed	Admins, makers, marketers, or analysts, automatically	✔ Aug 16, 2023	✔ Oct 2, 2023
Sell Business Central apps through AppSource	Admins, makers, marketers, or analysts, automatically	✔ Apr 2, 2023	✔ Oct 9, 2023
Hover over label variable to see text string value	Admins, makers, marketers, or analysts, automatically	✔ Aug 13, 2023	✔ Oct 2, 2023
Track source and build metadata on extensions	Admins, makers, marketers, or analysts, automatically	✔ Aug 16, 2023	✔ Oct 2, 2023
Choose between more sampling intervals for snapshot and in-client	Admins, makers, marketers, or analysts,	✔ Aug 16, 2023	✔ Oct 2, 2023

Feature	Enabled for	Public preview	General availability
profiling	automatically		
Document your extensions with the ALDoc tool for partners	Admins, makers, marketers, or analysts, automatically	✔ Aug 17, 2023	✔ Oct 2, 2023
Find all references now works on triggers, system methods, and trigger events	Admins, makers, marketers, or analysts, automatically	✔ Aug 13, 2023	✔ Oct 2, 2023
Validate AppSource app hotfixes against latest app version	Admins, makers, marketers, or analysts, automatically	✔ Dec 6, 2023	✔ Dec 6, 2023
Set new output folder setting for storing app files at AL project build	Admins, makers, marketers, or analysts, automatically	✔ Aug 13, 2023	✔ Oct 2, 2023
Add a new FieldGroup to an existing table	Admins, makers, marketers, or analysts, automatically	✔ Sep 12, 2023	✔ Oct 2, 2023
Call web services with AL Rest Client module	Users, automatically	-	✔ Nov 3, 2023
Open Visual Studio Code from web client to investigate or troubleshoot extensions	Admins, makers, marketers, or analysts, automatically	✔ Sep 10, 2023	✔ Oct 2, 2023

Governance and administration

We are 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
Use linked environment in Dataverse integration	Users by admins, makers, or analysts	Mar 2024	To be announced
Delete data from uninstalled extensions as an admin	Admins, makers, marketers, or analysts, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023

Feature	Enabled for	Public preview	General availability
Improved data upgrade troubleshooting for Dynamics GP migration	Admins, makers, marketers, or analysts, automatically	-	✔ Dec 1, 2023
Retain permissions when enabling cloud migration	Admins, makers, marketers, or analysts, automatically	-	✔ Oct 2, 2023
Granular administration as Dynamics 365 Business Central Administrator	Admins, makers, marketers, or analysts, automatically	-	Jan 2024
Automatically update AppSource apps with minor updates	Admins, makers, marketers, or analysts, automatically	-	✔ Oct 31, 2023
Improved update release processes	Admins, makers, marketers, or analysts, automatically	-	Mar 2024
Detect invalid cloud migration configurations with proactive warnings	Admins, makers, marketers, or analysts, automatically	-	✔ Jan 1, 2024
Get more information about effective permissions	Users, automatically	✔ Sep 6, 2023	✔ Oct 2, 2023
Transfer environments between Microsoft Entra tenants	Admins, makers, marketers, or analysts, automatically	-	Feb 2024
Include or exclude tables from cloud migration	Admins, makers, marketers, or analysts, automatically	-	✔ Nov 1, 2023
Control partner access per environment	Admins, makers, marketers, or analysts, automatically	-	Feb 2024

Legislation

This Business Central release wave delivers a set of legislative capabilities that can act as a foundation for more specific requirements in local versions.

Expand table

Feature	Enabled for	Public preview	General availability
Use drop shipments for triangular Intrastat trade	Users, automatically	✔ Sep 1, 2023	✔ Oct 2, 2023

Feature	Enabled for	Public preview	General availability
E-documents core as a global solution	Users, automatically	✔ Sep 1, 2023	✔ Oct 2, 2023
Digital vouchers	Users, automatically	-	✔ Dec 1, 2023
Large companies to report payment times	Users, automatically	✔ Sep 1, 2023	✔ Oct 2, 2023
Start faster with refreshed and enhanced setup data	Admins, makers, marketers, or analysts, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023
VAT posting in General Ledger setup	Users, automatically	✔ Nov 1, 2023	✔ Dec 1, 2023

Onboarding

Partners have more capabilities for improving their customers' onboarding experience with their solutions.

Expand table

Feature	Enabled for	Public preview	General availability
Demo tool and data for service scenarios	Admins, makers, marketers, or analysts, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023
Set initial role before first sign-in for a better first-run experience	Users, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023
Modify texts on the welcome banner and skip banner intro state	Admins, makers, marketers, or analysts, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023

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
Analyze, group, and pivot data from queries	Users by admins, makers, or analysts	✔ Sep 8, 2023	✔ Oct 2, 2023
Make use of static and runtime metadata available in Excel layouts	Users by admins, makers, or analysts	✔ Jan 3, 2024	✔ Jan 3, 2024
Translatable Excel layouts	Users by admins, makers, or analysts	✔ Jan 3, 2024	✔ Jan 3, 2024
Share a data analysis with a co-worker	Users by admins, makers, or analysts	✔ Sep 1, 2023	✔ Oct 2, 2023
Analyze, group, and pivot data on lists	Users by admins, makers, or analysts	-	✔ Oct 2, 2023

Service and platform

We're continuing to invest in the fundamentals of our service, with a focus on performance, stability, resource governance, security, and compliance.

Expand table

Feature	Enabled for	Public preview	General availability
Faster tab opening and navigation and action bar rendering	Admins, makers, marketers, or analysts, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023
Better performance when working with multiple extensions	Admins, makers, marketers, or analysts, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023
Performance gain by reducing locks in the database	Admins, makers, marketers, or analysts, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023
Faster application scenarios	Admins, makers, marketers, or analysts, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023
Service-to-service apps and device license users can schedule tasks	Users, automatically	-	✔ Oct 2, 2023
New operational limits on scheduled tasks and web requests improve	Users, automatically	✔ Dec 21, 2023	-

Feature	Enabled for	Public preview	General availability
throughput			
Synchronize multiple Business Central companies with the same Dataverse environment	Users, automatically	✔ Sep 6, 2023	✔ Oct 2, 2023

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
Search for pages and data in the mobile app	Users, automatically	✔ Sep 1, 2023	✔ Oct 3, 2023
Get to data search from anywhere in Business Central	Users, automatically	✔ Oct 2, 2023	-
Use drag and drop to attach multiple files	Users, automatically	Mar 2024	To be announced
Use actions to navigate and highlight or fix platform-generated errors	Users, automatically	Mar 2024	To be announced
Access worksheet pages from mobile phones	Admins, makers, marketers, or analysts, automatically	Jan 2024	Feb 2024
Show related record details from lookup	Users, automatically	✔ Sep 6, 2023	✔ Oct 2, 2023
Add existing table fields to optimize your pages	Users by admins, makers, or analysts	✔ Oct 2, 2023	-
Share readable deep links to pages and records	Users, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023
Distinguish between browser tabs when multitasking	Users, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023
Share error details to get help from another user	Users, automatically	Mar 2024	To be announced
Mark fields as read-only when customizing UI	Users, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023

Feature	Enabled for	Public preview	General availability
Use actions to go to or fix errors inline	Users, automatically	✓ Sep 6, 2023	✓ Nov 3, 2023
Scan barcodes with Business Central mobile app for iOS and Android	Admins, makers, marketers, or analysts, automatically	✓ Sep 1, 2023	✓ Oct 3, 2023

- You are able to opt into some features as part of early access on July 31, 2023, including all mandatory changes that affect users. To learn more, go to Early access FAQ .

Description of **Enabled for** column values:

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

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

Adapt faster with Power Platform

Article • 11/20/2023

ⓘ Important

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

Business Central's seamless integration with Power Platform lets you improve efficiency in your organization by automating repetitive tasks. Use Power Automate templates to automate workflows that optimize your business processes for your unique requirements. We'll continue to invest in a tight integration with Power Platform to make it more powerful and give you more ways to use your business data effectively. For example, you can use the Copilot capabilities for cloud flows in the Power Platform products to create connected business workflows and experiences. What's more, you can do so through quick and easy natural language expressions.

Business Central virtual tables fully supported on Microsoft Dataverse

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Nov 1, 2023

Business value

Business Central virtual tables allow for inbound interactions from apps, flows, and pages running on Microsoft Dataverse to perform create, read, update, and delete (CRUD) operations on Business Central physical tables without the need to replicate data into Dataverse.

Feature details

With Business Central virtual tables, your apps, flows, and pages built using Power Apps, Power Automate, and Power Pages on Power Platform can easily interact with Business Central physical tables. Synthetic relations can be created between native Dataverse tables and Business Central virtual tables, allowing related data to be presented together on Power Apps and Power Pages.

Additionally, changes made to Business Central physical tables can trigger outbound interactions from Business Central into Dataverse by emitting create, update, and delete (CUD) events that start Power Automate flows with the **When a row is added, modified, or deleted** trigger set to the corresponding Business Central virtual tables.

Change modification limits for triggering flows and bulk updates

Article • 11/15/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jul 20, 2023	✔ Oct 3, 2023

Business value

Processing large datasets in Power Automate or triggering automation when multiple rows have been updated works smoothly, even for larger updates.

Feature details

Until now, there was a limit of 100 rows in the way that Power Automate flows and Dataverse virtual tables were triggered when multiple rows were changed during a short period of time. This limit may have caused your Power Automate flows to stop reacting to certain rapid changes in data. We've now changed the limit from 100 to 1,000, opening up for more advanced scenarios.

Thank you for your idea

Thank you for submitting this idea:

- Increasing our Modification Changes Limit for Triggering Flows

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Working with Webhooks in Dynamics 365 Business Central (docs)

Consolidated Power Automate flow creation from Business Central templates

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 1, 2023	✔ Oct 3, 2023

Business value

It's essential that all Power Automate integration capabilities and sample templates are clearly defined, marked, and visible in the product so that decision makers can use them effectively when needed.

Feature details

This feature in Business Central provides advanced users with a single entry point to create flows based on templates. New actions have been added to enable flow creation in the following categories:

- Defining an approval request workflow if the page supports it. This was previously available as an application action but was difficult to find.
- Creating an automated background flow (for instance, flows based on external business events). Prior to this addition, such automations were only possible in Power Automate, and there were no Business Central templates supporting them.
- Creating a manual or instant flow. While this capability existed before, several new templates have been added to expand its functionality.

We also added several new automated and instant flow templates to our gallery.

Learn more about Business Central and Power Automate integration at Workflows in Dynamics 365 Business Central.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Use Power Automate Flows in Business Central (docs)

Create Power Automate flows that dynamically support different companies

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 4, 2023	✔ Oct 3, 2023

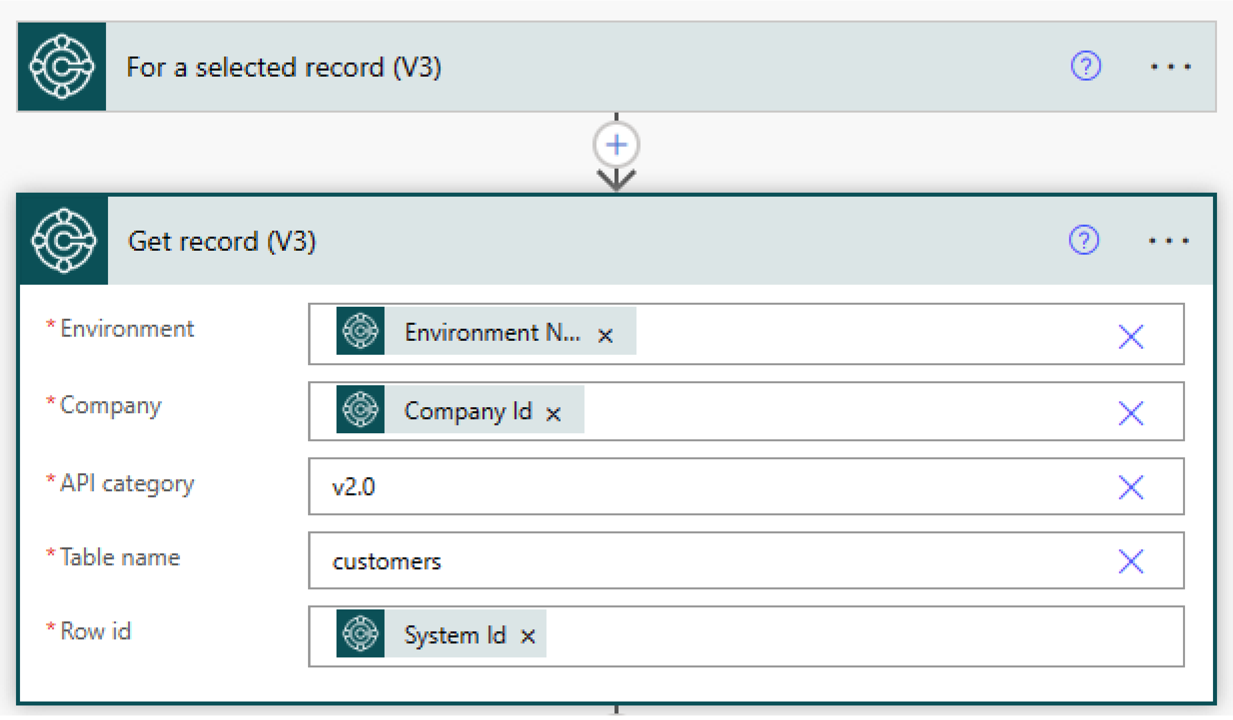
Business value

Building Power Automate flows that are easily portable and work with multiple companies helps partners and consultants use Power Platform when adapting Business Central to the needs of small and medium-sized businesses.

Feature details

This feature provides the following capabilities to Power Automate makers as they create or edit flows:

- Access to a list of API categories and APIs/tables in all actions—without even specifying a company.
- Edit the corresponding flow steps with all metadata details even though no company was provided.
- Use of Dataverse environment variables for environments and companies.
- Support for application lifecycle management (ALM) with Dataverse environment variables in AL-Go for GitHub.
- Use a standard variable for company ID and make flows that can run in the context of different companies.
- Use the output of the new **List Companies** action to perform actions or read data across companies.



See also

Dynamics 365 Business Central connector (docs)

Enable specific virtual tables when you connect to Dataverse

Article • 10/09/2023

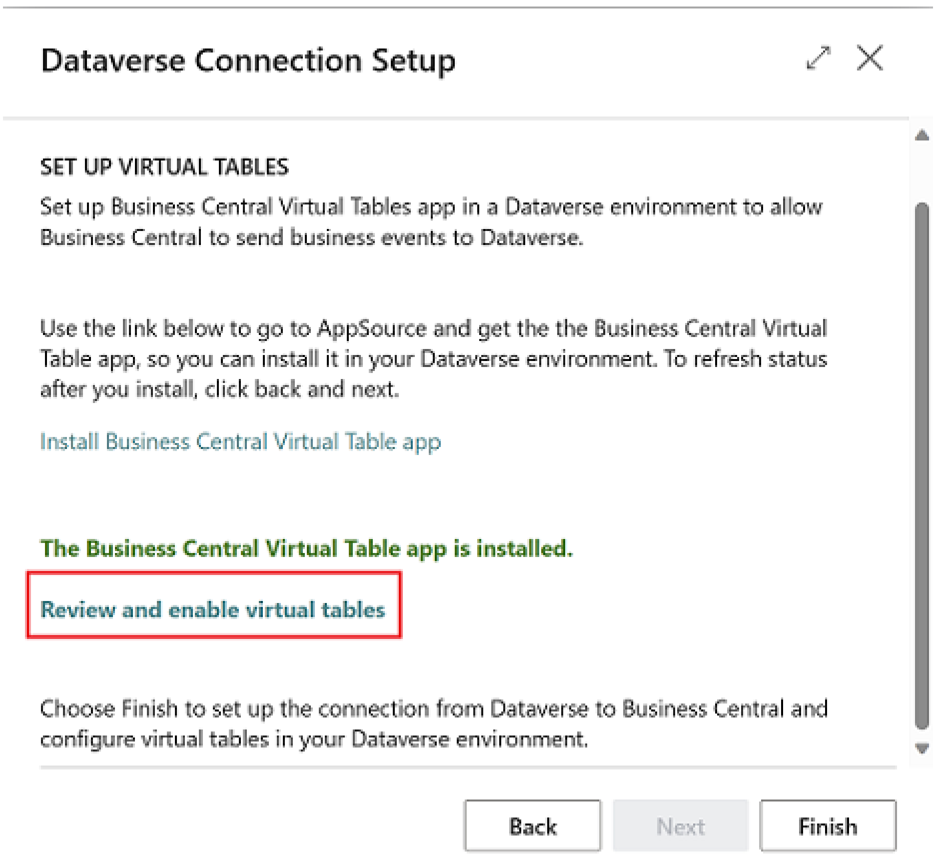
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Sep 6, 2023	✓ Oct 2, 2023

Business value

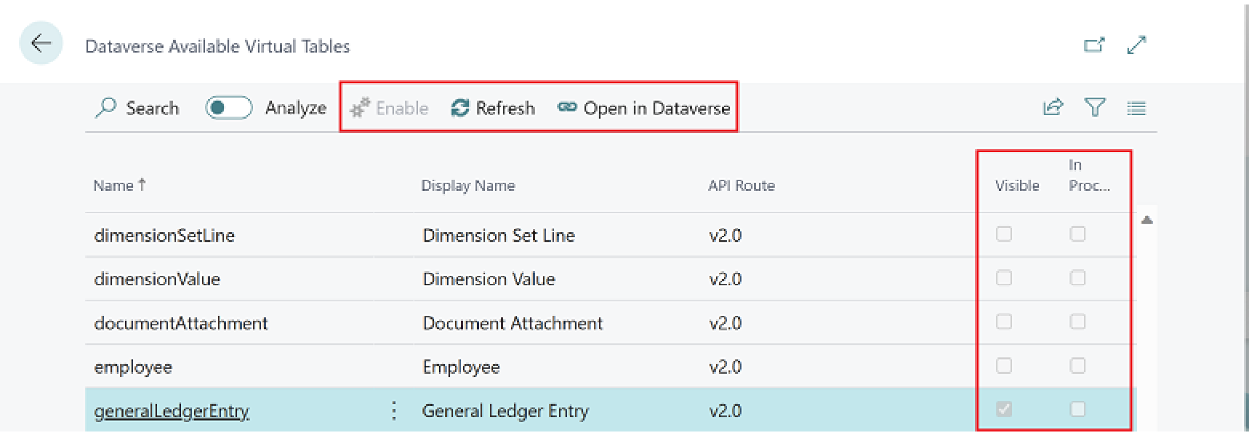
Avoiding duplicate data entry is a key value proposition for integrating Business Central with Dataverse. Enabling virtual tables makes more data available between Business Central and Dataverse, which enriches integrations without additional customizations.

Feature details

If you want to enable virtual tables, in the **Set up Dataverse Connection** assisted setup guide, on the **Setup Virtual Tables** step, you can choose **Review and enable virtual tables** and then choose the appropriate virtual tables.



Use the **Dataverse Available Virtual Tables** page to select multiple virtual tables. Choosing **Enable** makes them visible in the PowerApps maker portal. Enabling virtual tables runs in the background because it can take a few minutes to finish, depending on how many tables you enable.



You can also enable virtual tables from the **Dataverse Connection Setup**, **Virtual tables**, **Available Virtual Tables** pages in Business Central.

When you enable the feature, Business Central APIs are available as virtual tables in the PowerApps maker portal.

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.

Get control over how to view Power BI embedded content

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 1, 2023	✔ Oct 3, 2023

Business value

With the rising importance of data analysis, it's key to have the flexibility and modern content visualization of Power BI directly from inside Business Central. Prior to this release, the Power BI part on role centers was limited, with a fixed size that only displayed the first page of a multipage Power BI report.

Feature details

In this release, we add more capabilities to the Power BI embedded experience in Business Central. While details are still being finalized, here are some capabilities that you can expect:

- Control over pages in reports
- Stretch the view to full page
- Control zoom level of reports more easily
- Show scorecards

On top of these capabilities, we've also updated the delivery mechanism for demonstration reports and given the reports a visual refresh.

See also

Embed Power BI reports, scorecards, dashboards in pages (docs)

Get list of companies using Business Central connector in Power Automate

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 1, 2023	✔ Oct 3, 2023

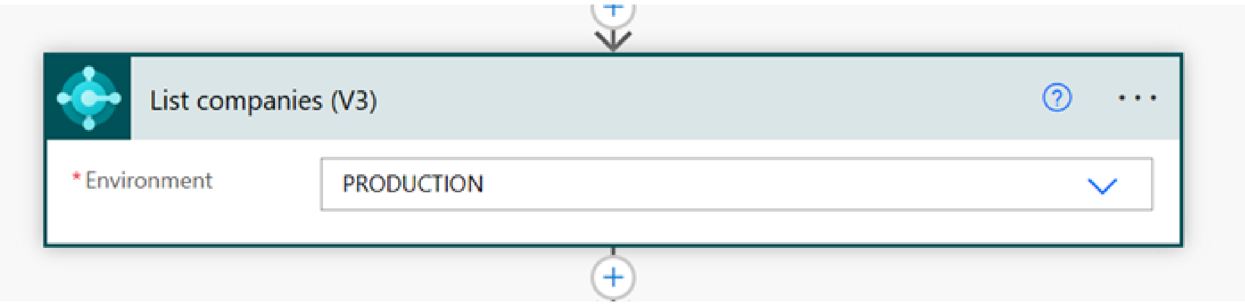
Business value

More often, customers and partners are trying to instrument workflows working across companies in Business Central, but they're blocked. Having an action in the Business Central connector that retrieves a list of companies in Business Central unblocks these customers and partners, providing greater flexibility for executing flows across multiple companies.

Feature details

With this new action in a workflow, you can get all Business Central companies available in a given environment and then either iterate through them all or find a specific one.

This capability enables the creation of more dynamic workflows that function seamlessly across different companies.



Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Dynamics 365 Business Central connector (docs)

Power Pages support via Business Central virtual tables on Dataverse

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 1, 2023	-

Business value

Power Pages support will enable both anonymous and authenticated external users to perform create, read, update, and delete (CRUD) operations on Business Central tables that are available as virtual tables in Microsoft Dataverse.

Feature details

In many commerce and collaboration scenarios, external users may need to participate in processes that involve Business Central data, such as bidding or onboarding, even if they are not Business Central users. With anonymous access via Power Pages, external users can perform operations on Business Central tables without signing in. Authenticated access via Power Pages requires external users to sign in to perform operations on tables or rows that are accessible to them. Business Central admins can select only the necessary operations, tables, and rows to be enabled for anonymous or authenticated access by external users.

Power Pages support also enables authenticated access by internal or existing Business Central users, similar to authenticated access via Power Apps or Power Automate. We are excited to announce the preview of this feature and always appreciate your feedback and suggestions.

See also

Power Pages on virtual tables (preview) (docs)

Simplified Power Automate approval flow experience

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2023	✔ Oct 3, 2023

Business value

Approving documents or data changes in a modern company must be straightforward. We listen to feedback and continue to improve this area, making sure this experience matches business users' expectations.

Feature details

In the previous release, we introduced several new templates and a simplified approval experience based on Power Automate. With this wave, we improve this area by introducing several new changes:

- We automatically set the environment and company in approval templates so that the user doesn't need to choose those every time.
- We've added the requestor to the request for approval and confirmation emails, making it clear who requested and who approved the change.
- The **Approval** step in our templates now includes "Requested by" to indicate the proper requestor.
- We correctly handle the "cancel approval request" decision on the Power Automate side.
- An optional adaptive card can be posted to a chosen Teams channel (or user) with information that a given document was approved.

We welcome your feedback on these improvements as we continue to innovate.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Use Power Automate Flows in Business Central (docs)

Support business events in Business Central connector for Power Automate

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jul 20, 2023	✔ Oct 3, 2023

Business value

During 2023 release wave 1, the new external business events feature was introduced as a preview in the platform, enabling robust and extendable integration scenarios. Adding the same capability directly to the Business Central connector opens up more possibilities for Power Automate flows and Azure Logic Apps to react on events precisely when and how the developer intended.

Feature details

With this release, building flows that react to specific business events in Business Central (version 22.2 and later) is now possible. This feature enables users and makers to hook flows to specific business events raised by Business Central (version 22.2 and later), or even events built by partners who added business event code into their applications.

To support this functionality, we've added a Business Central connector trigger called *When a business event occurs (preview)*. The trigger has the following characteristics:

- It immediately reacts to any business event raised in a selected environment.
- It reacts to events in a specific named company or in any company in that environment.
- It provides the creator with more context to build the flow logic upon, like environment, company ID and company name, initiating user ID (which is the Azure AD user ID), and everything included in the specific business event payload.
- It reacts on multiple events at once, even in parallel, letting Power Automate deal with concurrency.

For more information about business events in Business Central, visit Business events on Business Central

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Business events on Business Central (docs)

Synchronize more fields in your integration with Dataverse and Dynamics 365 Sales

Article • 10/09/2023

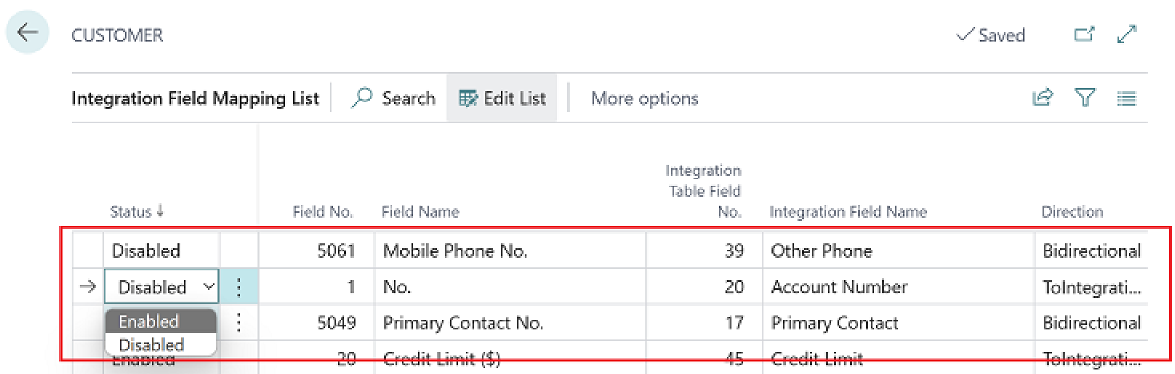
Enabled for	Public preview	General availability
Users, automatically	-	✔ Oct 2, 2023

Business value

Companies often customize their integration between Business Central and Dataverse or Dynamics 365 to fit their specific business needs. To make that easier to do without help from a developer, we've made more fields available for mapping in our standard integration table mappings.

Feature details

We've made more fields available in the standard CUSTOMER, VENDOR, CONTACT, SALESPERSON, and OPPORTUNITY integration table mappings. On the **Integration Table Mapping** page, you select the table mapping for which you want to enable field mappings by choosing **Mapping**, and then the **Fields** action.



To start synchronizing data from the fields you've chosen, change the status of the field to **Enabled**.

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.

Use Power Automate connector V3 actions instead of V2

Article • 02/13/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may 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	✔ Jan 31, 2024	✔ Feb 2, 2024

Business value

Customers and users benefit from using the latest Power Platform components. This applies also to Power Automate actions in the Business Central online connector. We expect customers and partners to stop using the old actions in the coming months and only use the current V3 actions.

Feature details

The Power Automate connector for Business Central online offers access to old V2 actions, but these actions will be fully deprecated in the future (timing is to be determined, but likely in 2025). For now, V2 actions are hidden from view when creating flows. Please migrate to V3 actions. If you're using V2 actions, this change affects your existing flows when you're editing them but not when they run. The actions still execute, they are just hidden.

ⓘ Note

- This change is in the connector—independent of the version of Business Central online being used.
- This change applies to Business Central online only.

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.

Use virtual tables to expose more Business Central data in Dataverse

Article • 11/15/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2024	To be announced

Business value

Use virtual tables when you synchronize data between Business Central, Dataverse, and other Dynamics 365 apps to enhance the value of your Dynamics 365 investment. Virtual tables erase boundaries between Dynamics 365 apps and make your data accessible to users in their preferred app.

Feature details

When you synchronize data between Business Central and Dataverse, if you enable virtual tables in Business Central you can add a synthetic relationship between a synchronized entity and a virtual table. Virtual tables let you enrich the data you've set up to synchronize from Business Central with data you haven't, without help from a developer.

Application

Article • 12/21/2023

ⓘ Important

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

To determine what goes into the application in every release, we prioritize the top requests from customers and respond to market trends. For example, our investment in helping customers use Copilot to optimize their business processes.

For the last couple of releases, we've invested in multicompany capabilities because an increasing number of businesses are using Business Central across borders and to manage multiple companies. We'll continue to improve the experience of using Business Central to manage multiple companies. We'll invest throughout the application, improve experiences in inventory management, service and project management, and improve our integrations with other Dynamics 365 applications.

Add more columns to pages for better insight

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023

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 made the Description 2 field available for personalization on more pages.

Feature details

The **Description 2** field lets you provide more details about records. We've expanded the list of pages on which it's available for personalization to include the following:

- page 651 **Handled IC Inbox Purch. Lines**
- page 649 **Handled IC Inbox Sales Lines**
- page 643 **Handled IC Outbox Purch. Lines**
- page 641 **Handled IC Outbox Sales Lines**
- page 647 **IC Inbox Purchase Lines**
- page 645 **IC Inbox Sales Lines**
- page 639 **IC Outbox Purchase Lines**
- page 637 **IC Outbox Sales Lines**
- page 517 **Requisition Lines**
- page 900 **Assembly Order**
- page 930 **Assembly Quote**
- page 940 **Blanket Assembly Order**
- page 904 **Assembly List**
- page 902 **Assembly Orders**
- page 932 **Assembly Quotes**
- page 942 **Blanket Assembly Orders**
- page 5746 **Posted Transfer Rcpt. Subform**

- page 5759 **Posted Transfer Receipt Lines**
- page 5758 **Posted Transfer Shipment Lines**
- page 5744 **Posted Transfer Shpt. Subform**
- page 5749 **Transfer Lines**
- page 5741 **Transfer Order Subform**
- page 30 **Item Card**
- page 31 **Item List**
- page 5858 **Get Pst.Doc-RtrnShptLn Subform**
- page 6648 **Get Return Shipment Lines**
- page 6653 **Posted Return Shipment Lines**
- page 6651 **Posted Return Shipment Subform**
- page 6657 **Return Shipment Lines**
- page 5853 **Get Pst.Doc-RtrnRcptLn Subform**
- page 6638 **Get Return Receipt Lines**
- page 6663 **Posted Return Receipt Lines**
- page 6661 **Posted Return Receipt Subform**
- page 6667 **Return Receipt Lines**
- page 7383 **Invt. Movement Subform**
- page 7385 **Reg. Invt. Movement Subform**
- page 7397 **Posted Invt. Pick Lines**
- page 7393 **Posted Invt. Pick Subform**
- page 7355 **Internal Put-away Subform**
- page 7396 **Posted Invt. Put-away Lines**
- page 7391 **Posted Invt. Put-away Subform**
- page 5769 **Whse. Receipt Subform**
- page 7336 **Whse. Shipment Subform**
- page 7351 **Movement Worksheet**
- page 7352 **Put-away Worksheet**
- page 7345 **Pick Worksheet**
- page 1007 **Job Planning Lines**
- page 201 **Job Journal**
- page 5903 **Service Item Lines**
- page 5907 **Service Item Worksheet Subform**

We'd like to thank our community for your valuable contributions to Microsoft's open source BusinessCentralApps repo on GitHub.

Looking for more fields? This wave also includes powerful customization tools that let administrators, department owners and partner consultants customize user profiles by adding any table field to these pages.

Adjust exchange rates easily, replace the built-in batch job

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 6, 2023	✔ Oct 2, 2023

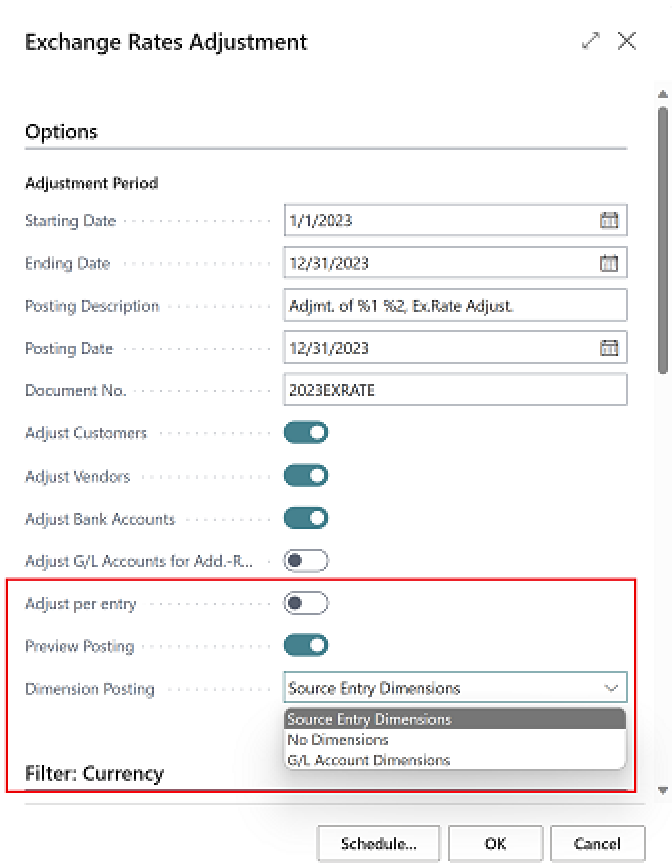
Business value

When companies operate in multiple countries or regions, it's important that they can do business and run financial reports in more than one currency. Because exchange rates often change, businesses must periodically update the rates in Business Central. This update gives accountants additional control over how they adjust exchange rates. At the same time, partners can now extend and customize the exchange rate adjustment to meet the needs of specific industries or markets.

Feature details

You can now preview the effect that an exchange rate adjustment will have on posting before you actually post by choosing the **Preview Posting** action on the **Exch. Rates Adjustment** report (Report 596) request page. Specify whether you want a detailed posting to the general ledger by entry, or a summarized posting by currency, by using the **Adjust per entry** field. You can also specify how the adjustment will handle dimensions for unrealized gains and losses postings by choosing one of the following options in the **Dimension Posting** field:

- **Source Entry Dimensions**: G/L entries for unrealized gains and losses will have dimensions values transferred from the entry you're adjusting.
- **No Dimensions**: G/L entries for unrealized gains and losses won't have dimensions values.
- **G/L Account Dimensions**: G/L entries for unrealized gains and losses will have dimensions values transferred from the unrealized gains and losses G/L account's dimension settings source entry.



ⓘ Note

Due to local specifics, we don't recommend that you enable **Feature Update: Enable use of new extensible exchange rate adjustment, including posting review** in the Swiss (CH) country version.

ⓘ Note

You must have the **Feature Update: Enable use of new extensible exchange rate adjustment, including posting review** feature enabled in the **Feature Management** page to use this capability.

See also

Update Currency Exchange Rates (docs)

Allow lines with amounts of zero on recurring general journals

Article • 03/26/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2024	To be announced

Business value

Recurring general journals let you distribute and allocate recurring expenses and revenue in an effective way. The journals' lines are saved from run to run, and you can modify them whenever you want before you post them.

Feature details

With this release we've made it easier to maintain recurring general journals that use the Fixed recurrency method, but might have zero amount lines in some of the runs.

During posting, Business Central ignores the lines with zero amount and doesn't post them instead of prompting you to add an amount or delete the lines. Deleting the lines would then mean having to add them again if they're needed for future runs. The lines remain in the journal for the next run, where you can update the amounts as needed.

This makes it easier to maintain journals without having to maintain the list of lines needed in cases where they had to be removed for an individual run.

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.

Archive projects

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2024	To be announced

Business value

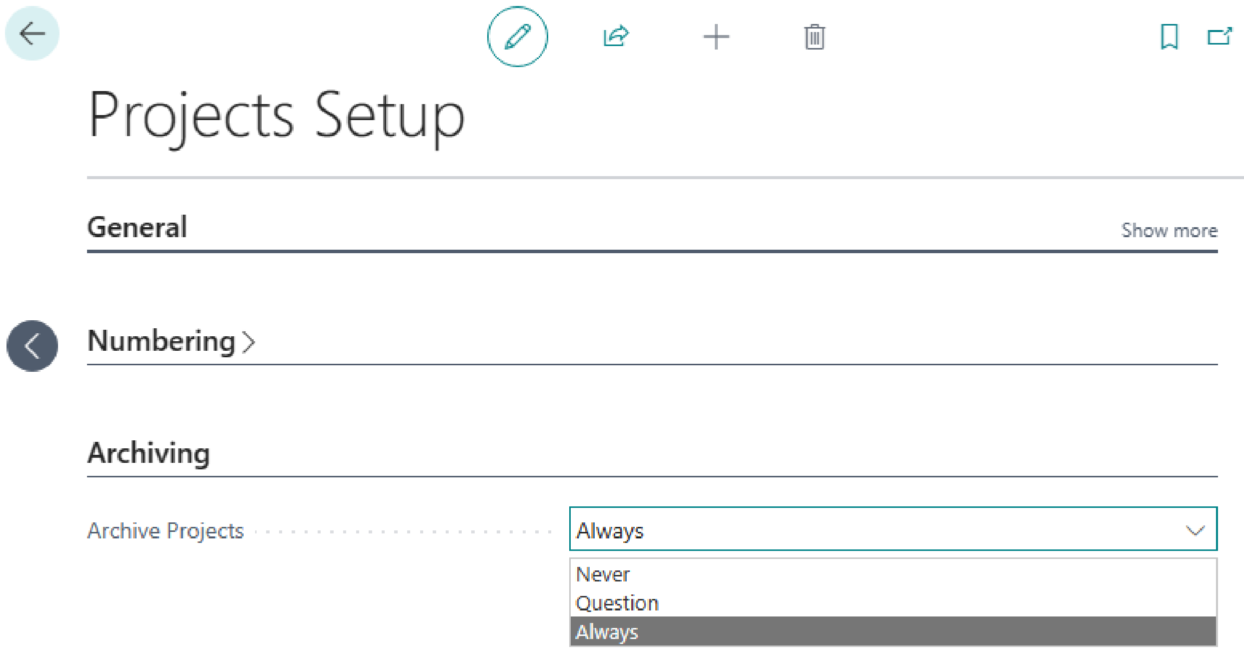
Projects often change and evolve during their lifecycle. The archiving capability gives you control over your project data through audit trails and version control.

Feature details

Archiving capabilities for projects are similar to the functionality you might already be familiar with from the sales and purchase areas. You can set up projects to archive automatically, so that you don't need to think about it. With automatic archiving, Business Central creates a new version of the archived document when people do the following:

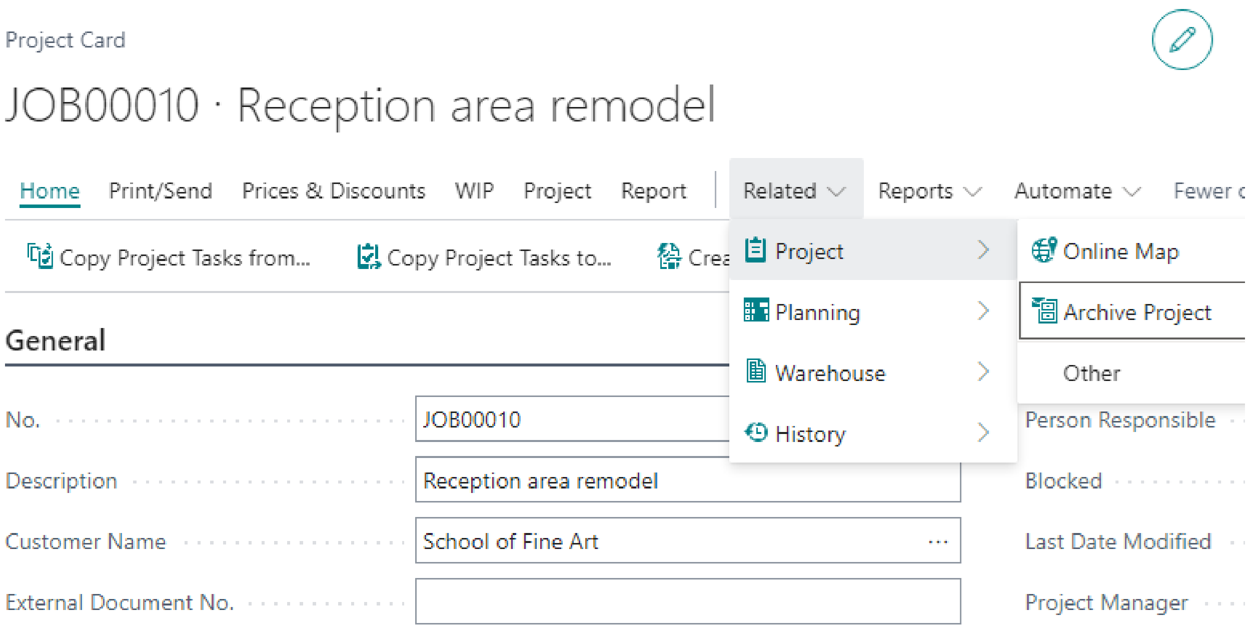
- Change the status of a document, or delete it.
- Print, download, or send a document by email.
- Post an invoice.

You're in full control of archiving. The following table describes the options you can choose when you set up automatic archiving on the **Project Setup** page.

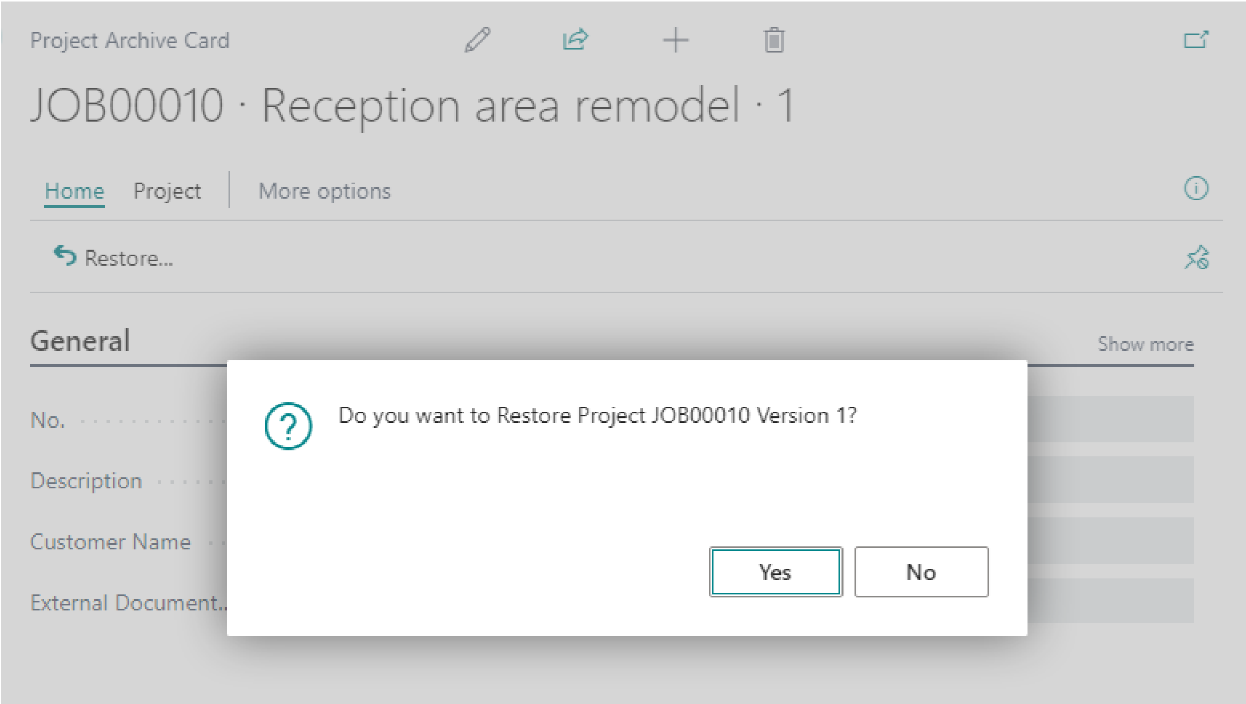


Expand table

Option	Description
Never	Don't archive projects automatically. You can manually archive projects by using the **Archive Document** action, if needed.
Question	Be prompted to choose whether to archive a project when one of the events mentioned earlier occurs.
Always	Silently archive the project automatically when one of the events mentioned earlier occurs.



You can reuse earlier versions of archived projects, if needed. For archived projects where the original still exists and isn't posted, you can use the **Restore** action to overwrite the current project with an archived version.



To keep database size under control, archived projects are added to a list of Retention policy tables.

The following are known limitations:

- The **Statistics** page isn't available on the **Archived Project Card** page.
- Dimensions aren't stored in the archive and can't be restored. When you restore a project, Business Central will use the default dimensions.

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 .

Assemble to project

Article • 01/02/2024

ⓘ Important

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

Expand table

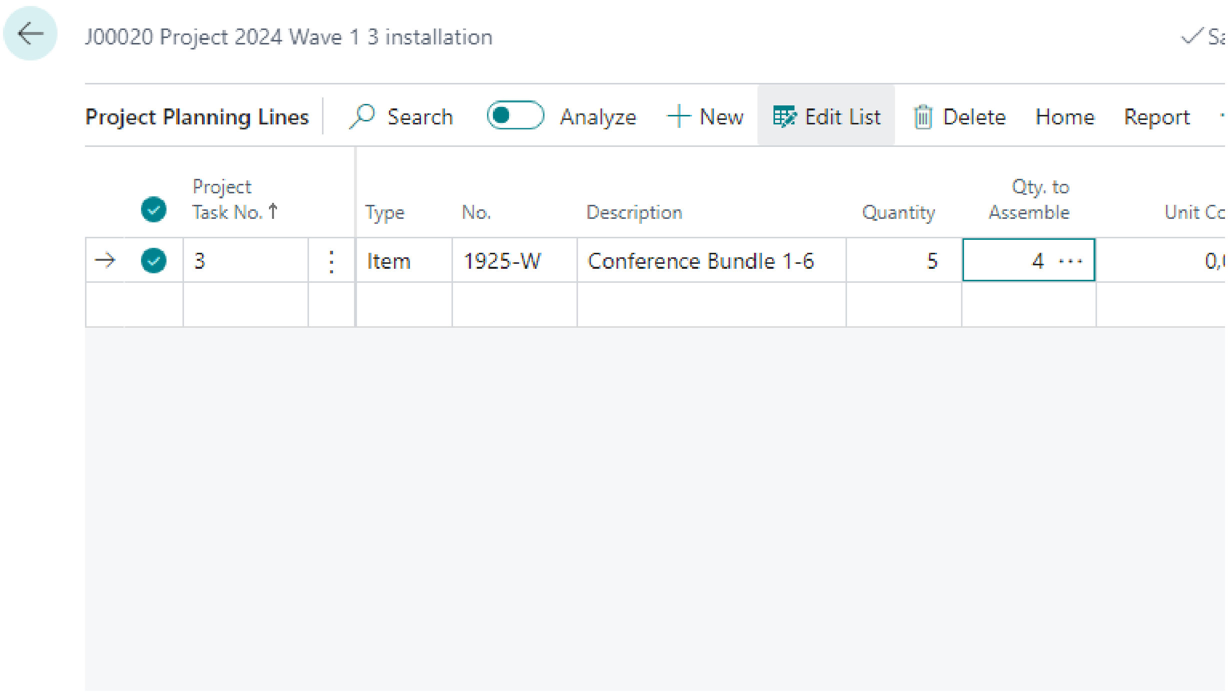
Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

Business value

Assemble to project helps you improve inventory management by assembling to order only when it's required, and enable other ways to customize projects.

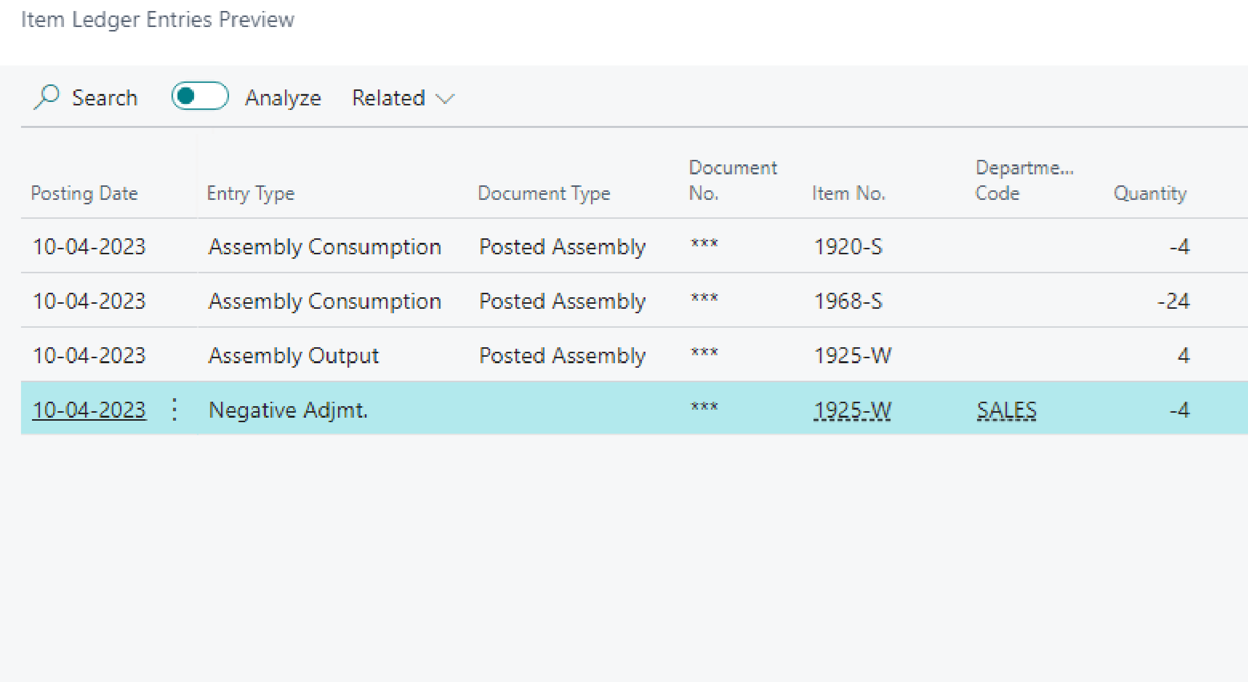
Feature details

When you enter an assemble-to-order item on a project planning line, an assembly order is automatically created. The assembly order is based on the project planning line, and its lines are based on the item's assembly BOM. The quantity of components on the assembly BOM is multiplied by the order quantity. The **Assemble-to-Order Lines** page shows details about the linked assembly order lines. The details can help you customize the assembly item. As in sales, you can't directly post linked assembly orders. The created assembly order is reserved for the project, and Business Central synchronizes item tracking between project planning lines and assembly orders. The feature integrates with warehouse management features to make assembly and shipping easier, and ensure that the workflow from project assembly to delivery runs smoothly.

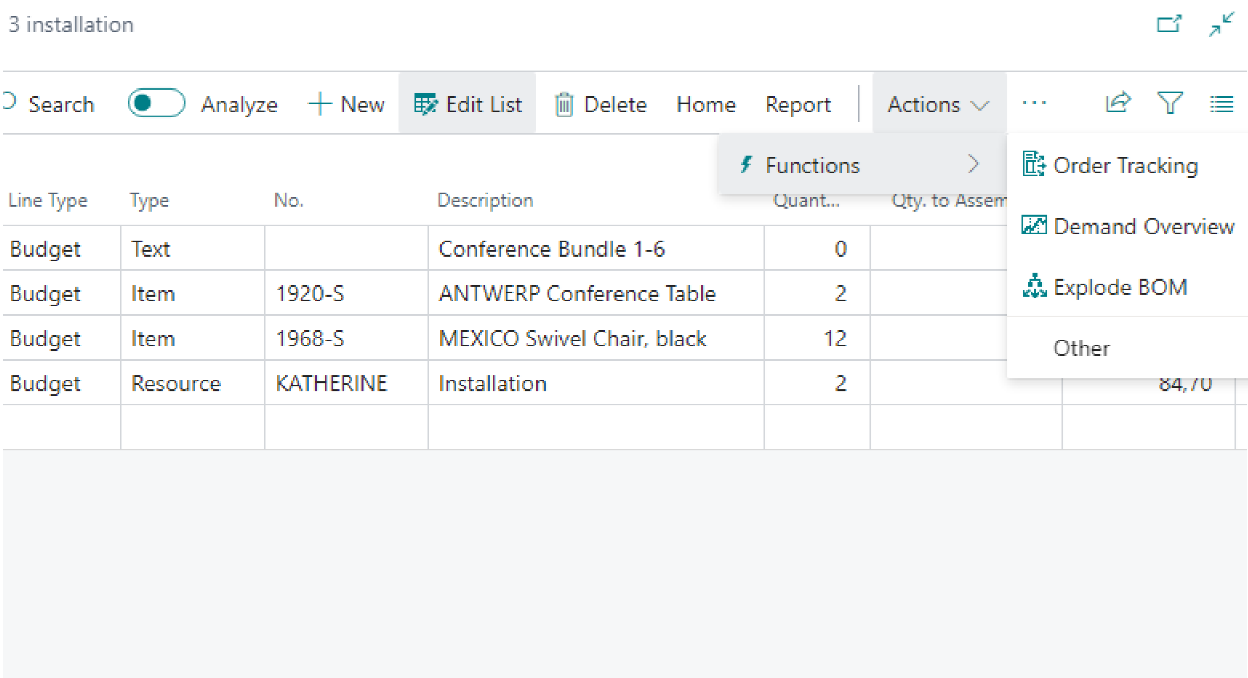


Assemble to project supports the following warehouse configurations:

- **No warehouse handling**: Use a project journal to post full or partial usage. The output and consumption of components post automatically for the assembly order.
- **Inventory pick**: Use an inventory pick to post full or partial usage. The output and consumption of components post automatically for the assembly order.
- **Warehouse pick**: Create and register warehouse picks for components, and then use a project journal to post usage. Business Central verifies whether the consumed assembly components were picked. The output and consumption of components post automatically for the assemble order.



You can also use the **Explode BOM** action in the **Project Planning Lines** to convert the product into a set of components.



The following are known limitations:

- The **Quantity to Assemble to Order** field isn't available for closed projects.
- For warehouse pick scenarios, the **Quantity to Assemble to Order** can be either zero or equal to the quantity. You can't mix assemble to order and assemble to stock on a project planning line. You must create separate project planning lines.
- Assemble to order does not affect billable parts of a project. An assembly is included on sales invoices, but not its components. You can't edit the **Quantity to Assemble to Order** field for Billable lines (not Budget+Billable).
- Order planning and the planning worksheet aren't affected because the job is the input for planning. The planning engine considers the assembly as demand.
- You can't enter a negative quantity in the **Quantity to Assemble to Order** field.
- You can't undo an assembly.

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.

Assign salesperson to customer ship-to addresses

Article • 02/13/2024

ⓘ Important

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

Expand table

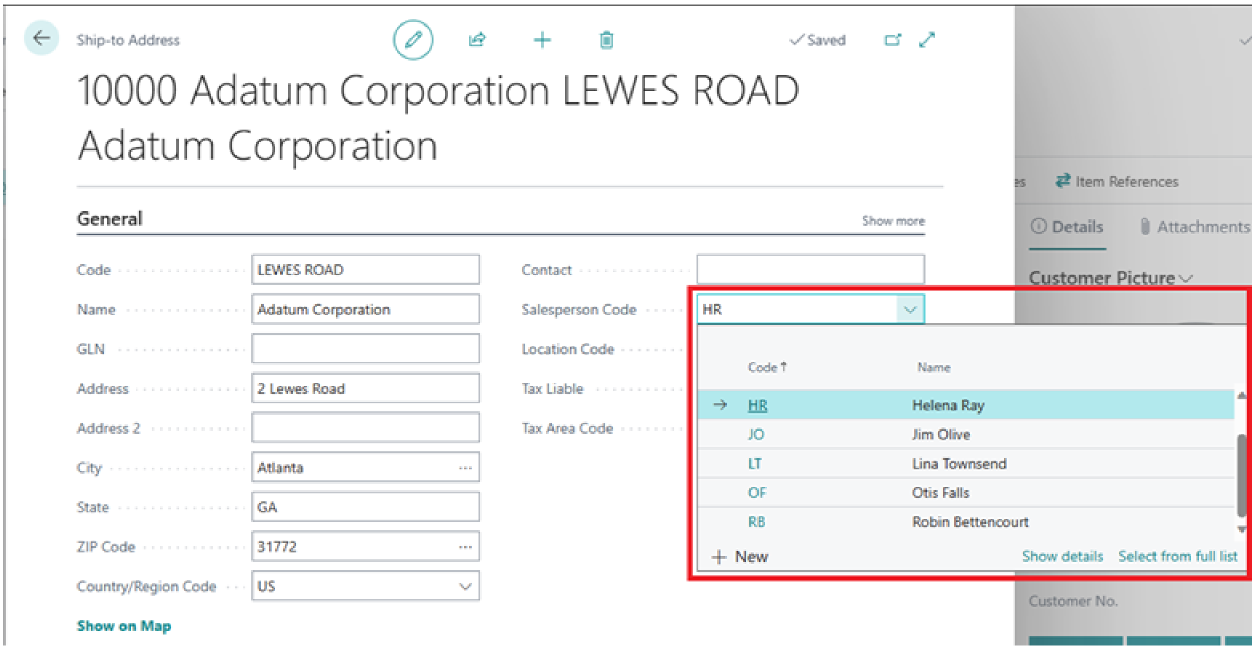
Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

Business value

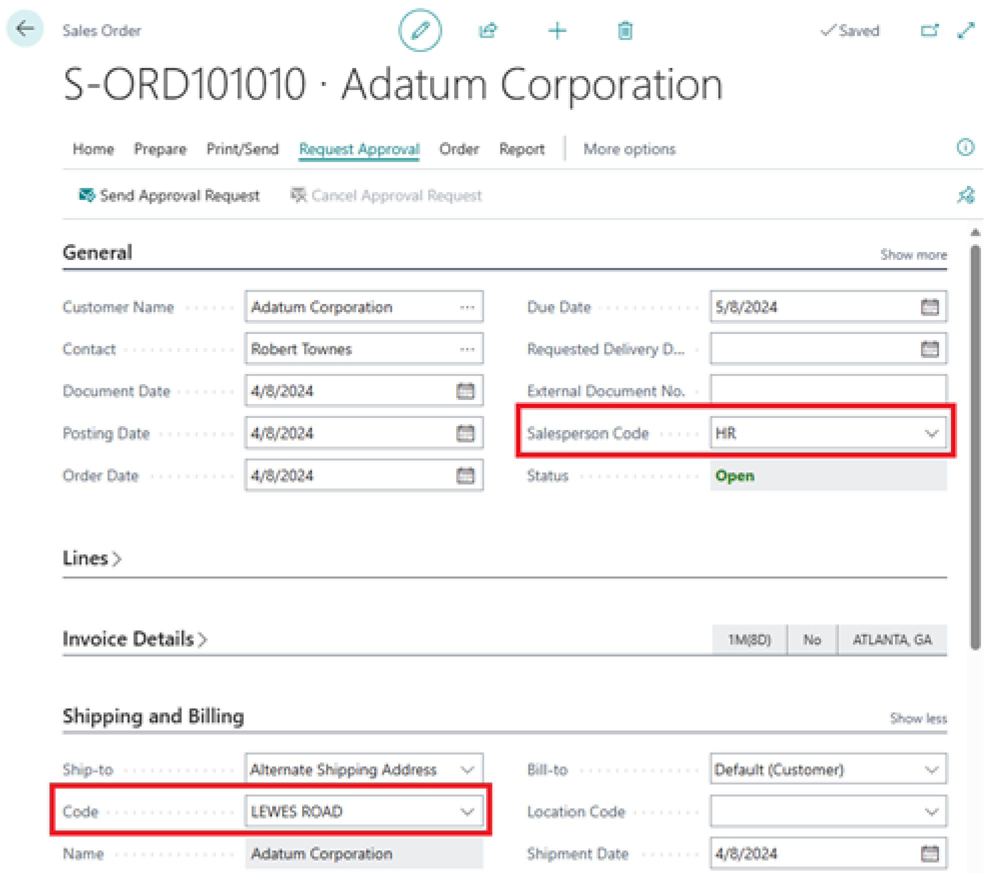
Assign salespeople to the shipping location rather than the billing address to ensure accurate sales reports by reflecting the true geographical distribution of your sales. Assigning a salesperson to a customer's ship-to address gives you more precise insights, optimizes resource allocation, and drives strategic growth in your business.

Feature details

You can assign a salesperson on the **Customer** card page by choosing **Customer**, and then **Ship-To Addresses** to open the **Ship-to Addresses List** page. Choose **Manage**, and then **Edit** to open the **Ship-to Address** card page. Enter or choose a **Salesperson Code** to select the salesperson who is responsible for the customer's ship-to address.



When you choose the **Alternate Shipping Address** option as a **Ship-To** location on a sales document, the **Salesperson Code** updates to match the salesperson from the **Ship-To Address** rather than the **Bill-To Customer**.



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 .

Automate the reminders process in collections

Article • 05/06/2024

ⓘ Important

This content is archived and is not being updated. For the latest documentation, go to What's new or changed in Business Central. For the latest release plans, go to Dynamics 365, Power Platform, and Cloud for Industry release plans.

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2024	✔ Apr 1, 2024

Business value

Make your collections more effective by automating the process of creating, issuing, and sending reminders to your customers. Automation can significantly reduce the time you'll spend on this workload, provide a better overview of the process, and give you full control over each step.

Feature details

You can automate each step in the reminder processes. You can set up automated jobs to create, issue, and send (or print) reminders, and you can create custom email texts for each reminder level so your messages suit your business's collection policies and practices.

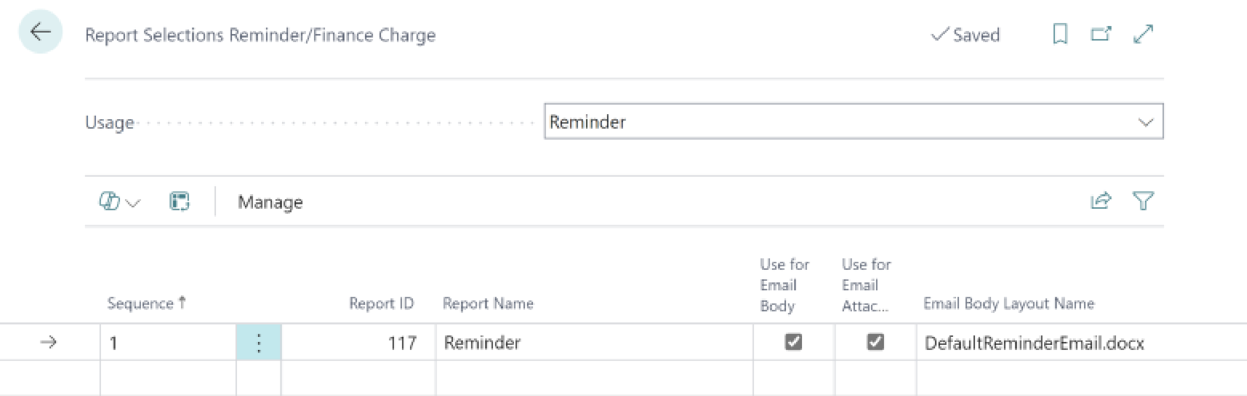
You set up reminder automation on the **Reminder Automation** page, where you create the individual automations. You can combine the steps to create, issue, and send reminders, or you can create separate automations for each step if that's better for your collections processes.

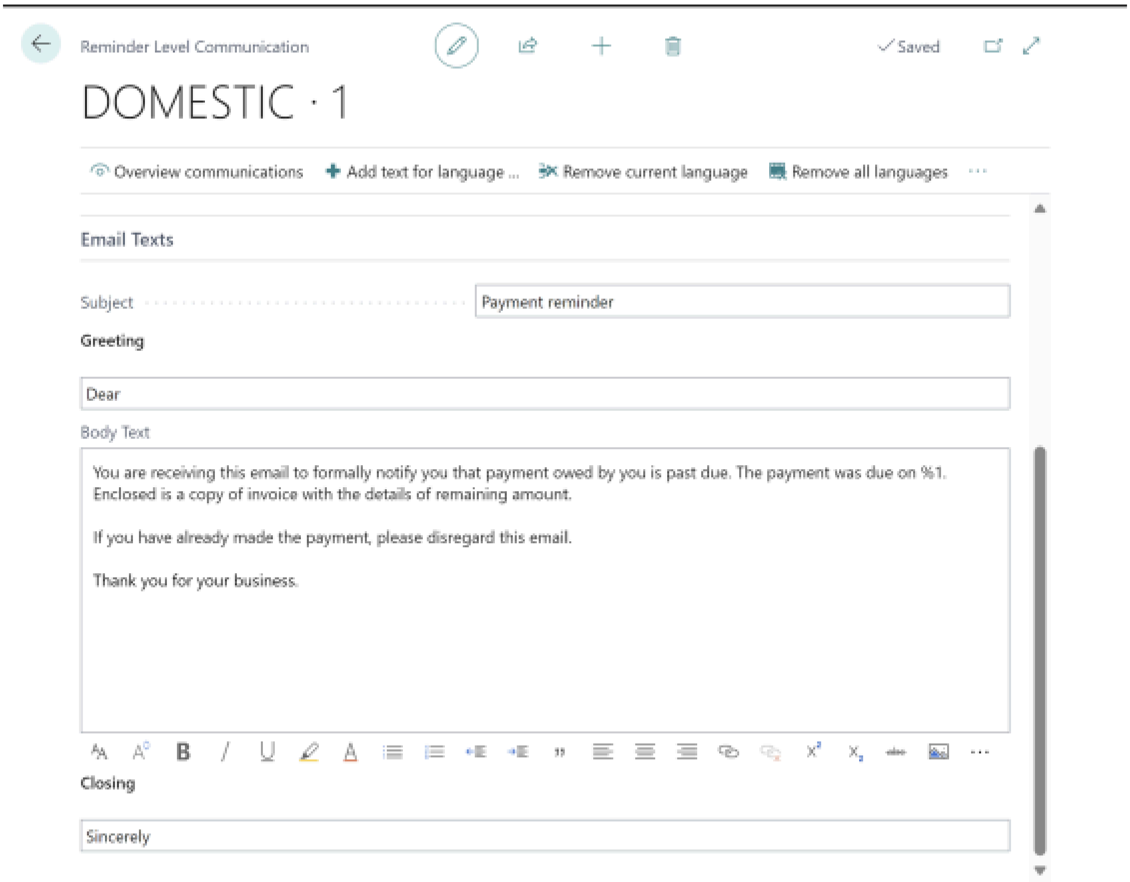
On the **Reminder Automation** page, you define the individual actions (steps) in the automations. You can set filters for reminder terms for the automation as a whole, and set additional filters for each action in the automation. You can also include outstanding invoices attached as PDFs to the emails.

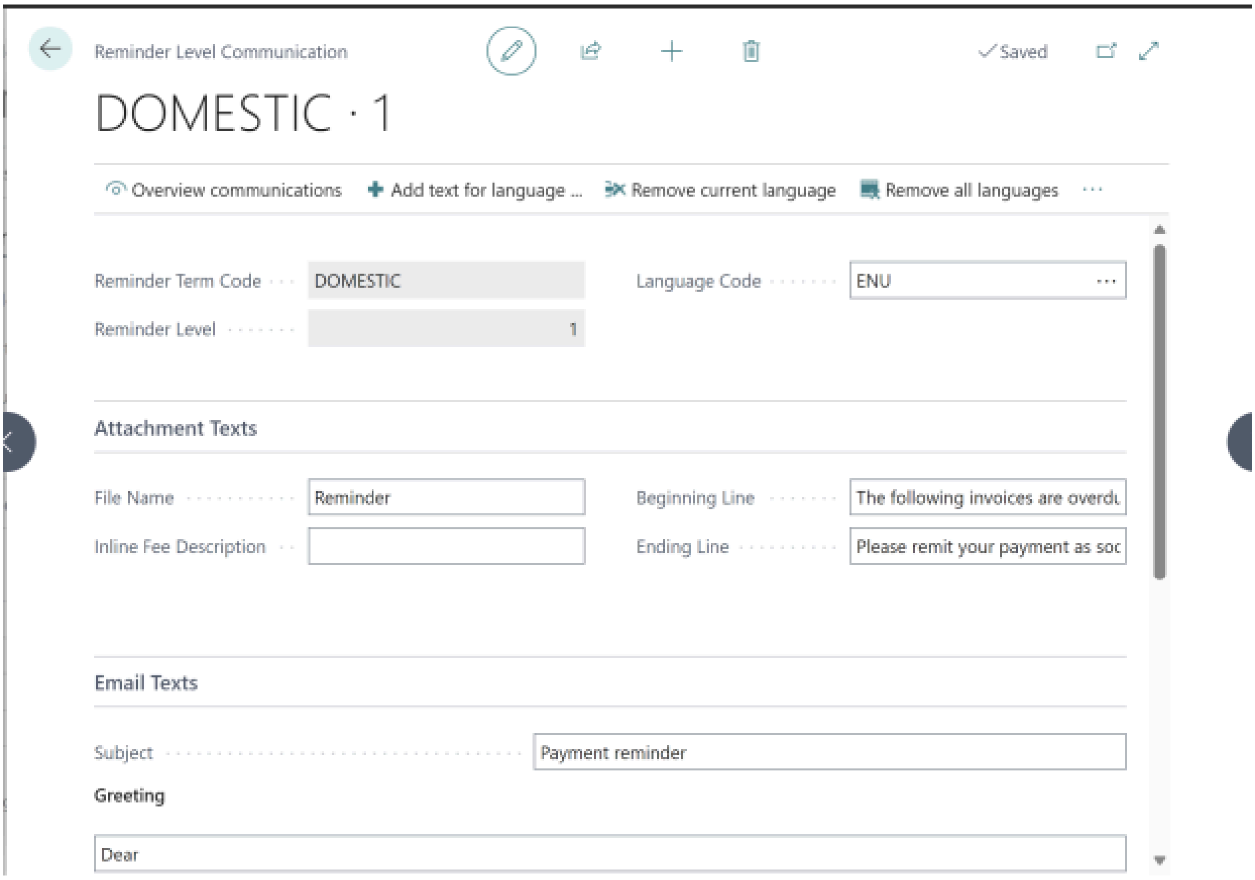
After you set up and start an automation, it'll run until you put it on hold or stop it. If you want to control how the automation runs, you can open the **Job Queue Entries** page and set the recurrence to daily, or every Tuesday, for example.

On the **Reminder Level Communication** page, you can enter texts to show on the reminder on the **Attachment Text** FastTab, and body texts for emails on the **Email Text** FastTab. The texts let you tailor messages for each reminder level, which makes it more flexible and accommodates business policies for communicating payment requests.

When you send an email, the reminder is a report you attach to the email. You define the report that generates the reminder on the **Report Selection Reminder/Finance Charge** page, where you also select the report that holds the email body text in the **Email Body Layout Name** field. When you send emails to your customers, the texts on the **Email Text** FastTab is inserted in the report selected in the **Email Body Layout Name** field. The standard report has different text fields to contain this field (GreetingText, BodyText, ClosingText). If you prefer, you can edit this report to have more content. The layout of these reports can be managed and edited in the (searchable) **Report Layouts** page if you need to tailor them to your business needs.







Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Automate reminders in collections (docs)

Availability overview helps you calculate quantities in your warehouse

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 8, 2023	✔ Oct 2, 2023

Business value

Increase warehouse handling efficiency by having accurate and real-time information about inventory levels, locations in your warehouse, processing stage, and other factors that affect available quantities—for example, quarantine or reservations.

Feature details

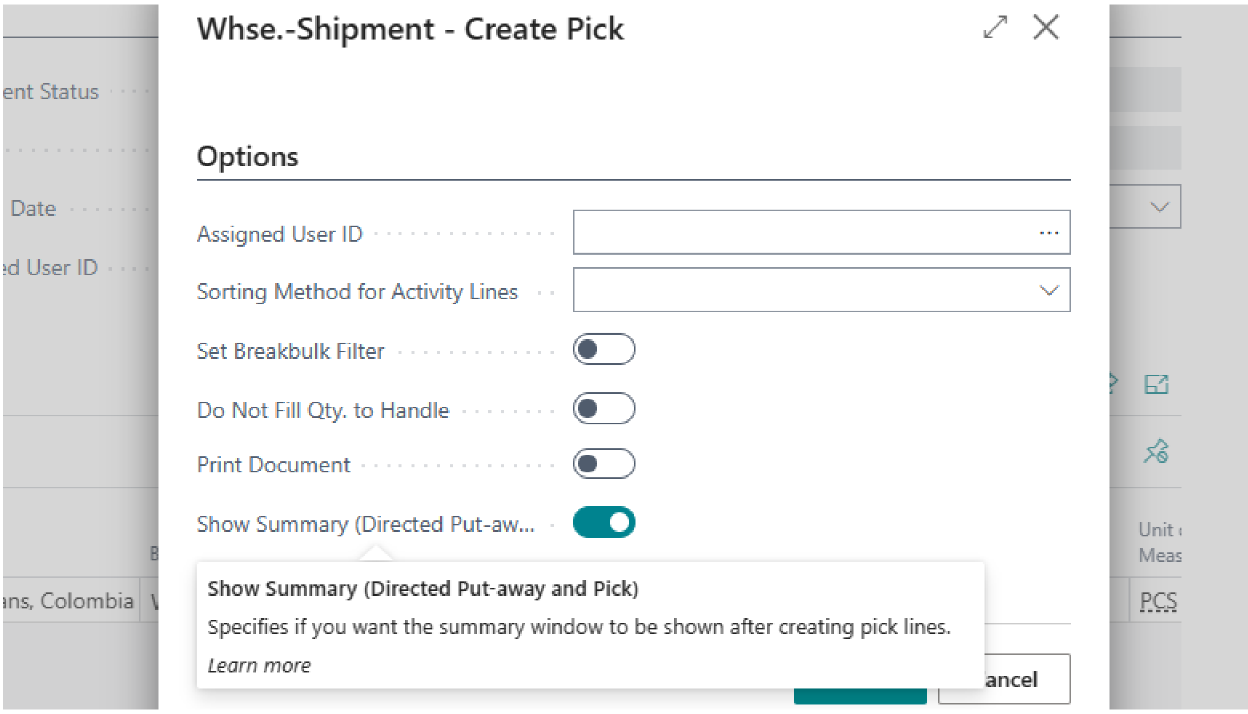
From source documents such as sales orders, production orders, assembly orders, or jobs, you can access information about the availability of items in your warehouse. The information is real-time, and respects factors that affect availability, such as dedicated bins, locked bins, and items that aren't available for picking. For example, items might be reserved, or pending put-away or shipment operations. The **Pick Summary** page lets you review the items that Business Central didn’t include in pick documents and take the necessary actions.

Scope

Available for locations that are configured to use Directed Put-away and Pick.

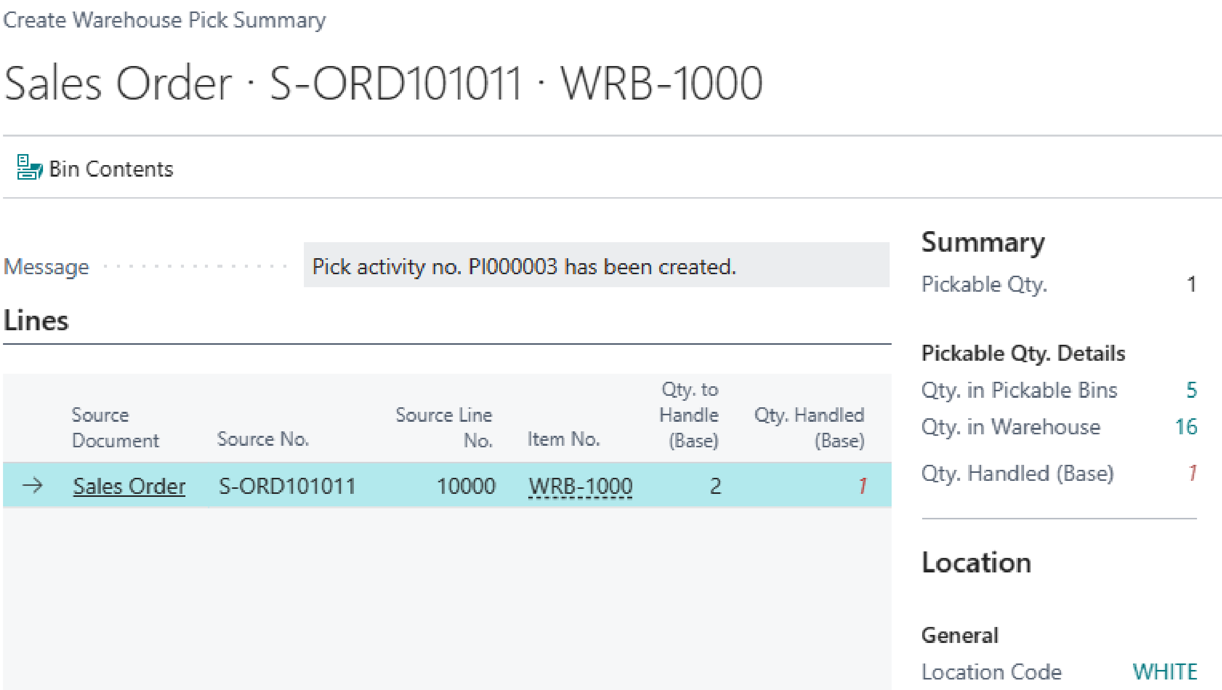
How to start

To get details on what's being picked and what isn't, turn on the **Show Summary (Directed Put-away and Pick)** toggle on the **Whse.-Source - Create Document** or **Whse.-Shipment - Create Pick** request pages.



Pickable quantity

The lines show which, and how many, items that Business Central tried to pick in the **Qty. to Handle (Base)** field. They show how successful it was in the **Qty. Handled (Base)** field. The **Summary** FactBox provides additional details.



In simple cases you can find answers in the **Pickable Qty** field, which shows how many items are available.

You can explore bin content, which can help you to understand why the pickable quantity is less than you expected.

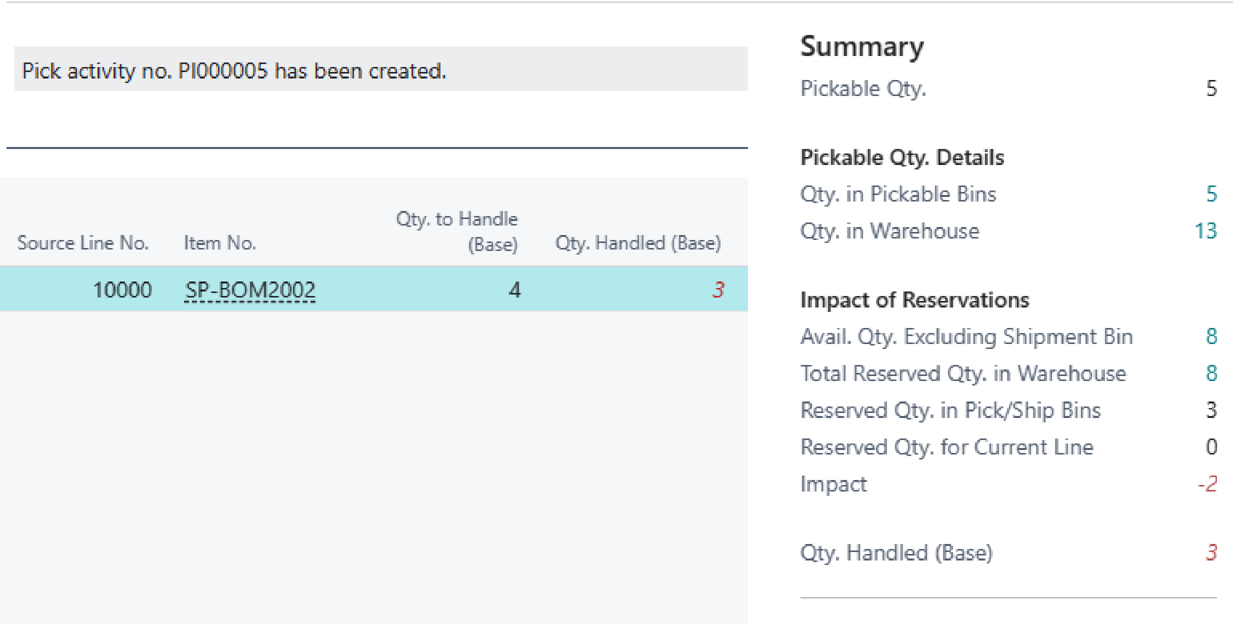
The **Quantity in Warehouse** field shows the total quantity you'll find in the warehouse if you do a physical count. You can drill down into warehouse ledger entries from this field. If the **Quantity in Warehouse** is less than the **Quantity in Pickable Bins**, there's a misalignment between warehouse and inventory quantities. In that case, use the **Calculate Warehouse Adjustment** action on the **Item Journal** page and then create the warehouse pick again.

The **Pickable Qty.** specifies the maximum quantity that Business Central can consider for picking. This quantity consists of items in pickable bins and excludes quantities that are in blocked or dedicated bins, or items that are being picked (quantity in warehouse pick documents). If the item you want to pick requires item tracking, then blocked lots or serial numbers stored in pickable bins are excluded from the pickable quantity.

If the **Pickable Qty** is different than **Qty. in Pickable Bins**, you might want to explore the bin content to find blocked bins or quantities in active documents.

Impact of reservations

If there are reservations for the item being picked, then calculation continues. The idea is that reserved demand has higher priority than non-reserved, which means that picking for non-reserved demand shouldn't prevent picking for reserved demand later.



The screenshot shows that the **Pickable Qty** is enough to cover the **Qty. to Handle (Base)**.

However, this demand isn't reserved, and there's another demand that is reserved from the stock. You can find reservations in the **Total Reserved Qty. in Warehouse** field. Some of the reserved quantity is already picked and ready for shipment, usage, or consumption, and shouldn't affect the availability calculation. You can see this quantity in the **Reserved Qty. in Pick/Ship Bins**.

The screenshot shows that the **Reserved Qty. in Pick/Ship Bins** is **3**, which reduces the reserved quantity in the warehouse from **8** to **5**.

It might seem like the pickable quantity is 5, so we can't pick anything without preventing picking for reserved demand. That isn't exactly true. While we don't want to make it impossible to pick, we should be reasonable. As we figured out, the total quantity in the warehouse is 13. If we reduce this by removing quantities that are out of reach, such as quantities picked for shipment, they can be already loaded into trucks, or picked for consumption, which means these quantities might be already processed in machine center. It also makes sense to exclude blocked item lots or serial numbers and quantities in blocked bins. What's left, which you can find in the **Avail. Qty. Excluding Shipment Bin** field, is potentially available. It can't be picked right away because this quantity is still in the receipt, storage, or quality assurance areas, but it can be reasonably faster moved to picking area either by processing a put-away or movement worksheet.

The difference between **Avail. Qty. Excluding Shipment Bin** and reserved quantity in warehouse is the quantity available for picking without impacting reserved stock. In our example, it will be 8 - 5. The pickable quantity should be reduced to 3 (impact on pickable qty is -2).

Other details

If items require item tracking, you can find the quantity in blocked lots or serial numbers as well, which reduces the pickable quantity, available quantity excluding the shipment bin, and the reserved quantity in the warehouse.

If you pick the same item for multiple source documents or lines, which is also the case when you pick serial numbers, information about picks for other lines also displays because it reduces the pickable quantity.

Technical warning

When implementing this overview, we changed the sequence of checks. On the one hand, that reduced the number of calls and improved the overall performance and reliability of warehouse picks. On the other hand, some events aren't called or are called less often. This might impact solutions that adjust availability calculations.

The following are the events in the CreatePick.codeunit.al that are affected:

1. OnAfterCalcQtyOnPickAndReceiveBins
2. OnBeforeCalcQtyOnOutboundBins (triggered within WarehouseAvailabilityMgt.CalcQtyOnOutboundBins(....))
3. OnAfterGetOutboundBinsOnBasicWarehouseLocation (triggered within WarehouseAvailabilityMgt.CalcQtyOnOutboundBins(....))
4. OnAfterCalcQtyOnBlockedITOrOnBlockedOutbndBins (triggered within WarehouseAvailabilityMgt.CalcQtyOnBlockedITOrOnBlockedOutbndBins(...))
5. OnCalcTotalAvailQtyToPickOnBeforeCalcSubTotal
6. OnBeforeAdjustQtyReservedOnPickShip (triggered within AdjustQtyReservedOnPickShip(...))

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Design Details: Availability in the Warehouse (docs)

Be more productive when approving time sheets

Article • 03/26/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 4, 2024	To be announced

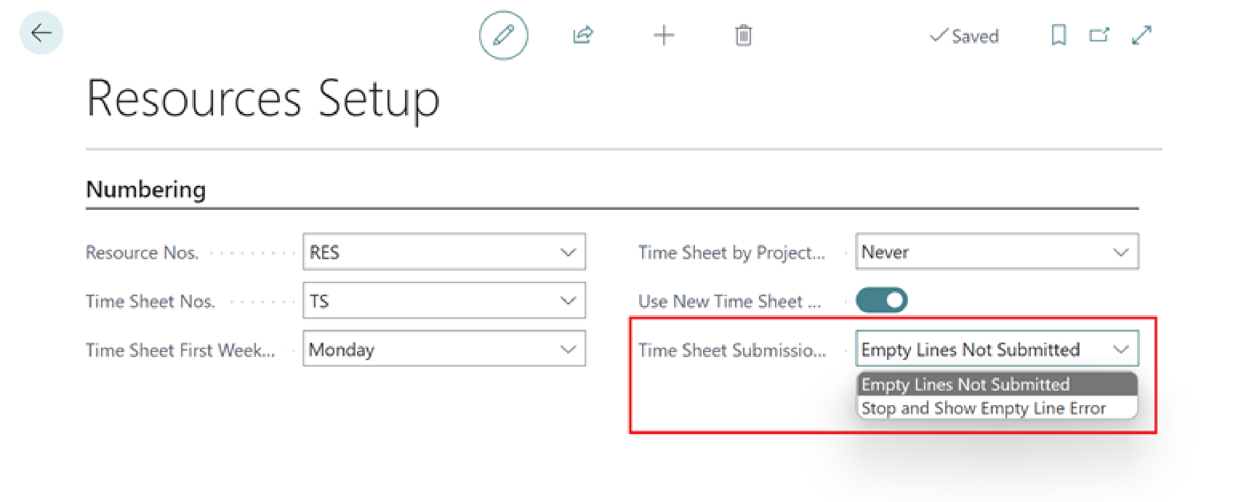
Business value

The ability to quickly and easily approve multiple time sheets at the same time makes the approval process more efficient for managers. Reducing the time and effort managers spend on reviewing and approving individual time sheets gives them more time to focus on their core business.

Feature details

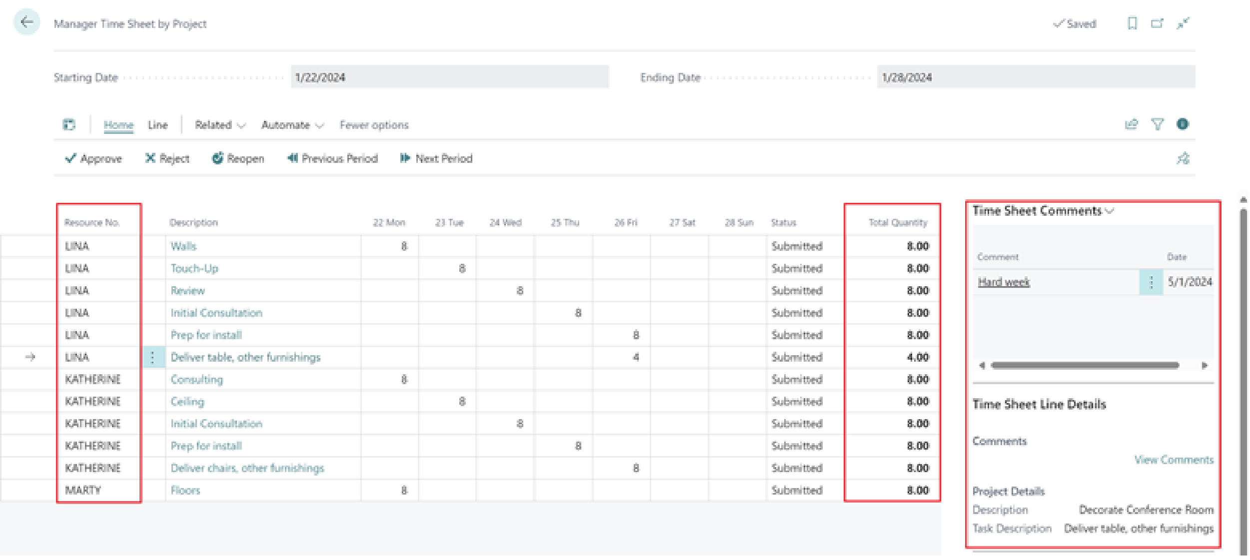
You can now set up how Business Central will handle empty lines during submission for approval by choosing **Time Submission Policy** in the **Resource Setup** page:

- Choose **Empty Lines Not Submitted** to skip lines that don't contain hours to submit. This is the default setting.
- Choose **Stop and Show Empty Line Error** to stop processing the time sheet if one or more lines are missing hours.

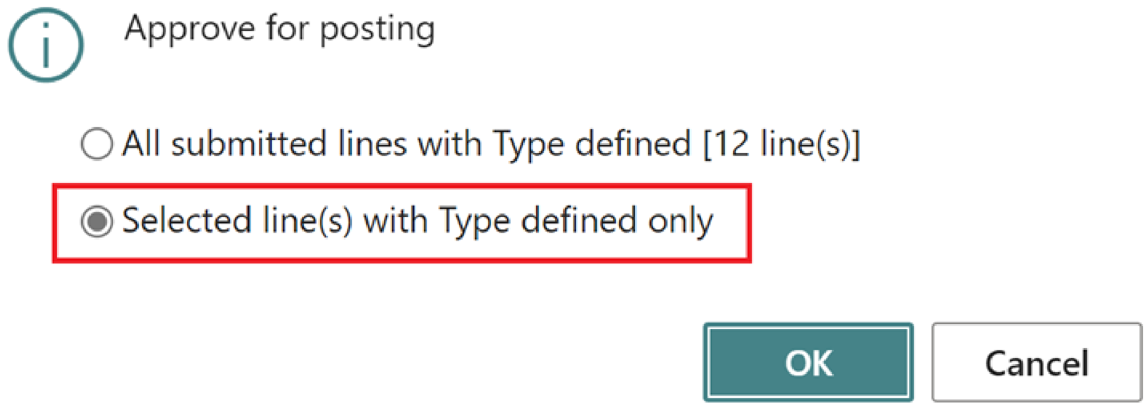


Project managers have more details in **Manager Time Sheet by Jobs** available while approving time sheets:

- The **Resource No.** shows on **Manager Time Sheet by Job**. You can also add the **Resource Name** by personalizing the page.
- Saturday and Sunday are included on the **Manager Time Sheet by Job**.
- The **Total** column shows the total per time sheet line.
- The **Time Sheet Comments** FactBox shows time sheet header comments during approval.
- The **Time Sheet Line Details** FactBox gives you quick access to time sheet line comments and activity details, such as the project name and task description.



When you choose **Approve** or **Reject** to approve or reject time sheet lines, the default is **Selected lines** to avoid mistakes.



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:

- Time Sheet View - Showing the Job Name
- Showing Resource code

We listened to your ideas, along with comments and votes, to help us decide what to add to our product roadmap.

Get more productive while entering time sheets

Article • 12/21/2023

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

Business value

Copying time sheets from previous periods can save you time and effort by reducing the need to manually enter data. The process improves productivity and efficiency by allowing you to quickly and easily create time sheets based on data you already have. Additionally, copying time sheets can help to ensure that your data is consistent and accurate by reducing the risk of data entry errors.

Feature details

We've made it faster and more efficient to fill out time sheets. You can use the **Copy From** action on the **Time Sheet** page to copy information from lines on previous time sheets. You can also copy information from the previous row on your time sheet. For example, when you're filling out a time sheet where you've worked on the same job, you might want to copy the job or job task numbers.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Use Time Sheets (docs)

Block item variants

Article • 10/24/2023

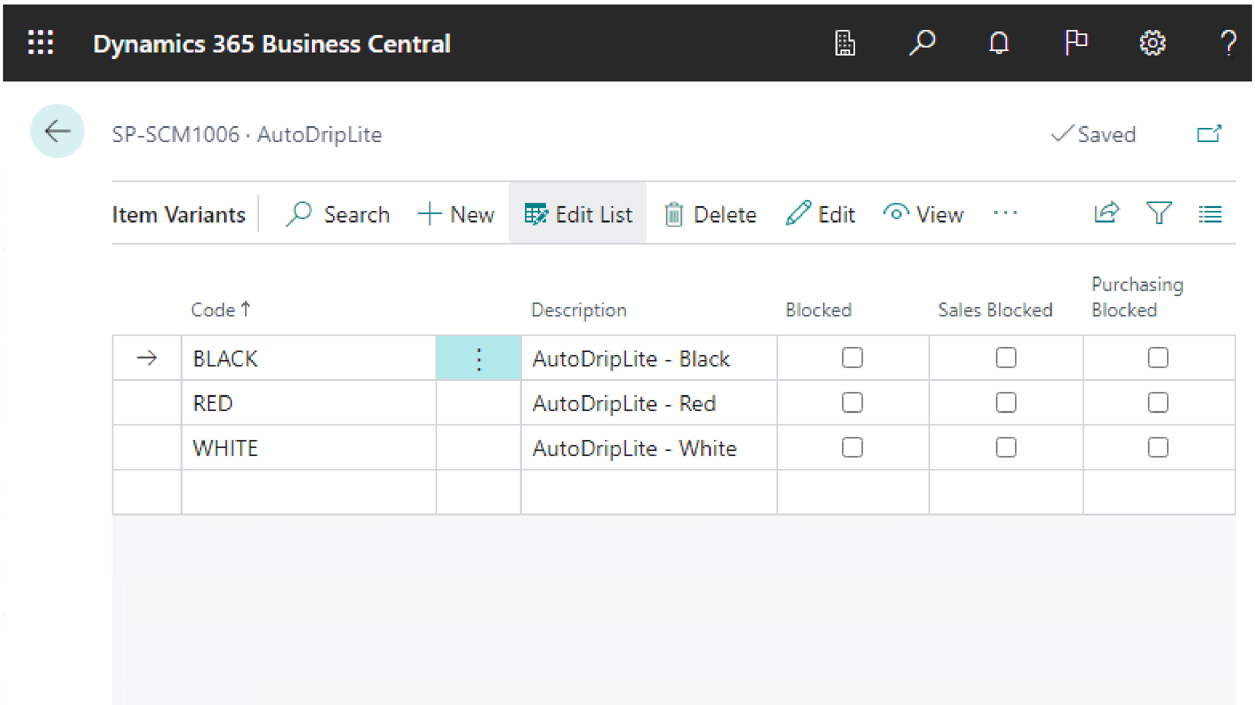
Enabled for	Public preview	General availability
Users, automatically	✓ Sep 8, 2023	✓ Oct 2, 2023

Business value

Over time, you might have some item variants that you no longer need. Business Central won't allow you to delete the unneeded variants, but you can block them from being chosen on sales or purchase lines, and you can block them from being posted in transactions.

Feature details

The following table describes the new toggles we've added to the **Item Variant** page.



Option	Description
Sales Blocked	You can't choose the item variant on a sales document or in a sales item journal.
Purchasing Blocked	You can't choose the item variant on a purchase document, in a purchase item journal, or in purchase planning processes.

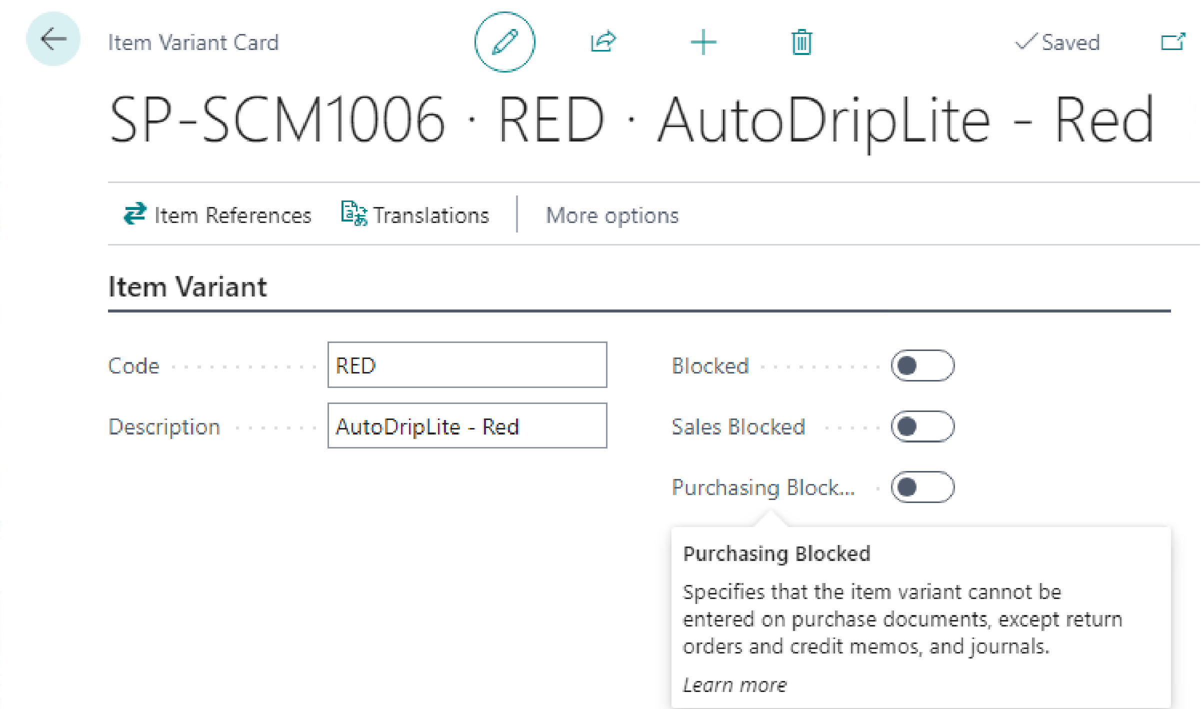
Option	Description
Blocked	You can't include the item variant in transactions.

ⓘ **Note**

Blocked items can be returned. The settings above don't apply to return orders or credit memos.

When you use the **Copy from Document** action to create new documents based on existing documents, you're notified if items or item variants on the source document lines are blocked. The blocked document lines are excluded from the new document, and a notification shows an overview of all document lines that are blocked in the source document.

We've also added an **Item Variant Card** page. The total number of fields in the standard product isn't overwhelming and you can continue to edit variants in the list, but some partner solutions extend this table dramatically. Those solutions will benefit from having a place where they can add new elements in a structured way.



Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Block Items or Item Variants from Sales or Purchasing (docs)

Block item, item variant or service item from use in service management transactions

Article • 01/11/2024

ⓘ Important

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

Expand table

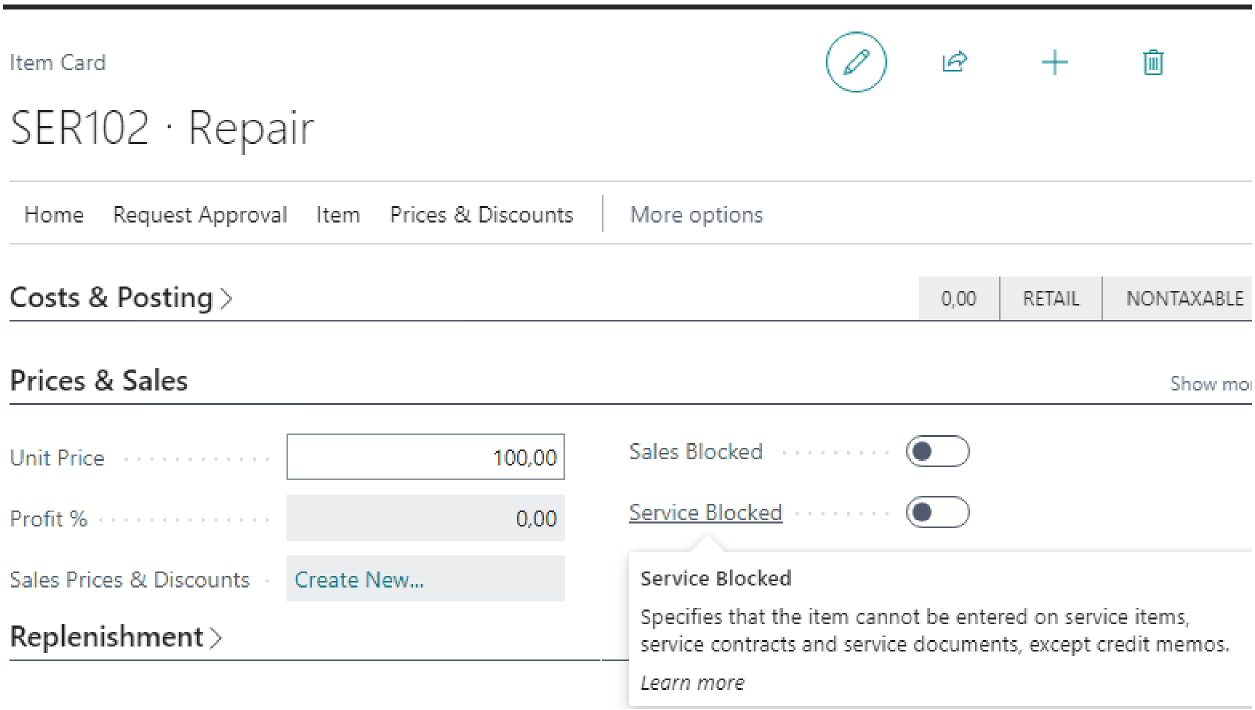
Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

Business value

Prevent certain items, item variants, or service items from being used in service management transactions, such as service contracts, service orders, and service invoices. This can be useful if you want to restrict the availability of some items or service items for service purposes, for example, due to discontinued support, limited stock, or contractual agreements.

Feature details

To block an item or an item variant from being used in service management transactions, turn on the **Service Blocked** toggle on the **Item Card**, **Item Variants**, and **Item Variant Card** page. You can also set this field on the **Item Template** page, and it will be copied to the items created from that template.



When an item or an item variant is service blocked, it isn't available for selection on the following pages:

- Service Line (except for service credit memos, where you'll see a notification that the item or variant is blocked, but allowed on this type of document)
- Service Item
- Service Contract Line
- Standard Service Line

If you manually enter an item number or variant code that's blocked, you'll get an error message that states, "The field contains a value that cannot be found in the related table."

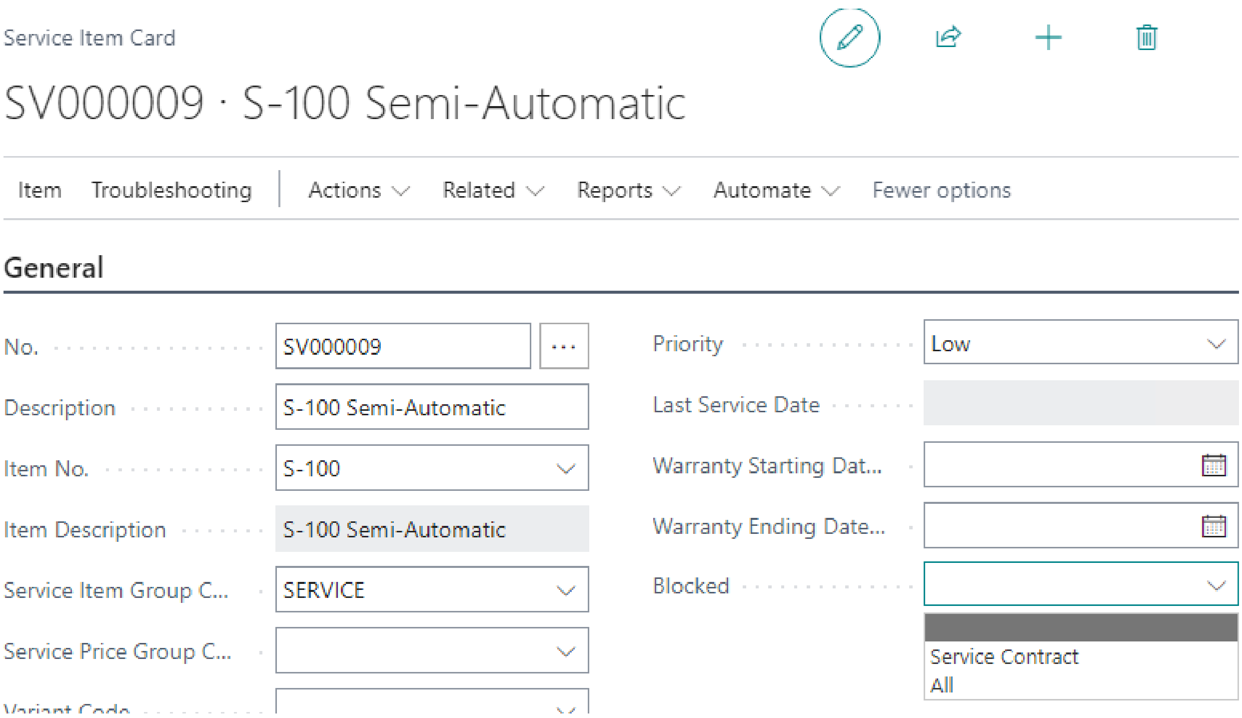
Additionally, if you have service contracts, service contract quotes, or service orders that include blocked service items or item variants, you can't use the following actions:

- **Lock** or **Make Contract** on the **Service Contract Quote** page.
- **Lock Contract**, **Sign Contract**, **Create Contract Service Orders** or **Create Contract Invoices** on the **Service Contract** page.
- **Make Order** on the **Service Quote** page.
- **Release to Ship** or **Post** on the **Service Order** page.
- **Post** in the **Service Invoice** page.

Block a service item

To block a service item from being used in service management transactions, on the **Service Item Card** page, in the **Blocked** field, choose one of the following options:

- **Service Contract**: Block the service item from being used in service contracts and service contract quotes, but not in service orders or other service documents.
- **All**: Block the service item from being used in any service management transaction, including service contracts, service orders, and other service documents.



When a service item is blocked, you can't select it on the following pages:

- Service Contract Line (if blocked for service contract, or all)
- Service Item Line (except for service credit memos, if blocked for all)

If you manually enter a service item number, you'll get an error message that states, "The field contains a value that cannot be found in the related table."

Additionally, if you have service contracts, service contract quotes, or service orders that include blocked service items, you can't use the following actions:

- **Lock** and **Make Contract** on the **Service Contract Quote** page (if blocked for service contract, or all).
- **Lock Contract**, **Sign Contract**, or **Change Customer** on the **Service Contract** page (if blocked for service contract, or all).
- **Make Order** on the **Service Quote** (if blocked for all).
- **Release to Ship**, **Post** on the **Service Order** (if blocked for all. If service order documents contain multiple service items, and some are blocked and others are not, you can release and post non-blocked lines. Consider whether to turn on the **One Service Item Line/Order** toggle on the **Service Management Setup** page).
- **Post** on the **Service Invoice** page (if blocked for all).

You can also view the blocked service items by applying a filter to the following reports:

- Service Items (report 5935)
- Service Items Out of Warranty (report 5937)
- Service Profit (Service Items) (report 5938)

Data upgrade

This feature doesn't require additional setup. However, if you upgrade your Business Central, be aware of the following data upgrade behavior:

- If you have items, item variants, or item templates where the **Sales Blocked** toggle is turned on, the **Service Blocked** field is also turned on for those records during upgrade. This ensures that the existing sales blocked logic also applies to service management transactions.
- Data upgrades only if you have at least one service item in your company, which means you're using the service management functionality and need the data upgrade. If you don't have service items, the data upgrade is skipped and the **Service Blocked** toggle is turned off by default for all items, item variants, and item templates.

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.

Configure how to handle different warehouse operations

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 8, 2023	✔ Oct 2, 2023

Business value

Warehouse processes such as picking and replenishment are no longer one-size-fits-all. You can configure your warehouse processes differently to suit your inbound, outbound, and internal workflows.

Feature details

Business Central provides a wealth of capabilities for managing a warehouse, and allows businesses to configure inbound (purchase), outbound (sales), and internal (production) warehouse workflows individually. For example, you can use warehouse shipments to send items to customers, but use inventory movements to replenish bins for production or assembly orders.

Details

You define warehouse handling on the **Location Card**. The existing **Require shipment**, **Require pick**, **Require receipt**, and **Require put-away** fields are now used only for warehouse handling for sales, purchases, transfers, and service operations. Warehouse handling of internal operations, such as production, jobs, and assembly is now controlled by the following new fields:

1. Production consumption (**Prod. Consump. Whse. Handling**):
    - No warehouse handling
    - Warehouse Pick (optional). This is for compatibility with existing behavior.
    - Inventory Pick/Movement. Movement is for flushing scenarios.
    - Warehouse Pick (mandatory)
2. Production Output (**Prod. Output Whse. Handling**):
    - No warehouse handling

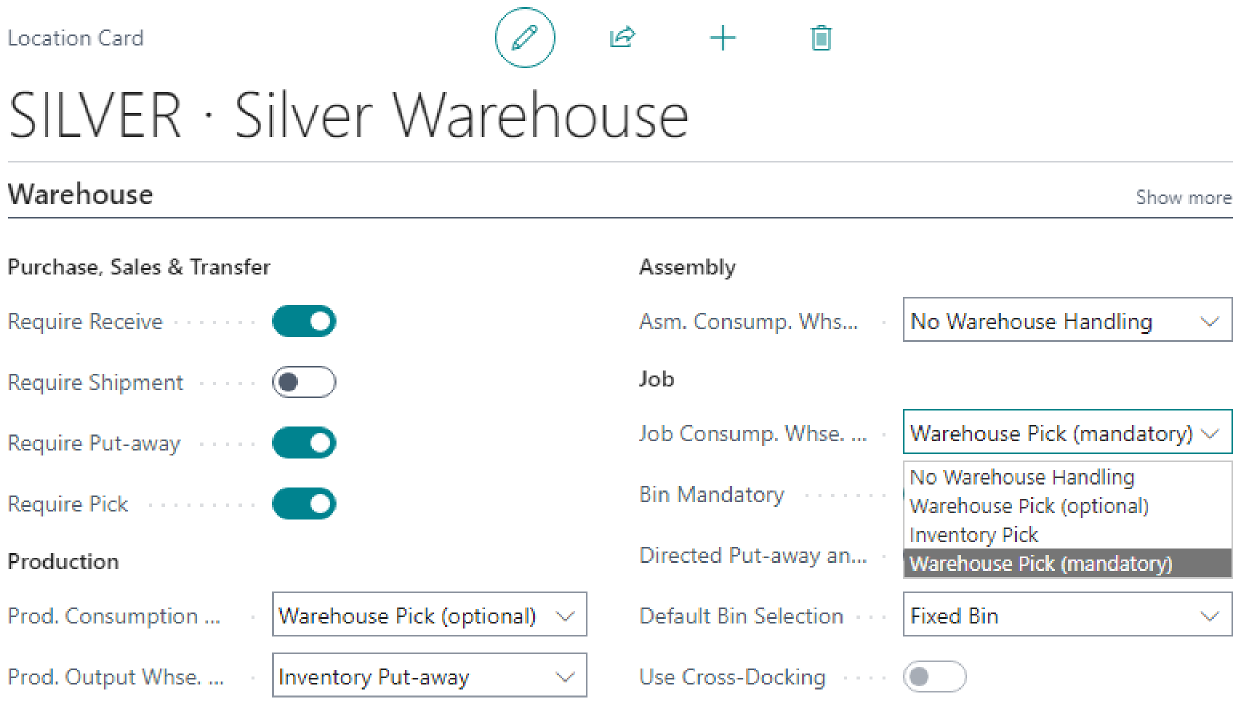
- Inventory Put-away

3. Assembly consumption (**Asm. Consump. Whse. Handling**):

   - No warehouse handling
   - Warehouse Pick (optional). This is for compatibility with existing behavior.
   - Inventory Move
   - Warehouse Pick (mandatory)

4. Job consumption (**Job Consump. Whse. Handling**)

   - No warehouse handling
   - Warehouse Pick (optional). This is for compatibility with existing behavior.
   - Inventory Pick
   - Warehouse Pick (mandatory)



Directed put-away and pick

The controls aren't editable if you turn on the Directed Put-away and Pick toggle for a location. If you turn on the Directed Put-away and Pick toggle, the following values are assigned automatically:

- Production consumption: Warehouse Pick (mandatory)
- Production output: No warehouse handling
- Assembly consumption: Warehouse Pick (mandatory)
- Job consumption: No warehouse handling, Note that Jobs are not supported for locations with Directed Put-away and Pick.

Upgrade

Depending on the state of the **Require shipment**, **Require pick**, **Require receipt**, and **Require put-away** fields, the new fields are initialized as follows:

1. Require shipment is turned off, Require pick is turned off, or Require shipment is turned on, and Required pick is turned off:
   - Production consumption: Warehouse Pick (Optional)
   - Assembly consumption: Warehouse Pick (Optional)
   - Job consumption: Warehouse Pick (Optional)
2. Require shipment is turned off, Require pick is turned on
   - Production consumption: Inventory Pick / Movement
   - Assembly consumption: Inventory Move
   - Job consumption: Inventory Pick
3. Require shipment is turned on, Require pick is turned on
   - Production consumption: Warehouse Pick (mandatory)
   - Assembly consumption: Warehouse Pick (mandatory)
   - Job consumption: Warehouse Pick (mandatory)
4. Require receipt is turned off, Require put-away is turned off or Require receipt is turned on, Require put-away is turned off or Require receipt is turned on, Require put-away is turned on
   - Production output: No warehouse handling
5. Require receipt is turned off, Require put-away is turned on
   - Production output: Inventory put-away

ⓘ **Note**

Because you couldn't define warehouse handling for internal operations, Business Central let you create warehouse pick in multiple cases, including scenarios where users expected to use an inventory pick/movement. The new settings let you define an exact flow and avoid confusion if one user chooses an inventory pick but another creates a warehouse pick.

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:

- Production Order Warehouse Pick Consumption
- Require Pick - Sales vs Production

We listened to your ideas, along with comments and votes, to help us decide what to add to our product roadmap.

Connect Business Central with Shopify B2B

Article • 01/11/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may 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	Mar 2024	To be announced

Business value

Connecting Shopify B2B and Business Central improves visibility into pricing, customers and their order histories, order status, billing, and payments. Better visibility means faster response to customer inquiries, timely returns and refunds, and more accurate order processing.

Feature details

The Shopify Connector now supports the latest features of Shopify's B2B platform, such as companies, prices, payment options and more. These features allow you to manage multiple buyers and groups, offer different pricing and discounts, and streamline your B2B operations. You can easily synchronize your Shopify B2B data with Business Central and automate your workflows. This helps save time, reduce errors, and increase customer satisfaction.

Adapt faster

Connecting Business Central with Shopify helps merchants around the world to implement more agile online business processes, while keeping their people focused on selling. With connected data across your online stores and business operations, you can rapidly respond to consumer demands to adjust product pricing and merchandising.

With support for multitier pricing structures and multiple currencies, companies, and entities, Business Central easily supports multiple Shopify store scenarios.

Work smarter

Eliminating manual processes improves accuracy and lets people focus on taking care of customers. Connecting Shopify and Business Central improves visibility into stock, pricing, existing customers and their order histories, order status, billing, and payments. Better visibility means faster response to customer inquiries, timely returns and refunds, and more accurate order processing.

Perform better

Enhanced operational efficiency not only saves you time and reduces costs, it can also translate into better results and faster decision-making. You'll have the confidence to expand your online presence while minimizing overhead with automatic synchronization between systems for price changes, product updates, and customers. At the end of accounting periods, Business Central will help with the financial reporting and tax reporting required by local legislation.

Details

To make sure that both the D2C and B2B flows are supported, the current customer synchronization flow focuses on D2C scenarios and a new flow is available for B2B customers.

Customer Sync D2C

Export Customers To Shopify is removed. The Connector won't export all existing Business Central customers automatically. Instead, on the **Shopify Customer** page, use the **Add Customers to Shopify** action. On the request page, specify the Shopify Shop and filters if you want to export a subset of customers. The Connector checks whether a customer with same phone number or email address already exists in Shopify. If it finds a match, it maps it to a customer in Business Central. If it doesn't find a match, it creates a new customer.

You can also open the **Shopify Customers** page by using the **Customers** action on the **Shopify Shop** card.

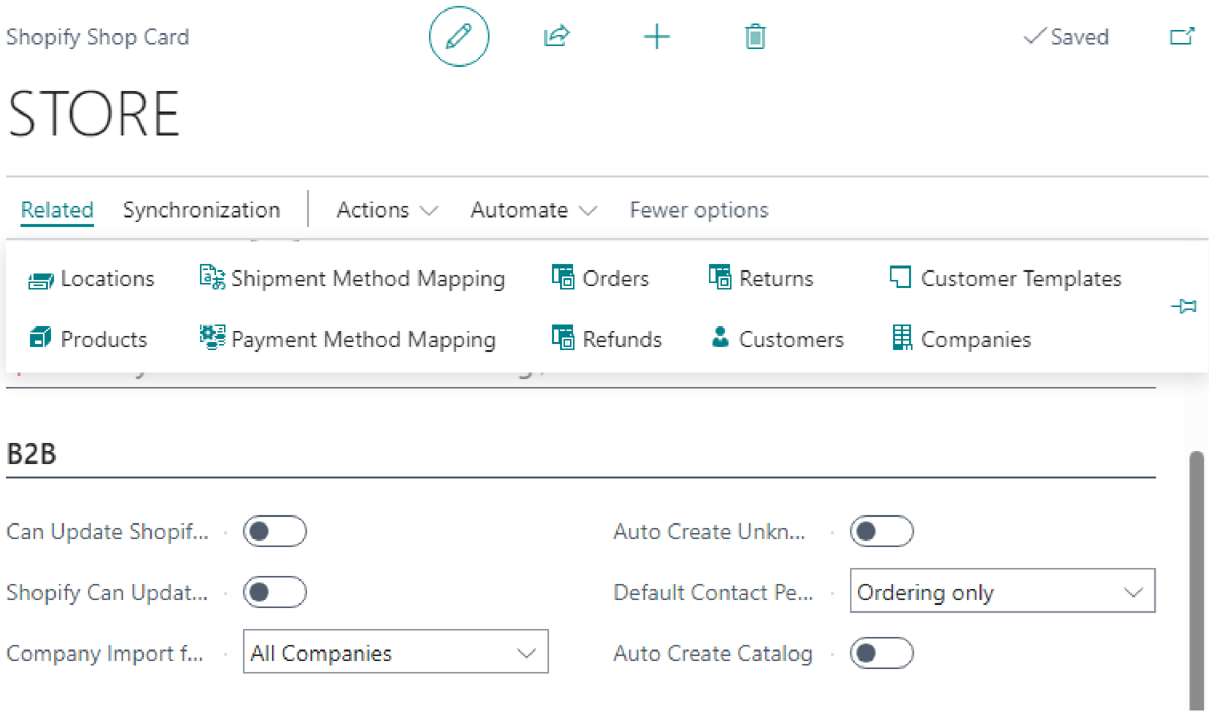
Company B2B

There are several new actions in the **Shop Card** page:

- Related > Companies
- Reset Companies Sync action

The B2B fields work in a similar way as their counterparts for the Customer D2C synchronization:

- **Can Update Shopify Companies**
- **Default Permission on Contact** that is assigned to the contact linked to the company. Possible options are: No permission, Ordering only, Location admin
- **Company import type**
- **Can Shopify Update Companies**
- **Auto Create Unknown Companies**
- **Auto Create Catalog**: If for exported company you want to create a catalog automatically. You can assign a catalog manually from a list of Shopify catalogs



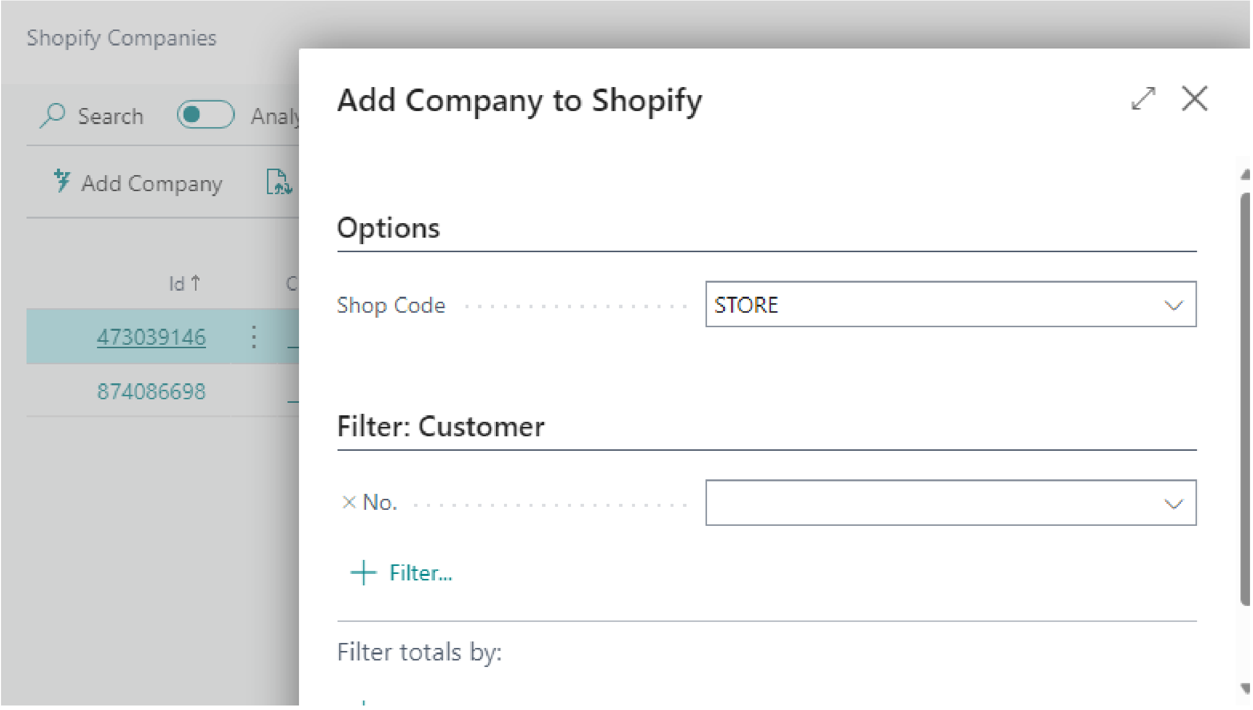
There's a new entity representing Company, for which we added the following objects:

- Company Table
- Company List
- Company Card
- Main Contact Factbox
- Company Location Table

New actions allow you to add or synchronize a company to Shopify.

The **Add Company to Shopify** action and report do the following:

- Create a customer and company in Shopify
- Add a customer as the main contact
- Add location 'Main' (this is subject to change)
- Add a catalog, depending on your settings



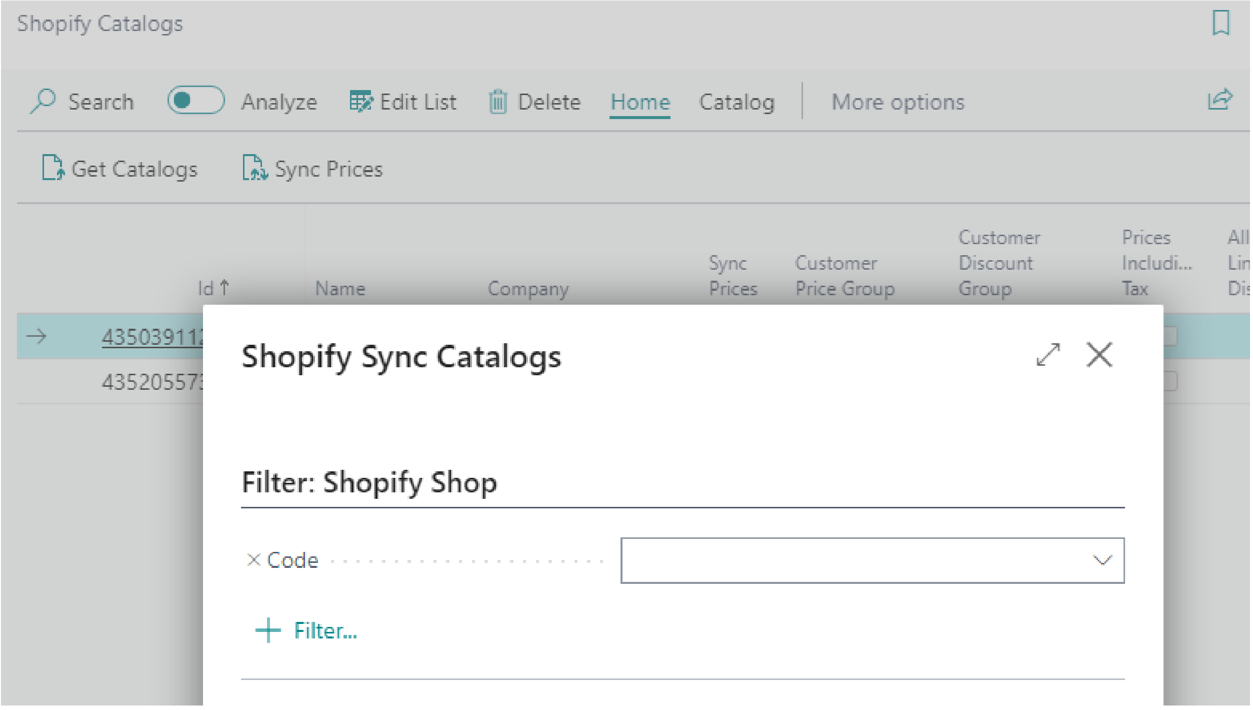
The **Sync Company** action and report which, depending on the synchronization direction, either updates the company in Shopify or imports a company to Business Central. In the latter case, the Connector does the following:

- Retrieves the company, main contact, and location and map Company/Customer, updated (if allowed) or create (if allowed).

For catalogs, we've added the following:

- Catalog Table
- Catalog List
- Price synchronization settings for each catalog. These settings are similar to the price settings in the Shopify Shop card FastTab.
- Hyperlink to Shopify Admin to review and manage products included in the catalog.

You can import catalogs from Shopify, assign them to companies, set price calculation settings, and trigger a price update for catalogs.



Orders

Imported orders use the D2C Customer or, if available, the B2B company information to look for a mapping of bill-to and sell-to customers.

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 .

Consolidate financial information across environments in multicompany setups

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2023	✔ Oct 2, 2023

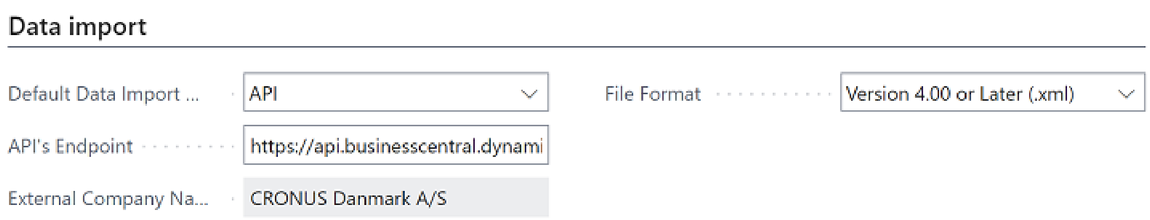
Business value

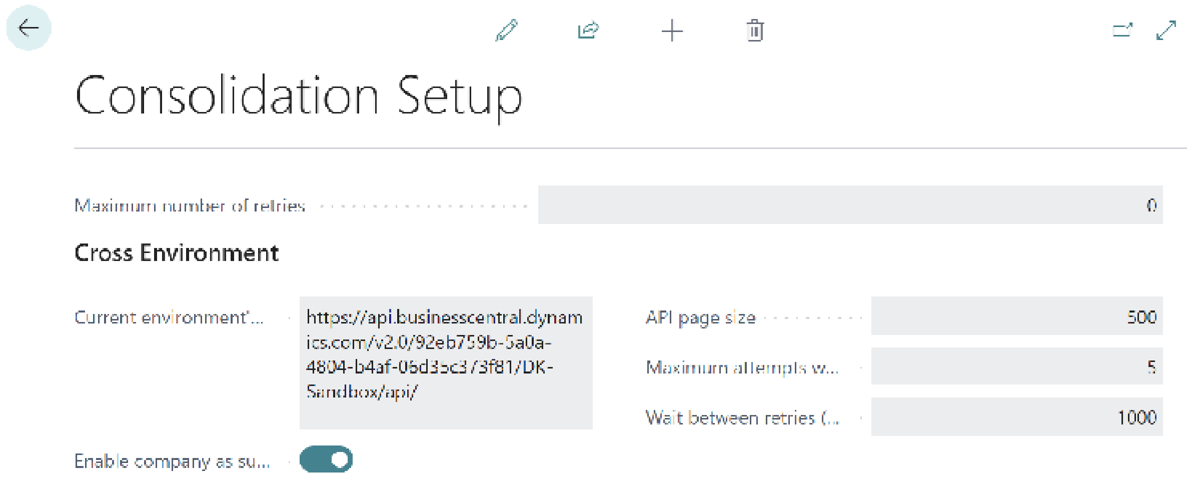
You can consolidate financial data for companies that have different Business Central environments without having to handle files.

Feature details

Some organizations use Business Central in multiple business units or legal entities. Others use Business Central in subsidiaries that must report into parent organizations. In some situations, the units, entities, or subsidiaries don't use the same Business Central environment. For example, a subsidiary company might be in a different geography than the consolidated company.

To enable your accountant to consolidate financial data for entities without having to handle files, on the **Business Unit Card** page, on the **Data Import** FastTab, you can add the API endpoint of the business unit's enviroments. You can find the endpoint in that company on the **Consolidation Setup** page. You'll be prompted to sign in to that company. After you sign in, you have added a business unit that you can consolidate. You can use all features for consolidating financial data across different Business Central environments.





Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Use our API to automatically share data across environments (docs)

Correct errors in service invoices

Article • 03/26/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2024	To be announced

Business value

Mistakes can happen, so it's important to be able to quickly correct them. This update enhances your flexibility and efficiency in managing service contracts and invoices by making it easier to fix mistakes.

Feature details

You can delete service invoices that have service ledger entries associated with them. This means that you can correct errors or make changes to service invoices without getting stuck or losing data. For example, if you forget to assign a product posting group to a G/L account, you can add it later and recreate the service invoice.

Use the **Delete** action to delete a service invoice. A corrective service ledger entry will be posted, and the invoicing date and invoicing period will be restored in the service contract so you can create the invoice again. Note that you can revert several invoices, but you must do it sequentially starting from the very last invoice. Business Central won't allow you to delete a service invoice if its details, such as the invoicing period or the prepaid toggle, were changed in the related service contract. Make sure that you delete invoices before you make such changes.

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.

Create projects that you can invoice to multiple customers

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

Business value

When projects involve multiple customers, billing the right customers for the right project tasks can be challenging and take time. Business Central makes billing less complex by letting you specify the bill-to and sell-to customers on each project task line. Having that information on each task lets you automatically generate invoices for the correct customers.

Feature details

You can define the **Bill-to Customer No.** and the **Sell-to Customer No.** for each project task line. To enable you to enter that information, we've made the following fields available on the **Project Task** table, **Project Task Lines** subform page, and the **Project Task Card** page:

- **Bill-to Customer No.**
- **Bill-to Name**, **Bill-to Name 2**
- **Bill-to Address**, **Bill-to Address 2**
- **Bill-to City**, **Bill-to Post Code**
- **Bill-to County**, **Bill-to Country/Region Code**
- **Bill-to Contact No.**, **Bill-to Contact**
- **Sell-to Customer No.**

- **Sell-to Customer Name**, **Sell-to Customer Name 2**
- **Sell-to Address**, **Sell-to Address 2**
- **Sell-to City**, **Sell-to Post Code**
- **Sell-to County**, **Sell-to Country/Region Code**
- **Sell-to Contact No.**, **Sell-to Contact**
- **Ship-to Code**
- **Ship-to Name**, **Ship-to Name 2**
- **Ship-to Address**, **Ship-to Address 2**
- **Ship-to City**, **Ship-to Post Code**
- **Ship-to County**, **Ship-to Country/Region Code**
- **Ship-to Contact**
- **Language Code**, **Format Region**
- **External Document No.**, **Your Reference**
- **Payment Method Code**, **Payment Terms Code**
- **Price Calculation Method**

The **Project Task Card** page includes most of the fields and makes them accessible from the **Project Task Lines Subform**. The **Project Task Card** page has the following FastTabs:

- **General**, which has the **Customer Details**, **Description**, **External Document No.**, and **Project Task Type** fields.
- **Lines**, which has the project planning lines.
- **Posting**, which has the **Project Posting Group**, **WIP Method**, **WIP Total**, **Location**, and **Bin** fields.
- **Invoice and Shipping**, which has billing and shipping details and the **Payment Terms** and **Payment Method** fields.

The **Project Task Lines** subform has the **Bill-to Customer No.**, **Sell-to Customer No.**, **External Document No.**, and **Your Reference** fields. By default, some of these fields don't display, but you can add them through personalization.

You can edit the fields only if you select **Posting** in the **Project Task Type** field.

Turn the feature on, or leave it off

If you're happy with the invoicing features you're already using, you can continue to do so. If you decide you do want to use this feature, it's easy to turn on.

On the **Project Setup Page**, in the **Default Billing Method** field, choose one of the following options:

- **Per Project**, which is the default setting. If you choose this option, the fields are empty and you can't edit them. The fields don't display on the **Project Task Lines** subform page.

- **Per Project Task**. If you choose this option, you can edit the fields. Business Central uses the billing details you define on project task lines to create invoices and define prices.

To ensure flexibility, you can use the **Billing Method** field on the **Project Card** page on the **Invoice and Shipping** FastTab. To display the field, you might need to choose **Show more**.

You can switch from **Per Project** to **Per Project Task**. If you do, Business Central populates the fields on the task level based on values in the header. This is irreversible.

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.

Define a service invoice posting policy for various users

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2024	To be announced

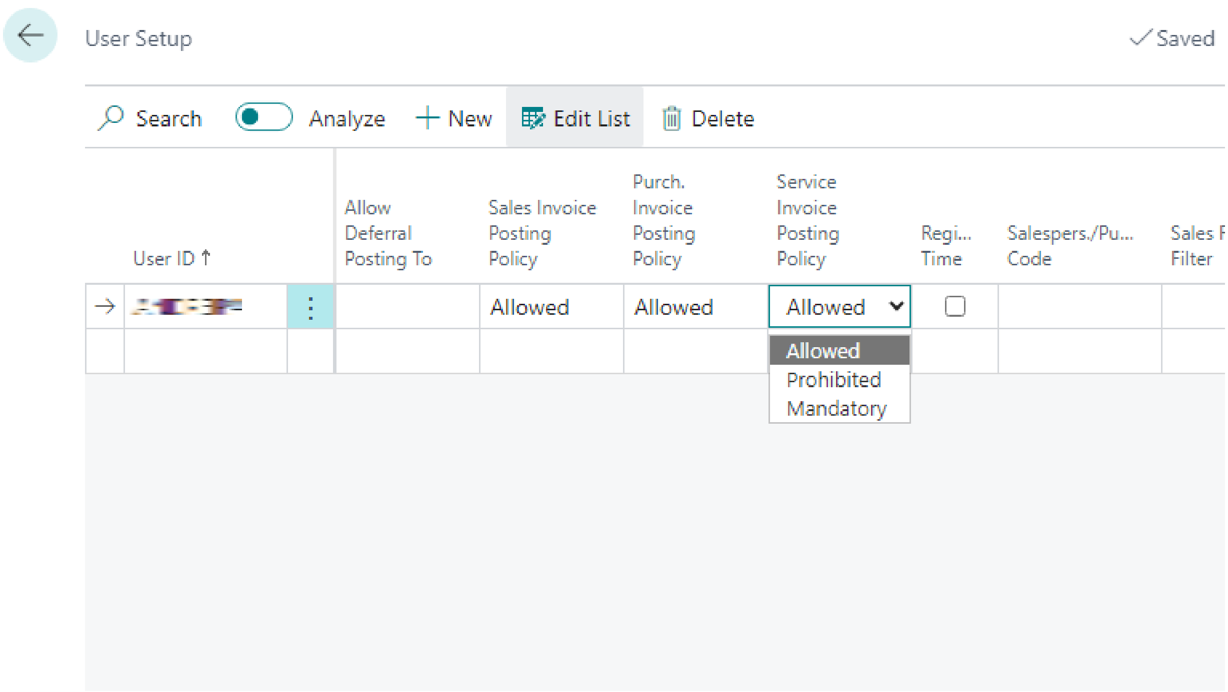
Business value

Companies often have unique processes for invoices and shipments. For example, processes can vary from one person posting everything on a service order to multiple employees, each working with their own pages. A setting on the **User Setup** page lets you specify how each user can process service invoices.

Feature details

You can use posting policies to restrict users from posting service invoices, or require them to post invoices together with the related service shipment. To specify a posting policy, on the **User Setup** page, choose one of the following options in the **Service Invoice Posting Policy** field:

- **Allowed** (Default): Keep the current behavior, where you can choose the posting option, such as **Ship**, **Invoice**, and **Ship and Invoice**.
- **Prohibited**: Prevent people from posting invoices. Business Central shows a confirmation dialog that provides only the **Ship** option.
- **Mandatory**: Let people post invoices along with service shipments. Business Central shows a confirmation dialog with the **Ship and Invoice** option.



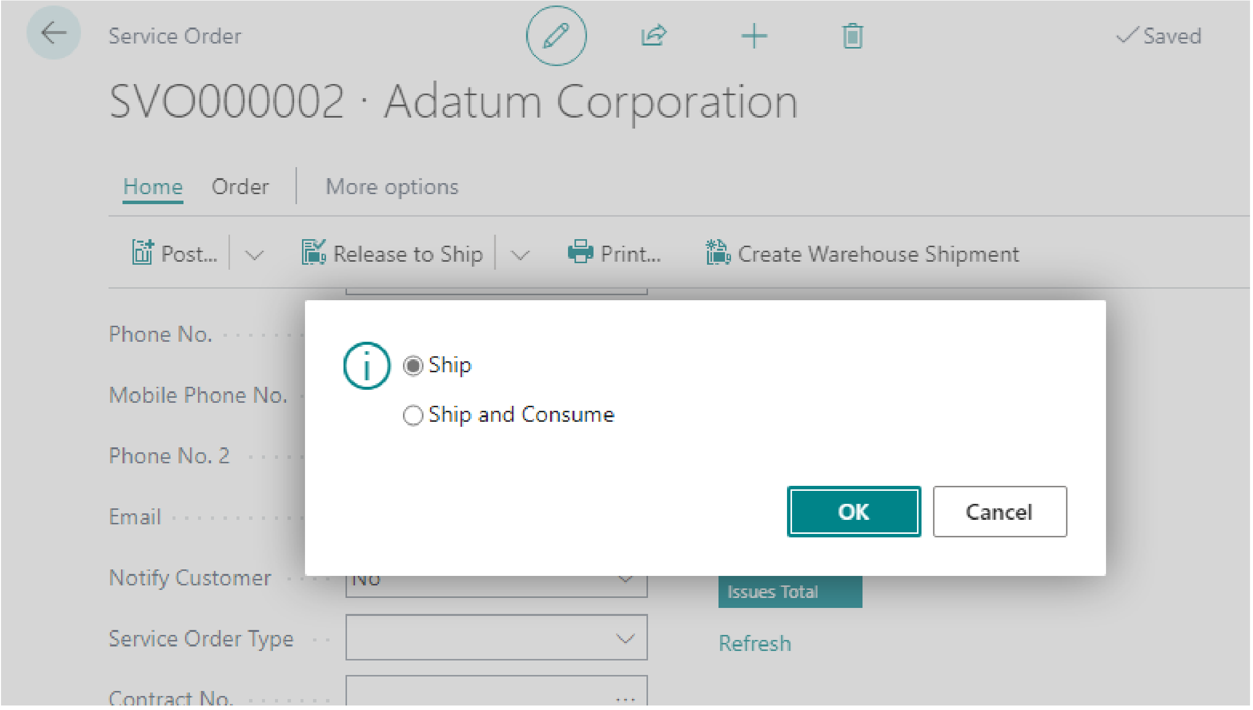
The setting affects the following documents:

- Service orders
- Warehouse shipments
- Service invoices
- Service credit memos

The following table describes the effects on different documents.

Expand table

Document	Option 1: Allow Displays a series of options	Option 2: Prohibited Confirmation dialog	Option 3: Mandatory Confirmation dialog
Service Order	- Ship - Invoice - Ship and Invoice	Do you want to post the shipment?	Do you want to post the shipment and invoice?
Warehouse Shipment	- Ship - Ship and Invoice	Do you want to post the shipment?	Do you want to post the shipment and invoice?
Service invoice	No options	Do you want to post the invoice?	Do you want to post the invoice?
Service credit memo	No options	Do you want to post the credit memo?	Do you want to post the credit memo?



> ⓘ **Note**
>
> When you post service invoices and credit memos, you don't have any posting options. The documents always post the physical and financial transactions together. You can't partially post invoices and credit memos.

Tell us what you think

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Define default location for project or project phase

Article • 01/11/2024

ⓘ Important

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

Expand table

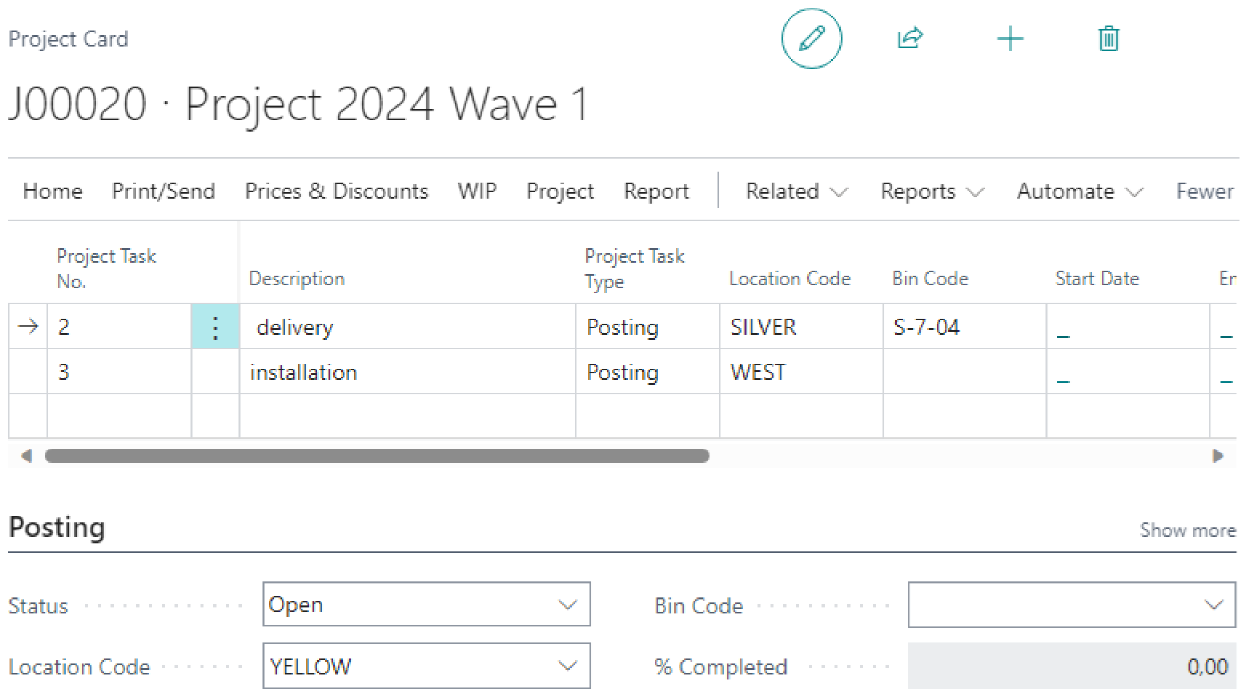
Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

Business value

Reduce the time you spend on data entry and focus more on core tasks by specifying a default location and bin for projects on the Project Card page. When you create project tasks, project planning lines, and project journal lines for the project, the default location and bin are automatically assigned. Stay flexible with the ability to change the location code and bin on tasks and lines if needed.

Feature details

Specify a default **Location Code** and **Bin Code** on the **Project** and **Project Task Lines Subform** pages. Similar to production order processes, these default values simplify data entry on project tasks, project planning lines, and project journal lines.



Project Card page

The **Location Code** and **Bin Code** are available on the **Posting Tab**. If you define a **To-Project Bin Code** on the location, the bin code is populated when you select the location code. If your warehouse flow requires warehouse picks, you can also define other bins from which to consume items.

These fields are the defaults when you create project tasks. Changes won't be made to existing project tasks.

Project tasks

The **Location Code** and **Bin Code** don't display by default, but you can add them through personalization. These fields are the defaults when you create project planning lines and project journal lines. Changes won't be made to existing lines.

Project planning lines

The **Location Code** is based on the value selected on the job planning line when you select an item. If a bin code isn't defined for the project task, the bin from the default bin content is selected. You can change both values manually.

Project journal lines

The **Location Code** is based on the value selected on the job journal line when you select an item. If a bin code isn't defined for the project task, the bin from default bin content is selected. You can change both values manually.

Purchase lines

This change doesn't affect purchase documents.

Tell us what you think

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Edit in Excel on item journals and warehouse worksheets

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 8, 2023	✓ Oct 2, 2023

Business value

One reason the Edit in Excel feature in Business Central is so popular is that it provides a fast way to enter data. For example, you can use templates for journals, make quick bulk edits, and so on. Businesses can now use the feature to speed up data entry on item journals and warehouse worksheets.

Feature details

The **Edit in Excel** action on item journals and warehouse worksheets lets you change records in Excel and then publish the changes back to Business Central. When Excel opens, you'll see the Excel Add-in pane on the right.

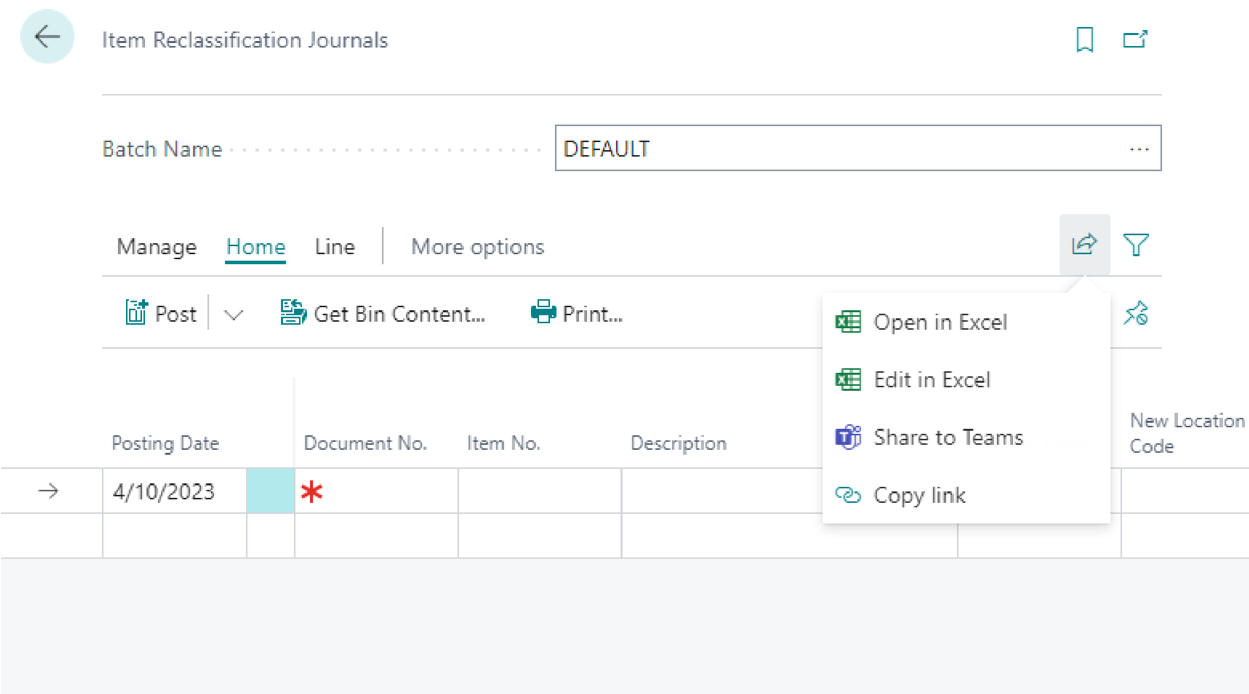
- Excel respects most filters on the page, so the Excel workbook will contain almost the same records and columns.
- To get the latest data from Business Central, choose **Refresh** on the Excel Add-in pane.
- If your organization has configured OneDrive for system features, the Excel workbook opens in your browser by using Excel for the web. If you aren't using OneDrive for system features, the workbook downloads to your device. From there, you can open it using either the Excel desktop app or Excel online, depending on what you have.

Journals and worksheets where Edit in Excel is available

We've added the Edit in Excel action to the following pages:

- Item Reclassification Journal (page 393)
- Physical Inventory Journal (page 392)
- Production Journal (page 5510)
- Output Journal (page 99000823)

- Consumption Journal (page 99000846)
- Requisition Worksheet (page 291)
- Planning Worksheet (page 99000852)
- Warehouse Item Journal (page 7324)
- Warehouse Reclassification Journal (page 7365)
- Warehouse Physical Inventory Journal (page 7326)
- Pick Worksheet (page 7345)
- Put-away Worksheet (page 7352)
- Movement Worksheet (page 7351)
- Bin Contents (page 7374)



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 in Excel function to be made available in all inventory journals
- Physical Inventory Journal - Edit in Excel
- Physical inventory journals & item reclass journal - copy and paste, edit in Excel, open in Excel
- Planning Worksheet and Journals open in Excel

We listened to your ideas, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Put Items Away with Warehouse Put-aways (docs)

Ensure accurate inventory valuation by controlling cost adjustment

Article • 03/26/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 2, 2024	To be announced

Business value

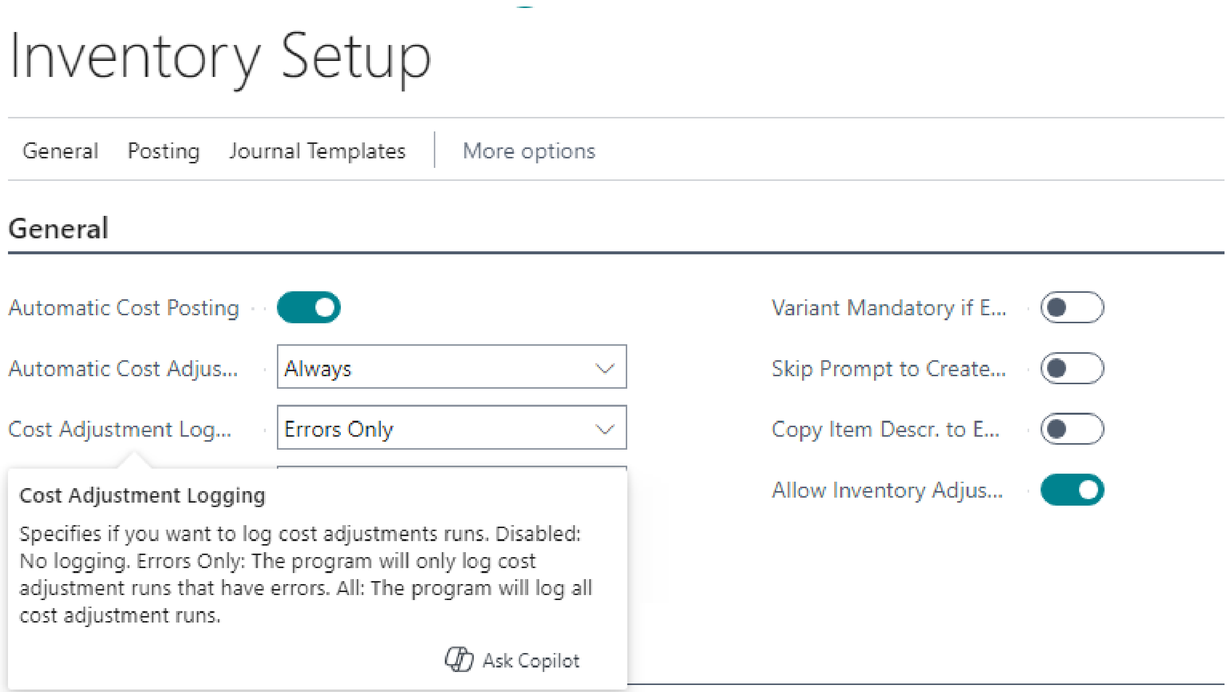
Minimize the number of items with inaccurate costs and reduce the time between posting an entry and reflecting its cost in the general ledger. You can track the performance of the cost adjustment batch job for each run and individual item. If the batch job has errors, you can identify the problematic items and take corrective actions. For example, you can exclude the items from calculations to ensure uninterrupted adjustments for other items.

Feature details

Setup

To enable tracking of the cost adjustment process, on the **Inventory Setup** page, turn on **Cost Adjustment Logging**. You'll find a dropdown list with three options:

- **Disabled**: Don't log cost adjustment runs.
- **Errors Only**: Log only the runs that failed.
- **All**: Log all cost adjustment runs.

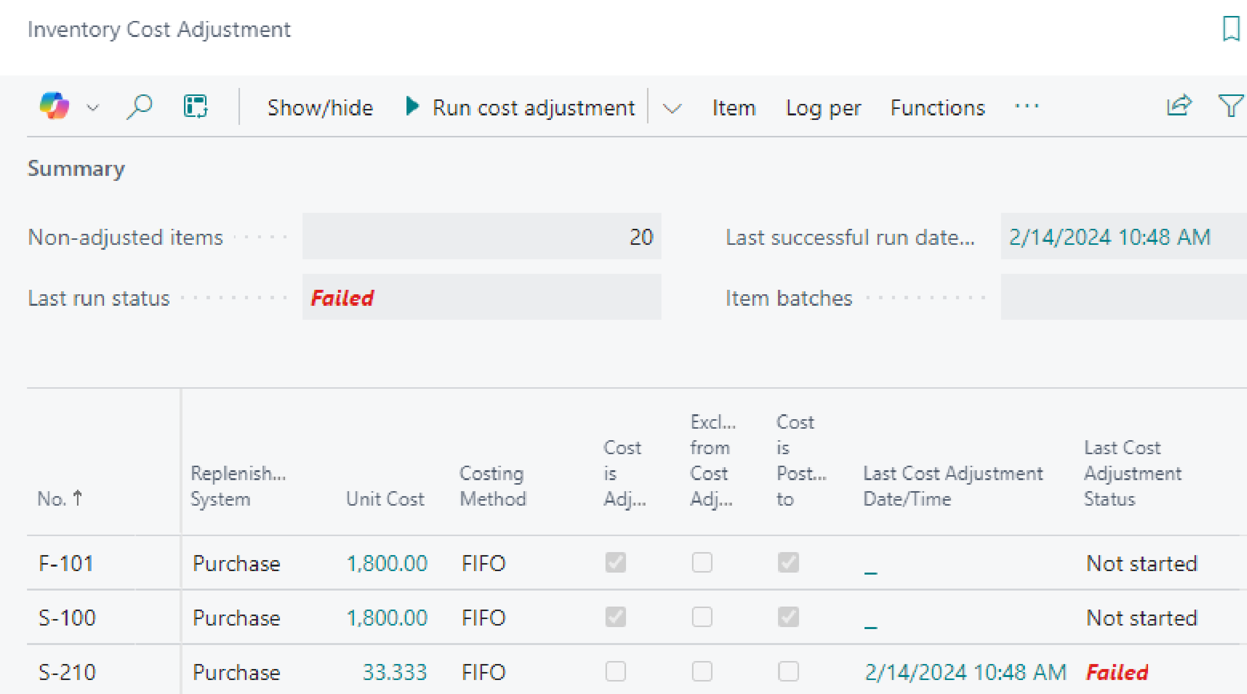


ⓘ **Note**

Business Central won't log automatic adjustments that were triggered by item posting.

Inventory Cost Adjustment page

Until now, the cost adjustment functionality has been complex. It often took time to process items, and occasionally resulted in errors that were difficult to troubleshoot because the item that caused them wasn't evident. The **Inventory Cost Adjustment** page provides tools to manage and monitor the cost adjustment process.



This page displays items along with their costing parameters and cost adjustment status. You can filter the list to focus on items that require adjustment or on those that are excluded from the cost adjustment process.

Here's an overview of features available on the page:

Run

- **Run cost adjustment**: Runs cost adjustments immediately for all or selected items.
- **Add Batch and Run**: Creates a new batch of selected items and runs cost adjustments for the batch.
- **Add Batch**: Creates a new batch of selected items.
- **Item Batches**: Shows a list of existing item batches.

For more information about batches, go to the **Item Batches** section below.

Item Details

- **Item Ledger Entries**: Lists item entries and provides a **Mark for Adjustment** action that lets you force the rerun of cost adjustment for items directly or indirectly linked to the inbound entries you select. Forcing a rerun can be helpful if previous runs led to incorrect costs.
- **Value Entries**: Lists value entries for the item.
- **Cost Adjmt. Entry Points**: Opens the **Avg. Cost Adjmt. Entry Point** page, which is primarily used to calculate average cost. The page displays combinations of items, locations, variants, and valuation dates for which cost adjustments have been, or must be, run.

- **Cost Adjmt. Orders**: Opens **Inventory Adjmt. Entry (Order)** page, which is used to adjust production and assembly orders. It shows which orders have been adjusted or require adjustment.

Log per

- **Run**: Shows cost adjustment logs for each run. The log includes data about the item filter, status (Success/Failed/Timed out), start and end date/time, duration, and the cost differences produced by the run.
- **Item**: Shows detailed information about the adjustment process for the selected item.

Functions

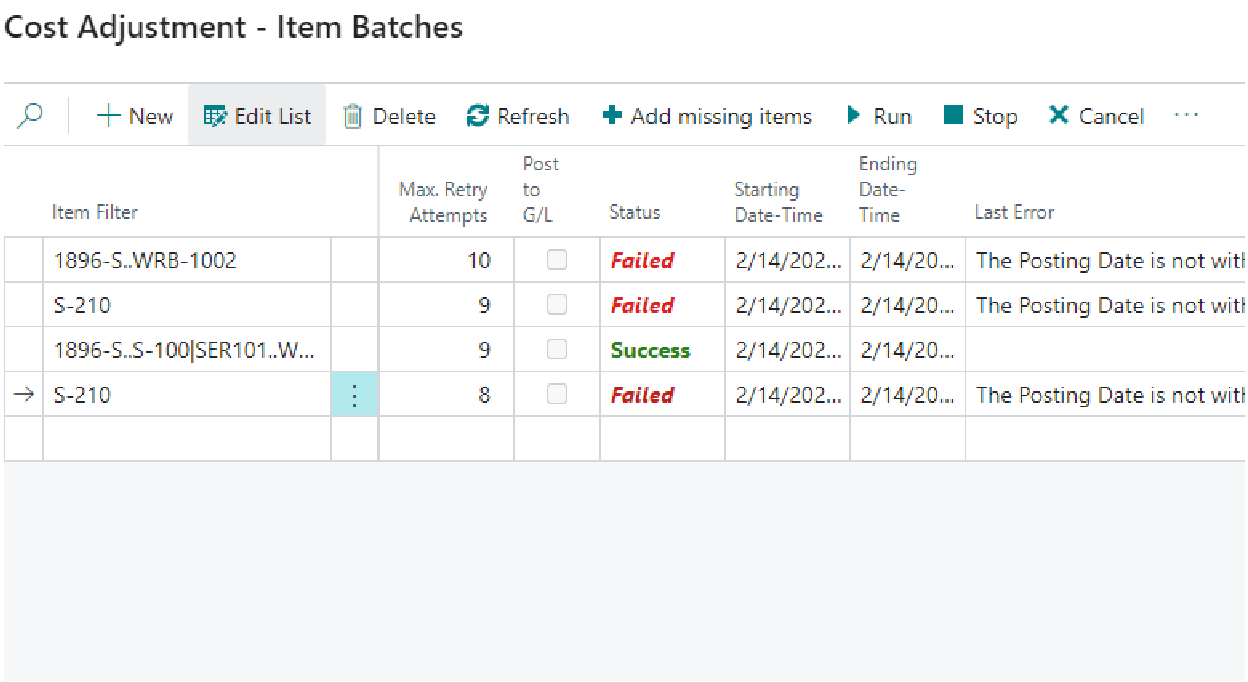
- **Exclude Item from Adjustment** and **Include Item in Adjustment**: Allow you to temporarily disable and then re-enable cost adjustment for a selected item. That lets cost adjustment run for other items to keep costs accurate for them while you investigate an issue with a specific item.
- **Post Inventory Cost to G/L**: Runs the report that posts new value entries to the general ledger.

Diagnostics

- **Export Item Data**: Exports item-related data to a text file. You can use the file for further analysis in a sandbox environment or attach it to a support request when investigating costing calculation issues.
- **Import Item Data**: Imports the previously exported text file back into the database. This action is only enabled in sandbox environments or evaluation companies.
- **Reset Cost Is Adjusted**: Reset the **Cost Is Adjusted** toggle on items, production orders, or assembly orders. This allows you to force the rerun of the cost adjustment for them.
- **Costing Issues Detection Report**: Use this report to diagnose common data issues that may have caused errors in costing calculations. It checks whether item ledger entries, value entries, item application entries, and capacity ledger entries are correct.
- **Delete Item Data**: Clears all item-related tables in the database. This action is only enabled in sandbox environments or evaluation companies.

Item batches

Use the **Cost Adjustment - Item Batches** feature to divide a set of items into multiple batches and run the cost adjustment separately for each batch. This feature also helps identify items that have issues.



Each batch runs in a separate session and can finish with one of the following outcomes:

- **Success**: If the cost adjustment completes successfully for a batch, it's marked as a success.
- **Failed**: If the cost adjustment fails for a batch, Business Central identifies the item that caused the error, and then splits the current batch into two. One batch with the problematic item, and another with the remaining items. Cost adjustment reruns for the batch with the remaining items. If it fails again, the process repeats. You define the maximum number of splits in the **Max. Retry Attempts** field.
- **Timed out**: If the cost adjustment for a batch doesn't finish within the specified timeout period (ranging from 1 to 720 minutes), the session terminates and changes are rolled back. Business Central then splits the current batch in half and reruns the cost adjustment process for each half. This process continues until the cost adjustment completes successfully or reaches the maximum retry attempts.

> **Tip**
>
> Each batch runs in a separate session. To monitor progress, use the **Refresh** action.

Tell us what you think

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Export and import multiline text using Configuration Packages

Article • 02/13/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

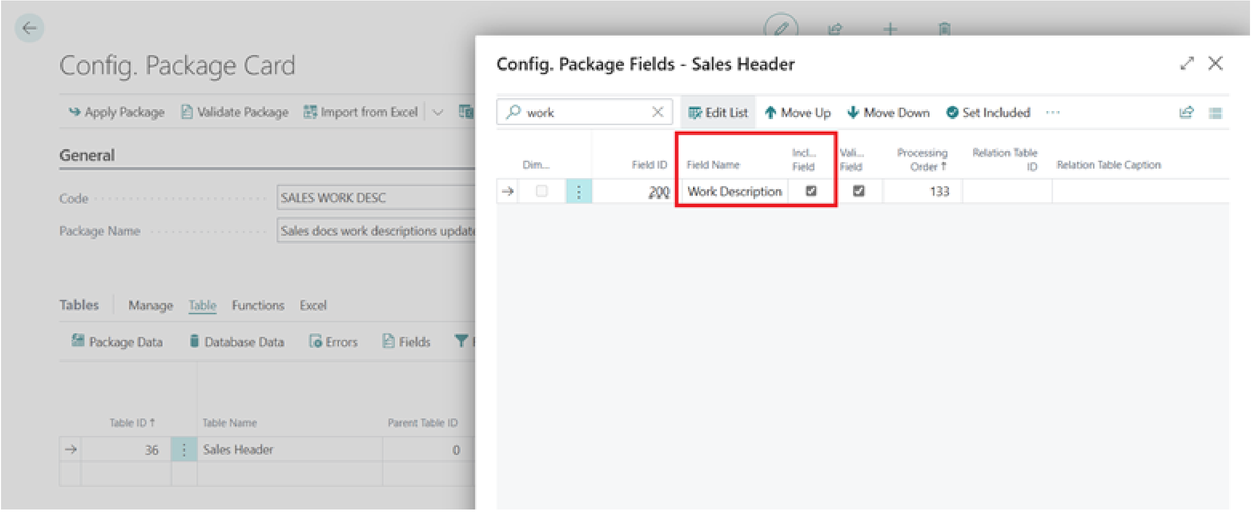
Business value

Avoid having to manually export and import multiline text by using an improved configuration packages capability that allows you to do that with efficiency and ease. This feature is especially useful for businesses that deal with large amounts of multiline texts and need to transfer them between different companies or environments.

Feature details

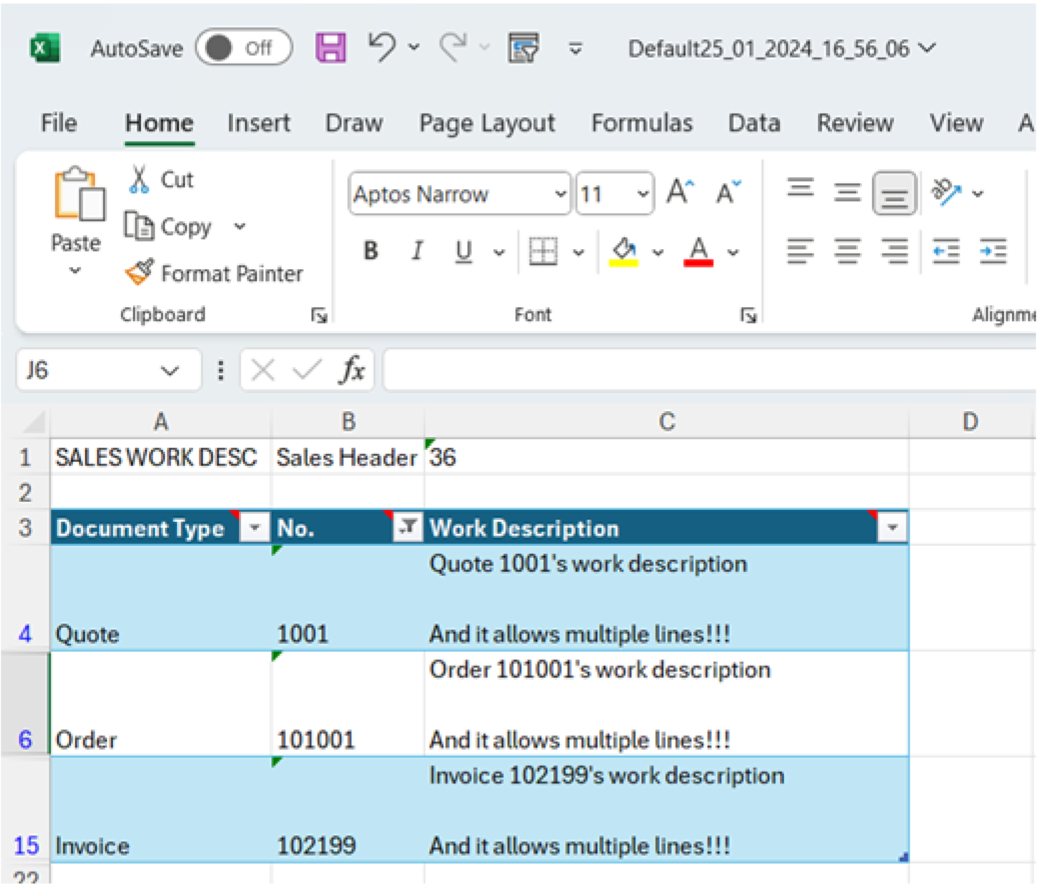
You can now use BLOB type fields, which usually contain multiline text, to import and export data using **Configuration Packages**.

Simply choose **Include Field** on the **Config. Package Fields** page to include fields that contain multiline text, such as the **Work Description** field, in your package.



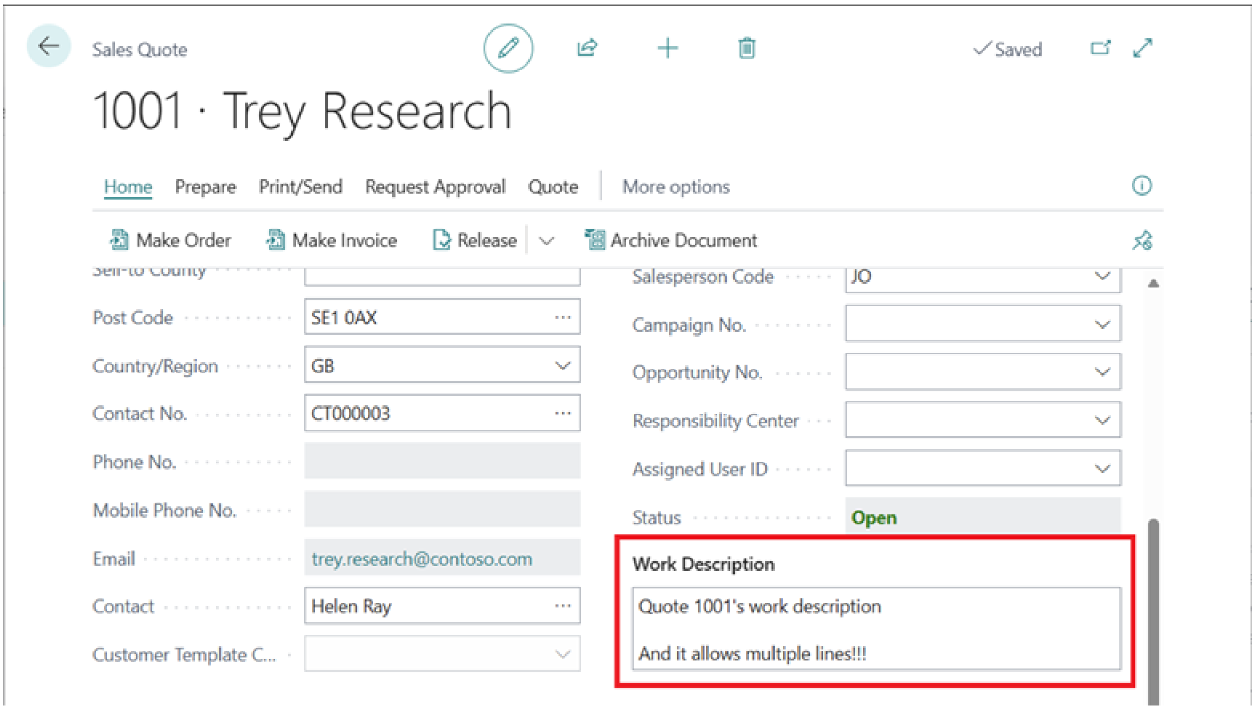
Export data by choosing the **Export to Excel** action in the **Config. Package Card** page to update it in Excel.

Update your data in Excel, for example, by adding multiline text in the Work Description column.



Back in Business Central, import the updated Excel file by choosing the **Import from Excel** action on the **Config. Package Card** page. After you validate the data, import it by choosing the **Apply Package** action.

After you apply the package, open a sales document that you updated, such as a sales quote, to verify that you imported multiline text to your sales document.



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Generate a customer statement only with open entries

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 19, 2023	✓ Oct 2, 2023

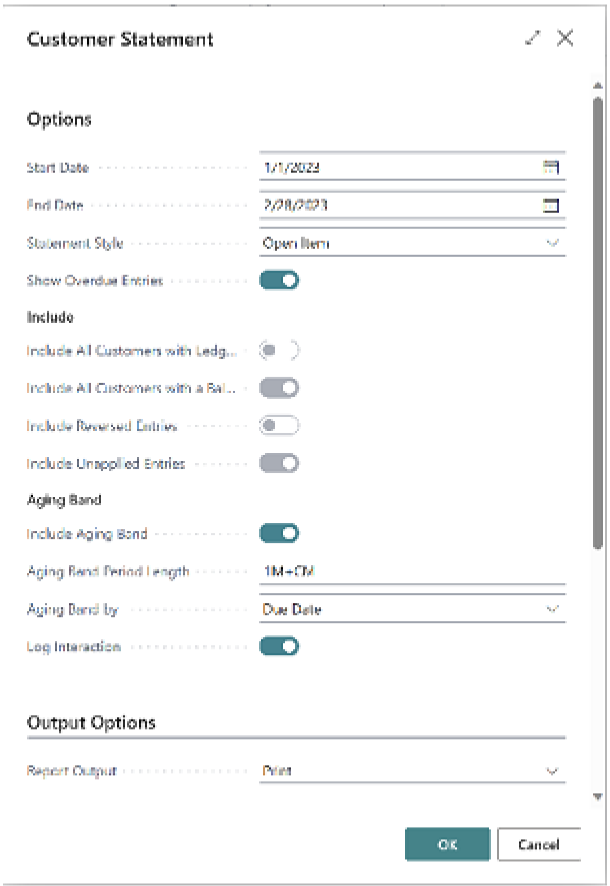
Business value

Businesses send customer statements to customers in various formats and to serve various purposes. We've added a new option to the Customer Statement report that can clarify what customers owe you.

Feature details

If you open the Customer Statement report from the Customers list or the role explorer, you'll find a **Style** field on the request page. The field offers two options:

- **Balance**: Get an overview of outstanding amounts.
- **Open Items**: If you choose this option, the report will:
  - Only show open entries within the selected date range.
  - Show a balance for open entries before the start date.
  - Ignore any entries with a posting date that's after the end date.



See also

[Report Overview](docs) (docs)

Identify and track items easier with item references

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 8, 2023	✓ Oct 2, 2023

Business value

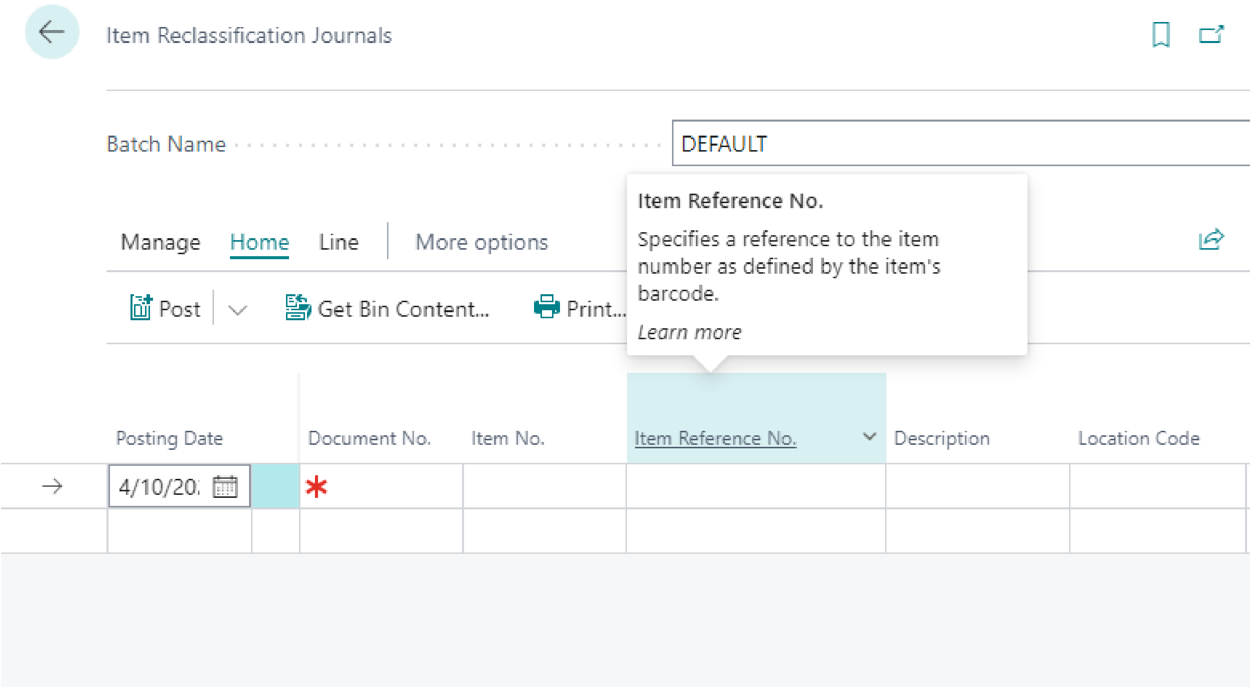
Streamline inventory management by providing quick and accurate identification of related items.

Feature details

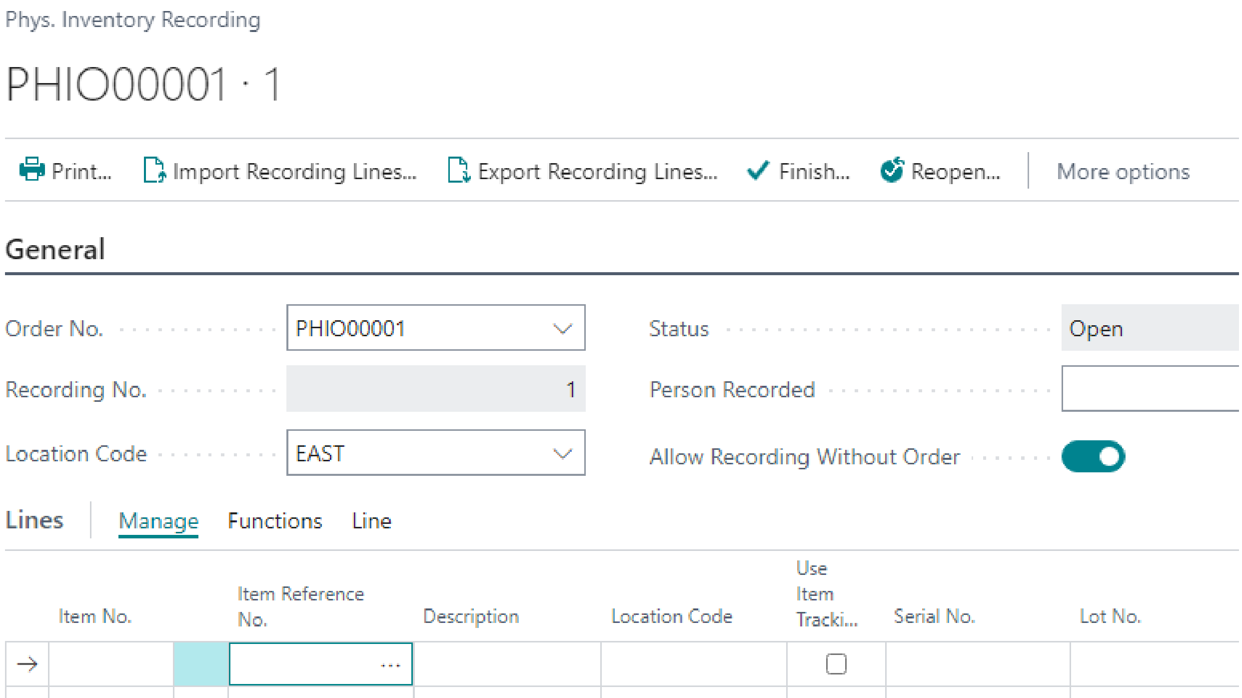
The **Item Reference No.** field is now available on the following tables and pages:

- table 83 "Item Journal Line"
- page 40 "Item Journal"
- page 392 "Phys. Inventory Journal"
- page 393 "Item Reclass. Journal"
- page 286 "Recurring Item Jnl."
- page 5803 "Revaluation Journal"
- page 99000773 "Capacity Journal"
- page 99000846 "Consumption Journal"
- page 99000823 "Output Journal"
- page 99000778 "Recurring Capacity Journal"
- page 99000850 "Recurring Consumption Journal"
- page 99000827 "Recurring Output Journal"
- table 5878 "Phys. Invt. Record Line"
- page 5882 "Phys. Invt. Recording Lines"
- page 5881 "Phys. Invt. Recording Subform"
- table 5876 "Phys. Invt. Order Line"
- page 5877 "Physical Inventory Order Subf."

For instance, the **Item Reclassification Journals** page now displays the **Item Reference No.** field, as shown in the following image.



Similarly, the **Phys. Inventory Recording** page also displays the field, as shown below:



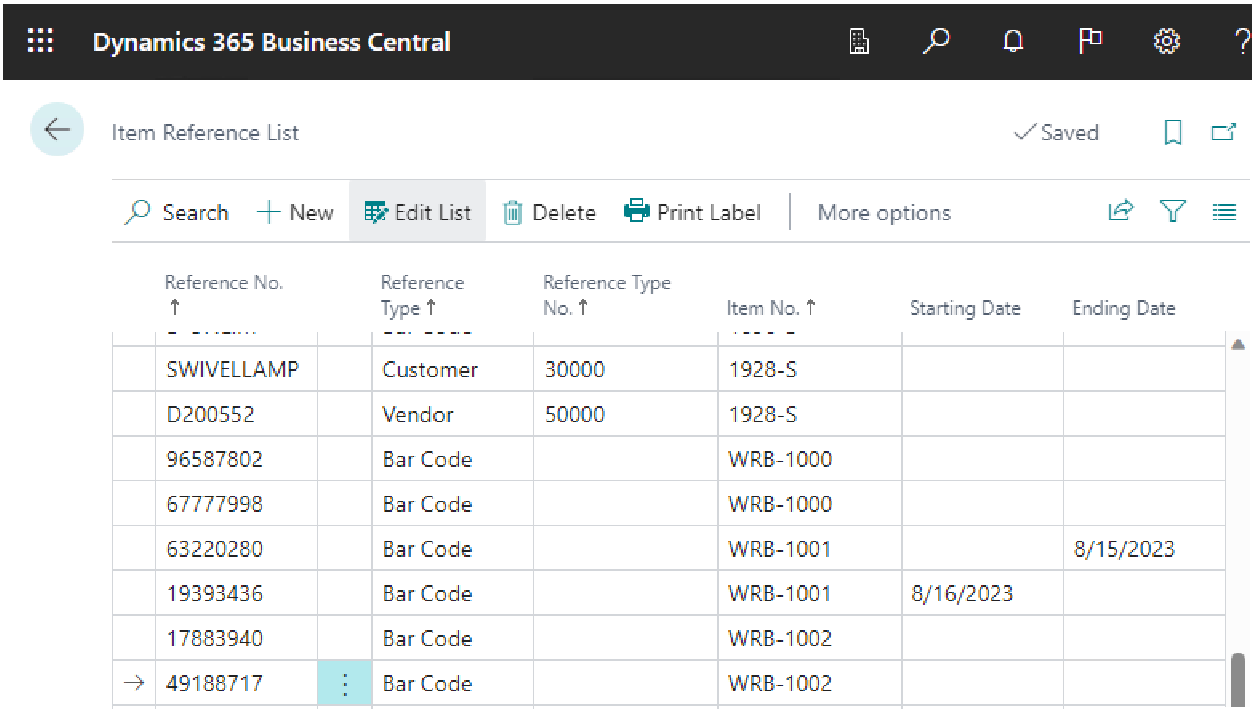
> ⓘ **Note**
>
> The lookup shows only item references with the reference type *blank*, but validation also recognizes the reference type *Barcode*. This is similar to sales and purchase documents.

We've also changed which page you'll find when you use **Tell Me** to search. Instead of page 5736 **Item References**, it's now page 5735 **Item Reference List**.

We made this change because the **Item Reference List** page is designed for editing, and it provides access to the **Reference Type** and **Reference Type No.** fields, which are missing on the **Item References** page. The **Item References** page is designed to be called from the **Customer Card** and **Vendor Card** pages, so these fields are automatically populated.

You can also specify a start and end date for a specific entry in the **Item References** table.

- **Starting Date**: Specifies the date from which the item reference is valid. You can use the **Starting Date** field if you want an item reference to be valid only after a particular date. To specify that an item reference should be valid during a specific period, enter the Ending Date as well. If you leave the **Starting Date** field blank, the item reference will be valid as soon as you implement it and will remain in effect until the ending date or until you delete the line.
- **Ending Date**: Specify if you want an item reference to be valid only up to a particular date. If you leave the Ending Date field blank, the item reference will be valid until you delete the line.



The system uses the following date fields when it verifies the validity of the item reference:

- Item Journals - the **Posting Date** field. If empty, use Workdate.
- Physical Inventory Order Line - the **Posting Date** field. If empty, use Workdate.
- Physical Inventory Recording Line - the **Date Recorded** field. If empty, use Workdate.

- Purchase Invoice and Purchase Credit Memo - the **Posing Date** field. If empty, use Workdate.
- Purchase Order - the **Order Date** field. If empty, use Workdate.
- Sales Invoice and Sales Credit Memo - the **Posing Date** field. If empty, use Workdate.
- Sales Order - the **Order Date** field. If empty, use Workdate.

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.

Use general ledger account revaluation for more accurate financial statements

Article • 11/15/2023

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

Business value

With a new setup on the G/L account card, you can now run G/L Revaluations for accounts with transactions in foreign currencies. This enables you to generate a more accurate financial statement with little need to keep separate spreadsheets.

Feature details

If you use general ledger accounts to register balance sheet items that are denominated in foreign currencies, a revaluation of the balances is often required before you produce financial statements for your business.

Until now, most businesses have used either a bank account or a vendor account to register and track such assets and transactions. They've had to keep the bank or vendor account separate from others, and to make it work they've had to maintain an expanded setup for posting groups.

The G/L Revaluation feature simplifies revaluations. For the general ledger accounts that you use for revaluations, you can turn on a general ledger account subledger that will hold the original currency value of the transaction and any adjustments you made using the Adjust Currency Exchange Rate batch job. Balances present in local currency (LCY) are revalued, which enables you to produce a more accurate financial statement with little effort.

> ⓘ **Note**
>
> The G/L Revaluation feature might not meet all requirements for transaction and asset registrations that require revaluation. For example, for financial instruments, securities, leased assets, or if used for specific or large volumes of transactions or assets. We recommend that you discuss with your auditor whether you can use the feature.

Posting gains and losses during a currency exchange rate adjustment follows the normal posting routine. For example, it's done for each setup on the currency card.

> ⓘ **Note**
>
> The new feature doesn't provide the ability to apply or unapply entries. Adjustments are done on a balance per currency basis.

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.

Improved processes for inventory counts and adjustments

Article • 10/11/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023

Business value

Productivity increases when processes are easy, so we've improved the usability of several processes for counting and adjusting inventory. For example, you can include items in physical inventory orders regardless of their availability or turnover, and in several places data is easier to access and digest.

Feature details

Based on feedback from our customers, we've made it easier to complete the count and adjust inventory processes.

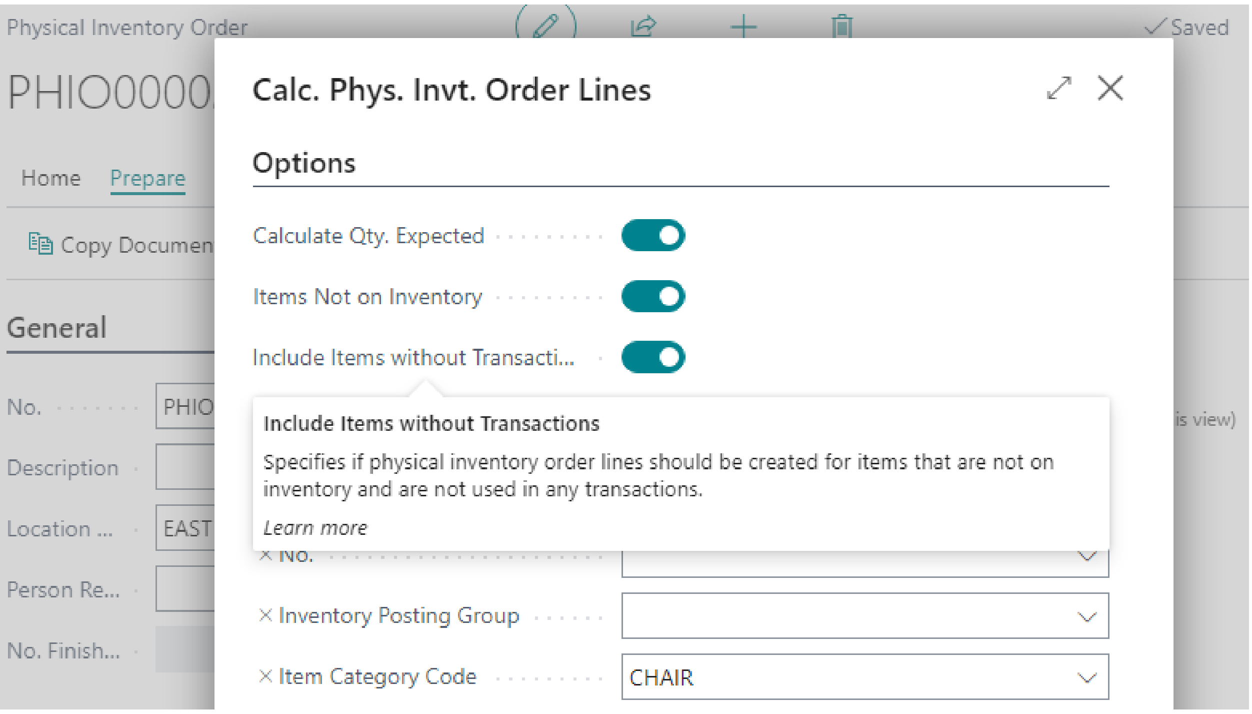
There are changes in the **Physical Inventory Order**, **Inventory Receipt** and **Inventory Shipment** documents, and the **Adjust Inventory** page.

Include items without transactions when you calculate lines on physical inventory orders

You can use physical inventory orders and physical inventory recording documents to take a physical inventory of your items. The **Physical Inventory Order** page organizes the inventory counting project. For example, one project per location. The lines on physical inventory orders contain information about the items.

To create the physical inventory order lines, you typically use the **Calculate Lines** action to reflect the current inventory as lines on the order. Filters and options help to fill in the order with the subset of inventory items.

In this release, we've added an **Include Items without Transactions** field to align the **Physical Inventory Order** and **Physical Inventory Journal** pages.

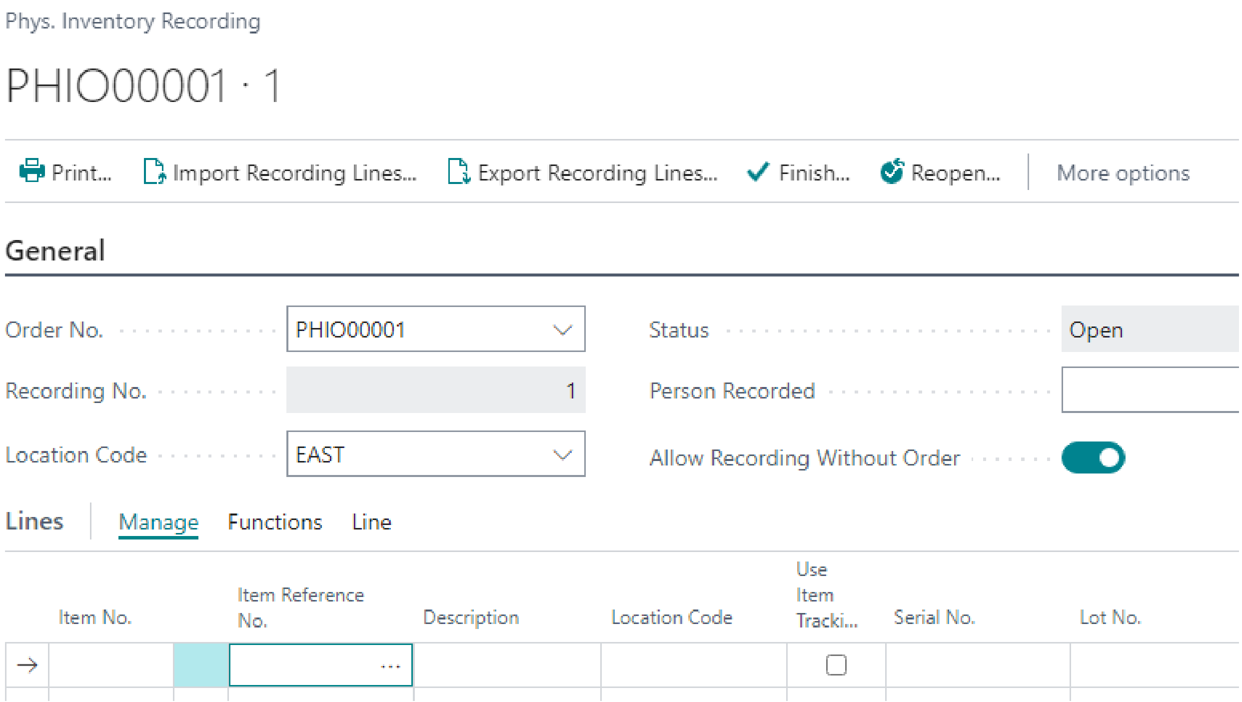


The following table shows the expected result of different combinations.

Items Not on Inventory	Include Items without Transactions	Lines inserted on the order
Off	Off	For each item that exists at the chosen location.
On	Off	For each item that isn't in inventory, but has transactions at the chosen location.
On	On	For each item that isn't in inventory and doesn't have transactions at the chosen location.

Item references in physical inventory documents

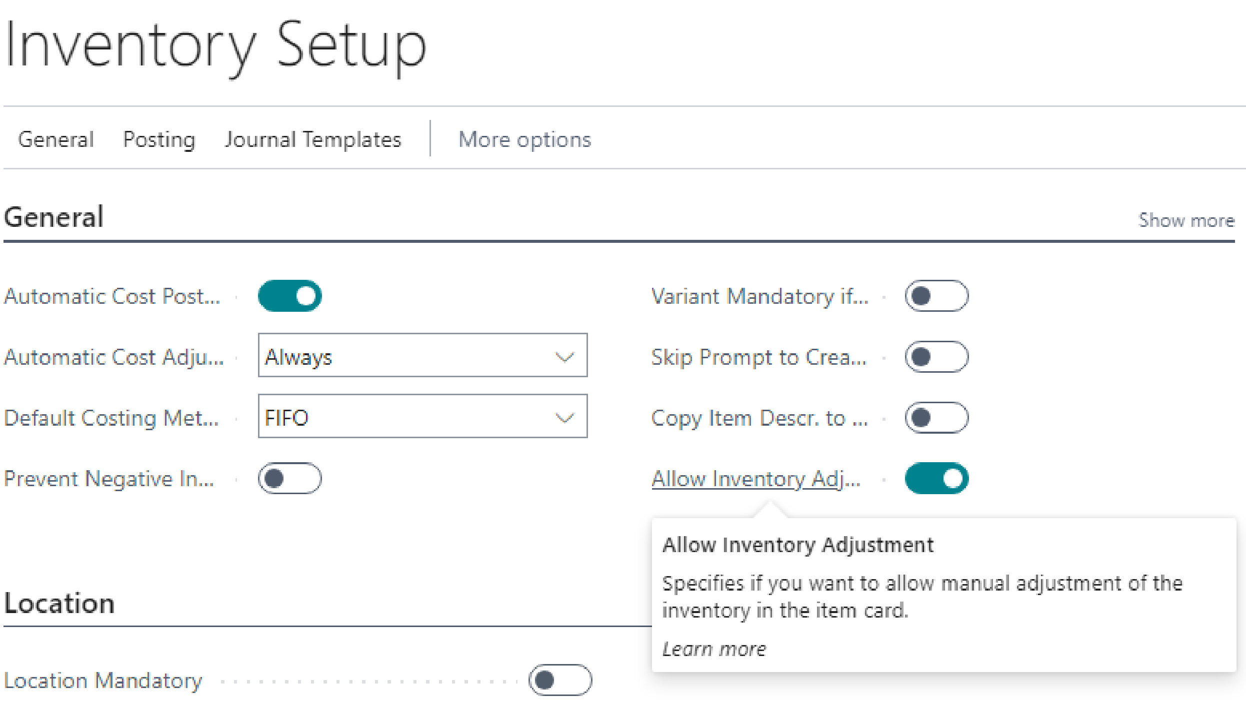
We've added the **Item Reference No.** field to the **Physical Inventory Recording Lines**. In combination with the **Allow Recording Without Order** toggle, it improves ad-hoc counting, which might be useful when you use bins.



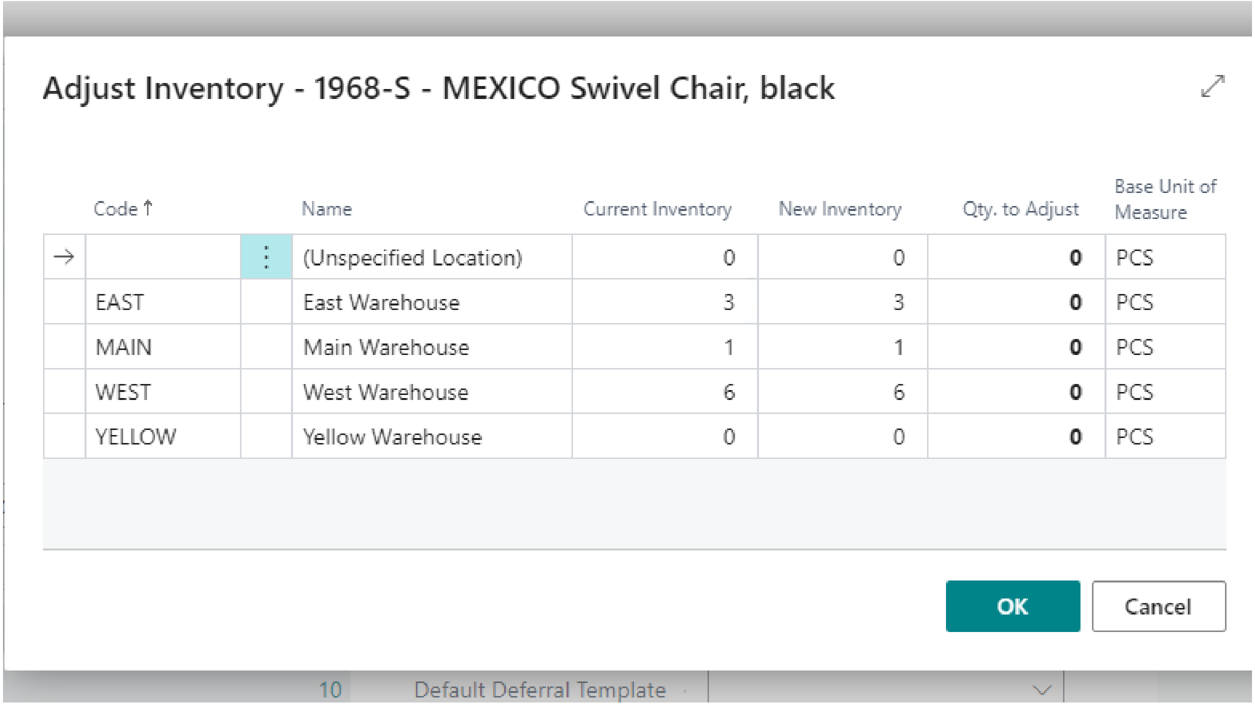
The **Item Reference No.** field is also added to **Physical Inventory Order Lines**. There, the field is useful when you define the scope for counting by importing lines from Excel using configuration packages.

Control over adjustment of one item

The **Adjust Inventory** dialog is helpful when you need to quickly adjust the inventory level for a specific item. However, larger organizations might require a more elaborate process. In this release, you can enable the **Adjust Inventory** feature by turning on the **Allow Invt. Adjustment** toggle on the **Inventory Setup** page.



We've made the **Adjust Inventory** feature useful in multiuser environments. You state the actual quantity in the **New Inventory** field, which allows you to correct mistakes if another user works with the same item and posts a sales or purchase transaction.



Corrections are easier when you copy inventory shipment and inventory receipts

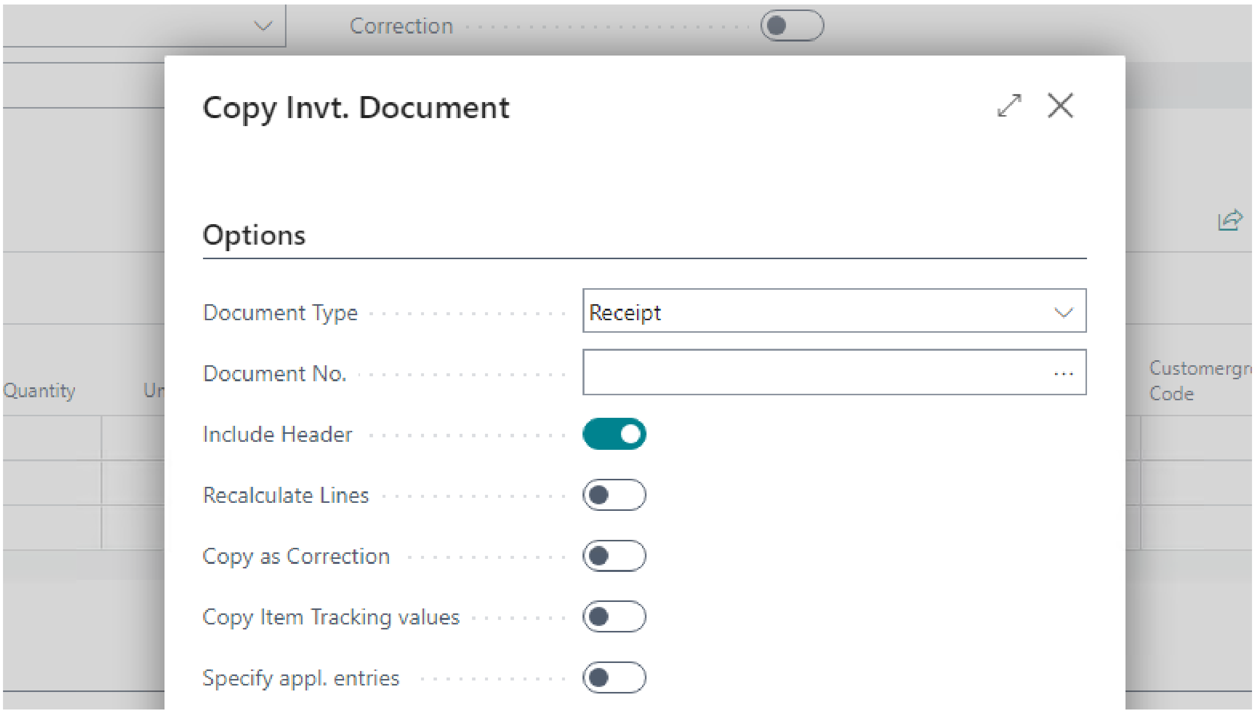
You can use the **Correction** checkbox if you need to post a corrective entry to an inventory. If you select the checkbox, when you post a corrective entry Business Central uses a negative quantity but keeps the entry type.

For example, you post the inventory receipt with a quantity of 500, but later discover the entry isn't correct. You can write off quantity using an inventory shipment, or you can post an inventory receipt that's marked as a correction. In the first case, Business Central creates a negative adjustment entry type. When you use a correction the entry will be a positive adjustment, but with a negative quantity. While the total turnover will be the same, if you run an analysis by entry type, the results will be different. In the second case, the total positive adjustment will be zero.

If you use item tracking, you definitely want to use the **Copy Document** action to fill in the document, tracking, and application information. In this release, the following toggles give you better control over what will be entered in the document, and how:

- **Copy as Correction**. Useful if you copy a posted document to a new document of the same type—for example, posted inventory receipt into inventory receipt—and you want to have an opposite sign. Note that if the posted document is already marked as a correction, the setting is ignored.

- **Copy Item Tracking value**. Define whether you want to populate item tracking details, such as lot or serial number from a source document. If the **Specify appl. entry** toggle is enabled, Business Central will populate **Apply from entry / Apply to entry** fields. Note that for a successful application, the sign of the target document should be the opposite. For example, from a posted inventory receipt to an inventory shipment, or from a posted inventory receipt to a correcting inventory receipt.



It's also easier now to delete inventory shipments or inventory receipts that contain lines with item tracking. The new behavior is similar to what we already have in purchase and sales documents, where instead of blocking users it shows a confirmation dialog.

We'd like to thank our community for your valuable contributions to Microsoft's open source BusinessCentralApps repo on GitHub.

See also

Count, Adjust, and Reclassify Inventory Using Journals (docs)

Include approvals for intercompany general journals in your workflows

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2023	✔ Oct 2, 2023

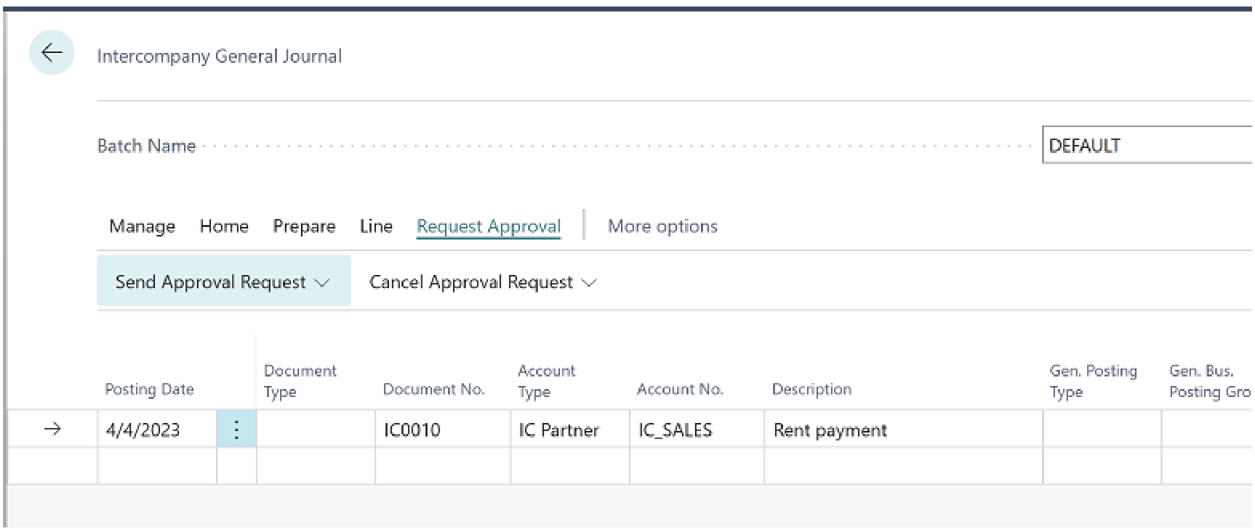
Business value

To increase control and reduce errors in intercompany posting, you can include intercompany general journals in an approval workflow. The approval workflow gives someone, like a manager, the opportunity to review intercompany general journals before they're posted.

Feature details

Intercompany general journals are now included in the approval workflow for general journals. Intercompany general journals are a variant of general journals, so when you set up the workflows for general journals they'll also work for intercompany.

You can set up a new workflow in the **Workflows** list for the **General Journal Batch Approval Workflow** or the **General Journal Line Approval Workflow**. To use the workflow, you must set up users on the **Approval User Setup** page in the same way you would for all workflows.



Include only open entries on customer statements

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 5, 2023	✓ Oct 2, 2023

Business value

Businesses send customer statements to customers in various formats and for various purposes. We've added a Statement Style field so that you can include only open entries in the report.

Feature details

If you open the Customer Statement report from the Customers list page or the role explorer, you'll find the following options in the **Statement Style** field on the request page:

- **Balance** gives customers an overview of outstanding amounts and a reminder to pay amounts that are overdue.
- **Open Items** does the following:
  - Shows only open entries within the specified date range.
  - Shows a balance for open entries before the start date.
  - Ignores entries that have a posting date that's after the ending date.

Statement

Document Date	03/08/23
Statement	5
Starting Date	01/01/23
Ending Date	03/31/23

cronus

Adatum Corporationnbbbbbbb
Robert Townes
gffghfhfghfghfghfgh
Atlanta, GA, United States of America

CRONUS USA, Inc.
7122 South Ashford Street
Westminster Atlanta, GA 31772
Phone No. +1 425 555 0100

Posting Date	Document No.	Description	Due Date	Original Amount	Remaining Amount	Running Total
Entries USD						1,295.60
					Total USD	**1,295.60**
Entries EUR						1,301.85
01/10/23	1	Adatum Corporation	01/10/23	10.00	10.00	1,311.85
01/10/23	4	Adatum Corporation	01/10/23	10.00	10.00	1,321.85
03/01/23	23423	Adatum Corporation	01/10/23	10.00	10.00	1,331.85
					Total EUR	**1,331.85**

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Report Overview (docs)

Manage work orders in Field Service, invoice them in Business Central

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2024	To be announced

Business value

This integration is particularly valuable for organizations that provide professional services. It offers a seamless and integrated solution for managing service tasks, consumption, and financial transactions, which benefits 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. This integration adds value to organizations by streamlining service operations, improving financial management, and enhancing overall operational efficiency.

Feature details

We're excited to announce the integration with Field Service. You can manage work orders and consumption in Field Service, and efficiently invoice and fulfill them in Business Central. This integration streamlines the end-to-end process of managing service operations and ensures a seamless flow of information between the two systems.

You can easily create and manage work orders in Field Service, track the progress of service tasks, assign resources, and capture consumption details. When the service tasks are complete, the integration enables the smooth transfer of data to Business Central for further processing.

The integration also facilitates the invoicing and fulfillment of work orders in Business Central. You can generate accurate invoices based on the service activities performed and the consumption recorded in Field Service. This ensures timely and accurate billing, which improves financial management and customer satisfaction.

By integrating Business Central with Field Service, you benefit from a unified and efficient workflow. The integration eliminates the need for manual data entry or duplication, which reduces errors and saves valuable time. It also provides a comprehensive view of service operations and financials, which improves decision-making and operational efficiency.

Tell us what you think

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Inventory package numbers work like item tracking dimensions

Article • 03/26/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 2, 2024	To be announced

Business value

This update addresses a gap that was present when the feature was originally introduced, and unlocks physical inventory orders for companies that use package-specific tracking.

Feature details

To start using this feature, you must activate **Feature Update: Enable use of package tracking in physical inventory orders** on the **Feature Management** page. Existing physical inventory orders will be updated; however, Business Central can't populate the **Package no.** field. You must recreate these lines using the **Calculate Lines** action on the **Phys. Inventory Order** page.

You can enter the package number for items where package tracking is needed on the **Phys. Inventory Recording Lines** page. Choose **Finish** to finalize recording.

After you choose **Finish** in the **Physical Inventory Order**, Business Central will calculate differences with respect to the package and other item tracking details, and will make positive or negative adjustments.

Phys. Invt. Item Track. List

Item Tracking Information

Item No.	Variant Code	Location Code	Serial No.	Lot No.	Package No.	Positive	Quantity
1001	VAR1		111111		CT000024	☑	1
1001	VAR1		SN000022			☑	1
1001	VAR1		SN000055		CT000024	☑	1
1001	VAR1		SN00002		CT000024	☐	-1
1001	VAR1		SN00005	LOT0001	CT000024	☐	-1

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Invoice a customer for multiple projects

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

Business value

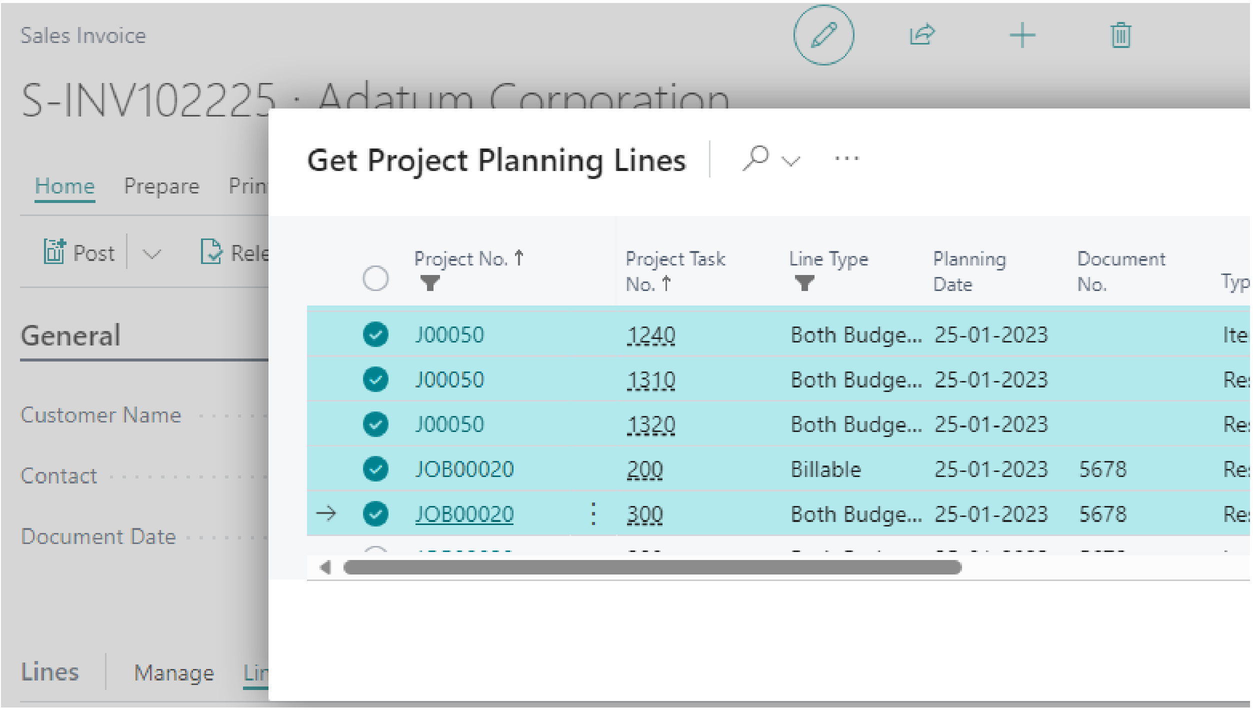
Simplify your invoicing process by sending one invoice for multiple projects, which reduces manual effort and improves accuracy.

Feature details

Add project planning lines from multiple projects to a sales invoice in one go. This process is similar to creating a sales invoice from a project planning line and entering a value in the **Append to Sales Invoice No.** field.

Here's an overview of the process.

1. Create a new sales invoice, and fill in the **Sell-to Customer No.** field. If needed, also fill in the **Bill-to Customer No.** and **Currency Code** fields.
2. On the **Lines** FastTab, choose the **Get Project Planning Lines** action. The **Get Project Planning Lines** page shows billable project planning lines from projects for the sell-to customer, bill-to customer, and invoicing currency where the quantity to invoice is more than zero.
3. Choose the lines you want to add to the invoice, and then choose **OK**.



You can repeat these steps to add another set of project planning lines. You can also delete the invoice or its lines and start over.

There are these noteworthy limitations:

- The **Get Project Planning Lines** action isn't available on sales orders or sales quotes.
- You can't filter on the **Ship-to Code** or **Contact No.** fields.

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.

Make intercompany transactions across Business Central environments

Article • 11/15/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 1, 2023	✓ Oct 2, 2023

Business value

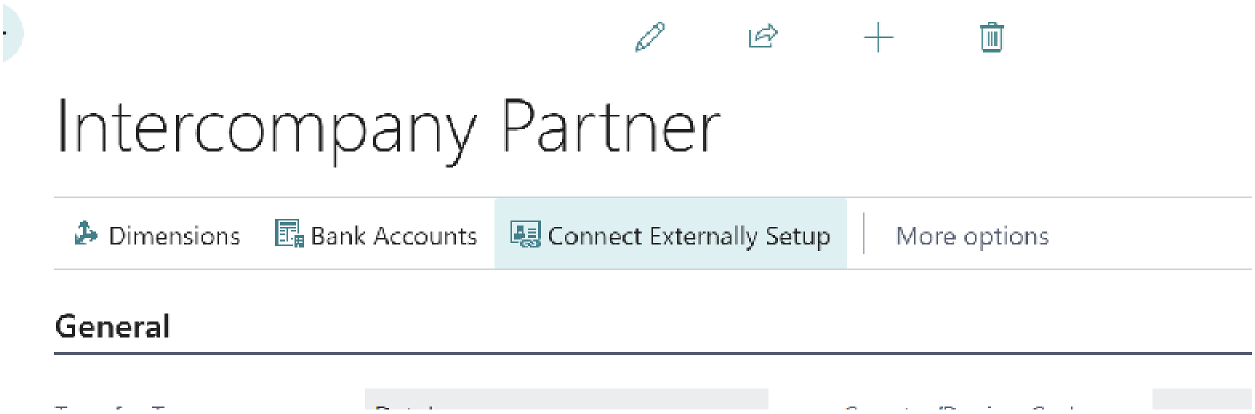
It's easier for businesses to handle transactions when they have multiple companies. Intercompany postings help you do accounting for multiple companies operating in multiple Business Central tenant environments, eliminating the need to manage files.

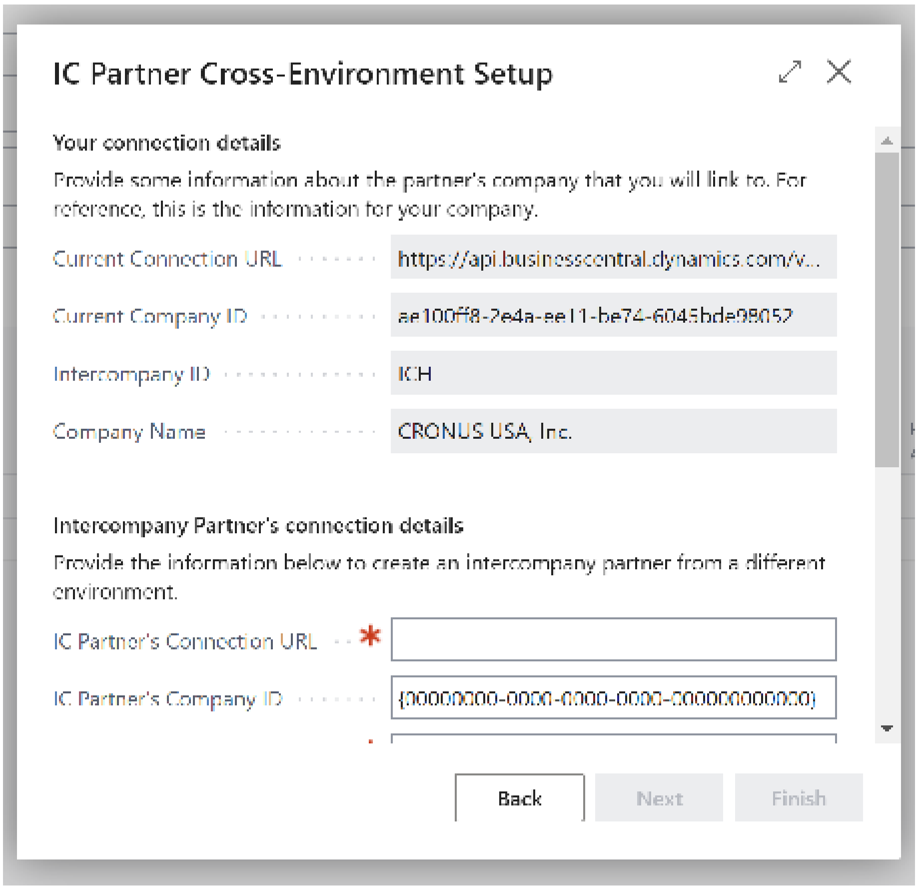
Feature details

It's easy to set up an intercompany partnership between companies that operate in different Business Central environments. On the **Intercompany Partner Setup** page, selecting **Connect Externally Setup** lets you set up a connection to a company in a different environment. You can select a company that you're allowed to set up as an intercompany partner in that environment. The setup also involves a step where you create and enable a registration application in Azure Portal in the company that you need to give access to from other companies.

When the setup is complete, you'll be able to automatically send and receive transactions for the company even though it's in a different environment.

You can use all intercompany features across environments, including sales and purchase documents, intercompany general journals, and purchase invoice cost distributions. For example, if you've chosen to map accounts to an intercompany chart of accounts, or dimensions or items, transactions can flow even though the partners reside in different Business Central environments.





Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

Thank you for submitting this idea:

- Intercompany transactions as Web Service

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Set Up Intercompany Transactions (docs)

Manage document attachments in service items and documents

Article • 03/26/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	✓ Mar 2, 2024	To be announced

Business value

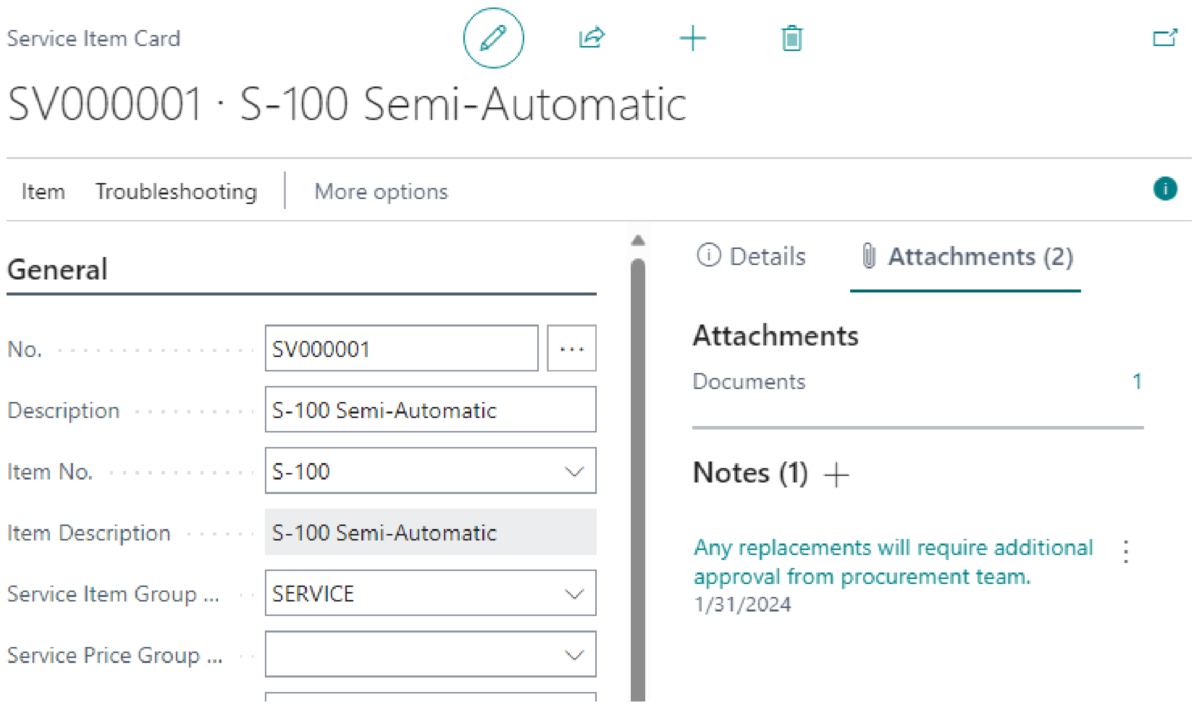
Digitalize document management of service-related documents (such as maintenance manuals, warranty certificates, or inspection reports) by attaching them directly to service items, contracts, and invoices. Access critical documentation on the go, ensuring efficient service delivery.

Feature details

In this release, we've made document attachments available on pages in Service Management. The **Document Attachment** FactBox is available in multiple places, like:

- **Service Item Card** (page 5980 "Service Item Card")
- **Service Items** (page 5981 "Service Item List")
- **Service Items** (page 5988 "Service Items")
- **Service Contract** (page 6050 "Service Contract")
- **Service Contracts** (page 9321 "Service Contracts")
- **Service Contract Quote** (page 6053 "Service Contract Quote")
- **Service Contract Quotes** (page 9322 "Service Contract Quotes")
- **Service Credit Memo** (page 5935 "Service Credit Memo")
- **Service Credit Memos** (page 9320 "Service Credit Memos")
- **Service Invoice** (page 5933 "Service Invoice")

- **Service Invoices** (page 9319 "Service Invoices")
- **Service Order** (page 5900 "Service Order")
- **Service Orders** (page 9318 "Service Orders")
- **Service Lines** (page 5905 "Service Lines")
- **Service Quote** (page 5964 "Service Quote")
- **Service Quotes** (page 9317 "Service Quotes")
- **Service Quote Lines** (page 5966 "Service Quote Lines")
- **Posted Service Credit Memo** (page 5972 "Posted Service Credit Memo")
- **Posted Service Credit Memos** (page 5971 "Posted Service Credit Memos")
- **Posted Service Invoice** (page 5978 "Posted Service Invoice")
- **Posted Service Invoices** (page 5977 "Posted Service Invoices")



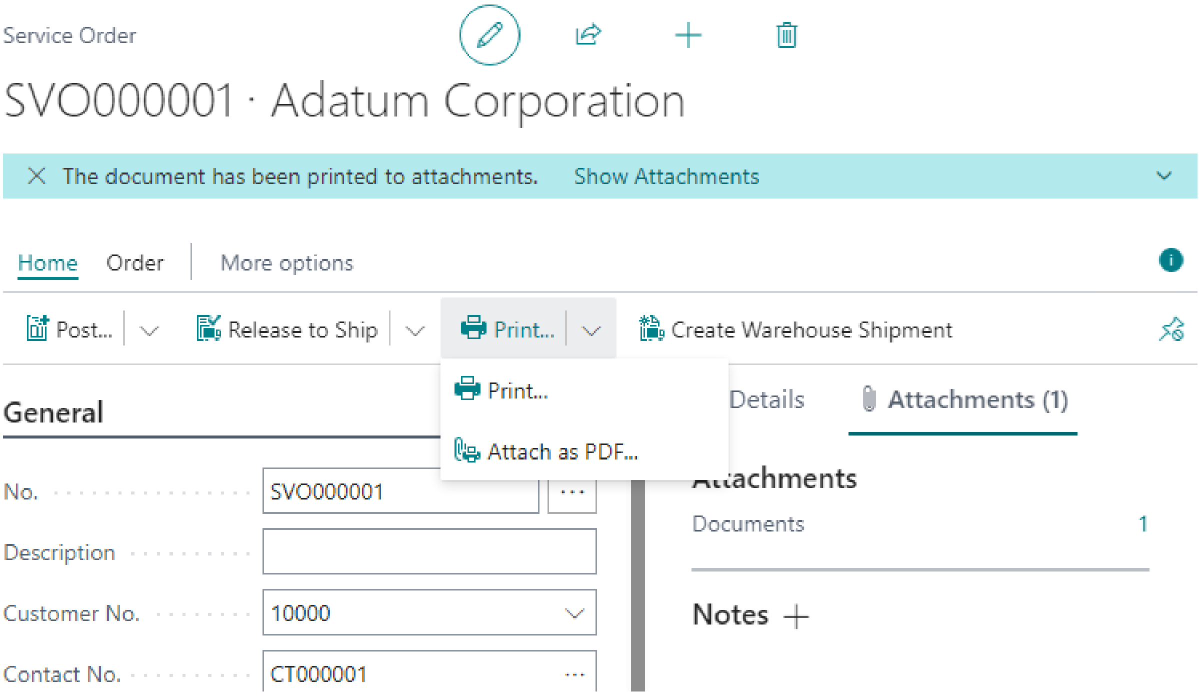
You can also choose the **Attachment** action to go to document attachments from lines:

- **Service Contract Quote Lines** (page 6054 "Service Contract Quote Subform")
- **Service Contract Lines** (page 6052 "Service Contract Subform")
- **Service Credit Memo Lines** (page 5936 "Service Credit Memo Subform")
- **Service Invoice Lines** (page 5934 "Service Invoice Subform")
- **Posted Serv. Cr. Memo Lines** (page 5973 "Posted Serv. Cr. Memo Subform")
- **Posted Service Invoice Lines** (page 5979 "Posted Service Invoice Subform")

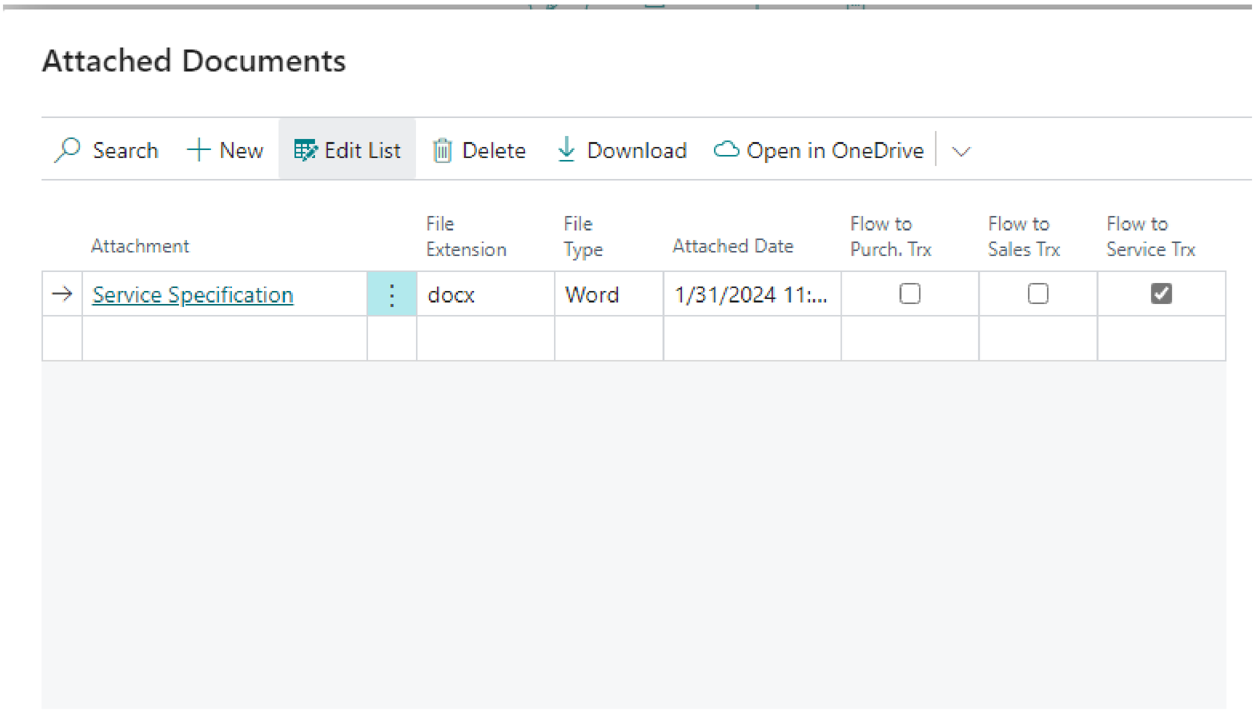
You can also print the following document to attachments using the **Attach as PDF** action:

- **Service Contract**
- **Service Contracts**
- **Service Contract Quote**

- Service Contract Quotes
- Service Order
- Service Orders
- Service Quote
- Service Quotes
- Posted Service Credit Memo
- Posted Service Credit Memos
- Posted Service Invoice
- Posted Service Invoices



Use the new **Flow to Service Trx** toggle in the **Attached Documents** page to control how documents attached to customers, items, or service items flow to documents, lines, and transactions.



Expand table

From	To	When
Customer	Service header: Service Order, Service Quote, Service Invoice, Service Credit-memo	Select value in the **Customer No.** field
Customer	Service contract header: Service Contract or Service Contract Quote	Select value in the **Customer No.** field
Item	Service Item	Select value in the **Item No.** field
Item	Service Line: Service order line, Service quote line, Service Invoice line, Service Credit-memo line	Select value in the **No.** field
Item	Service Contract Line: Service Contract line or Service Contract Quote line	Select value in the **Item No.** field
Service Item	Service Line: Service order line, Service quote line, Service Invoice line, Service Credit-memo line	Select value in the **Service Item No.** field
Service Item	Service Contract Line: Service Contract line or Service Contract Quote line	Select value in the **Service Item No.** field

ⓘ Note

Document attachments are not available for service item lines.

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:

- Attachments Service Items
- Ability to add Documents to Service Items
- Attach Documents in Service Orders and Quotes

We listened to your ideas, along with comments and votes, to help us decide what to add to our product roadmap.

More control over general journal approvals

Article • 10/09/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 6, 2023	✔ Oct 2, 2023

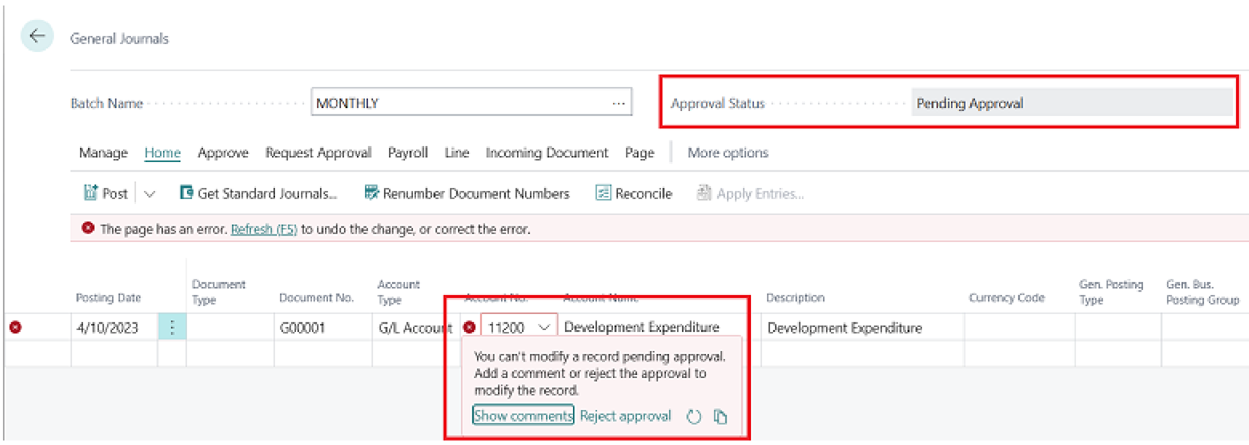
Business value

Some transactions require more scrutiny by accounting managers and require approval before being posted. Making sure such transactions remain unchanged after approval is of great importance so you can ensure compliance to company policies.

Feature details

When you send a general journal batch or specific general journal lines for approval, Business Central ensures that people can't change them before or after they're approved.

Because mistakes can happen, actionable inline errors make it easier to make corrections. For example, after you request approval for a general journal batch, your accounting manager notices that you've specified the wrong G/L account. Changing the G/L account will show an inline validation error message that offers two actions that can help the accounting manager fix the mistake, or return the general journal batch to the submitter. The accounting manager can document the change they're requesting by choosing **Show Comments**, or reject the batch by choosing **Reject Approval**.



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.

Navigate easier between order, receipt, and invoice documents

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 8, 2023	✓ Oct 2, 2023

Business value

Sales, purchase, and service orders and returns aren't standalone. They're almost always followed by posted shipments, receipts, invoices, and credit memos. To provide insight into the documents associated with an order, you can quickly access posted documents directly from an order or return.

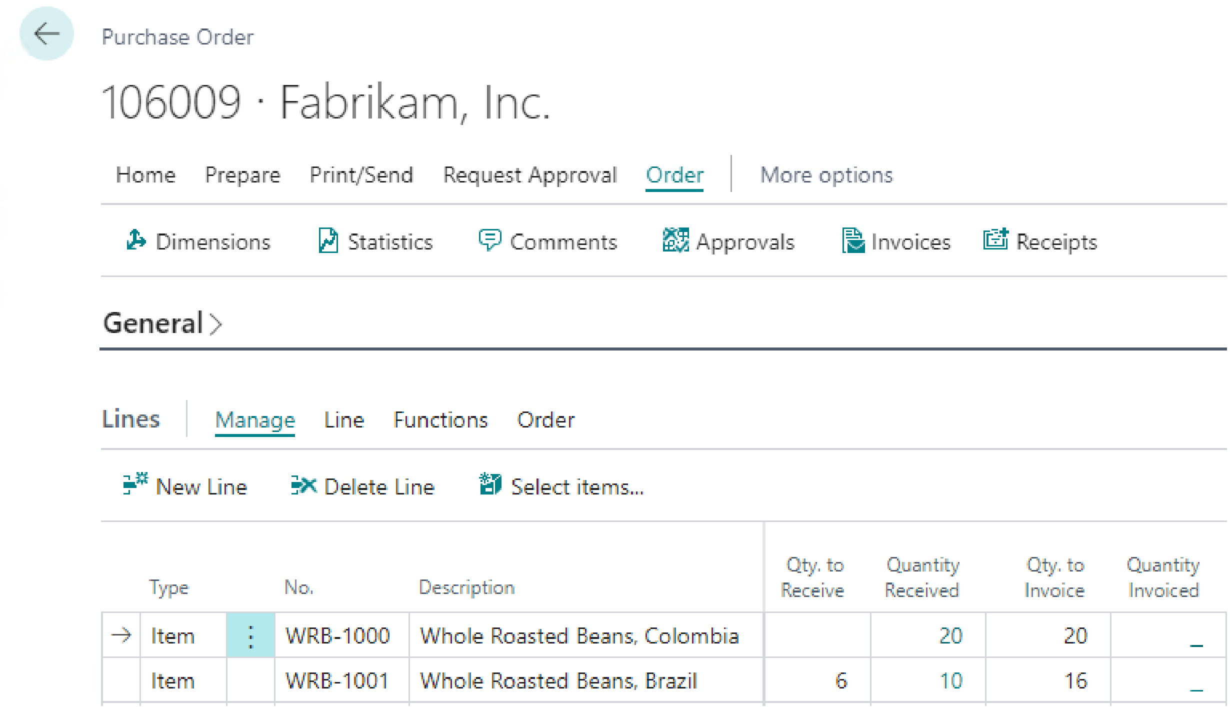
Feature details

Business Central gives you a lot of flexibility in the way you handle shipments and receipts, and invoices and credit memos. You can post receipts and shipments directly from an order, both completely or partially, or via warehouse documents. You can also post invoices from an order, both completely or partially, or you can combine shipments and receipts using either the Get Shipment Lines action or by combining the shipment.

In this release, regardless of how you handle shipments and invoices, it's easy to switch between those documents.

Drill down on fields

- From sales order lines, you can drill down in the **Qty. Shipped** and **Qty. Invoice** fields.
- From purchase order lines, you can drill down in the **Qty. Received** and **Qty. Invoiced** fields.
- From sales return lines, you can drill in the **Return Qty. Received** and **Qty. Invoiced** fields.
- From purchase return lines, you can drill in the **Return Qty. Shipped** and **Qty. Invoiced** fields.

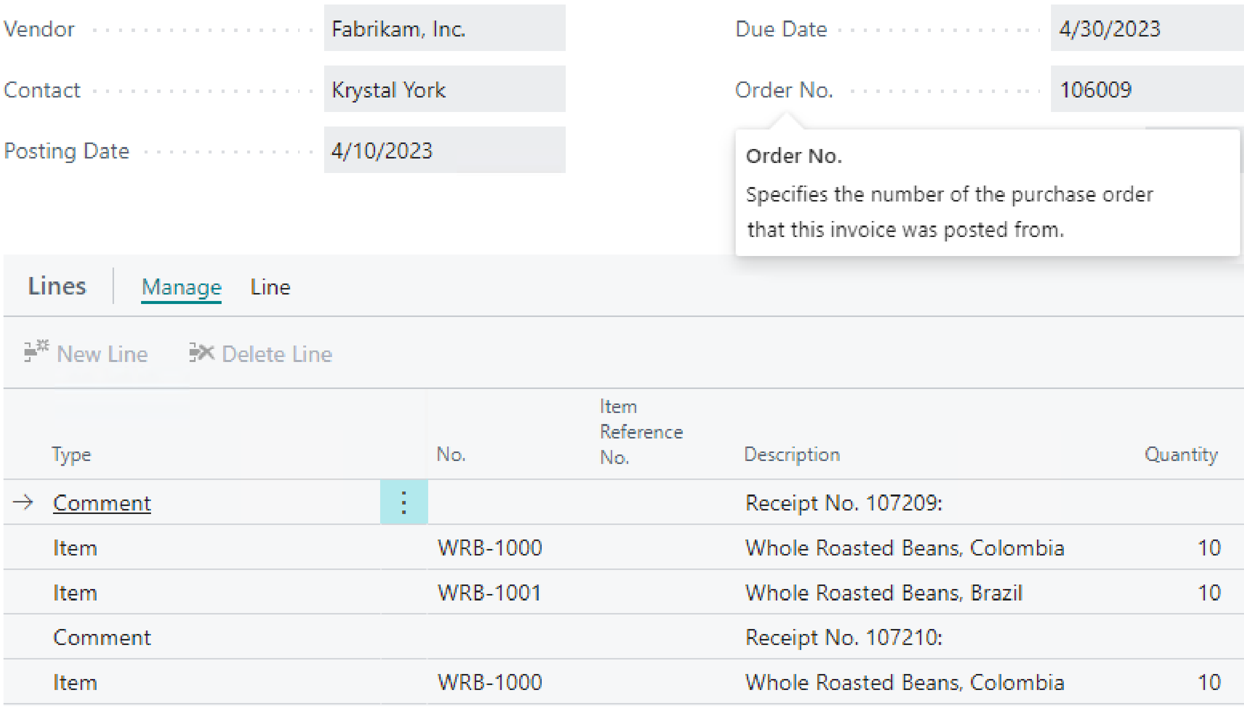


Better connection between order/return and posted invoices and credit memos

If you created an invoice or credit memo indirectly using one of the options listed below, you can still go to posted invoices or credit memos using corresponding actions from the order or return document.

Also, the **Order No.** field on posted sales and purchase invoices and the **Pre-Assigned No.** field on posted sales and purchase credit memos are populated if all lines are from the same order. This is true even if they're related to several shipments.

- Combine Shipments task
- Combine Return Receipts task
- Get Shipment Lines actions in the Sales Invoice
- Get Receipt Lines in the Purchase Invoice
- Get Return Receipt Lines in the Sales Credit Memo
- Get Return Shipment Lines in the Purchase Credit Memo



We'd like to thank our community for your valuable contributions to Microsoft's open source BusinessCentralApps repo on GitHub.

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:

- Show purchase order no. on ALL posted purchase invoices
- Navigate from a purchase or sales order to its documents.
- Purchase Invoice Link on Purchase Order Does Not Reflect Those Done via Get Receipt Line

We listened to your ideas, along with comments and votes, to help us decide what to add to our product roadmap.

Prevent editing number series on service documents, cards

Article • 03/26/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 2, 2024	To be announced

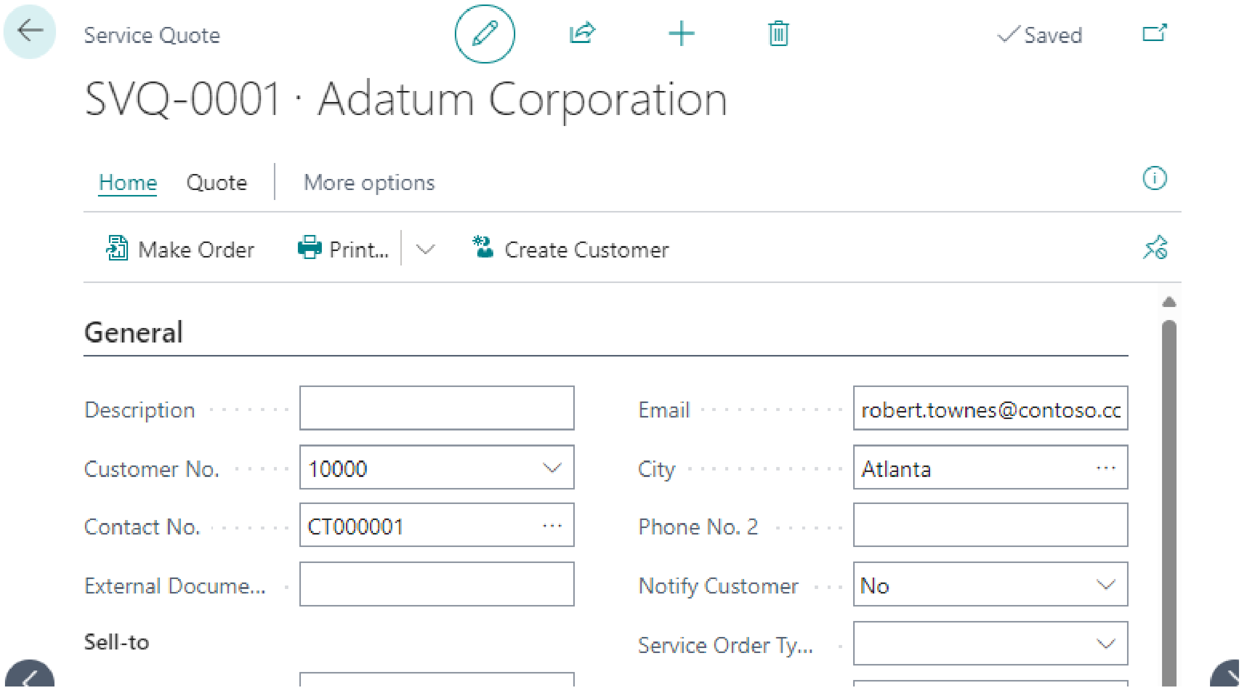
Business value

For each company where you set up service management, you must assign unique identification codes to things such as service items, invoices, and other documents. Numbering isn't only important for identification purposes. A well-designed numbering system also makes the company more manageable and easier to analyze, and can reduce the number of errors that occur in data entry.

Feature details

Behavior of the No. field on documents and cards

On service documents and all cards, the **No.** field can be filled in automatically from a predefined number series, or you can add it manually. However, under certain circumstances, the **No.** field isn't available so that you can't edit its value.



The **No.** field can be filled in three ways:

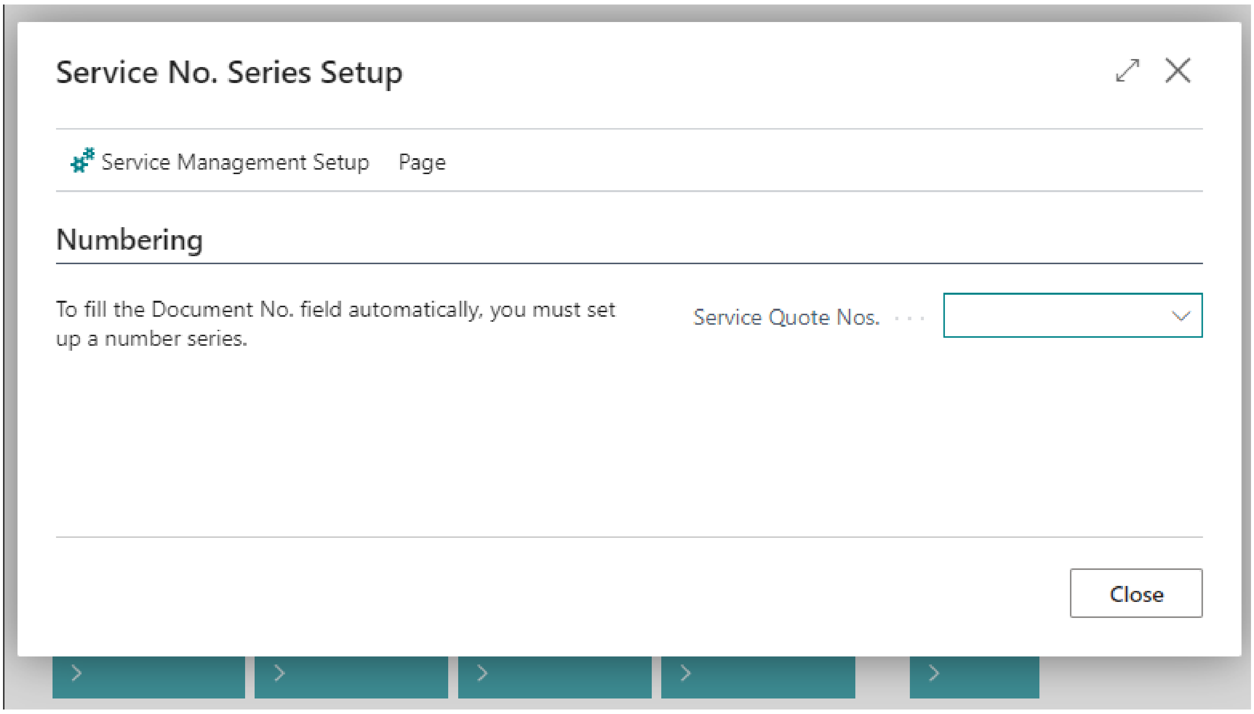
1. If only one number series for the type of document or card exists, and the **Default Nos.** field is selected and the **Manual Nos.** field is not selected for that number series, the field is automatically filled with the next number in the series. The **No.** field will not be visible on the card or document.

   > **Note**
   >
   > If the number series doesn't work, for example because it's run out of numbers, the **No.** field will be visible and you can manually enter a number or resolve the issues on the **No. Series** page.

2. If more than one number series for the type of document or card exists, and the **Default Nos.** checkbox isn't selected for the number series that's assigned, then the **No.** field is available and you can look up the **No. Series** page and select the number series you want to use. The **No.** field contains the next number in the series.

3. If you haven't set up a number series for the type of document or card, or if the **Manual Nos.** field is selected for the number series, the **No.** field is available and you must manually enter a number of up to 20 characters, which can be both numbers and letters.

When you open a new document or card that a number series doesn't exist for, the **No. Series Setup** page opens so that you can set up a number series for that type of document or card before you start to enter data.



> ⓘ **Note**
>
> If you need to enable manual numbering on, for example, new service item cards that have been created with a data migration process that's hidden the **No.** field by default, go to the **Service Management Setup** page and choose the **Service Item Nos.** field to set the number series to **Manual Nos.**.

Tell us what you think

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Print and scan barcodes

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 8, 2023	✓ Oct 2, 2023

Business value

Streamline your processes with barcode technology.

Feature details

Print barcodes

With this release of Business Central, we are adding a **Print Label** report action on multiple pages:

- **Item Card** and **Items List**

  Report prints Item No., Description, and GTIN as 1D and 2D barcodes.

- **Item References** and **Item References List**

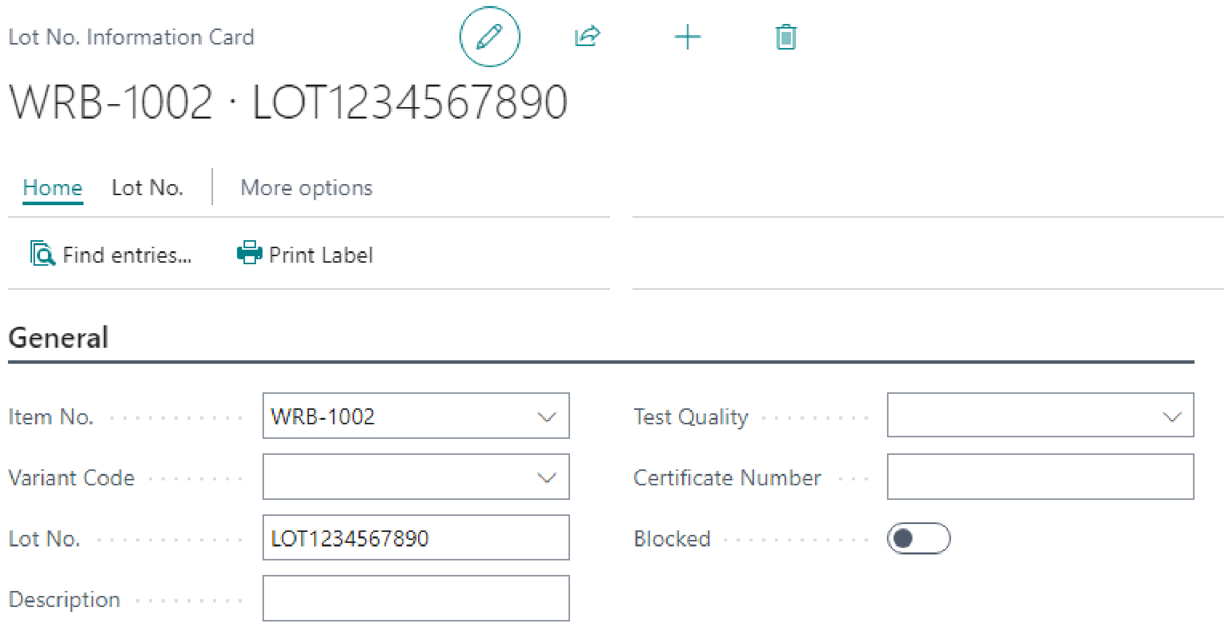
Report prints Item No., Description, unit of measure, and Reference No. as 1D and 2D barcodes.

- **Lot No. Information Card** and **Lot No. Information List**

  Report prints Item No., Description, and Lot Number as 1D and 2D barcodes.

- **Serial No. Information Card** and **SN Information List**

  Report prints Item No., Description, and Serial Number as 1D and 2D barcodes.



> ⓘ **Note**
>
> While the report functions well, it's important to note that there are different printers and barcode/QR code formats that may require a specific implementation. In such cases, you may need to upload a different Word template or clone the report to create your own customized version.

Scan barcode in mobile client with device camera

You see the barcode icon on various page fields, mainly focused around "Item Tracking" and "Item References" capabilities as listed below. The action starts the barcode scanner. Once a barcode is scanned, its value is entered in the field on the page, and the focus moves to the next quick-entry field on the page. This feature is supported on both iOS and Android platforms.

Item Tracking

1 Page 6510 "Item Tracking Lines"

- Serial No.
- New Serial No.
- Lot No.
- New Lot No.
- Package No.
- New Package No.

3 Page 6550 "Whse. Item Tracking Lines"

- Serial No.
- New Serial No.
- Lot No.
- New Lot No.
- Package No.
- New Package No.

5 Page 6520 "Item Tracing"

- Serial No. Filter
- Lot No. Filter
- Package No. Filter

7 Page 40 "Item Journal"

- Serial No.
- Lot No.
- Package No.

9 Table 5767 "Warehouse Activity Line"

- Serial No.

- Lot No.

- Package No.

  Note that this table is used by the following pages:
  - page 5780 "Whse. Pick Subform"
  - page 7378 "Invt. Pick Subform"
  - page 5771 "Whse. Putaway Subform"
  - page 7316 "Warehouse Movement Subform"
  - page 7376 "Invt. Putaway Subform"
  - page 7383 "Invt. Movement Subform"

11 Page 7326 "Whse. Phys. Invt. Journal"

- Serial No.
- Lot No.
- Package No.

Item References

1 Table 5777 "Item Reference"

- Reference No.

3 Table 6505 "Lot No. Information"

- Lot No.

5 Table 6515 "Package No. Information"

- Package No.

7 Table 6504 "Serial No. Information"

- Serial No.

9 Table 83 "Item Journal Line"

- Item Reference No.

11 Table 5876 "Phys. Invt. Order Line"

- Item Reference No.

11 Table 39 "Purchase Line"

- Item Reference No.

11 Table 37 "Sales Line"

- Item Reference No.

Other

1 Table 27 "Item"

- GTIN

Benefit from continuous scanning in the Item Tracking Lines page when running on mobile client.

Select the **Scan multiple...** action in the **Item Tracking Lines** page, then specify whether you want to scan Serial, Lot, or Package (if enabled).

The action starts the barcode scanner. You then scan the 1D or 2D barcode, and lines will be added until all tracked quantity is scanned.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Scan barcodes with Business Central mobile app for iOS and Android (docs)

Receive more items than ordered by using inventory put-away documents

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 8, 2023	✔ Oct 2, 2023

Business value

When more goods arrive than you ordered and it's cheaper not to return them, or your vendor offers you a discount, you can handle such receipts without having to prepare and perhaps request approval for a new purchase order.

Feature details

When more goods arrive than were ordered, you may want to receive them instead of canceling the receipt. For example, it might be cheaper to keep the excess items in inventory than return them, or your vendor may offer a discount for keeping them. In this release, in addition to purchase orders and warehouse receipts, you can also use inventory put-away documents to handle over-receipts.

Set up over-receipts

Create over-receipt codes to define a percentage by which a received quantity can exceed the ordered quantity. You assign the code on the **Item Card** or **Vendor Card** pages for items and vendors.

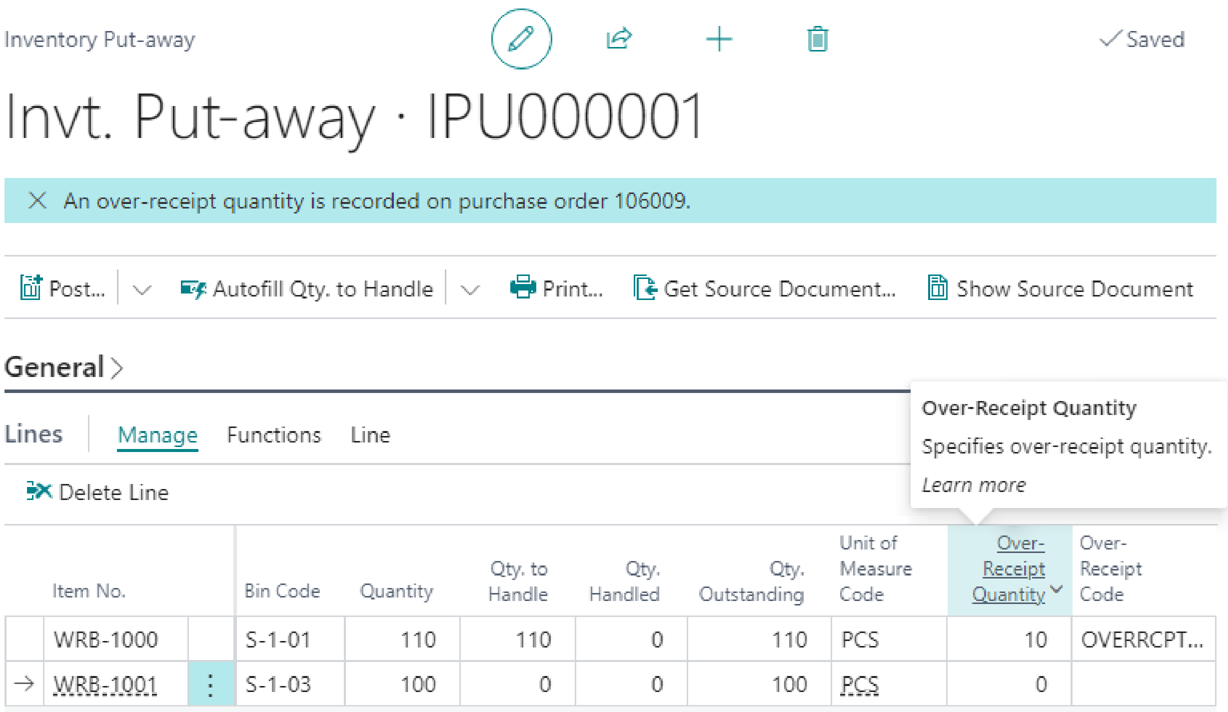
1. Choose the lightbulb icon that opens the Tell Me feature, enter **Over-Receipt Codes**, and then choose the related link.
2. In the **Over-Receipt Tolerance %** field, enter the percentage to allow for over-receipts.
3. To require that someone approves an over-receipt, choose the **Approval Required** checkbox. You'll need to set up a corresponding approval workflow. Learn more at Create Workflows.

Assign the over-receipt code to an item

1. Choose the lightbulb icon that opens the Tell Me feature, enter **Items**, then choose the related link.
2. Open the **Item Card** page for the item.
3. In the **Over-Receipt Code** field, choose the code that contains the percentage you want to allow for over-receipts.

Over-receive via Inventory Put-away

On inventory put-away lines, use the **Over-Receipt Quantity** field to record quantities that exceed the order quantity in the **Quantity** field.



If the increase is within the tolerance specified by the over-receipt code, the **Over-Receipt Quantity** field updates to show the quantity by which the value in the **Quantity** field is exceeded.

If the increase is over the tolerance, the over-receipt isn't allowed. Investigate whether another over-receipt code does allow it. Otherwise, only the ordered quantity can be received, and the excess quantity must be handled another way. For example, by returning it to the vendor.

If you set up an approval workflow for over-receipts, you'll need to request approval from the purchase order. You won't be able to post inventory put-away before the purchase order is approved.

ⓘ **Note**

Business Central doesn't automatically handle the financial aspects of over-receipts. You must manually handle the financials in agreement with the vendor. For example, the vendor might forward a new or updated invoice.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Receive Items with Warehouse Receipts (docs)

Reverse a customer and vendor ledger entry with a realized gain or loss entry

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	-	✓ Oct 2, 2023

Business value

From time to time you may need to recover from mistakes, so we've improved the features for reversing transactions to save you time both when you enter data and when you validate manual postings.

Feature details

You can use the **Reverse transaction** action to reverse payments that were applied to entries that originated in foreign currencies and were adjusted using the Exchange Rate Adjustment batch job. The feature works for both purchases and sales.

The following is a simple scenario that illustrates how it works:

1. Post a sales invoice for a customer using a foreign currency.
2. Adjust the exchange rate for that currency.
3. Post a payment applied to the invoice.
4. Unapply and reverse the payment transaction, for example, from the Customer Ledger Entries page.

With this one-step (actually two because you must always unapply entries before you can reverse them), you can easily undo mistakes that also involve currency adjustments.

See also

Update Currency Exchange Rates (docs)

Usability improves for warehouse and inventory

Article • 03/26/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 2, 2024	To be announced

Business value

Productivity increases when processes are easy, so we've improved the usability of several areas within inventory and warehouse management. For example, you can get help to create warehouse employees, and in several places data is easier to access and digest.

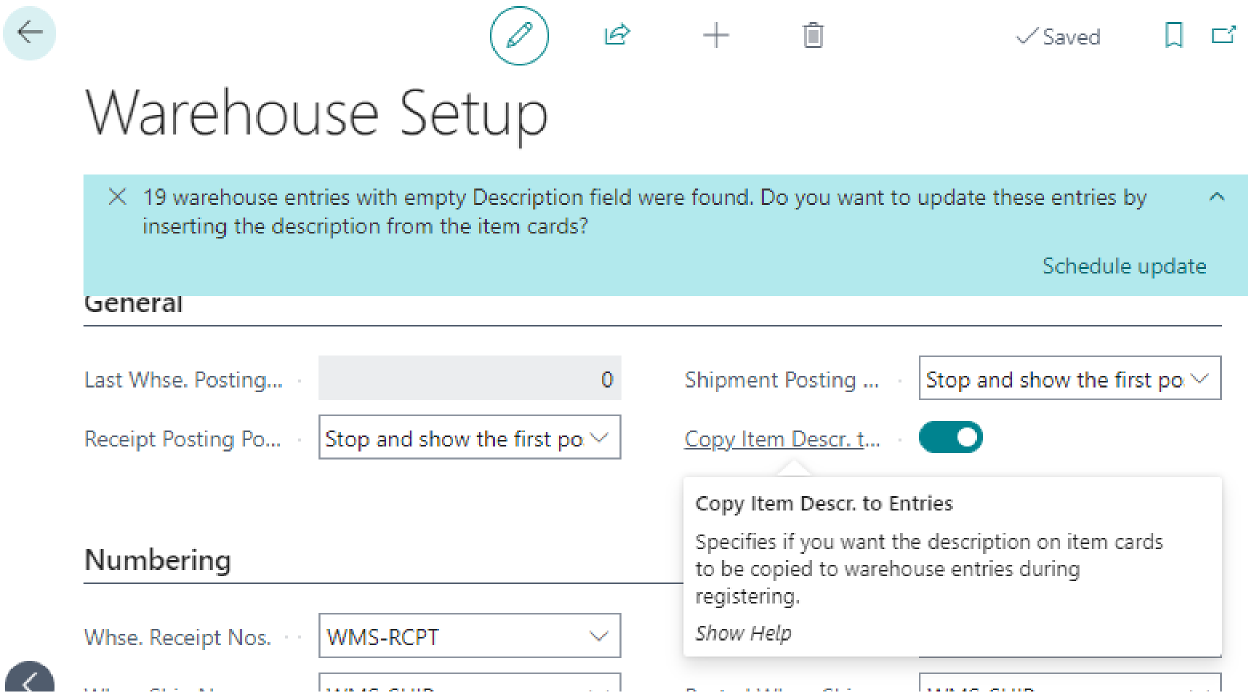
Feature details

Based on feedback from our customers, we've made it easier to complete several inventory and warehouse processes.

Carry item description to warehouse entries

When reconciling or auditing data, it's useful to have the description of the item from the source document on the warehouse ledger entries.

On the **Warehouse Setup** page, you can choose the **Copy Item Descr. to Entries** checkbox so that when transactions are made at locations that require bins, the description text on lines of type *Item* carries over to the warehouse entries.

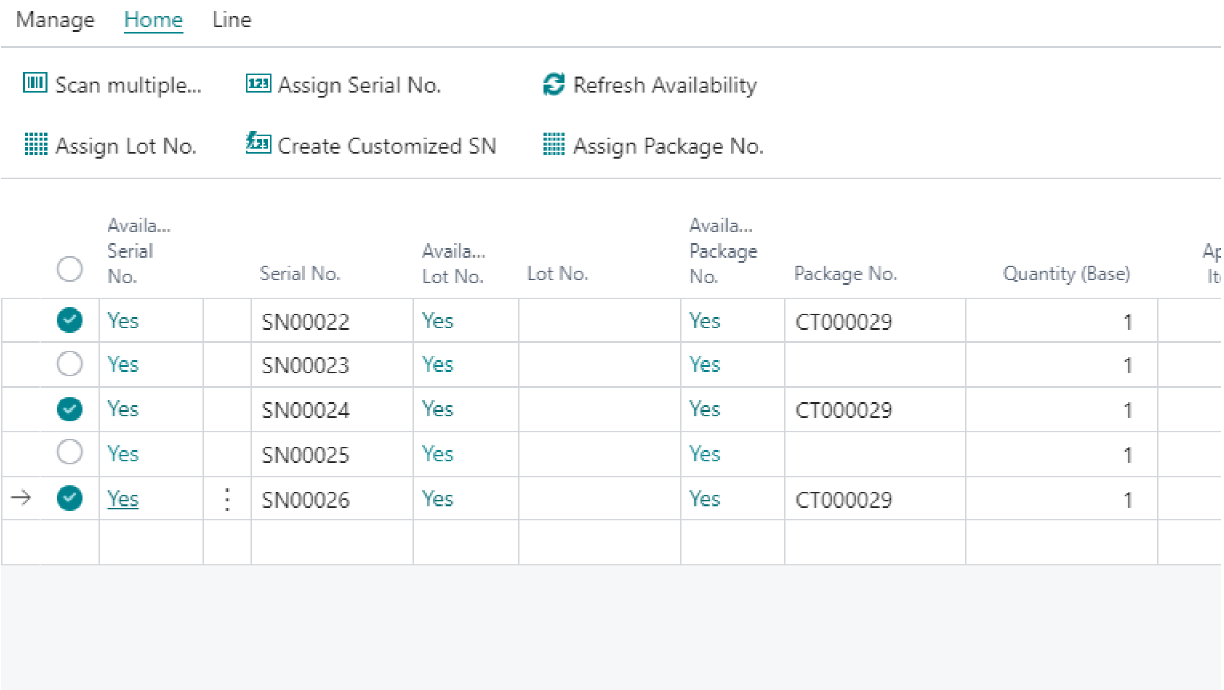


When turned on, Business Central suggests that you update empty descriptions in existing warehouse entries. If you have a large number of warehouse entries, it might take some time to add descriptions.

Assign lot and package numbers to existing item tracking lines

We've slightly enhanced how the **Assign Lot No.** and **Assign Package No.** actions work:

- You can select multiple lines.
- You can select existing lines, for example where serial number or lot is populated, and assign a package number where it's missing. You can do the same for lots. If the package or lot is already defined, the actions won't overwrite the existing values.



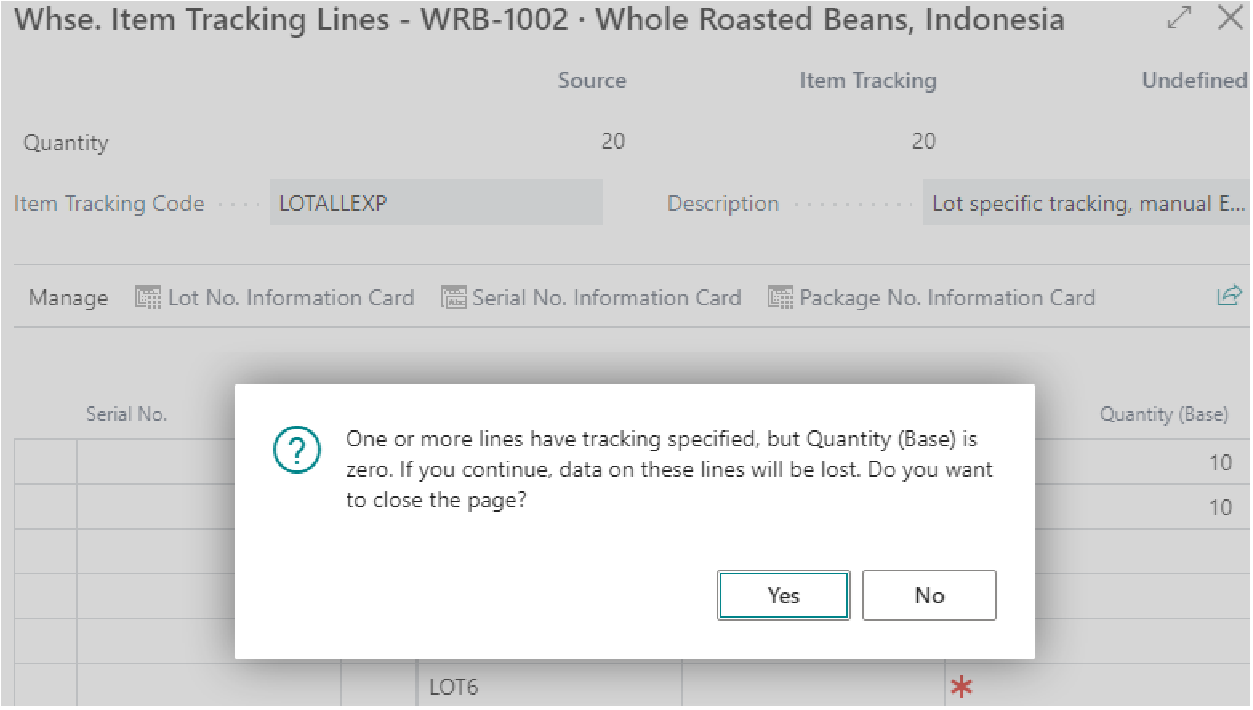
You can continue to use this action to generate new lines with lot or packages and redistribute quantities manually.

There's also a **Create New Package No.** toggle on the **Assign Serial No.** request page. It works in the same way as **Create New Lot No.**, and assigns one package to all created serial numbers.

Warehouse item tracking lines

The **Warehouse Item Tracking Lines** page got the same enhancements as **Item Tracking Lines**:

- The **Quantity (Base)** field has an indicator to remind people to specify a quantity.
- The confirmation dialog ensures that you're aware of potential data loss if you leave the **Quantity (Base)** field empty.
- Drill-down in the **Item Tracking Code** field helps you easily go to the related item tracking record and explore its settings.



Tell us what you think

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Set up financial consolidation runs more efficiently

Article • 03/26/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2024	To be announced

Business value

When you run consolidation for business units that use a foreign currency, you must pay special attention to the exchange rates that various parts of the process use, and even more so when you redo consolidation. To do that, you can use the **Set Up Business Unit Currencies** page to easily keep track of the rates. The feature helps streamline your consolidation processes and improve your productivity.

Feature details

When you run a consolidation, the **Set Up Business Unit Currencies** page gives you the last rates that were entered for average, closing, and last closing rate. Also, you can look up the exchange rates in the currency exchange rate table, which makes it easier to validate. You can modify the rates used for the current run by either entering the values or copying values from previous runs by selecting **Select from previous consolidation**.

This page is particularly valuable when you want to rerun a previous consolidation, where you need to use the closing rate of the consolidation run previous to the earliest of such runs. This is required to correctly revaluate your balance sheet items. You can use the **Select from previous consolidation** register to find the relevant last run to copy values from, or just look up the rates that were used when you're troubleshooting. The page is filtered to runs that included the selected business unit.

The **Run Consolidation** batch job with the new parameters is available on the **Business Units** list page. You can also find the **Set Up Business Unit Currencies** page by selecting the **Exchange Rates** action.

> ⓘ **Note**
>
> The Exchange Rate setup pages for average, closing, and last closing rate, which are currently on the Business Unit card, will be deprecated. However, you can still maintain these rates if you have business units you import through files.

Tell us what you think

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Simpler Shopify connection

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

Business value

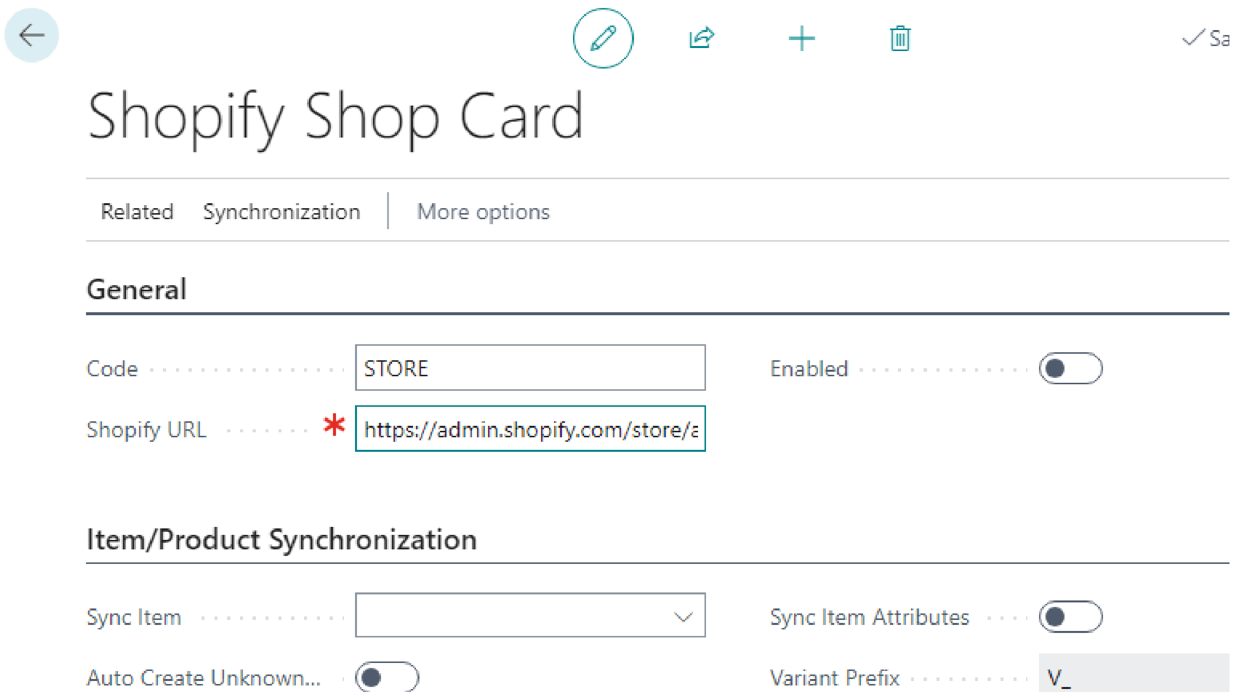
Business Central has teamed up with Shopify to help our customers create a better online shopping experience. Shopify provides merchants with an easy-to-use e-commerce solution, and Business Central offers comprehensive business management across finance, sales, service, and operations. The seamless connection between the two applications synchronizes order, stock, and customer information to ensure that merchants can fulfill orders faster and better serve their customers. The joint effort furthers Business Central's commitment to connecting data that can help businesses adapt faster, work smarter, and perform effectively.

Feature details

Based on feedback from customers, we've made a number of improvements in the user interface.

It's easier to get the Shopify URL

The Connector requires a URL in the following format: https://.myshopify.com/. However, after Shopify introduced Unified Admin it hasn't been as easy to get the URL for the store. Therefore, we've reintroduced simplicity. Just copy the URL from Shopify Admin, such as https://admin.shopify.com/store/, and the Connector converts it to the required format.



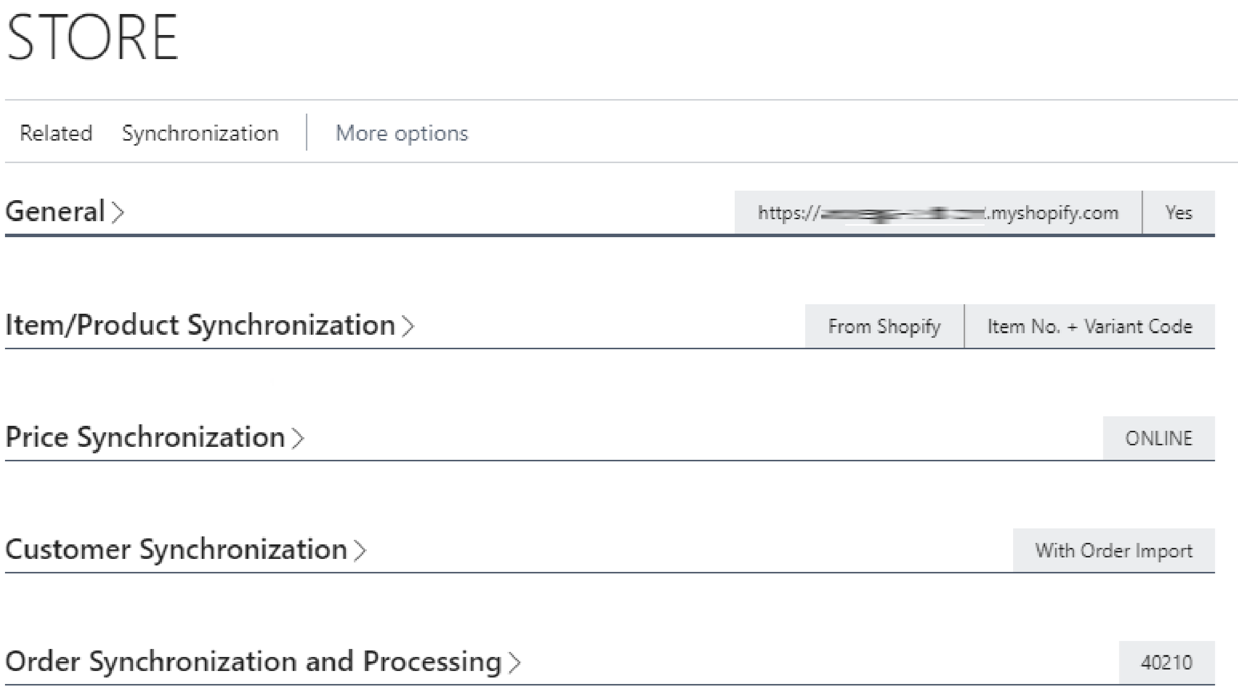
Skip blocked or sales blocked items and variants

When you want to export many items and variants, there might be some that are blocked. You can't include blocked items and variants in price calculations, so they aren't exported. The Connector now skips those items and variants automatically, so you don't need to filter them on the **Add Item to Shopify** request page.

Shopify Shop shows important fields when FastTabs are collapsed

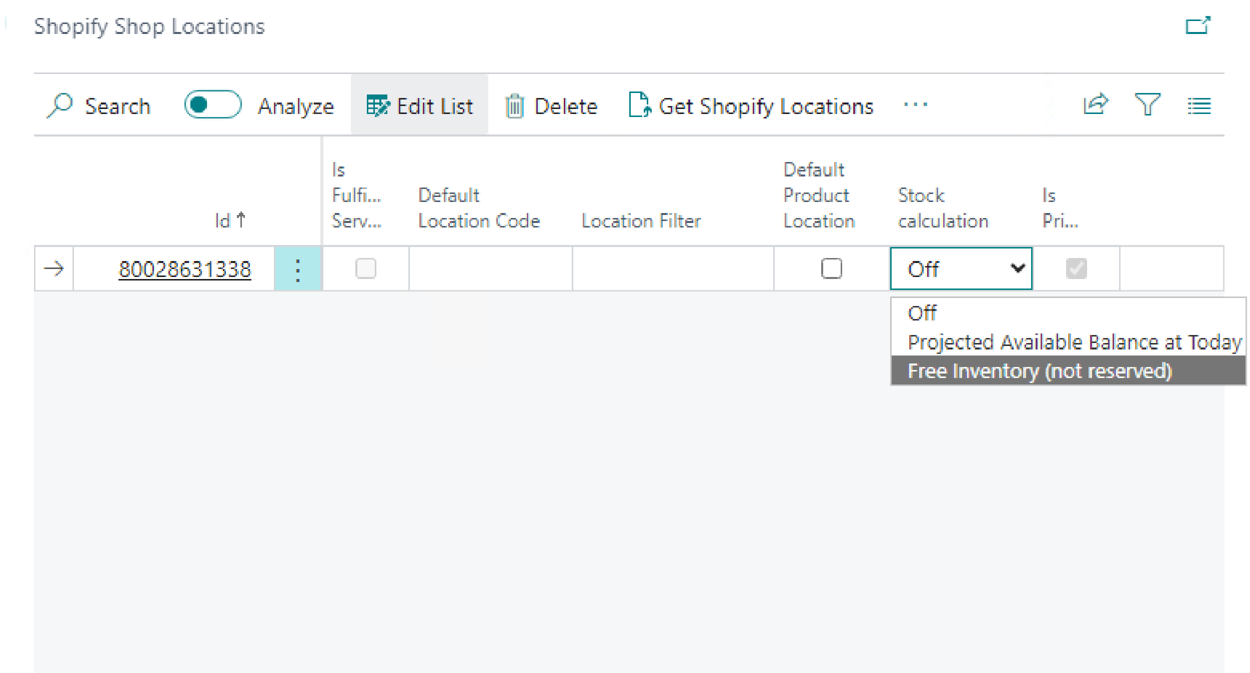
The values of the following fields display, even when a FastTab is collapsed:

- Shopify URL
- Enabled
- Sync Item
- SKU Mapping
- Customer Price Group
- Customer Discount Group
- Customer Import from Shopify
- Default Customer
- Shipping Charges Account
- Process Type



New stock calculation method

Because many businesses use extensibility to implement the same stock calculation, we decided to make it standard functionality. The **Free Inventory** method is simple and efficient. The method takes the current inventory and subtracts what's reserved from inventory. It ignores expected receipts or demand.



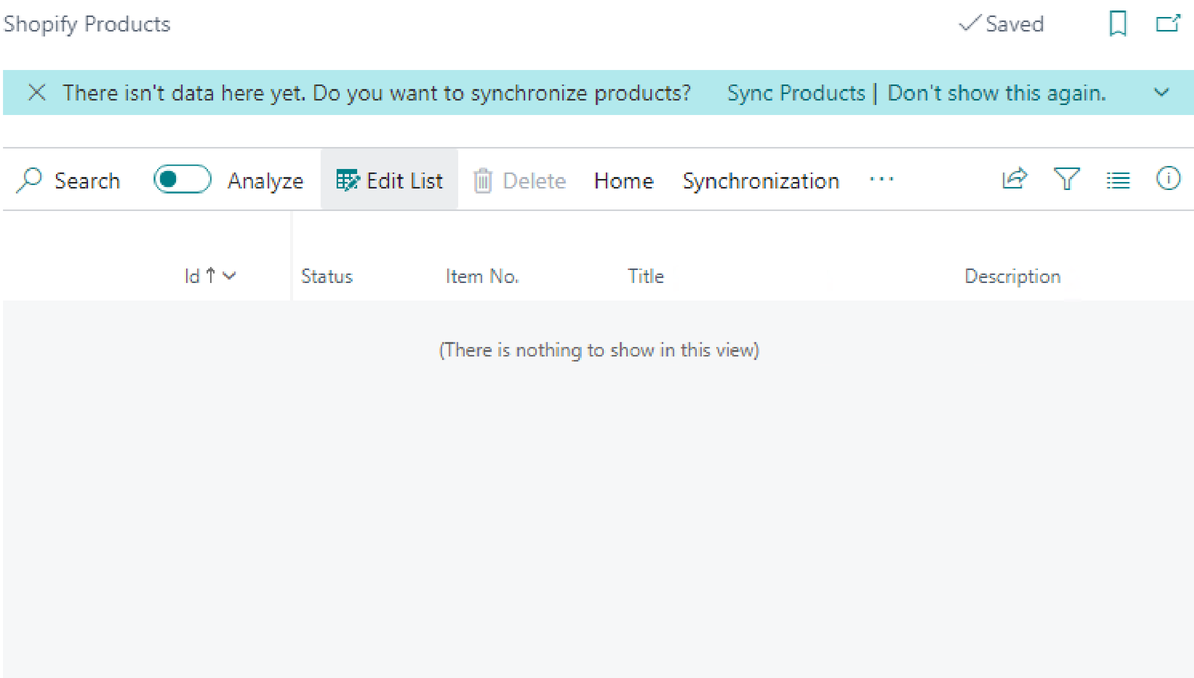
Decide whether fulfilment synchronization should trigger a notification

Send Shipping Notifications lets you control whether Shopify sends a notification when posted shipments synchronize to Shopify. The notification might be useful, for example, if your company sells services.

Guide users on item synchronization

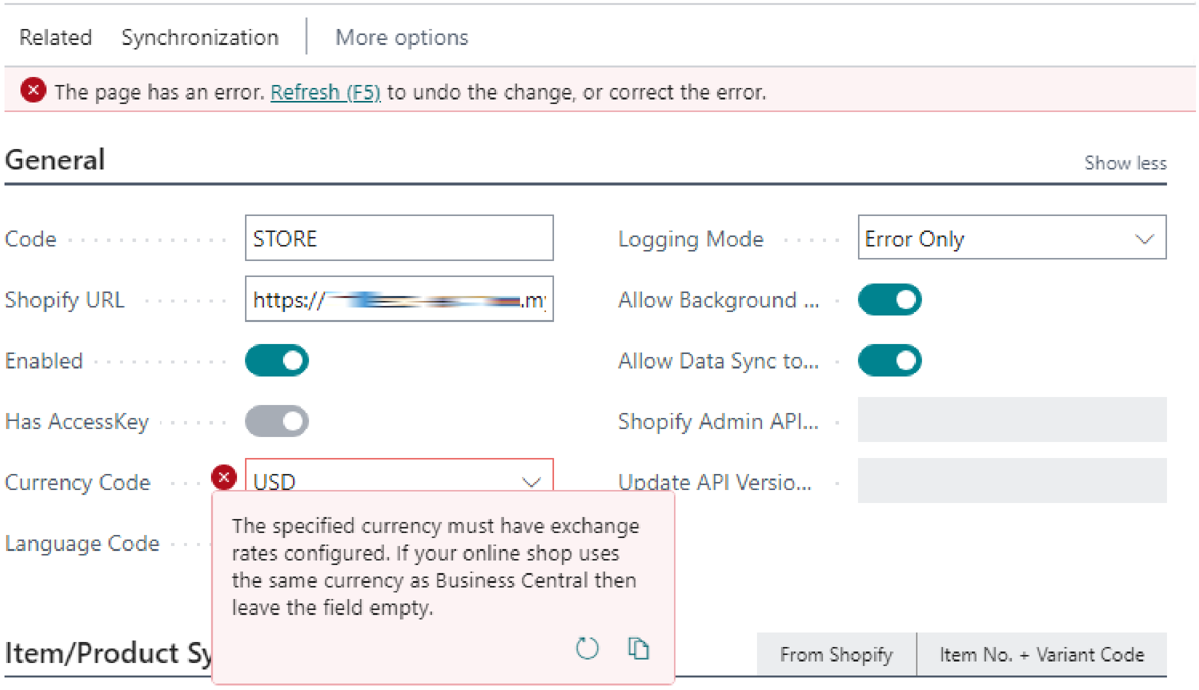
Often, the first task people use the Connector for is to synchronize products and items. To make that synchronization easier, a notification in Shopify Products suggests the following actions based on your settings:

- **Sych products**, if your shop is configured to import products from Shopify.
- **Add Items**, if you manage products in Business Central.



Extra checks reduce the risk of errors

- Check whether the selected currency code is assigned an exchange rate. If the rate is missing, it explains the use of the field.
- Check whether Business Central is part of fulfillment services in Shopify, and instruct users to enter a **SKU Mapping**.



Tell us what you think

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Suggest the next step for sales and production orders

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 8, 2023	✓ Oct 2, 2023

Business value

Improve customer satisfaction by delivering on sales and production orders faster. Business Central monitors the inventory status of the items on orders for you, and suggests the next step accordingly.

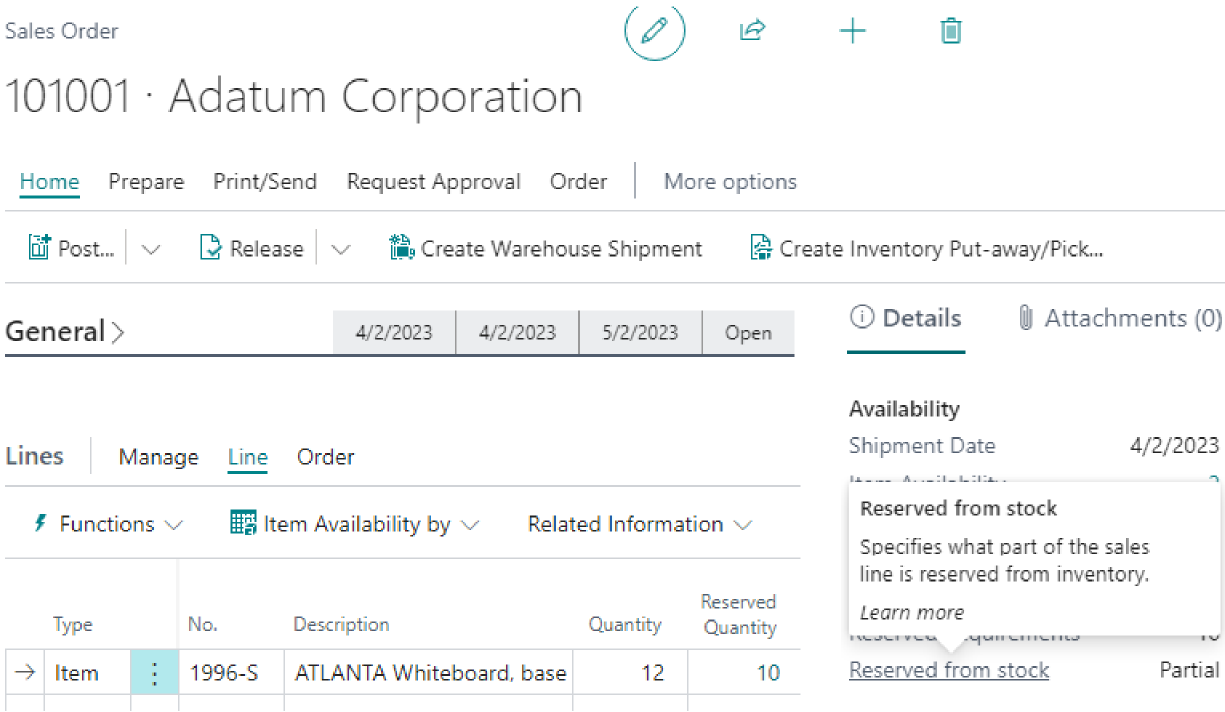
Feature details

Business Central offers a reservation worksheet that can help you reserve and allocate incoming goods in bulk, so you can be sure that quantities are available for your sales and production orders.

Based on the quantities you've reserved in inventory, Business Central displays a status on the documents so that you're quickly aware of the next step. For example, Business Central will indicate that you can ship a sales order or start to work on a job, assembly, or production order. The status also helps reduce the risk of accidental partial shipments or hold-ups due to missing stock for production and assembly orders.

Scenario: A sales person or production planner wants to check the status of a demand document and take the next step, such as post consumption or create a warehouse document

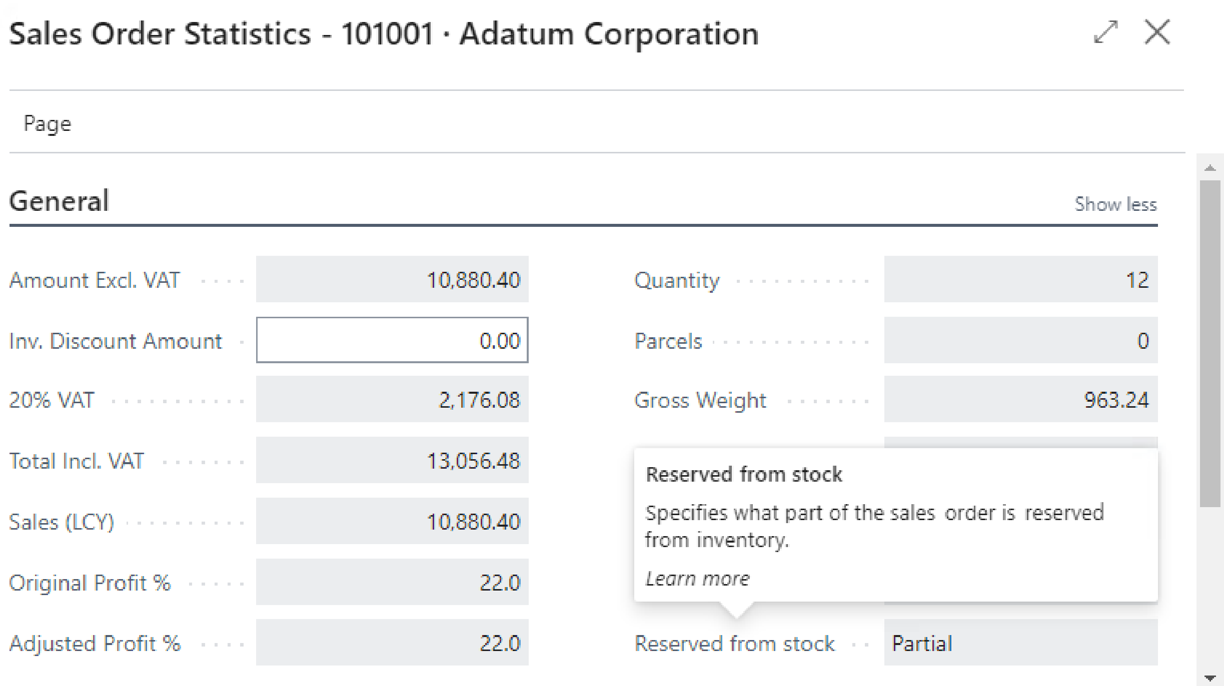
The new **Reserved from stock** field helps them understand whether they can ship or pick for a specific order or order line. For lines, the **Reserved from stock** field is available on FactBoxes. For example, for sales orders it's available in **Sales Line Details**.



The **Reserved from stock** field offers the following options:

- **Full**: The outstanding quantity is completely reserved from on-hand inventory.
- **Partial**: The outstanding quantity is partially reserved from on-hand inventory.
- **None**: The outstanding quantity isn't reserved at all, or it's reserved from other source documents such as purchase orders.

To get information about the status of the entire document, check the **Reserved from stock** field that we've added to the **Statistics** page for the document.



The **Reserved from stock** field can have one of the following values:

- **Full**: Reserved from stock on all lines is set to **Full**.

- **None**: Reserved from stock on all lines is set to **None**.
- **Partial**: All other cases.

Scenario: Documents that are ready for processing move to the next stage automatically

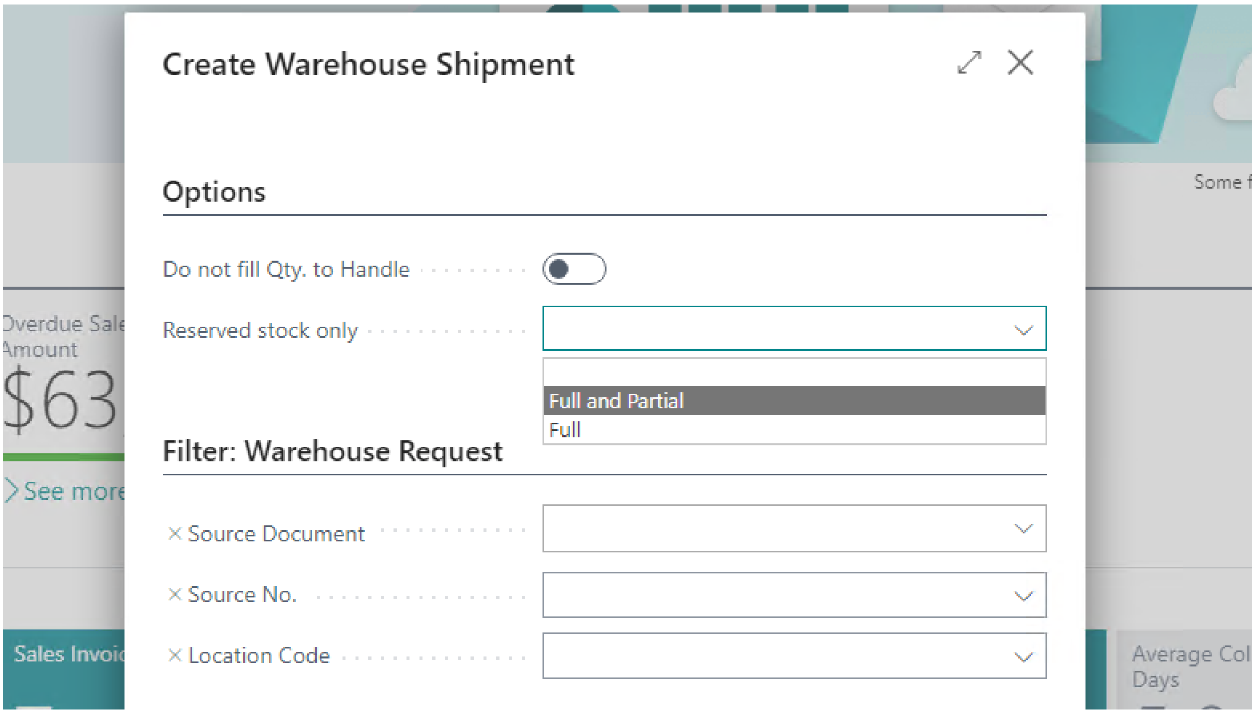
The following combinations are already available:

- The **Default Quantity to Ship** set to **Blank** on the **Sales and Receivables Setup** page.
- The **Sales Reservation Avail.** report that updates the quantity to ship on sales documents that are reserved from inventory.
- The **Batch Post Sales Order** task that can run through documents and post shipments only or also include invoices.

The same combinations are available for purchase return orders and the **Purchase Reservation Avail.** report.

Now, we've also added the **Reserved from stock** field to the following pages and reports:

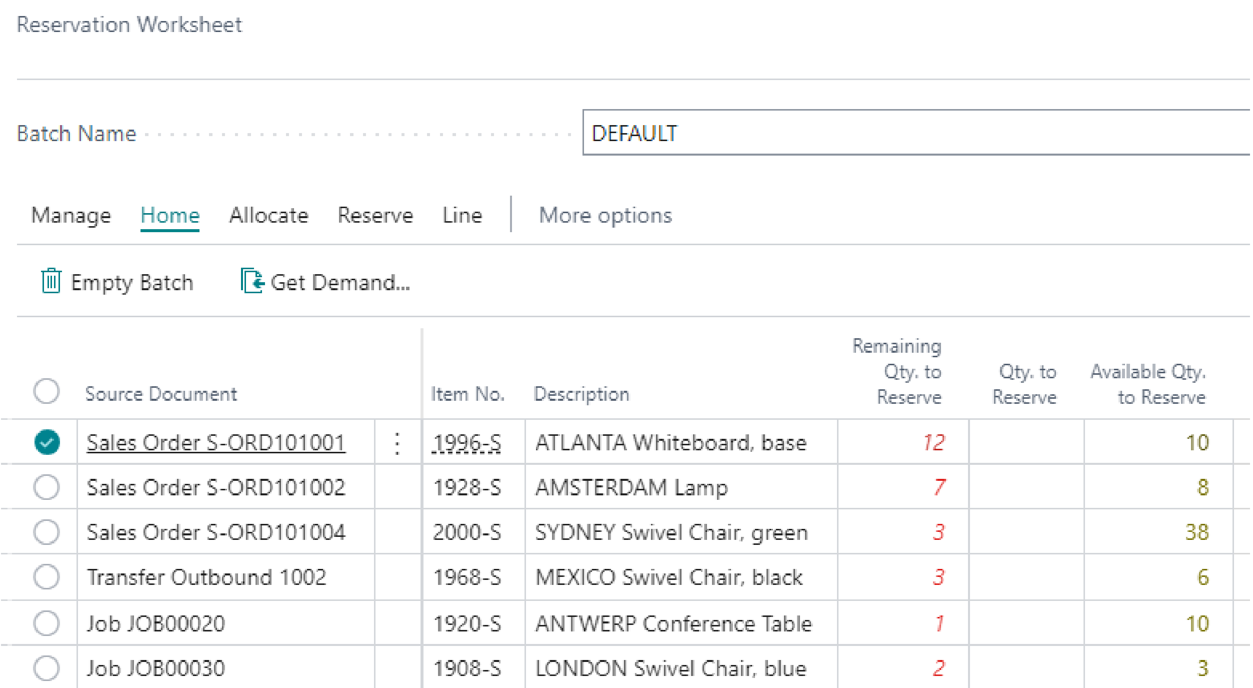
- On the **Create Inventory Put-away/Pick/Movement** report, the **Reserved from stock** filter is on the request page so that Business Central creates inventory picks only for lines where the quantity is available in inventory.
- On the **Create warehouse pick** page that you open from the Pick Worksheets page, the **Reserved from stock** filter is on the request page.
- On the **Create warehouse shipment** page, we've added a new report that you can create shipments in bulk, or schedule them using the job queue. We've also added the **Reserved from stock** filter to the request page.
- On the **Calc. Consumption** page that you open from the **Consumption Journal** page, we've added the **Reserved from stock** filter to the request page.
- On the **Job Calc. Remaining Usage** page that you open from the **Job Journal** page, we've added the **Reserved from stock** filter to the request page.



Scenario: Make reservations from stock in bulk

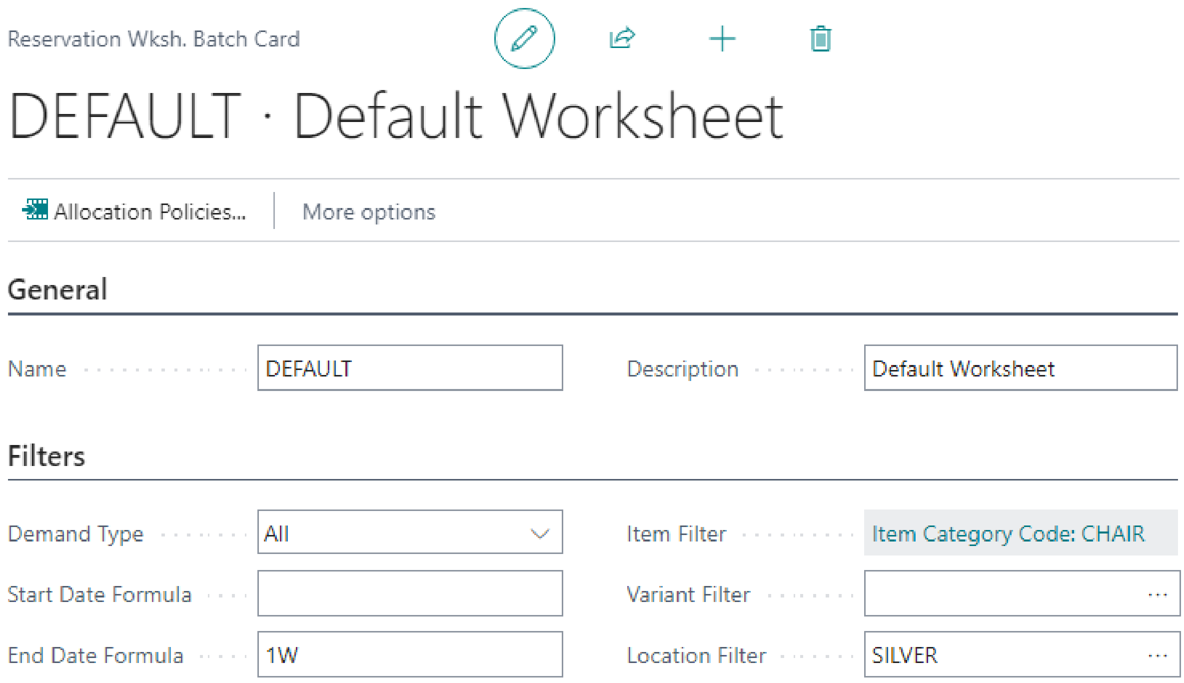
Because the process depends on reservations, we've added a new **Reservation Worksheet** page that can help you reserve in bulk.

Choose the **Get Demand** action, and specify the kind of demand you plan to reserve from available inventory.

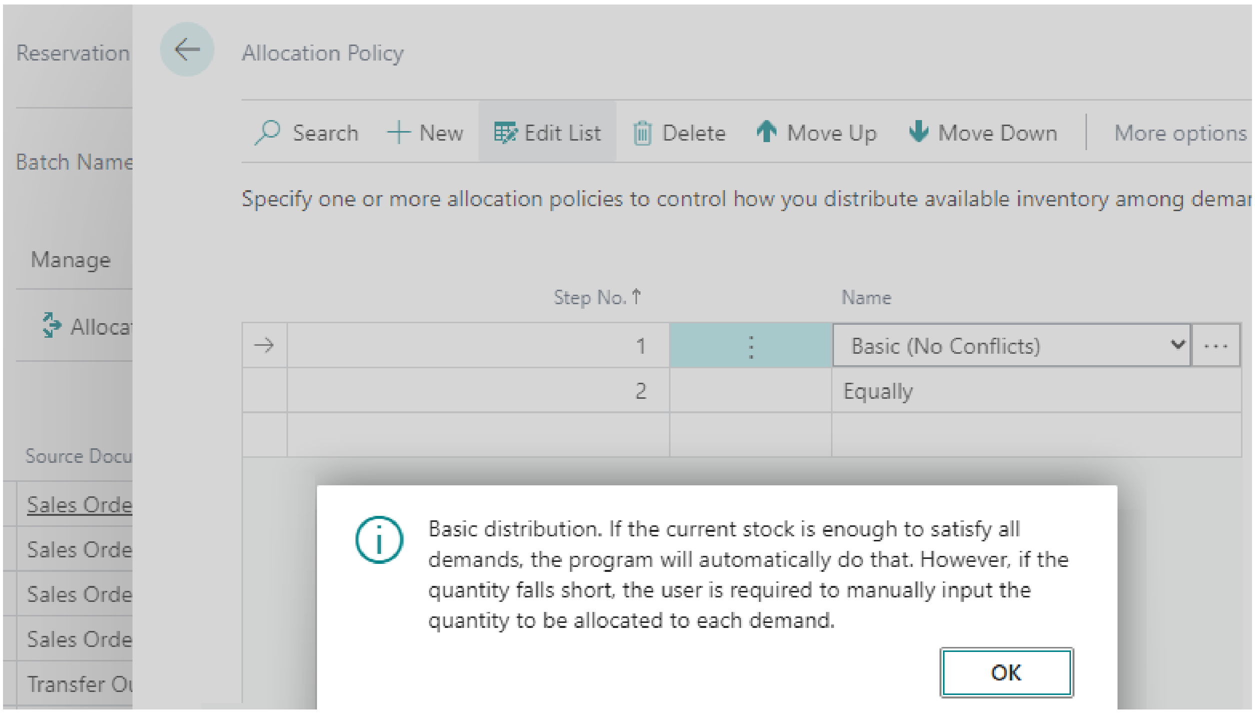


Source Document	Item No.	Description	Remaining Qty. to Reserve	Qty. to Reserve	Available Qty. to Reserve
Sales Order S-ORD101001	1996-S	ATLANTA Whiteboard, base	12		10
Sales Order S-ORD101002	1928-S	AMSTERDAM Lamp	7		8
Sales Order S-ORD101004	2000-S	SYDNEY Swivel Chair, green	3		38
Transfer Outbound 1002	1968-S	MEXICO Swivel Chair, black	3		6
Job JOB00020	1920-S	ANTWERP Conference Table	1		10
Job JOB00030	1908-S	LONDON Swivel Chair, blue	2		3

You can specify filters on the request page, including dates and item categories in the batch of the reservation worksheet. You can have multiple batches for different purposes. For example, you might allocate production orders on a weekly basis but reserve daily for sales.



After you import the demand for which you can reserve stock, you can run the allocation by choosing the **Allocate** action. You can use default allocation policies or combinations of them.



The following are the default policies:

- Basic (no conflicts)
- Equally

Basic

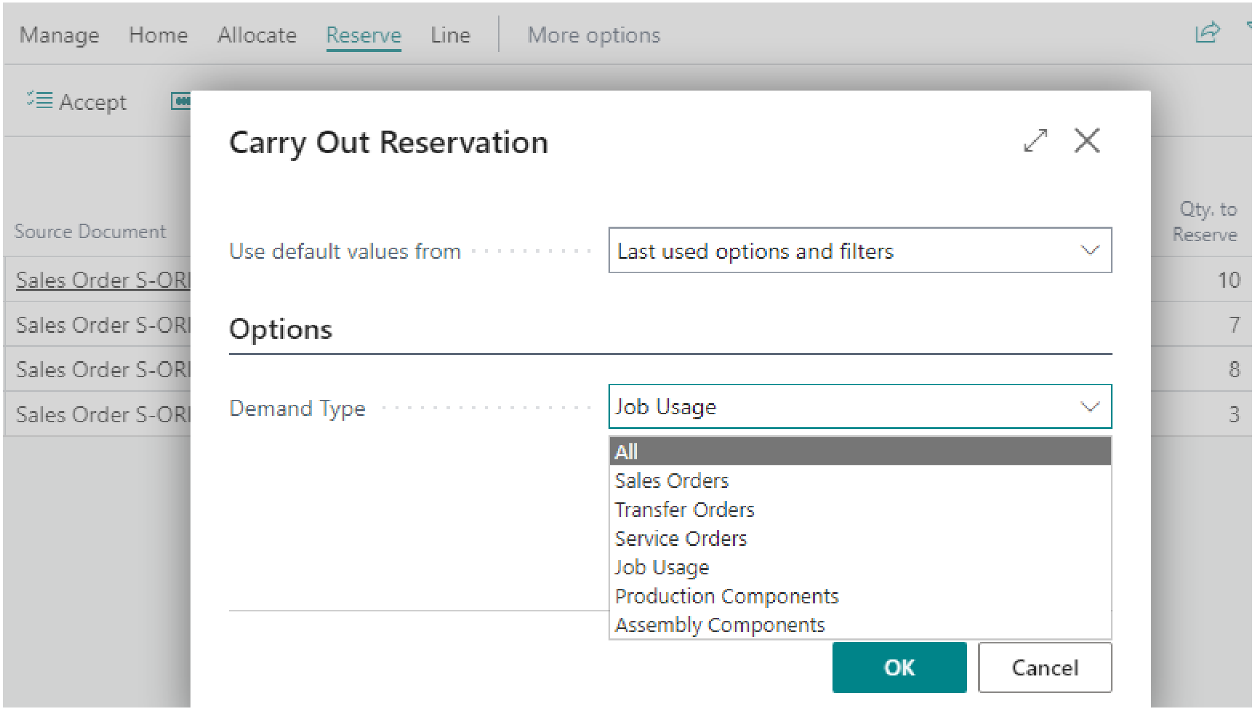
Only allocates stock to a demand if there are no conflicts and the demand can be fully covered. For example, you have a sales order A with a quantity of 10, and a job with a quantity of 7. If you have 20 in stock, both demands receive full quantity. If your stock is 12, then none of demands will get any stock and you must manually allocate the quantity.

Equally

Distributes available stock to demand equally. Let's reuse the example for the Basic allocation. You have a sales order with a quantity of 10, and a job with a quantity of 7. If your stock level is 20, then both demands will receive full quantity. If your stock is 12, then both demands will get 6.

You can edit the suggested allocation. The **Details** and **Customer Statistics** FactBoxes can help you make a decision.

When you're finished, choose the **Make reservation** action and reserve all lines where **Accept** is turned on. You can also specify the type of source documents to reserve. For example, you can process sales orders first and production components later.



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Thank you for your idea

Thank you for submitting this idea. We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Reserve Items (docs)

Sync document and posting dates for sales and purchases

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 8, 2023	✔ Oct 2, 2023

Business value

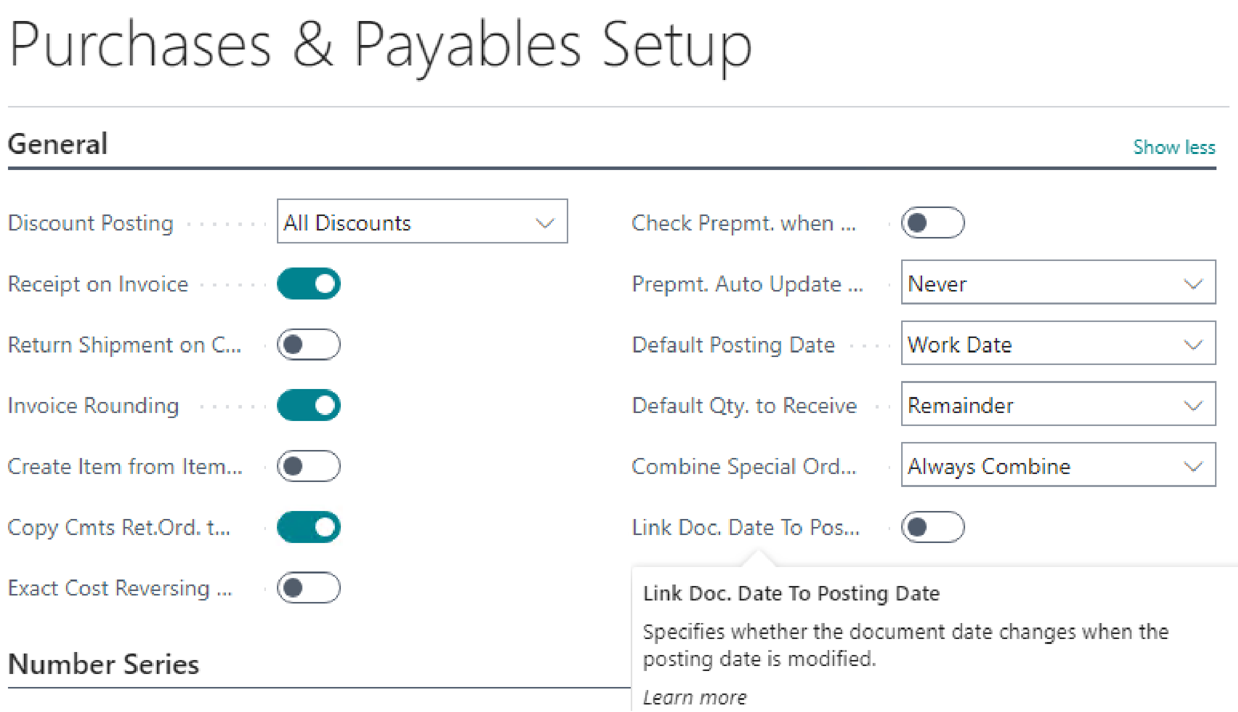
The option to synchronize or decouple document dates and posting dates on sales and purchase documents improves financial accuracy and operational flexibility.

Feature details

To help you comply with accounting standards and ensure accurate financial calculations, sales and purchase documents have date fields that serve different purposes.

- The **Document Date** must align with the date on the sales invoice that you sent to the customer, or with the date on the purchase invoice that you received from your vendor, so that Business Central can correctly calculate finance charges and the amount due.
- The **Posting Date** shows when a document was registered in Business Central. Many accounting standards and regulations require businesses to accurately record and report financial transactions based on the date they occurred.

Depending on your business processes, these dates might not be the same. To give you the flexibility you need, the **Link Doc. Date to Posting Date** setting on the **Sales & Receivables Setup** and **Purchases & Payables Setup** pages lets you configure your sales and purchase processes accordingly.



> ⓘ **Note**
>
> The setting has no impact on the **Sales Journal** and **Purchase Journal**.

In previous versions, changing the posting date always updated the document date. To avoid that, you had to create an extension and subscribe to the event. Now, you can just turn off the new setting. For new environments, the toggle is off by default. If you update a posting date it won't affect the document date.

To make sure that processes for existing customers aren't affected, the **Link Doc. Date to Posting Date** toggle is turned on during upgrade. The extension will continue to work because the event is still there for more advanced scenarios.

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See also

Updating document dates with posting dates (docs)

Troubleshoot Shopify integration issues

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 8, 2023	✔ Oct 2, 2023

Business value

When a business experiences a problem with the integration of their front end—Shopify—and their back end—Business Central, it's important to quickly get to the bottom of the issue. Having different levels of logging reduces the time it takes to resolve a problem with your integration between Shopify and Business Central.

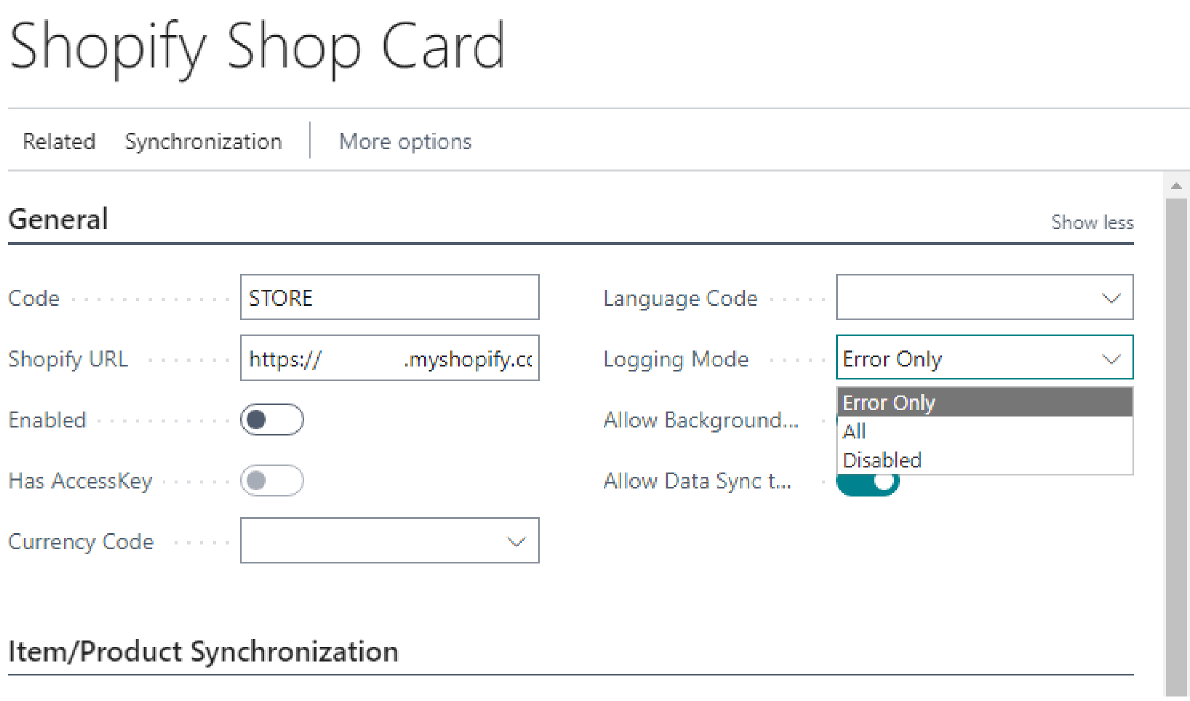
Feature details

Logging

The logging functionality can help you troubleshoot an issue and quickly identify its root cause. On the other hand, overly detailed logs can be difficult to decipher and might consume a lot of space in your database storage. In this release, we've introduced a new logging mode that records only errors.

The new **Logging Mode** field replaces the Log Enabled toggle, and provides the following options:

- **Disabled**: This is the same as turning off the **Log Enabled** toggle.
- **Error Only**: This is turned on by default for new shops.
- **All**: This is the same as turning on the **Log Enabled** toggle.



We've also made a lot of improvements to the **Shopify Log Entries** page.

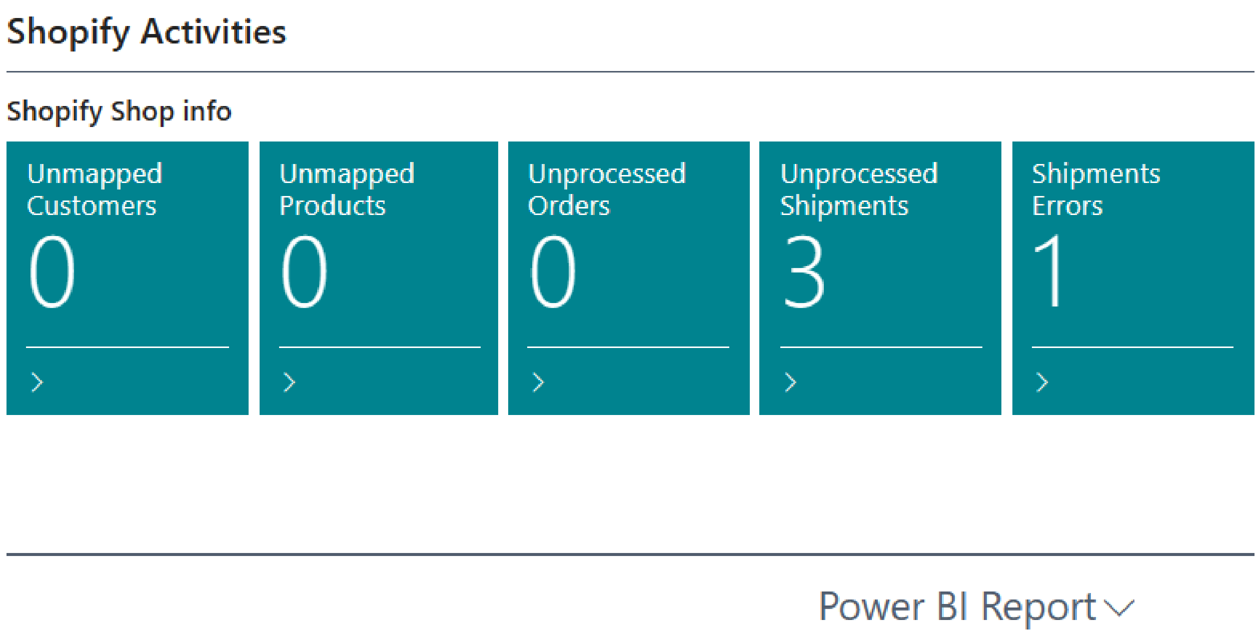
- The **Has Error** toggle indicates whether a request failed completely or if a response contains error details. That information can help you identify failed entries faster when full logging is turned on. Only those entries are saved in the database if your logging mode is set to **Error Only**.
- The **Request Preview** and **Response Preview** fields contain the first 50 characters of the request or response.

The Shopify Log Error Card now contains the **Request ID** field, which helps Shopify support to troubleshoot a specific request.

Troubleshooting of fulfillments

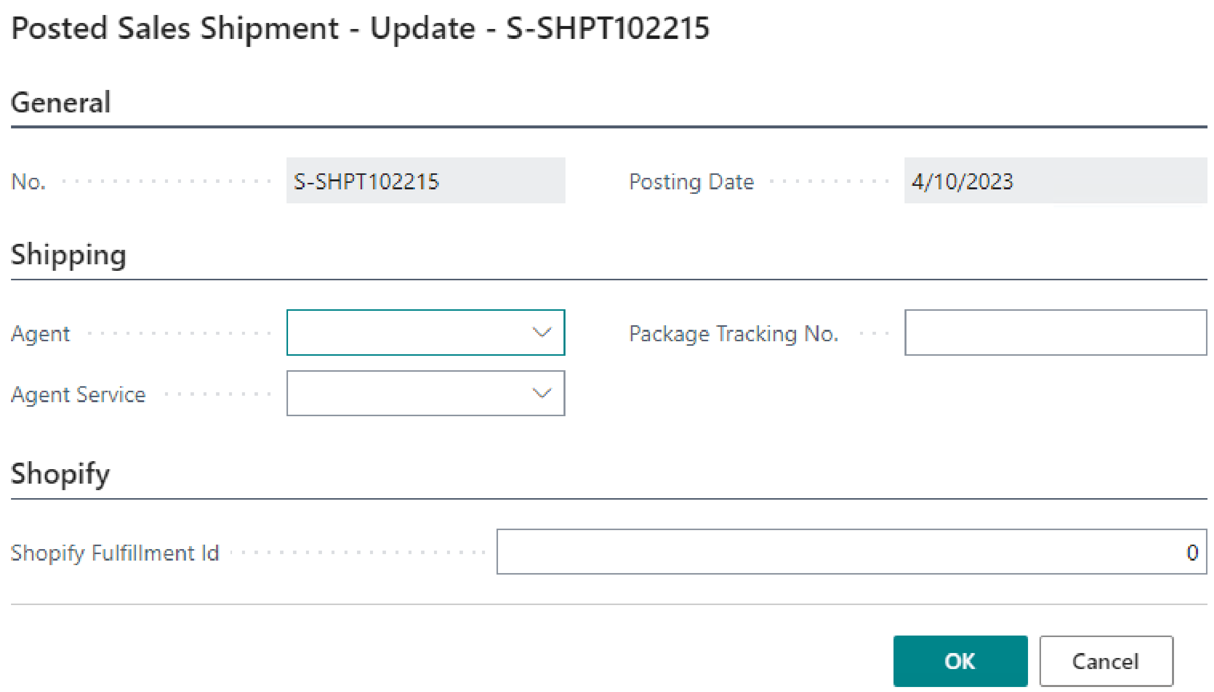
We've updated the **Shopify Activities** part. There are two fields that show the status of shipment synchronization:

- The **Unprocessed Shipments** field specifies the number of posted sales shipments that aren't yet synchronized with Shopify.
- The **Shipments Errors** field specifies the number of posted sales shipments that couldn't be synchronized with Shopify.



For shipments that are linked to a Shopify order, the **Posted Sales Shipment - Update** page displays the **Shopify** FastTab, which lets you:

- Exclude a shipment from the **Sync Shipments to Shopify** routine by entering -1 instead of 0 in the **Shopify Fulfillment Id** field.
- Retry synchronization by entering 0 instead of -1.



You can't modify the **Shopify Fulfillment ID** field if a shipment was successfully processed and the field contains a fulfillment ID.

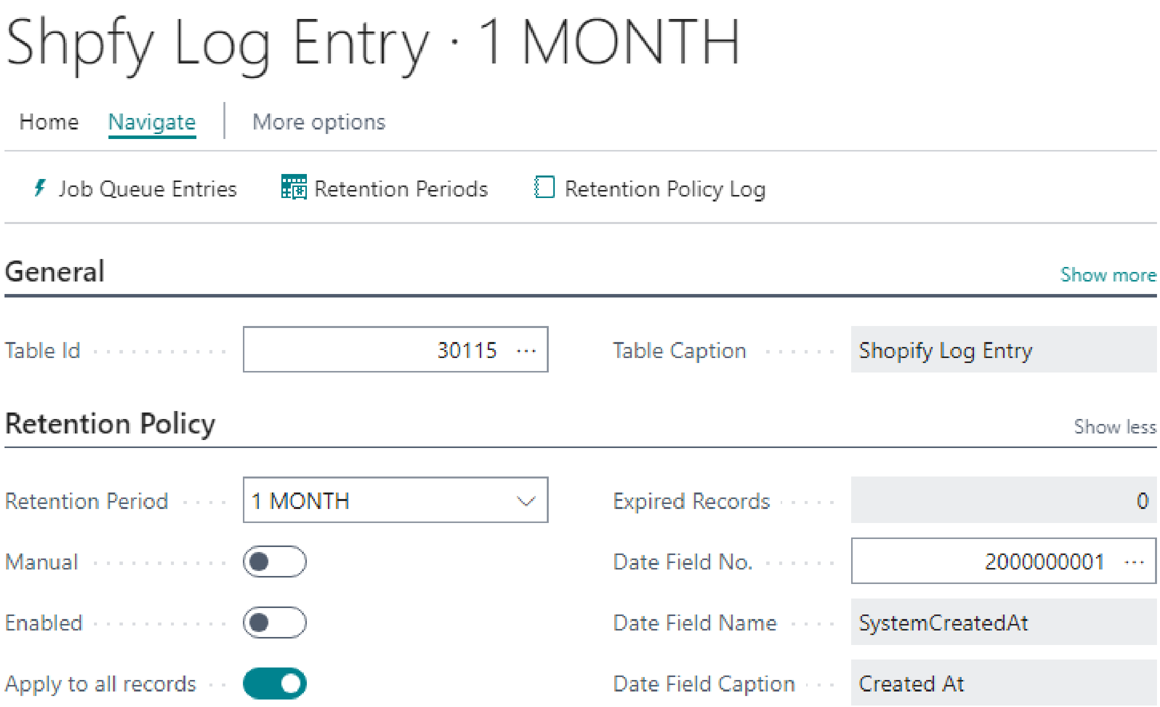
Also, users can now explore data in some internal tables. From the **Shopify Order** page you can:

- Choose the **Fulfillments** action, and then open the **Shopify Fulfillment** page to review details about the processed fulfillment. You can also go to the linked posted sales shipment.
- Choose the **Fulfillment Orders** action, and then open the **Shopify Fulfillment Order** page to check what's left to fulfill.

Finally, we've made the fulfillment logic more reliable, so it's less likely that you'll need these new tools.

Retention policies

To help you keep your database size under control, **Shopify Logs** and **Shopify Data Capture** are included in Define Retention Policies.



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See also

Troubleshooting the Shopify and Business Central Synchronization (docs)

Usability improves for service and projects

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

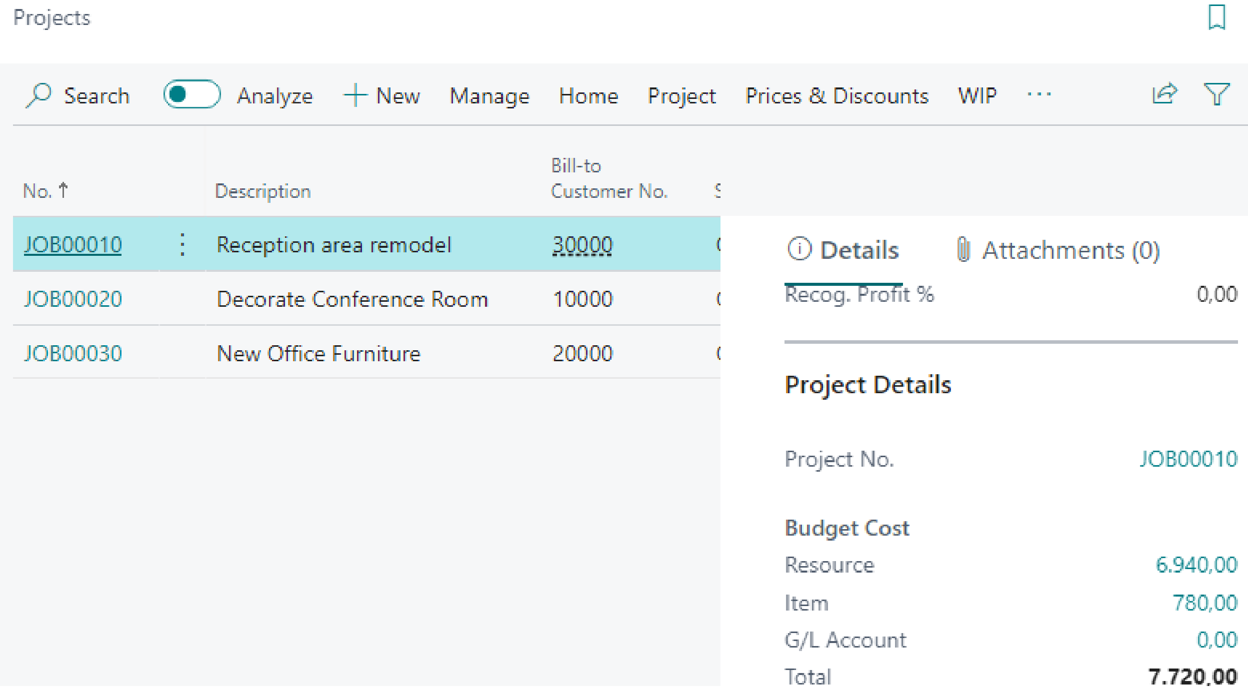
Business value

Productivity increases when processes are easy, so we've improved the usability of several areas within project and service management. For example, you can save a step by automatically releasing source documents, and in several places data is easier to access and digest.

Feature details

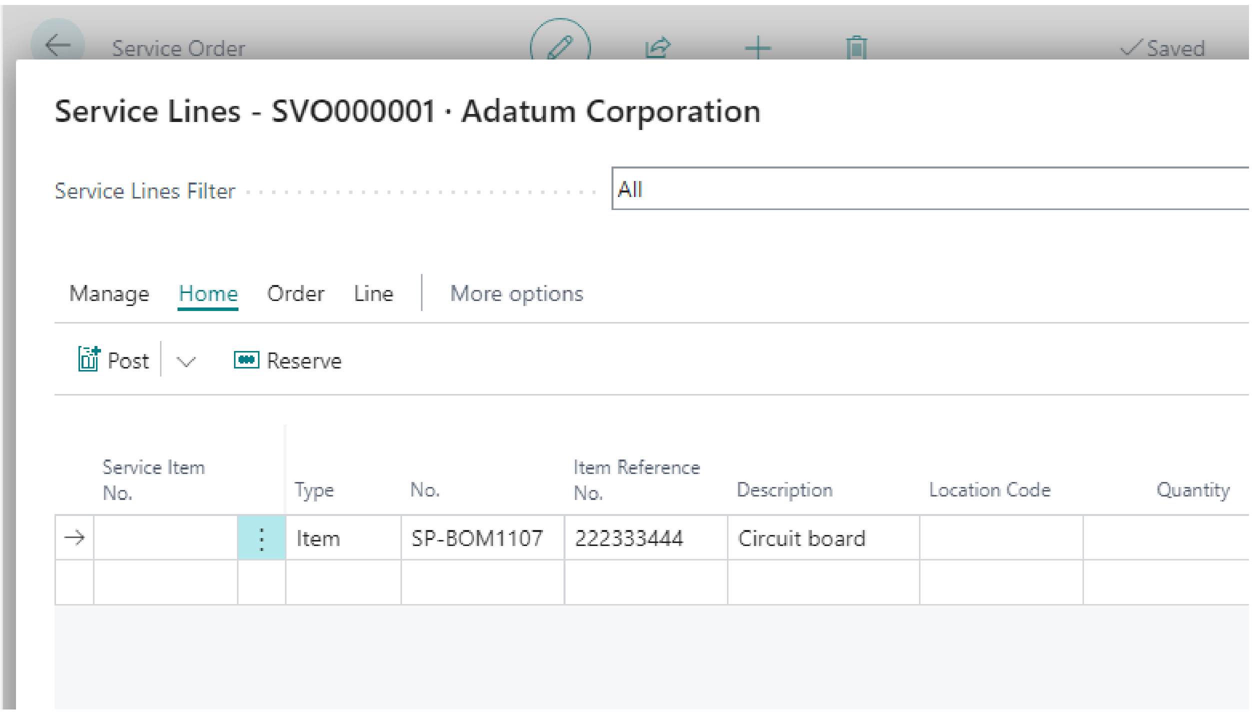
Based on feedback from our customers, we've made it easier to complete several business processes in service management and accounting.

The**PowerBI** and **Project Details** FactBoxes are available on the **Project List** page, so you can access project details from the list. The Power BI content that's currently available isn't changed.



The **Item Reference No.** field is available on the following tables and pages:

- table 5902 **Service Line**
- page 5934 **Service Invoice Subform**
- page 5936 **Service Credit Memo Subform**
- page 5906 **Service Item Worksheet**
- page 5905 **Service Lines**

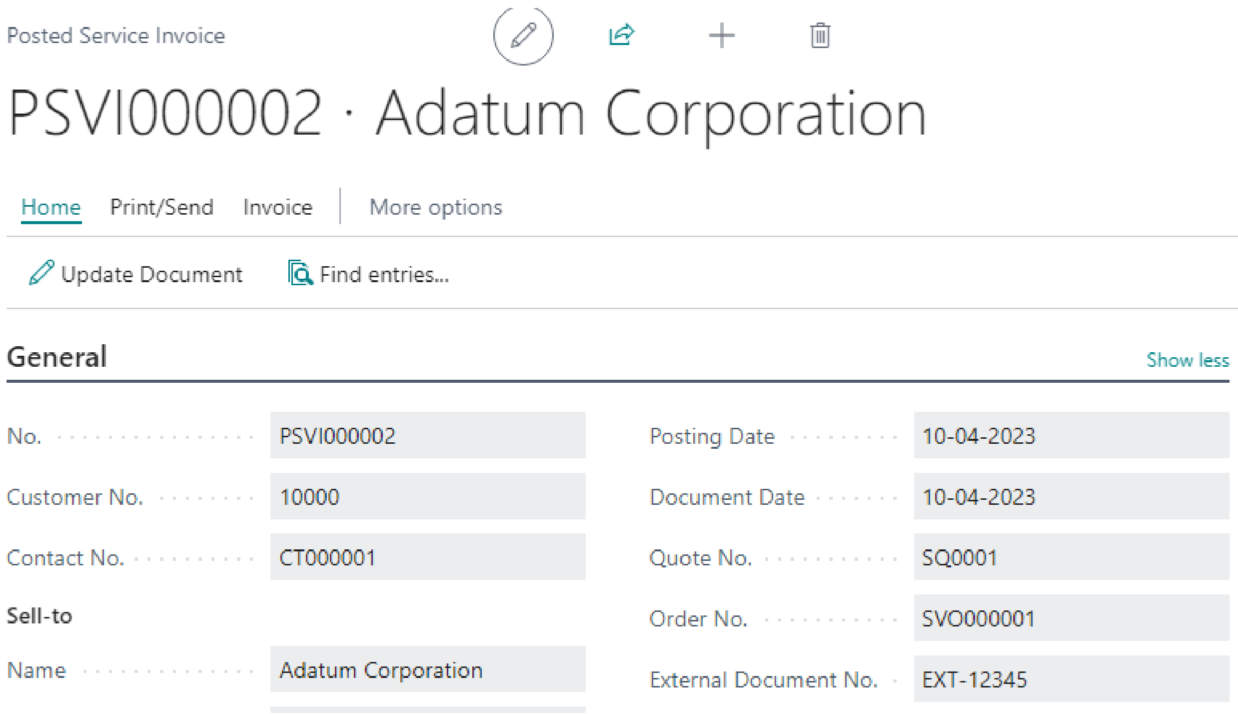


ⓘ **Note**

The lookup shows only item references with the reference type **blank**, but validation also recognizes the reference type **Barcode**. This is similar to sales and purchase documents.

To give you better insight into the services you're providing to your customers, you can add more columns to service documents:

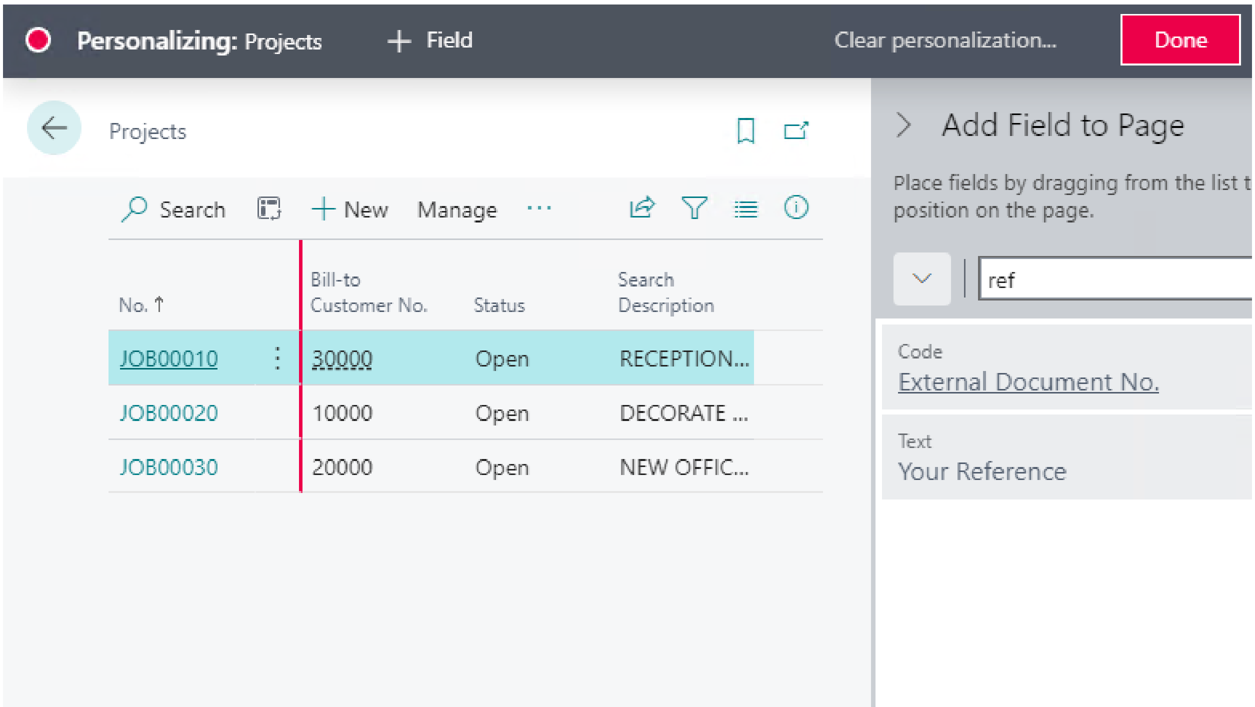
- **Quote No.** on posted services documents, such as posted service credit memos and invoices.
- **Bill-to Name** and **Sell-to Name** fields are available in the service contract list.
- **External Document No.** in service documents, service orders, credit memos, invoices, quotes, posted service invoices, shipments, credit memos, and service ledger entries. This data is passed to general ledger entries. If an external document number isn't specified, Business Central uses the original service document number when you post to the general ledger.



ⓘ **Note**

The **External Document No.** already exists in the Norwegian localization, so it will stay in the local range. For other localizations, the field is added to the W1 range.

Also, you can add the **External Document No.** or **Your reference** columns to the project list.



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Usability improves for warehouse and inventory

Article • 10/11/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 8, 2023	✓ Oct 2, 2023

Business value

Productivity increases when processes are easy, so we've improved the usability of several areas within inventory and warehouse management. For example, you can get help to create warehouse employees, and in several places data is easier to access and digest.

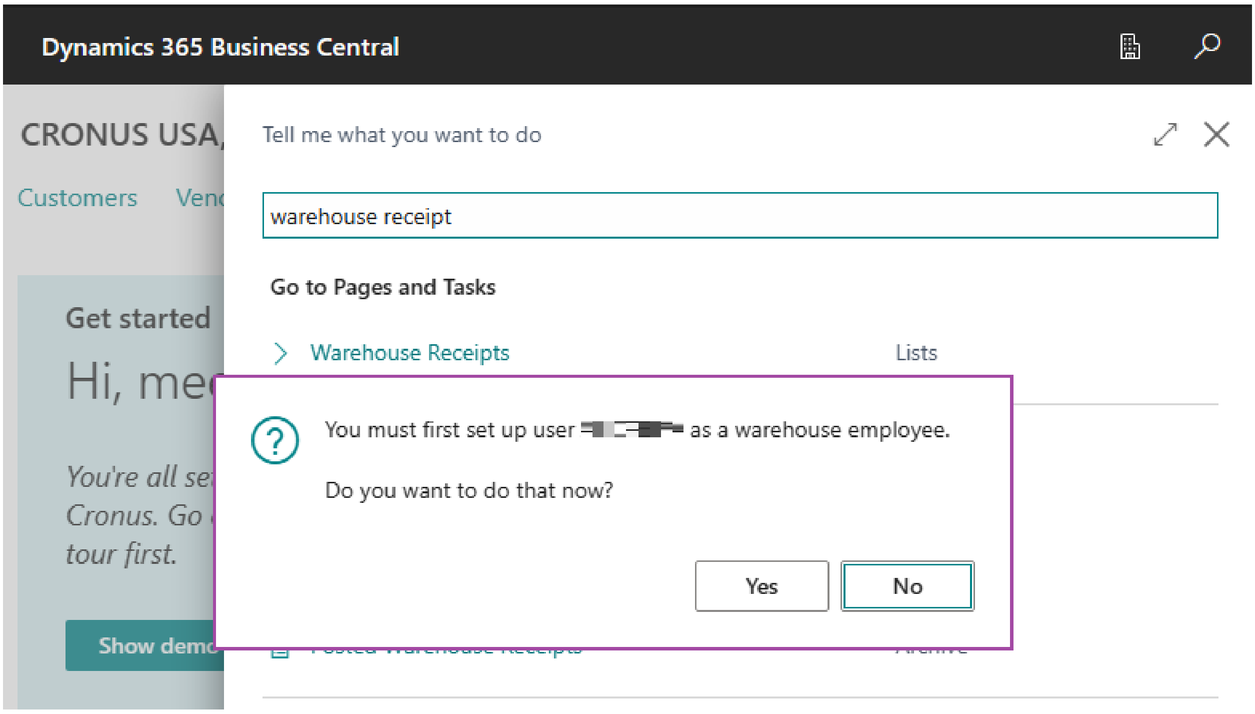
Feature details

Based on feedback from our customers, we've made it easier to complete several inventory and warehouse processes.

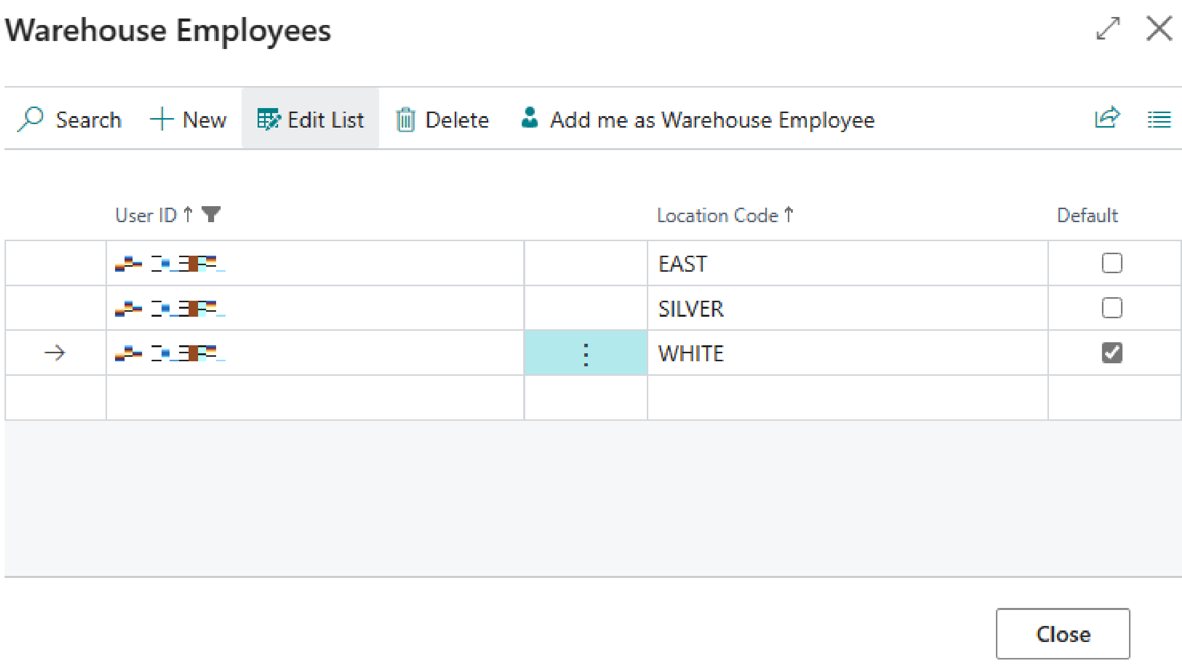
Create warehouse employees during testing and presale

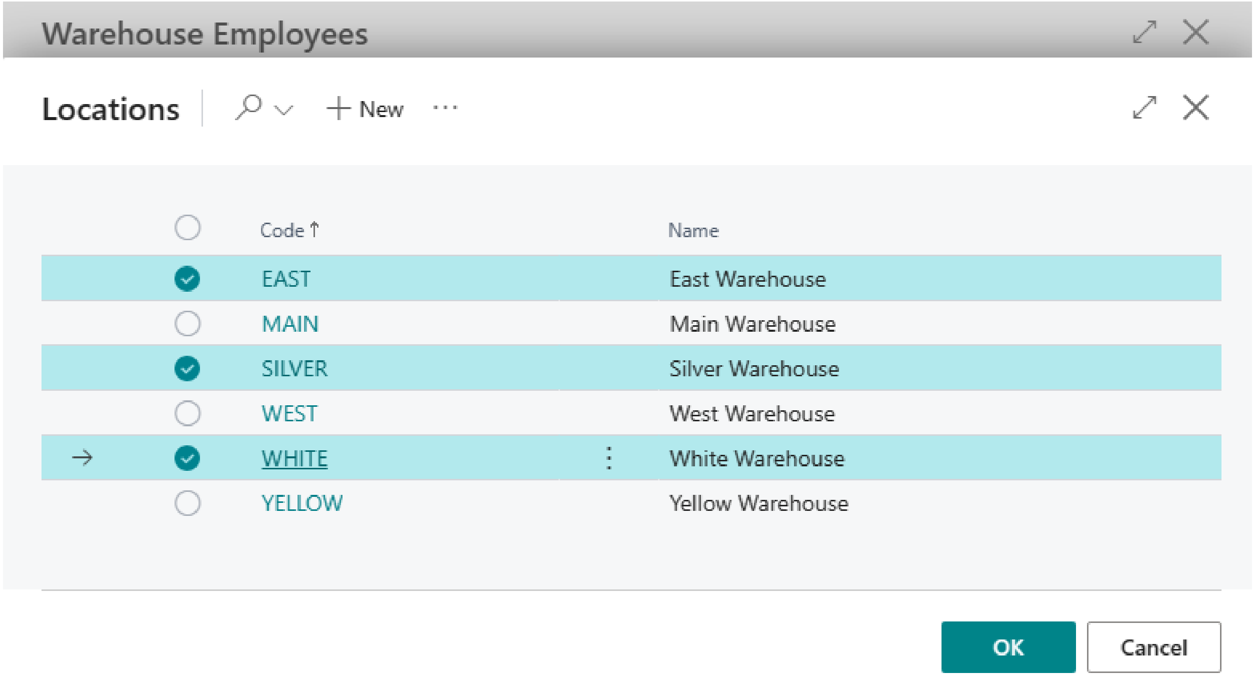
Each user who performs warehouse activities must be set up as a warehouse employee and assigned to a default location, and potentially more non-default locations. This setup filters all warehouse activities across the database to the employee's location so that they can only perform activities at their assigned locations.

During testing or presale activities, you may run into scenarios where Business Central checks whether a warehouse employee record exists for a user. If the warehouse employee record is missing for the user, and the user has the right permissions, Business Central will suggest that you create a warehouse employee without interrupting your flow.



On the Warehouse Employees page, you can add a location for the user. Alternatively, you can choose the **Add me as warehouse employee** action and select one or more locations. The page is filtered for the current user, so the **User ID** field will be filled in automatically.

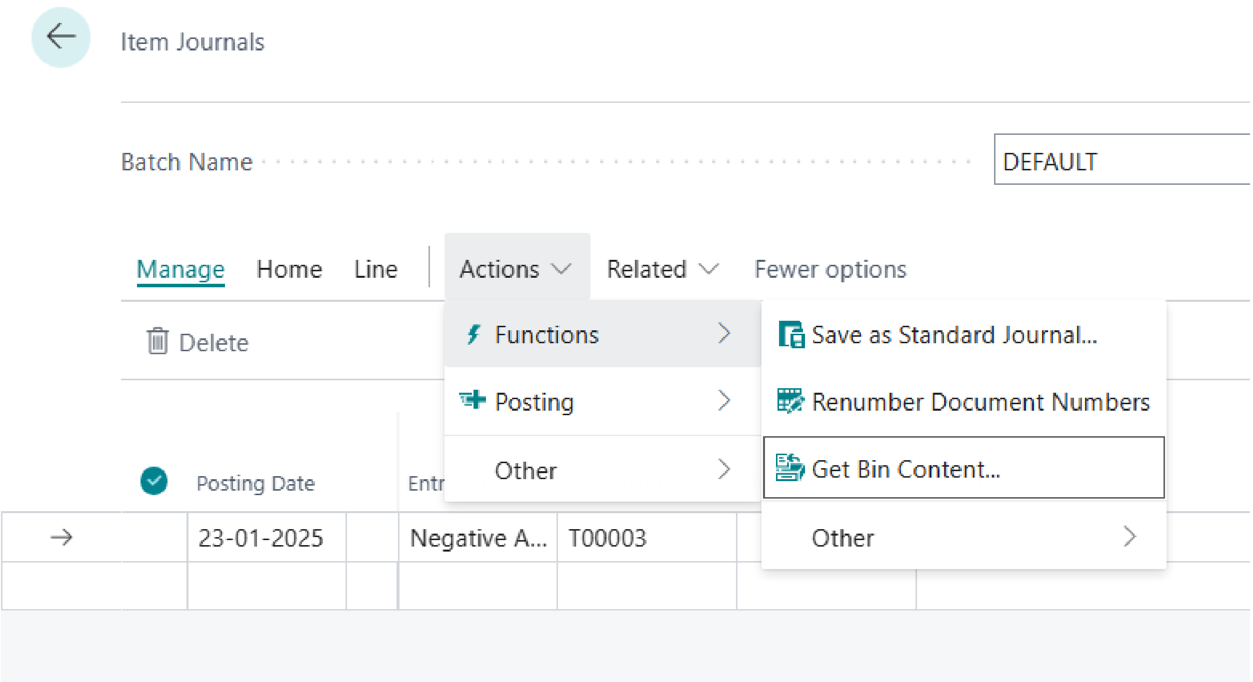




For users who don't have permission to add warehouse employees, the behavior is unchanged. Business Central will stop the flow and notify the user that a warehouse employee record is missing. They'll need to contact their administrator to get unblocked.

Create item journal lines based on the actual contents in a bin

On the **Item Journal** page, you can use the **Get Bin Content** action, and then specify filters to calculate the contents of bins and create a journal line for each bin content. The line includes information such as the bin number, item number, and quantity.

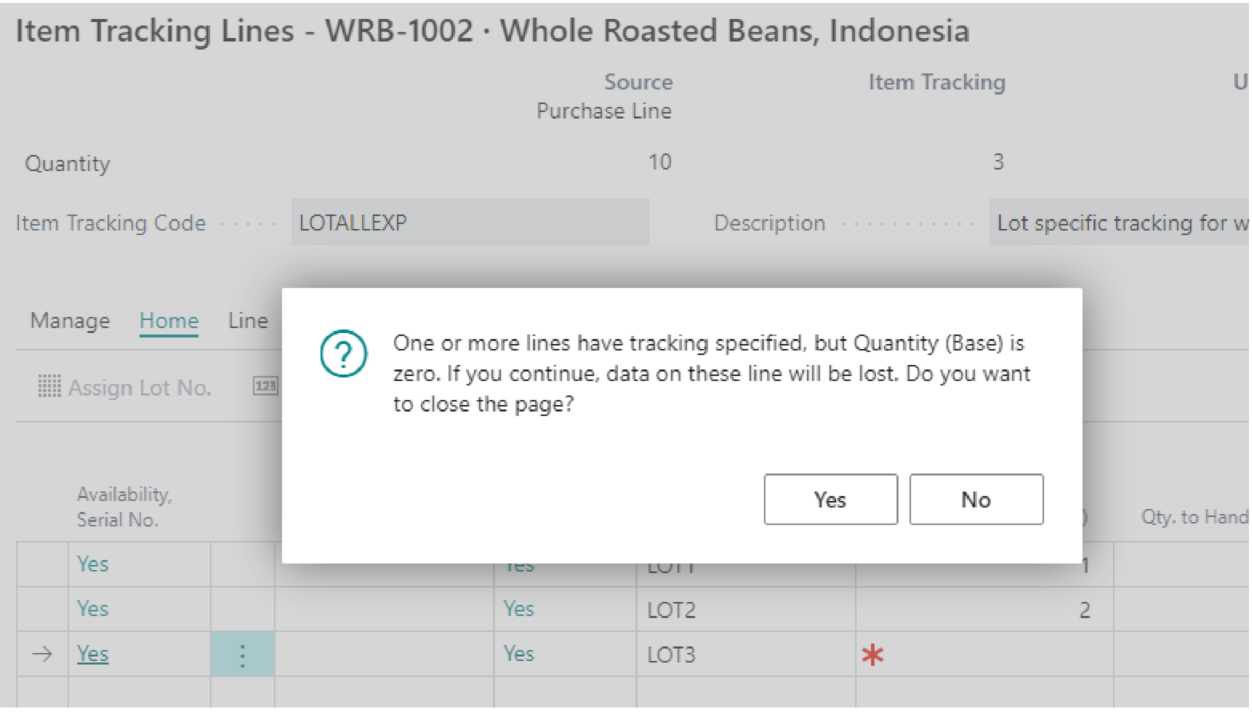


All fields on item template are considered when you convert a catalog item

Catalog items are items that you don't manage in Business Central until you sell them. When you use the **Select Catalog Item** action to add a catalog item to a line on a sales order, blanket sales order, or quote, the catalog item is converted to a regular item. You can use templates to standardize settings when you create new records. For example, templates help ensure that settings for posting and reporting are correct, so that productivity isn't interrupted when people enter data. In this release, all fields are used when converting a catalog item, including the **Critical**, **Include Inventory**, or **Indirect Cost** fields.

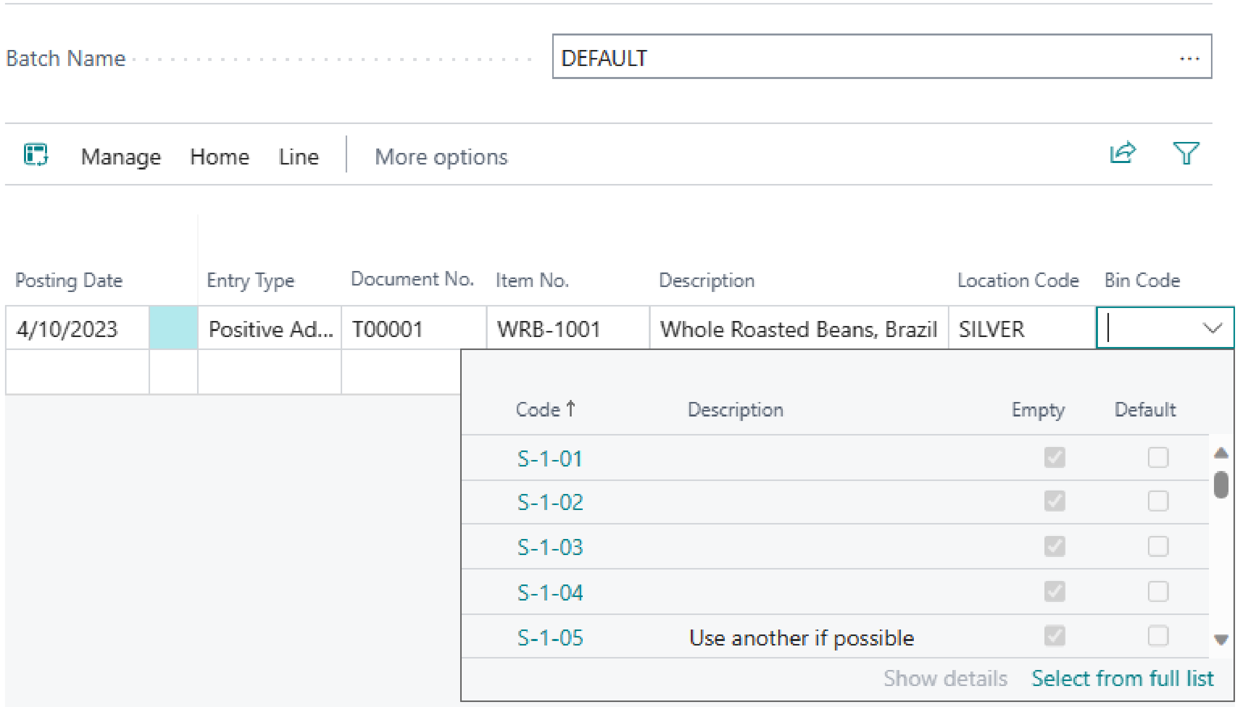
Get a warning if the Quantity (Base) is missing on item tracking lines

If you close the **Item Tracking Page** with one or more lines where a lot or serial number is specified, but the **Quantity (Base)** isn't, a warning message will inform you that you'll lose these lines.



Descriptions of warehouse bins are now part of a field group

You can access descriptions of bins in field lookups, without having to open the full list. Fast access to descriptions can give you the opportunity to make quick adjustments to your warehouse processes. For example, if there's something wrong with a bin, you might add a tip for warehouse employees that they should use another bin.

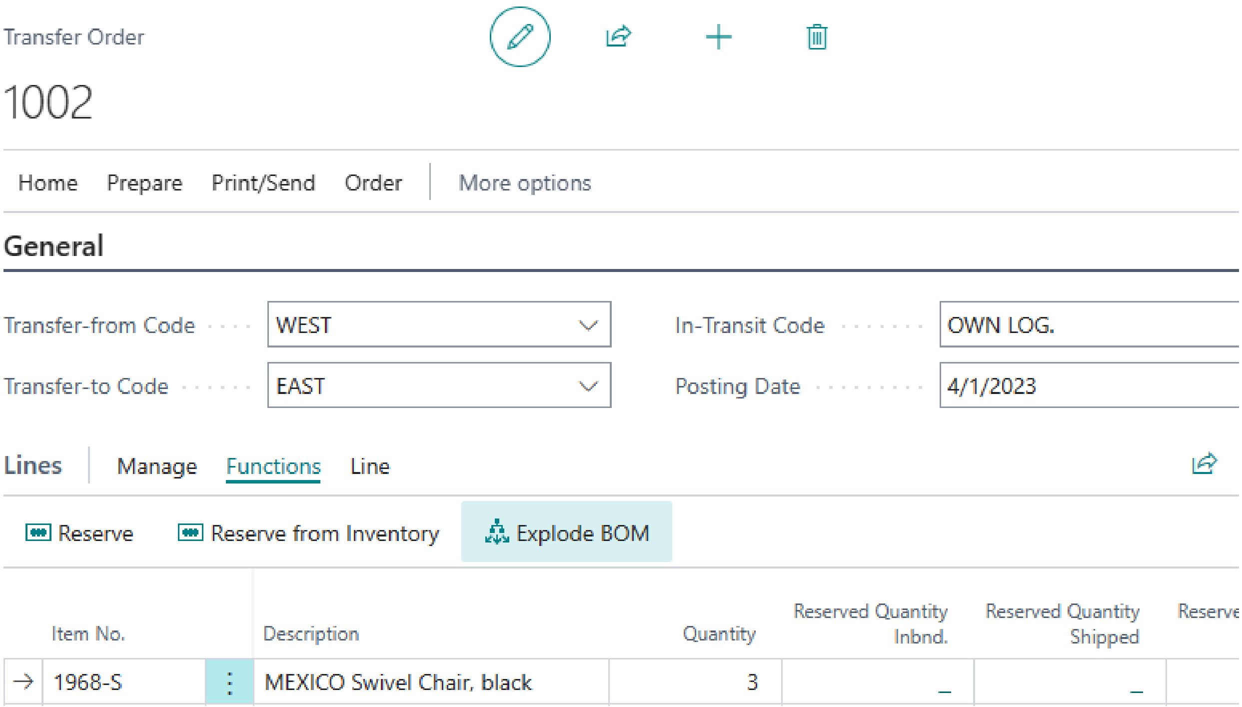


Preview Posting is now available for warehouse receipts and warehouse shipments that include multiple source documents

The **Preview Posting** action helps you avoid mistakes by giving you the chance to review the types of entries that you'll create when you post journals or documents. If you find a mistake, you can fix it before you post. In a previous release, we added posting preview to more types of inventory and warehouse documents and journals. Now, posting preview is also available for warehouse receipts and shipments that contain more than one source document.

Explode assembly bill of material is now available in transfer orders

In addition to sales and purchase documents that contain an assembly item, you can now use a special function on transfer orders to replace the line for the assembly item with new lines for its components. This function is useful, for example, if you want to move the components as a kit that represents the assembly item.



> ⓘ **Note**
>
> When you use the Explode BOM function, you cannot easily undo it. You must delete the document lines representing the components and then re-enter a document line for the assembly item.

1. Open a transfer order that contains a line for an assembly item.
2. Choose the line for an assembly item, then select the **Explode BOM** line action.
3. All fields on the transfer order line for the assembly item are cleared except for the Item and Description fields.

> ⓘ **Note**
>
> Resources are not supported on transfer orders, so these lines aren't included.

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Thank you for your idea

Thank you for submitting this idea:

- Better Warehouse Employee Error

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Set Up Warehouse Employees (docs)

Use a new role center for collection management

Article • 03/26/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2024	To be announced

Business value

Collection management tasks center on customers and posted documents, and typically involve creating and sending reminders, statements, or other related documents. Information that's important for collection managers is gathered on a modernized version of the Accounts Receivable Administrator Role Center.

Feature details

The Accounts Receivable Administrator Role Center collects the information you need for collections. The Role Center has wide cues, cues and lists, an updated menu, and an embedded actions menu.

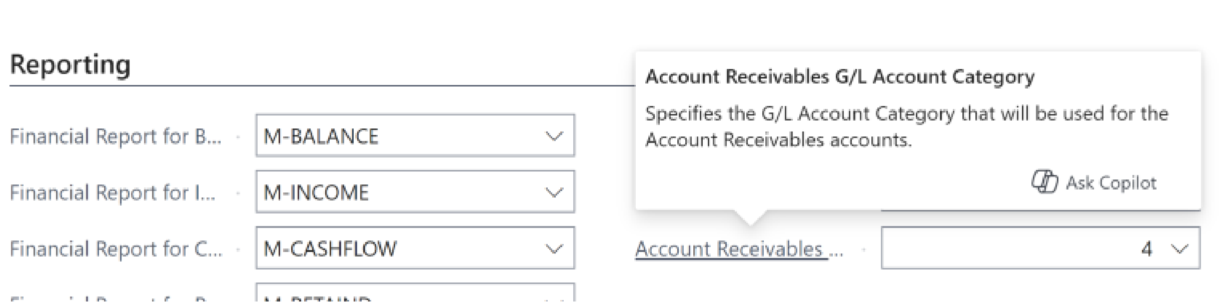
To explore the Role Center, on the **My Settings** page, in the **Role** field, choose **Account Receivables Administrator**.

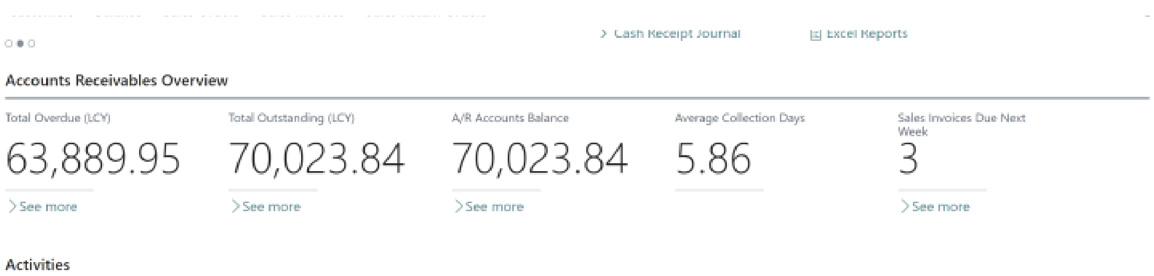
The Role Center has two wide cues that help you quickly validate and reconcile account receivables balances.

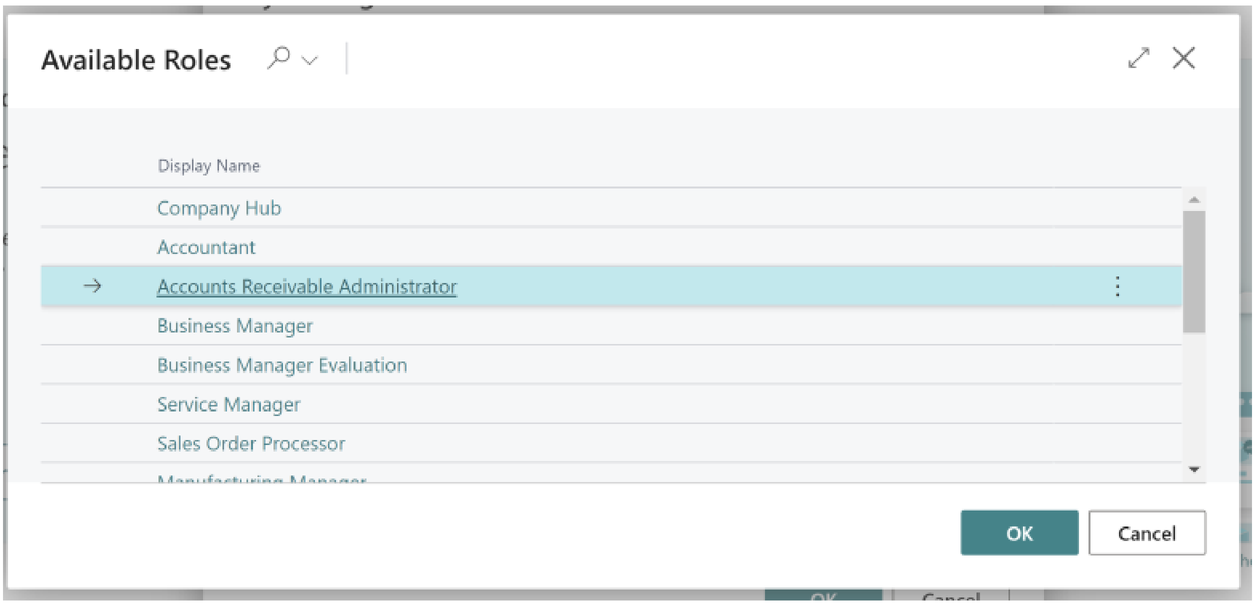
- **Total Outstanding (LCY)** shows the outstanding balance of unpaid invoices in your local currency, so you can investigate invoices.
- **A/R Accounts Balance** shows the balance on the G/L accounts that are assigned to the **Account Receivables** account sub-category.

To use the wide cues, there's some setup to do. You must specify the account category that represents account receivables. On the **General Ledger Setup** page, in the **Account Receivables G/L Account Category** field, select the category. In a US demo company, it's category '4', but that might differ across companies or if you have custom account categories.

> ⓘ **Note**
>
> If you don't use account categories in your chart of accounts, or if you post directly to account receivables accounts instead of using posting groups, it probably won't make sense to use the **A/R Accounts Balance** cue. If you want, you can personalize the Role Center to hide it.







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Use currencies when posting employee transactions

Article • 11/15/2023

ⓘ Important

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

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

Business value

You can use general journals for employee accounts to register employee expenses and reimbursement transactions in foreign currencies, and then easily track the amounts and compare them to receipts. Leave your calculator in your desk drawer—Business Central can adjust the exchange rate for you.

Feature details

When you use general journals to post transactions for employee accounts, such as when you reimburse expenses, you can use the **Currency Code** field to specify the currency for the transactions. Specifying a currency lets you use the same features as when you register transactions in the customer and vendor ledgers. For example, employees can register an expense in euros but get paid in dollars.

To ensure that the exchange rate for the amounts is up to date, you can adjust employee balances when you run the currency exchange rate batch job. If you want to use the exchange rate table, but settle employee balances in your local currency, you can exclude employee accounts when you adjust exchange rates.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Use deferral codes in purchase and sales journals

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

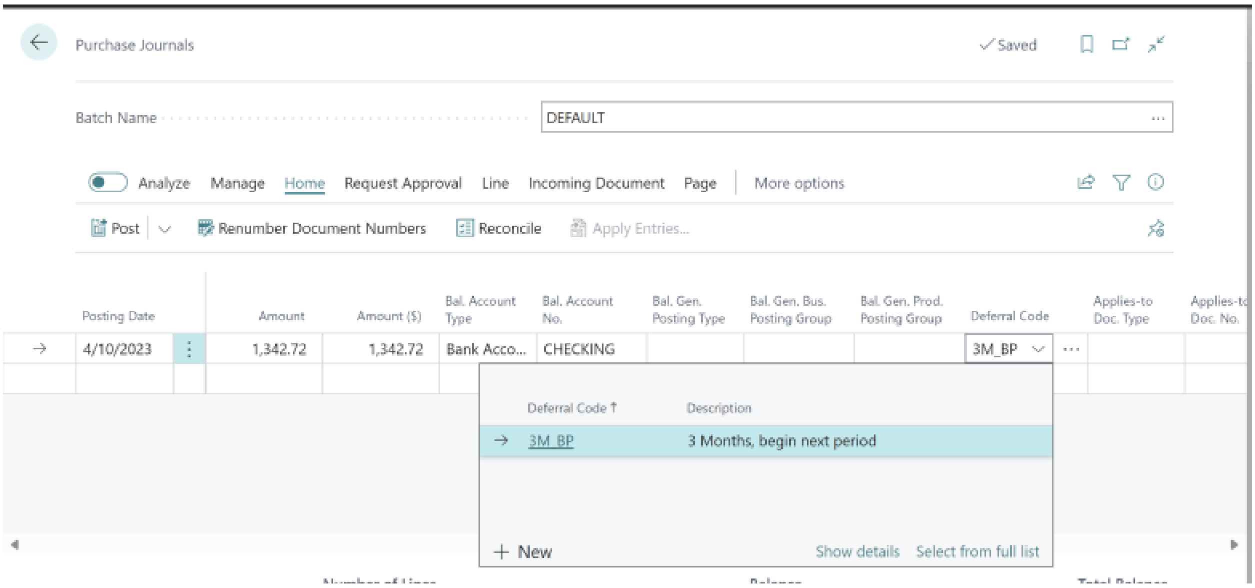
Business value

Entering sales and purchase journals is sometimes associated with data entry for transactions that require deferrals. The process of entering data is smoother because you can specify a deferral code on sales and purchase journals, without having to create a general journal.

Feature details

You can set a deferral code on sales and purchase journal lines, which allows you to post deferral transactions while you work in these journals. Deferral works the same way on sales and purchase journals as it does for general journals. To learn more about deferrals, go to Defer Revenue and Expenses.

Note that sales and purchase journals validate the source code. The validation requires that the source code for sales and sales journals, and purchase and purchase journals respectively, aren't identical when you're using deferrals. If it's set up to be identical, to work around this limitation you can create a template and batch that uses another source code.



Tell us what you think

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Use different general ledger accounts for payables, receivables

Article • 10/09/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Sep 6, 2023	✓ Oct 2, 2023

Business value

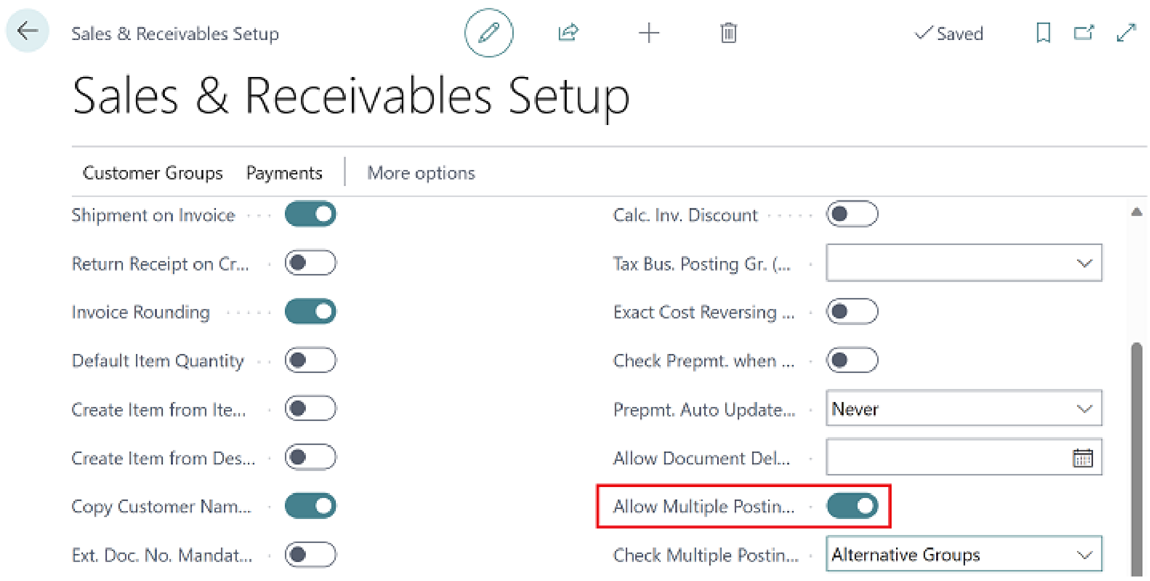
Sometimes businesses want to post payable and receivable transactions to a different general ledger (G/L) account than the one that's specified on the customer or vendor posting group. For example, in a case where a transaction is for a bad debt. Controllers can define policies for posting these nonstandard transactions, and accountants can change them during posting.

Feature details

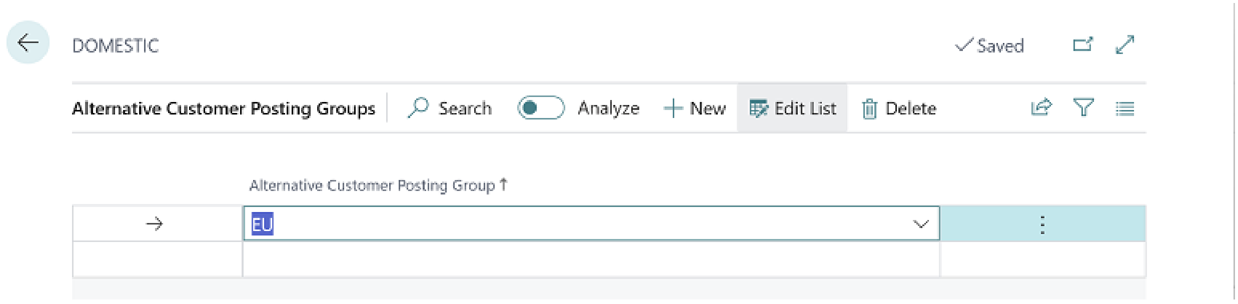
You can let people change the default customer or vendor posting groups by turning on the **Allow Multiple Posting Groups** toggle on the following pages:

- For customer posting group changes, turn on the toggle on the **Sales and Receivable Setup** and **Service Mgt. Setup** pages.
- For vendor posting group changes, turn on the toggle on the **Purchases and Payables Setup** page.

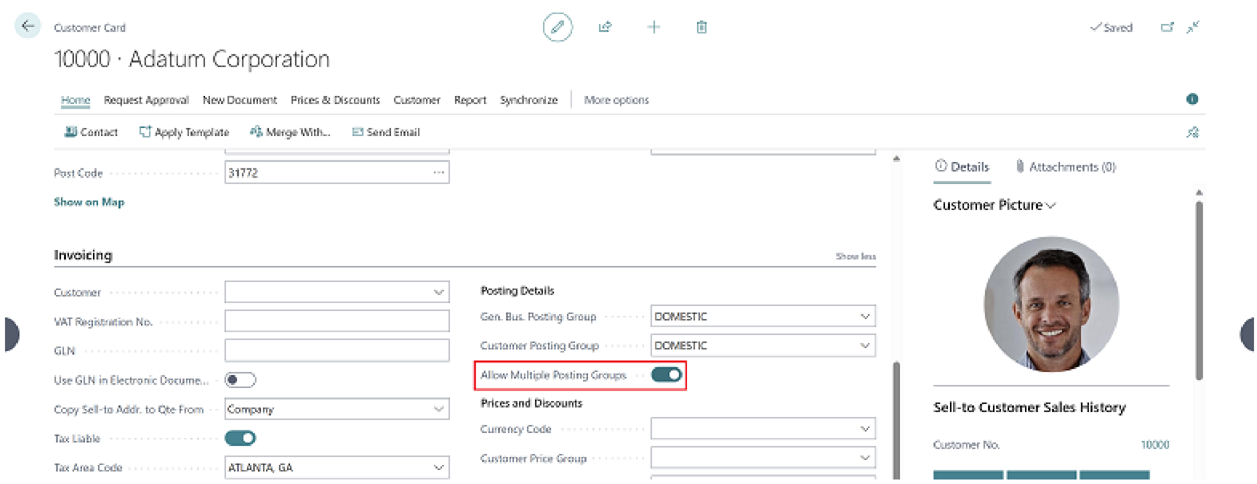
On the **Customer Posting Groups** or **Vendor Posting Groups** pages, you can specify the posting groups to allow as substitutes by choosing **Alternative Groups**. Alternative posting groups can replace the default customer or vendor posting group specified for a customer or vendor. In the following image, the EU posting group can replace the DOMESTIC customer posting group.



After you set this up, you can choose alternative posting groups and change the customer or vendor posting groups when you post sales or purchase documents and journals. Business Central copies the alternative customer or vendor posting groups to posted documents and journals, and posts payable or receivable G/L entries to the G/L accounts specified for the alternative groups.



To further control where people can change posting groups, you can also **Allow Multiple Posting Groups** on specific customers or vendors on the **Customer Card** or **Vendor Card** pages.



When all of the conditions are met, Business Central allows you to change the posting group on documents and journals and ensures that transactions post to the payables or receivables account specified at the time of posting.

For example, when you apply an invoice and a payment that are posted with different customer or vendor posting groups, resulting in different G/L accounts, Business Central transfers amounts between the G/L accounts to balance them.

> **Note**
>
> This feature is currently available only for developers and can't be turned on in production environments yet.

Use directed pick and put-away suggestions in basic warehouse configurations

Article • 10/24/2023

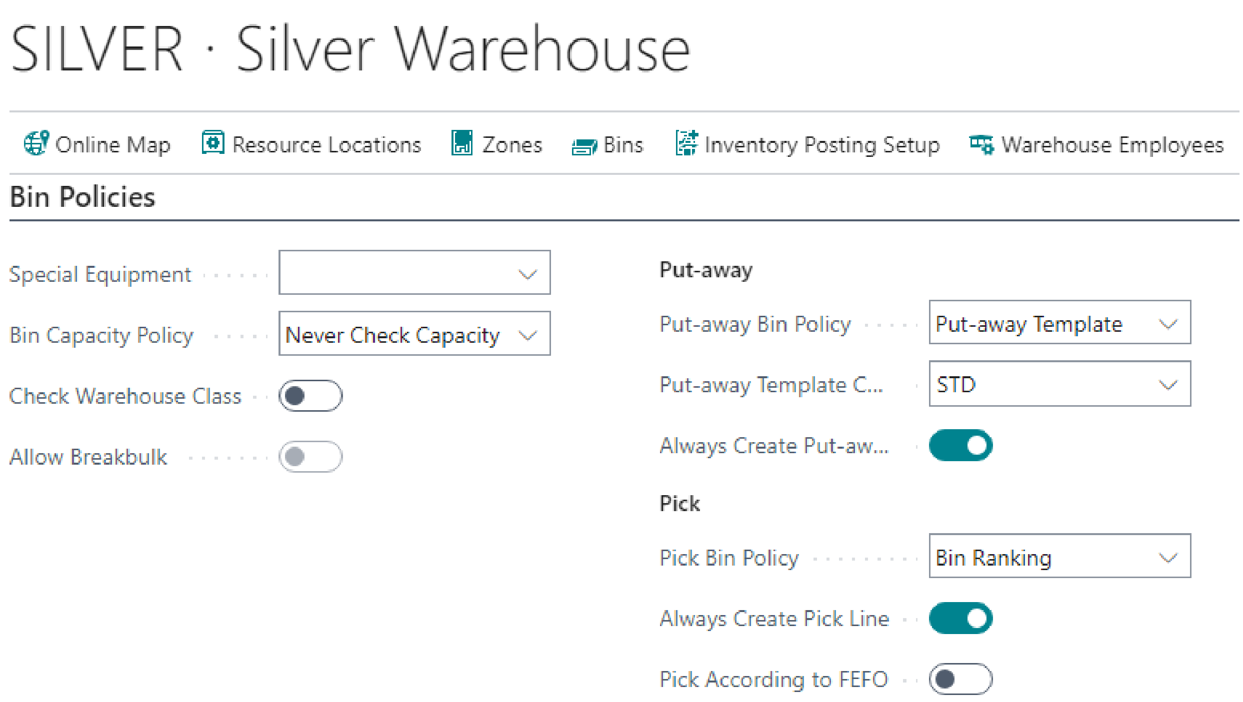
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Sep 8, 2023	✓ Oct 2, 2023

Business value

We're enabling a capability for basic warehouse configurations that was previously available only when a location is configured to use directed put-away and pick, which is an advanced configuration. Business Central suggests the most appropriate bin for items at any given time based on the following settings:

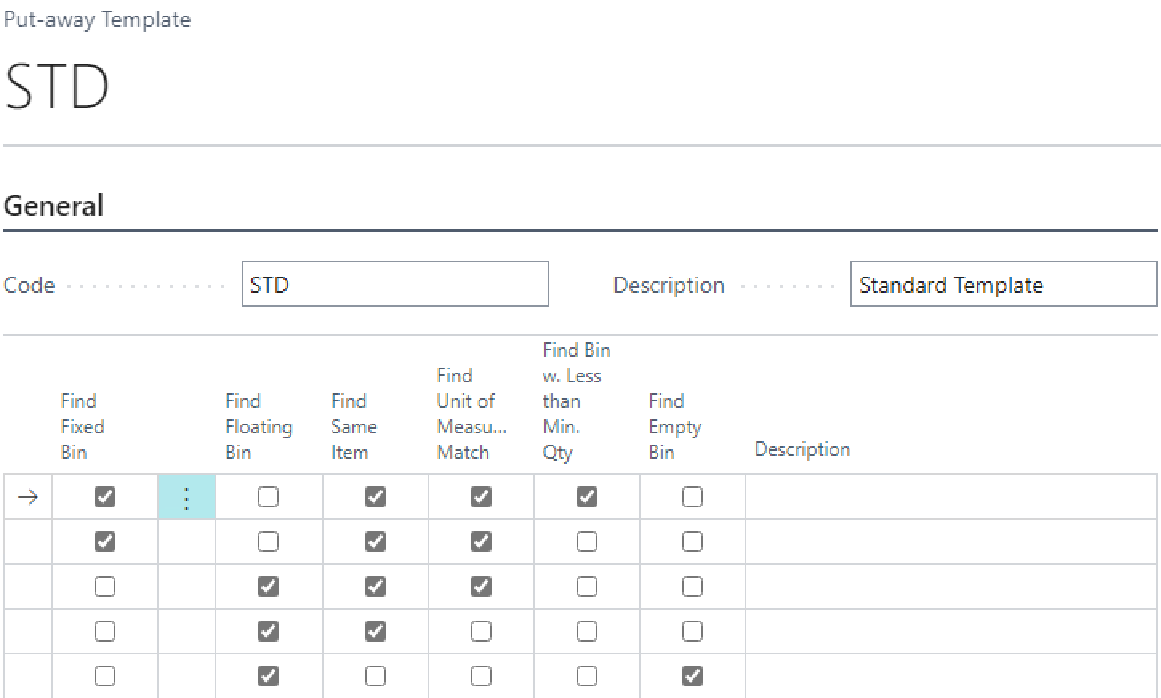
- The put-away template that you've set up for the warehouse.
- How you rank your bins.
- The minimum and maximum quantities that you specify for fixed bins.

Feature details



Put-away template

You can set up put-away templates to control how you put away items in your warehouses. Put-away templates are especially useful when items or stockkeeping units have special storage requirements, such as volume or class, or bins that contain the same items.



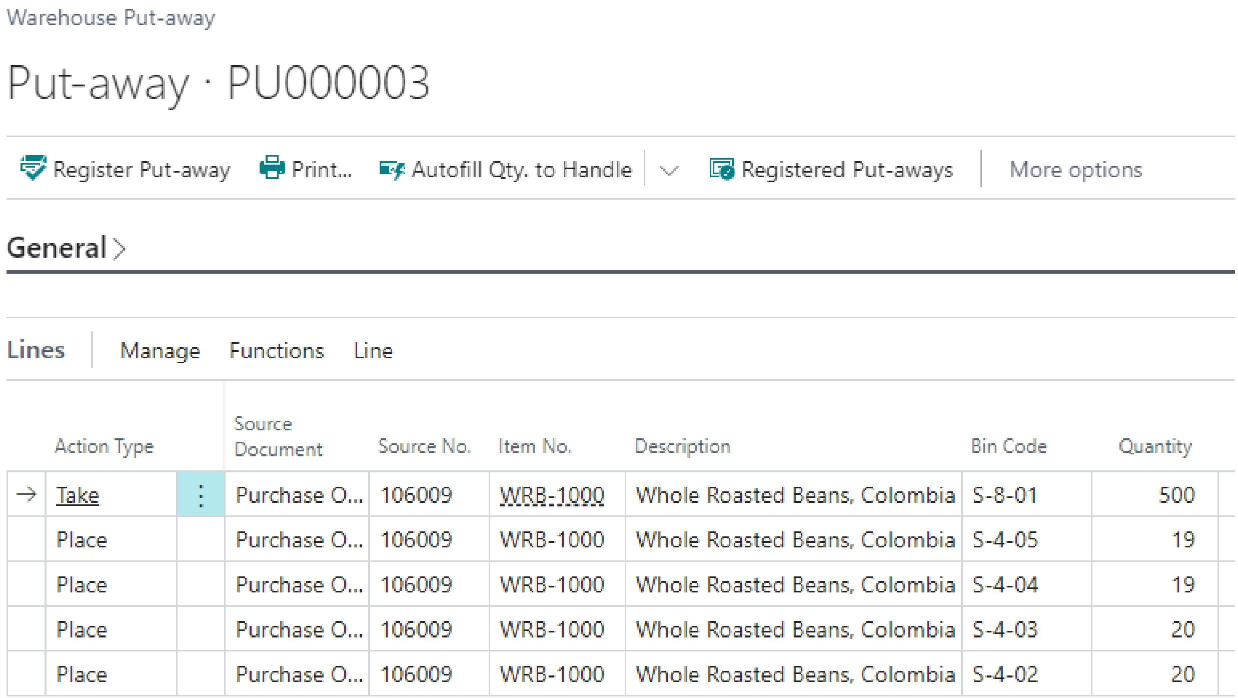
Business Central finds a bin that meets the requirements for put-away that you've set up for the warehouse, item, or stockkeeping unit. If it can't find a bin that meets these requirements, it looks for a bin that meets the requirements of the second line, and so on. If several bins match the put-away template criteria, Business Central uses the bin with the highest ranking. If both the put-away template criteria and the bin ranking are the same for more than one bin, Business Central suggests the bin with the highest bin code.

To start using this feature, on the **Location Card** page, in the **Put-away bin policy** field, choose one of the following options:

- **Default Bin**: Keep the current behavior where Business Central uses the default bin. This is the default value.
- **Put-away templates**: Use put-away templates.

You can use the **Put-away bin policy** field if you turn on the **Bin Mandatory** toggle and turn off the **Directed Put-Away and Pick** toggle. Business Central will use put-away templates for warehouse put-away and inventory put-away. Warehouse receipts aren't supported.

> ⓘ **Note**
>
> Because locations that don't use Directed Put-away and Pick don't support alternative units of measure, the **Find Unit of Measure Match** field on put-away templates is ignored.



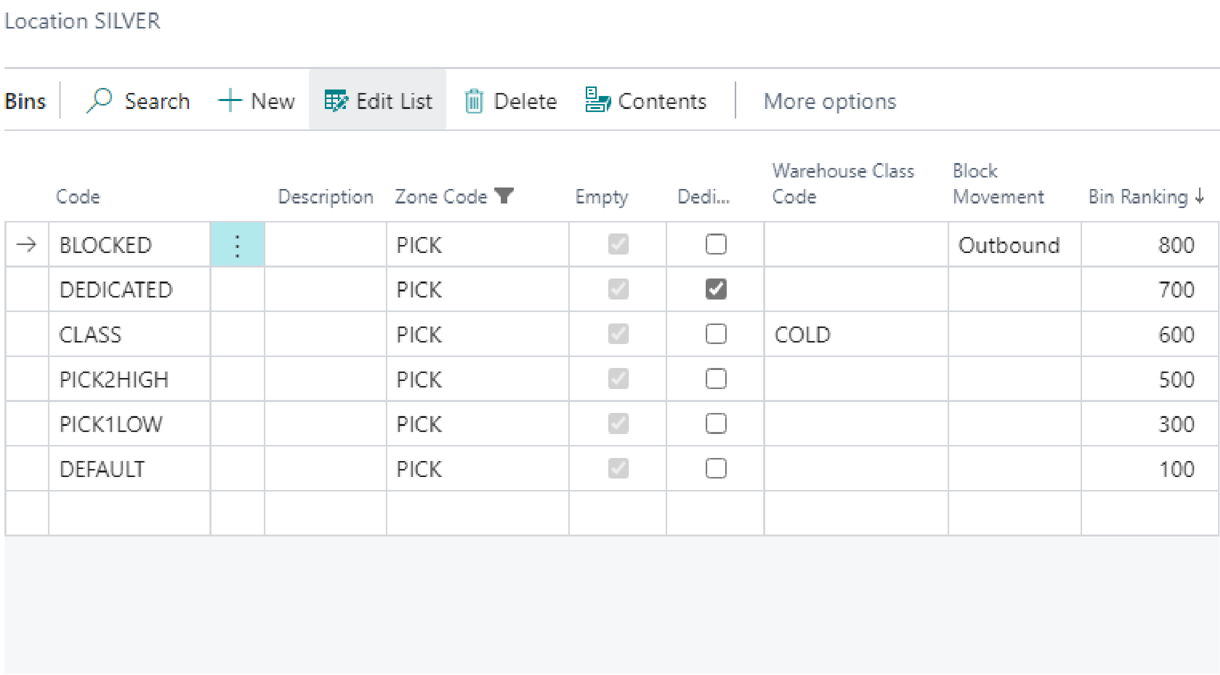
Action Type	Source Document	Source No.	Item No.	Description	Bin Code	Quantity
Take	Purchase O...	106009	WRB-1000	Whole Roasted Beans, Colombia	S-8-01	500
Place	Purchase O...	106009	WRB-1000	Whole Roasted Beans, Colombia	S-4-05	19
Place	Purchase O...	106009	WRB-1000	Whole Roasted Beans, Colombia	S-4-04	19
Place	Purchase O...	106009	WRB-1000	Whole Roasted Beans, Colombia	S-4-03	20
Place	Purchase O...	106009	WRB-1000	Whole Roasted Beans, Colombia	S-4-02	20

You can also use the **Always Create Put-away Line** toggle to specify how to handle situations where Business Central can't find a suitable bin. If enabled, Business Central will always create a line and let the warehouse employee manually select a bin.

> ⓘ **Note**
>
> If you use a default bin policy, Business Central might ignore the setting for the **Always Create Put-away** toggle. Business Central automatically makes the first bin used as the default, which means that when a receipt is posted, the receipt bin becomes the default and can't be used for put-away. Some might expect that in this case the system will create put-away lines with an empty bin, but we decided to keep the previously available logic that selected a bin based on code.

Bin ranking

Business Central will suggest that you pick from the bin that has the highest ranking. Items in the highest-ranking bins are picked first.



Location SILVER

Bins | Search | New | Edit List | Delete | Contents | More options

	Code	Description	Zone Code	Empty	Dedi...	Warehouse Class Code	Block Movement	Bin Ranking
→	BLOCKED		PICK	☑	☐		Outbound	800
	DEDICATED		PICK	☑	☑			700
	CLASS		PICK	☑	☐	COLD		600
	PICK2HIGH		PICK	☑	☐			500
	PICK1LOW		PICK	☑	☐			300
	DEFAULT		PICK	☑	☐			100

To start using this feature, on the **Location Card**, in the **Pick bin policy** field, choose one of the following options:

- **Default Bin**: Keep the current behavior where Business Central uses the default bin. This is the default value.
- **Bin Ranking**: Pick from the bin with the highest ranking first.

You can use the **Pick bin policy** field if you turn on the **Bin Mandatory** toggle and turn off the **Directed Put-Away and Pick** toggle. Business Central uses pick by ranking for warehouse picks and inventory picks. Warehouse shipments aren't supported.

> **Note**
>
> If there are several bins with same ranking, Business Central suggests bins in descending order.

You also can use the **Always Create Pick Line** toggle to specify how to handle situations when Business Central can't find the proper bin. If enabled, Business Central will always create a line and let the warehouse employee manually select a bin.

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](). We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Use General Ledger Allocations to distribute costs and revenue more efficiently

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2023	✔ Oct 2, 2023

Business value

To make data entry efficient and reduce errors for recurring types of posting, you can use allocations to predefine how to distribute revenue for transactions or cost amounts across G/L accounts and dimensions. You can use allocation keys on document and document lines, and in most journals

Feature details

You can use customized allocation keys to automate the distribution of revenue or cost transactions in journals, sales documents, or purchase documents. Allocation keys can trigger automatic G/L entry postings and allocations across different accounts and dimensions.

For example, allocation keys can automate postings related to payroll overhead. When posting total salary expenses at the end of the month, you can use automatic account codes to assign a percentage of the total salary to automatically post as overhead expenses. Or, you can use headcount per department to distribute the cost to the department-related dimension.

You can define your allocation keys based on:

- Fixed amounts
- Variable amounts (balance, net change)
- Statistical accounts (non-financial quantities you track through the **Statistical Accounts** feature)

See also

Allocate revenue and costs to multiple general ledger accounts (docs)

Use new Excel layouts for 35 selected reports

Article • 03/26/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 4, 2024	To be announced

Business value

Running reports to analyze and present business information is a frequent task in any business. Now you can use the Excel report layouts to interactively generate analyses and present learnings.

Feature details

For this release we've added eight new Excel reports with new report layouts for finance, sales (customers), and purchases (vendors).

The reports give you more options in creating your own Excel layouts for the report by giving you not only the report, but also data from the report request pages and data for translations of a layout. If the data in the reports comes from multiple tables, the report layouts show the data in multiple worksheets, which makes it easy to understand where the data originated.

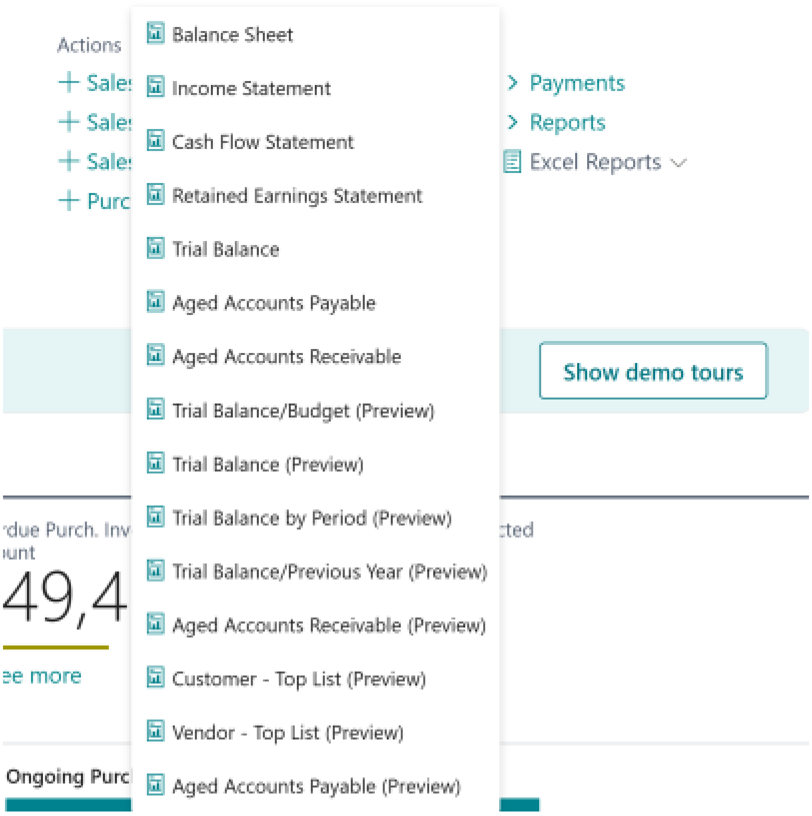
The reports are flexible, and you can use them in the way that best fits your needs:

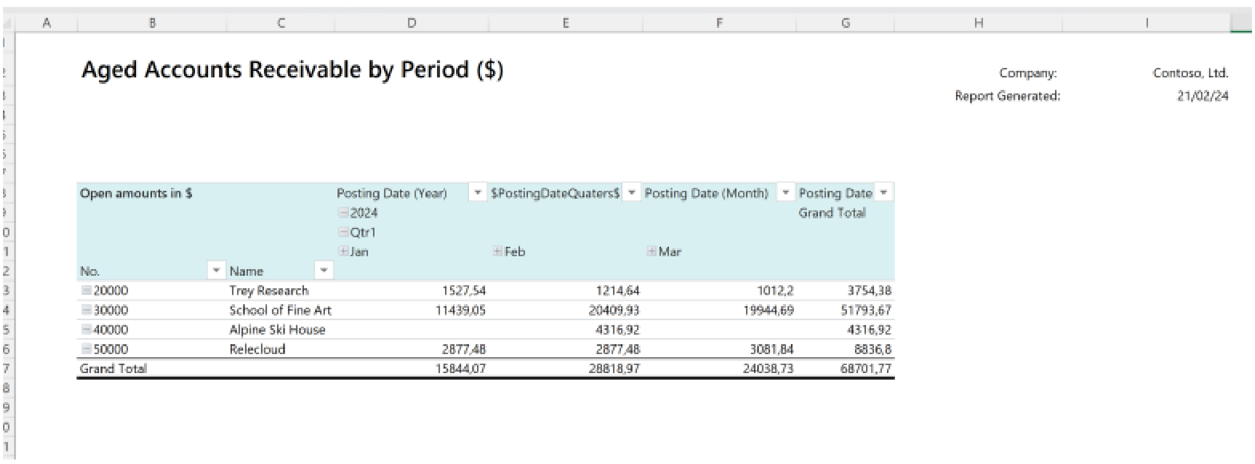
- Use the reports as-is to get insight about your business.
- Use pivot tables to slice and dice data for analysis.
- Use them as a template to create your own Excel layouts for the same data.

You can create your own copies of the report layouts from the Report Layouts page. To learn more about how to create Excel report layouts, go to Creating an Excel layout report.

We expect to add more layouts to cover more functional areas. You'll find examples, typical use cases, and a description of the data for each report in our documentation.

> ⓘ **Note**
>
> The Excel reports are limited to around 1 million rows. For reports that have a high volume of data, we recommend that you use the report request page to filter your data.





Aged Accounts Receivable by Period ($)

Company: Contoso, Ltd.
Report Generated: 21/02/24

Open amounts in $		Posting Date (Year) / 2024 / Qtr1 / Jan	$PostingDateQuaters$ / Feb	Posting Date (Month) / Mar	Posting Date / Grand Total
No.	Name				
20000	Trey Research	1527,54	1214,64	1012,2	3754,38
30000	School of Fine Art	11439,05	20409,93	19944,69	51793,67
40000	Alpine Ski House		4316,92		4316,92
50000	Relecloud	2877,48	2877,48	3081,84	8836,8
Grand Total		15844,07	28818,97	24038,73	68701,77

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.

Use standard terminology for project management

Article • 01/11/2024

ⓘ Important

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

Expand table

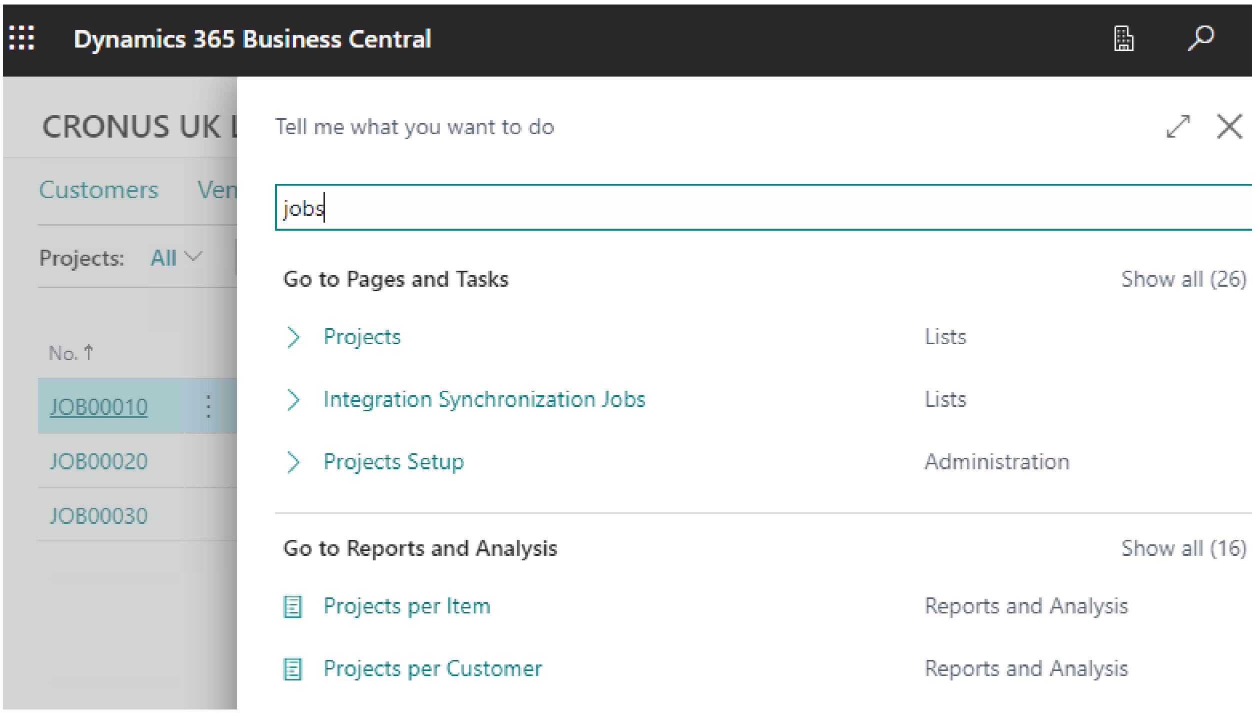
Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

Business value

We're making it easier to work with project accounting by updating the terminology we use for its features in the product and documentation. Specifically, we're renaming things that were called “jobs” to “projects.” The goal is to improve the user experience, the clarity of the documentation, and the consistency of the terminology across the application.

Feature details

For a long time now, we’ve referred to project accounting features as “jobs,” which has caused confusion in our community because that’s not the term that people who work with project accounting expect. We’re happy to announce that we’re addressing this legacy problem. To clarify the true nature and purpose of the project accounting features for various types of businesses, we’re replacing the term “job” with “project” in the user interface and documentation. For example, entities such as job tasks, job journals, and job planning lines are now project tasks, project journals, and project planning lines. The renaming won’t break existing integrations and customizations because we’re only updating the captions in the user interface and the terms in our documentation. We aren’t touching the names of the underlying table and field objects.



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 .

View incoming documents in archived quotes and orders

Article • 02/13/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

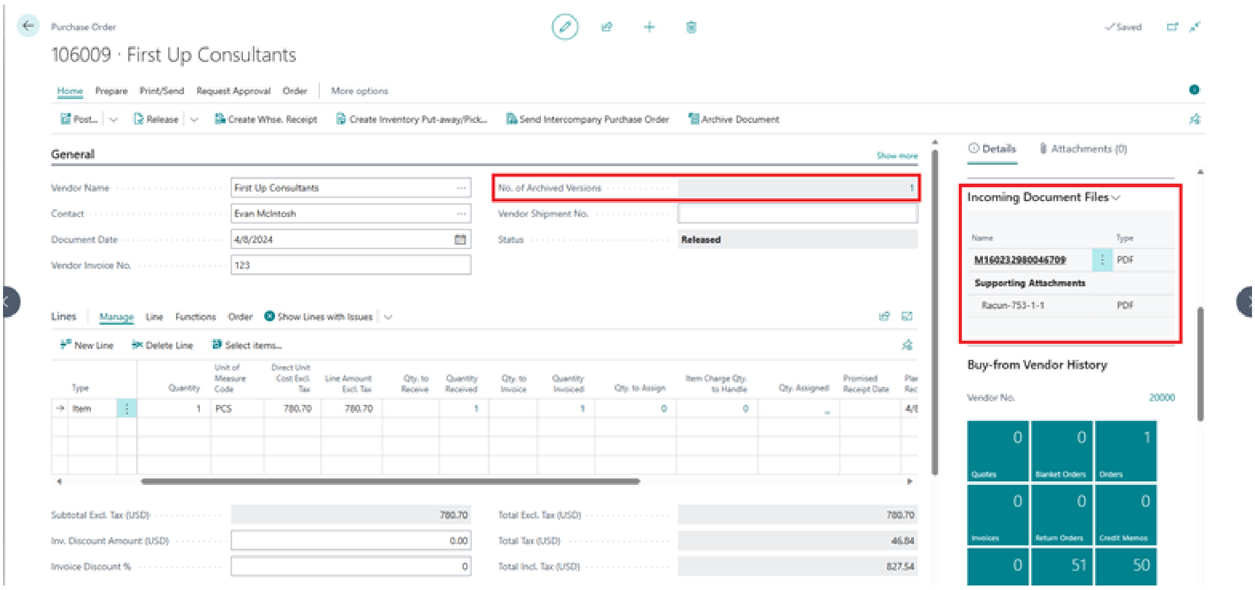
Business value

The ability to view incoming documents added to sales and purchase quotes and orders, even after they are archived, enhances your document management efficiency, ensures seamless access to critical information, supports informed decisions, and reduces administrative overhead.

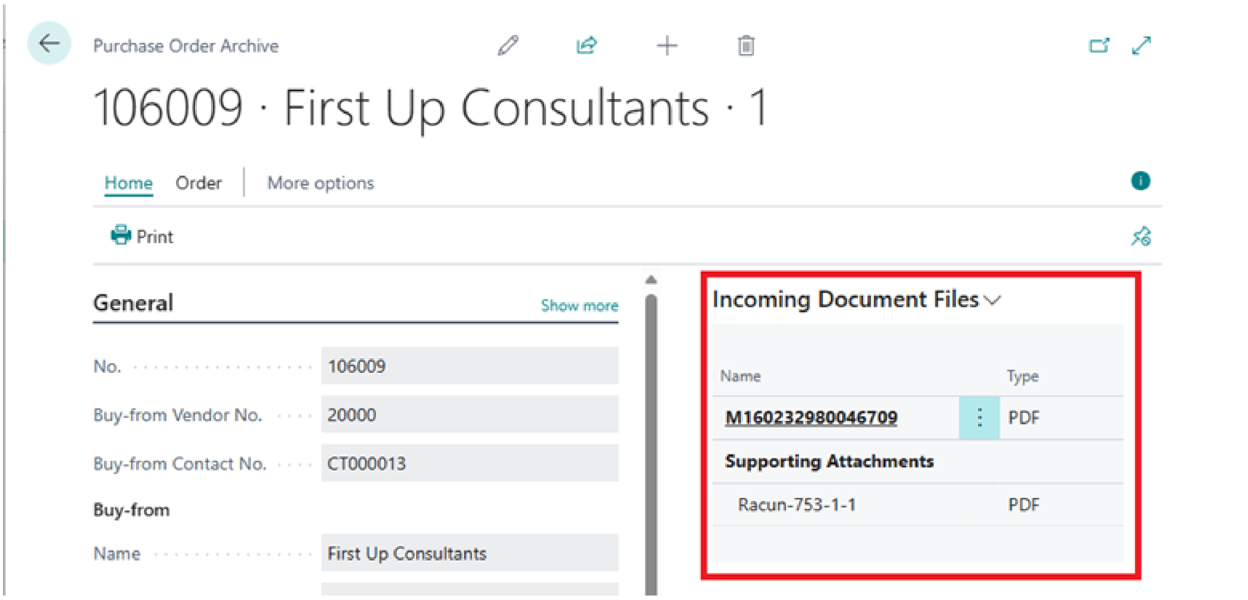
Feature details

After you archive purchase and sales quotes and orders, either manually or automatically, the archived version of those documents contains the incoming document you attached before you archived them.

For example, let's say you attached an incoming document to a purchase order, and then fully received and invoiced the order.



When you select the number in the **No. of Archived Versions** field to open the **Purchase List Archive** page and view the archived versions of a purchase order, the **Incoming Document** FactBox contains attachments that were attached to the original document.



ⓘ Note

The **Incoming Documents** FactBox is hidden by default, but you can personalize pages to show it.

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 .

Copilot and AI innovation

Article • 12/21/2023

ⓘ **Important**

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

According to our recent survey on business trends, nearly 9 out of 10 workers hope to use AI to reduce repetitive tasks in their jobs. But until recently, AI has been a commodity that few SMBs could truly invest in.

Microsoft Dynamics 365 Copilot enables professionals to perform their day-to-day work with the assistance of cutting-edge AI by their side. With Copilot in Business Central, our customers empower their workers with intuitive AI tools to get more done with less effort, without needing to become data scientists.

This wave expands on our use of Copilot capabilities, in order to boost productivity for a broader set of SMB roles.

Complete bank account reconciliation faster with Copilot

Article • 12/21/2023

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Nov 10, 2023	To be announced

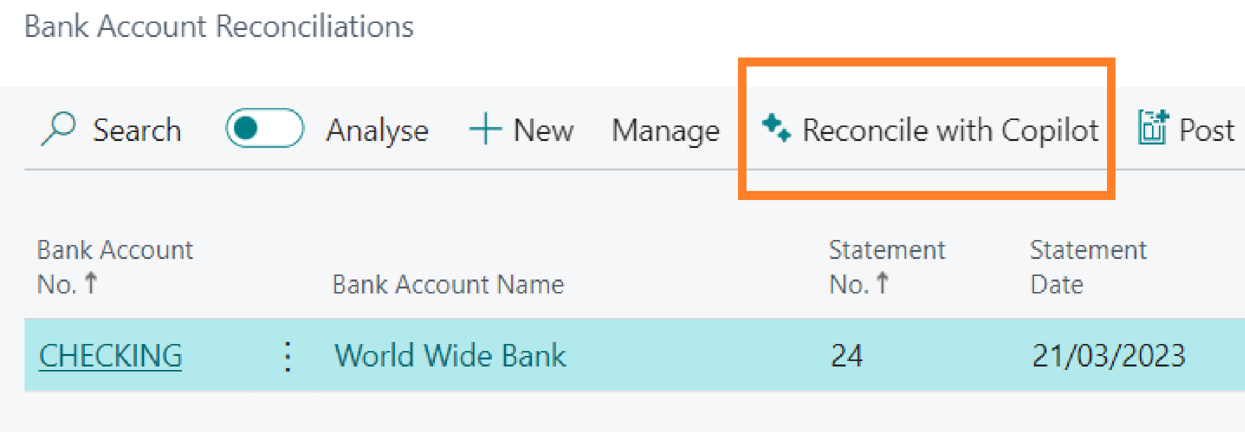
Business value

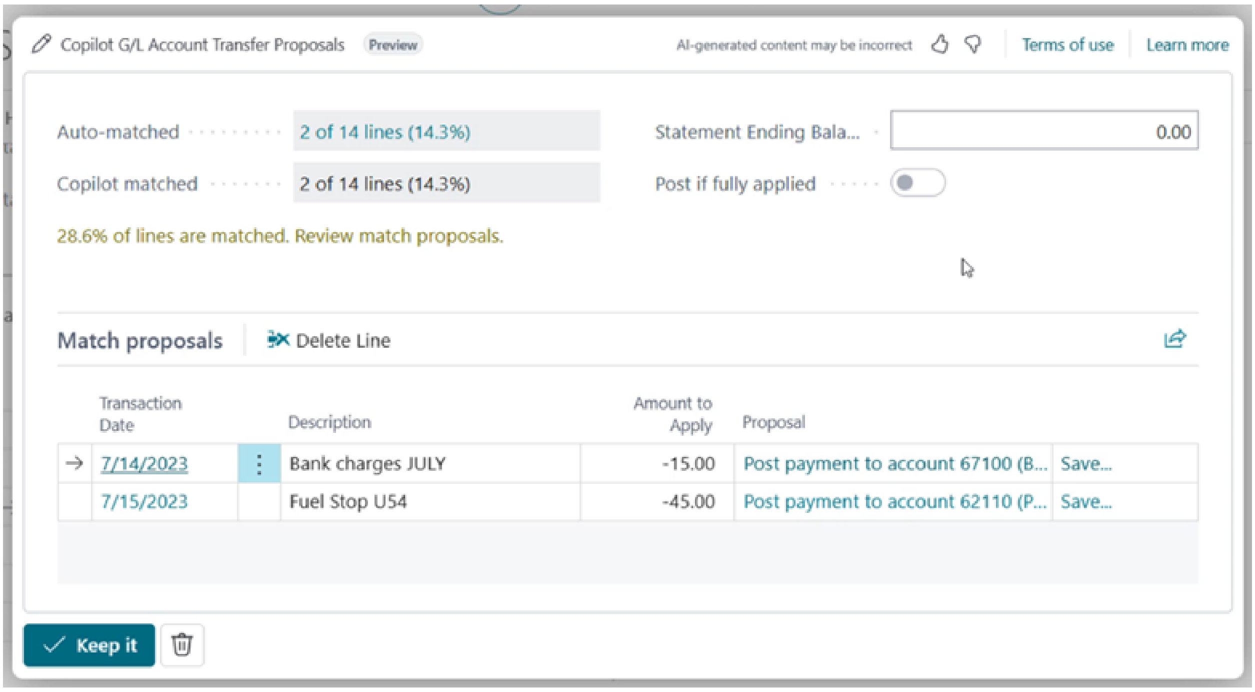
Bookkeepers in SMB organizations need to import bank statements and reconcile transactions with their bank ledger entries, making sure all transactions are accounted for. While Business Central already reduces effort through rule-based transaction matching, the residual work to process the unmatched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

Feature details

The bank account reconciliation feature in Business Central has been enhanced with:

- **AI-powered transaction matching** that complements rule-based matching and further reduces the remaining unmatched transactions that require review.
- **AI-powered G/L account suggestions** where Copilot suggests the most likely ledger account to post any residual transactions to and offers the opportunity to remember a specific transaction description for the next reconciliation.
- **Built-in demo data** for evaluation companies that makes it easier to experience and demonstrate this Copilot capability to others. Demo data is available in English with 23.1 and other languages with 23.2.





Public preview notes

This feature is available as a production-ready preview for production and sandbox environments with any country localization of Business Central and is available for any user language. Production-ready previews are subject to supplemental terms of use. For more information, see Supplemental terms of use for Dynamics 365 preview.

While the feature is in preview, it performs best when the G/L account names, ledger entries, and bank account transaction descriptions are in the same language and in English.

Availability

This feature is exclusively available for Business Central online.

Looking for more details?

Watch the 20-minute video where the product engineering team at Microsoft shares more details about this new capability.

To access recordings on demand from the Business Central 2023 release wave 2 launch event, register for free at aka.ms/BCLE.

Try it out

To get started, go to the **Bank Account Reconciliations** page and choose *Reconcile with Copilot*.

This feature is available with all new production and sandbox environments with Update 23.1.

For upgrading customers, the feature will be automatically enabled with Update 24, but administrators can enable it as early as Update 23.1. To enable features ahead of time, sign in to your online environment and open Feature Management, then enable for all users the item named **Feature Preview: Bank account reconciliation with Copilot**.

In some regions where Azure OpenAI Service is not yet available, administrators must first consent to business data moving across compliance boundaries from the **Copilot & AI capabilities page**.

Tell us what you think

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at aka.ms/bcIdeas, or join the discussion on the Dynamics 365 Business Central Development Yammer network to help us shape the future of AI in Business Central.

Geographic areas

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

- Germany
- Norway
- Singapore
- South Africa

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

See also

Reconcile bank accounts with Copilot (docs)

Easily integrate generative AI with your AL solutions

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Dec 11, 2023

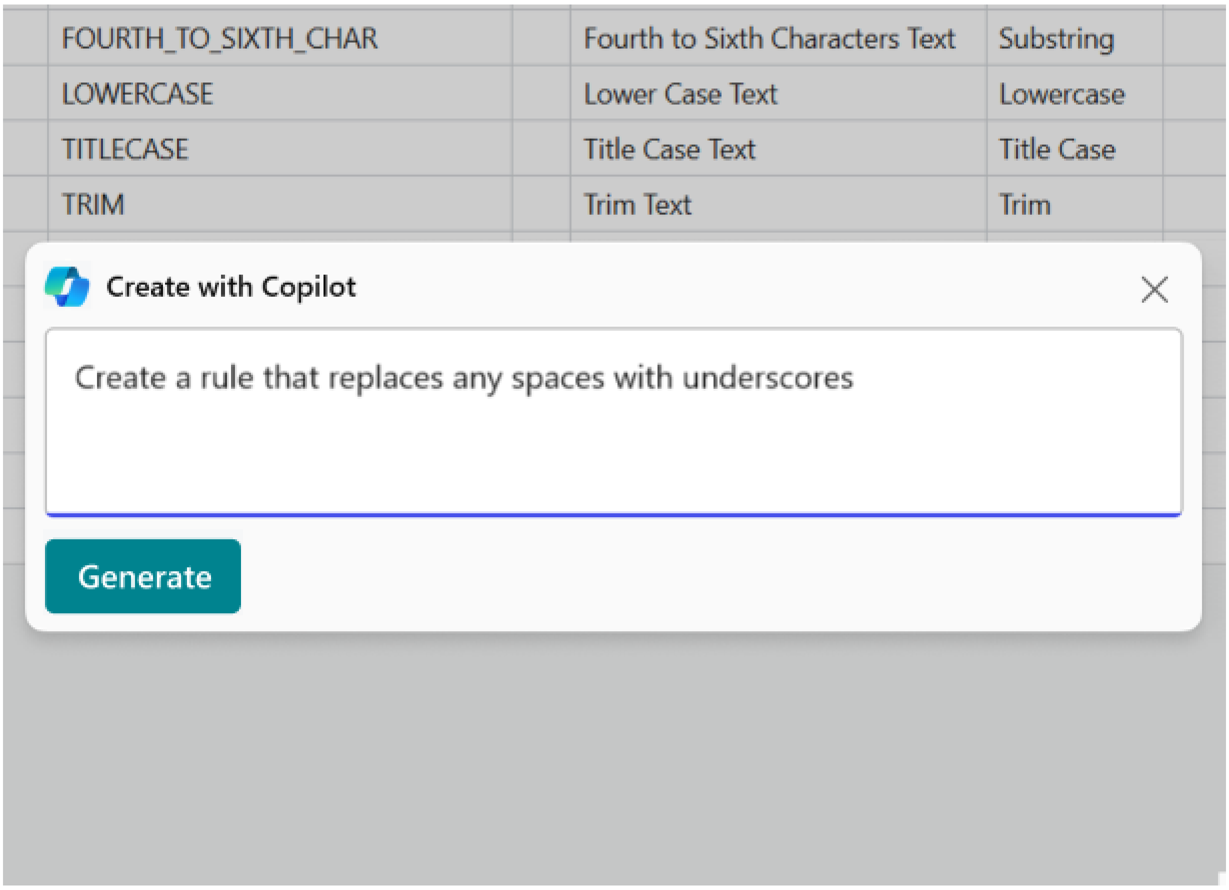
Business value

Azure OpenAI Service offers powerful, generative AI models that our partners can now leverage to deliver a rich ecosystem of AI-powered extensions for Business Central. With only a few lines of AL code, developers can enhance their solutions with generative AI that feels seamlessly integrated into the Business Central user experience and can be delivered as a natural part of their add-ons or customizations.

Feature details

The first version of the Copilot toolkit offers:

- **Connect with less code**: Leverage the new **System.AI** namespace in the system application to connect to Azure OpenAI Service and tap into models such as GPT from your AL code.
- **Seamlessly integrate**: Use the new **PromptDialog** page type to light up generative AI experiences that look and feel unmistakably Copilot, including signature visuals, and built-in safety controls for customers.
- **Manage your subscription**: Bring your own Azure AI key that powers your AI story.
- **Build for safety**: Follow guidance on how to apply Responsible AI principles to your design and implementation.
- **Draw attention**: Highlight the presence of your AI-powered features using the new *Sparkle* action image.
- **Keep admins in control**: Help customers discover and govern your features by plugging into new administrative screens.
- **Learn from examples**: Download sample code available as an extension to get started.
- **Track usage**: Follow feature adoption statistics and monitor end-user feedback in Power BI.



Availability

The toolkit is available for Business Central online from Update 23.2. You can develop against Insider builds or release builds.

Data governance

Azure OpenAI Service is currently available in select countries and regions. Customers and partners connecting to Azure OpenAI service within their region won't require any additional setup, configuration or consent. When connecting to Azure OpenAI service outside of the environment's region, admins must first consent to data movement across regions before any Copilot features can be used in Business Central.

Try it out

Developers can now 'get hands-on' and begin developing their own generative AI capabilities.

1. **Get your key**: To use Azure OpenAI Service, you need to have an Azure subscription and apply for access to the service.
2. **Try it out in Visual Studio Code**: Leverage the new PromptDialog page type and System.AI namespace to connect to Azure OpenAI service and bring your idea to

life. Looking for an inspirational example? Take a look at marketing text suggestions in Microsoft's base application.
3. **Experiment with prompts**: Try various prompts in code or in Azure OpenAI Studio.

Looking for more details?

Watch the 50-minute video where the product engineering team at Microsoft shares more details about how to use these tools including code samples.

To access recordings on demand from the Business Central 2023 release wave 2 launch event, register for free at aka.ms/BCLE.

Geographic areas

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

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

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Integrating AI using Developer Tools for Copilot (docs)

Get marketing text suggestions with Copilot

Article • 12/06/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Nov 13, 2023

Business value

Save time and effort when bringing new products to market. Marketing text suggestions is now generally available.

Feature details

Business Central's first copilot feature, marketing text suggestions, moves from public preview to being generally available.

- **Start with a picture**: Create a new item record by uploading a picture. Business Central analyzes the image and automatically suggests a matching category from your list of item categories. Customers who configured categories with templates and default attributes benefit from all of these being automatically assigned, reducing manual data entry.

- **Author marketing copy**: The new Marketing Text page, reachable from the Item card actions or FactBox, is where users author a customer-ready, rich-text product description that can be used in any marketing activities.

- **Get AI-powered suggestions**: Business Central uses Azure OpenAI Service and GPT technology to suggest a compelling product description based on the item's attributes, category, and name (description). Review and edit before saving.

- **Customize suggestions**: Use the Draft with Copilot window to adjust various language parameters such as the format, tone of voice, and quality to emphasize. Choose precisely which attributes should be included when text is generated.

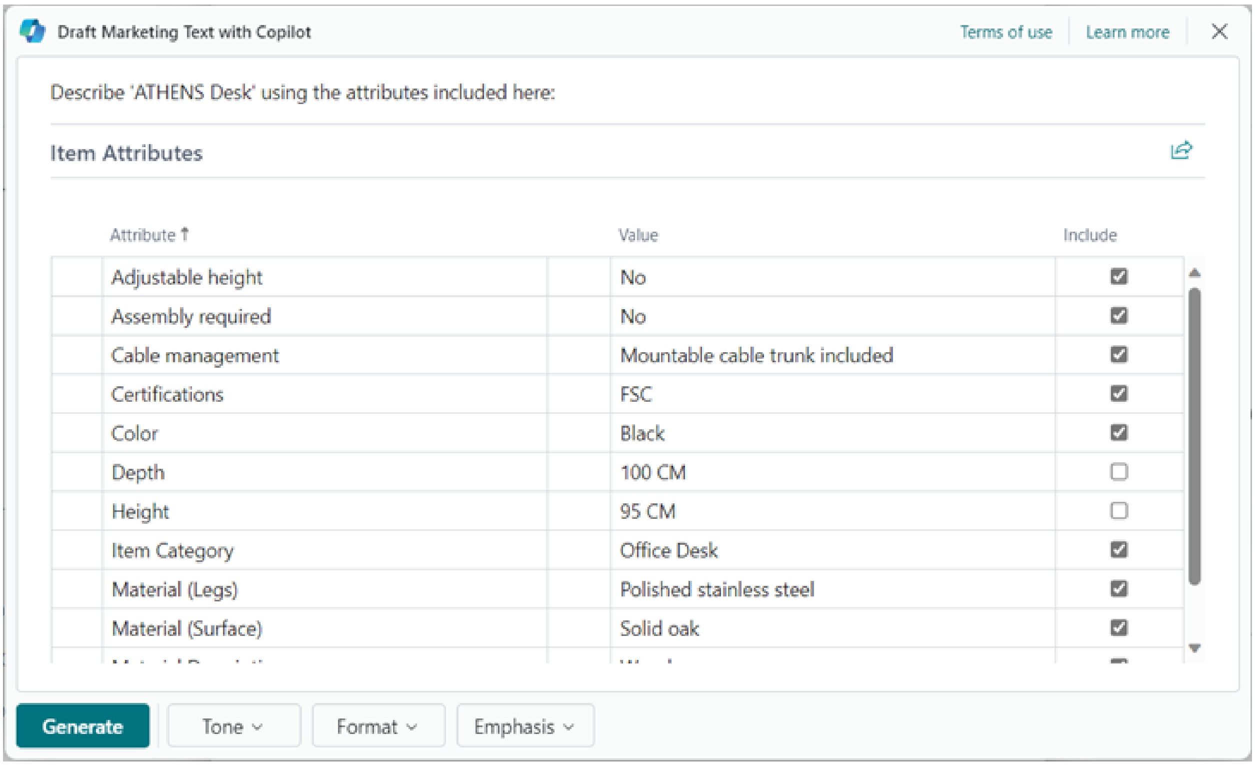
- **Publish to Shopify**: Customers who connect Business Central to Shopify using our extension can quickly publish the item directly from the item card and list.

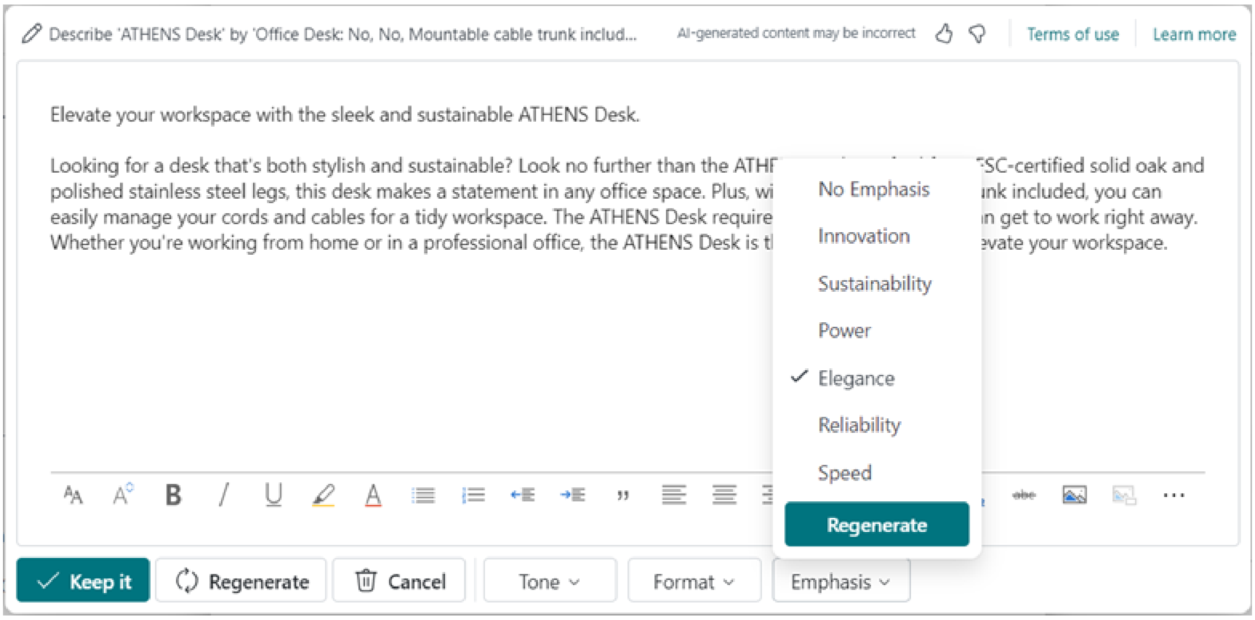
- Send the item directly to your Shopify store to start selling immediately. This follows your store settings and may include information such as the item picture, marketing text, inventory, and price.
- Navigate to the corresponding product on your Shopify store, as your customers would experience it.

- **Take the tour**: Free trials of Business Central are also AI-powered; start your tour directly from the Role Center to experience marketing text suggestions in any evaluation company.

In addition, this wave includes:

- An entirely new user experience that is easier to use and gives more space to review and edit drafted text.
- Various quality improvements that address customer feedback.
- Additional content moderation.
- Support for more languages, including English, Spanish, Danish, Italian, French, German, Dutch, and Japanese.





Looking for more details?

Watch the 15-minute video where the product engineering team at Microsoft shares more details about this capability.

To access recordings on demand from the Business Central 2023 release wave 2 launch event, register for free at aka.ms/BCLE.

Try it out

To experience marketing text suggestions:

1. Navigate to the **Items** list and open any item record such as the **ATHENS Desk**.
2. On the **Item card**, choose *Marketing Text* from the action bar to bring up the dialog.
3. Choose action *Draft with Copilot*.

In version 23.0 of Business Central, customers will continue to experience the preview of marketing text suggestions.

From Update 23.1, the updated feature becomes available to all production and sandbox environments.

For upgrading customers, the feature will be automatically enabled with Update 24, but administrators can enable it earlier. To enable features ahead of time, sign in to your online environment and open Feature Management, then enable this feature for all users. Depending on your version of Business Central, this is either named **Feature Preview: Create AI-powered product descriptions** or **Feature Update: Create AI-powered product descriptions with Copilot**.

In some regions where Azure OpenAI Service is not yet available, administrators must first consent to business data moving across compliance boundaries from the **Copilot & AI capabilities page**.

Availability

This feature is exclusively available for Business Central online.

Geographic areas

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

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

See also

Overview of AI-powered item marketing text with Copilot (docs)

Country and regional

Article • 11/20/2023

ⓘ Important

Some of the functionality described in this release plan has 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 continues to become available to businesses in more countries and regions. This expansion happens largely through partner-led localizations. Our partners create and maintain apps for specific countries and regions, and publish their apps on AppSource. In combination with built-in language offerings, Business Central is available to serve customers in more than 155 countries and regions worldwide. Additionally, in the countries where Microsoft is responsible for the localization, we provide updates for all regulatory features.

Advance payment and a posting preview of tax documents - Czechia

Article • 11/15/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 1, 2023	✓ Oct 2, 2023

Business value

You can verify that tax documents are posted in the Czech Advance Payments functionality.

Feature details

The advance payments functionality allows you to receive advance invoices from suppliers, issue advance invoices to customers, make advance payments, including payments subject to VAT, and draw down advance payments on receipts. The functionality also provides tax documents that are required by legislation and outputs for financial statements and VAT reports. This new feature provides a posting preview of tax documents for advance payment.

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.

Direct transfer - Czechia

Article • 11/15/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2023	✔ Oct 2, 2023

Business value

Posting direct transfers is in accordance with the Czech accounting rules and provides a report for the posted direct transfer document.

Feature details

Czech posting rules require that location transfers be posted with the defined **Inventory Adjustment Account**, which is different from other item journal postings. In the **Transfer Orders** functionality, fields for **General Business Posting Groups**, **Ship**, and **Receive** are added. Use this feature to post different transfer orders with different **General Posting Setup**, which is different from posting in an item journal.

In the **Transfer Route**, fields for **General Business Posting Groups**, **Ship**, and **Receive** are added. This setup is automatically copied to the transfer order based on the used transfer route. These **General Business Posting Groups** are also used for direct transfers.

A printout report for **Posted Direct Transfer** is also available with this feature.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

E-invoicing with NemHandel in Denmark

Article • 01/11/2024

Expand table

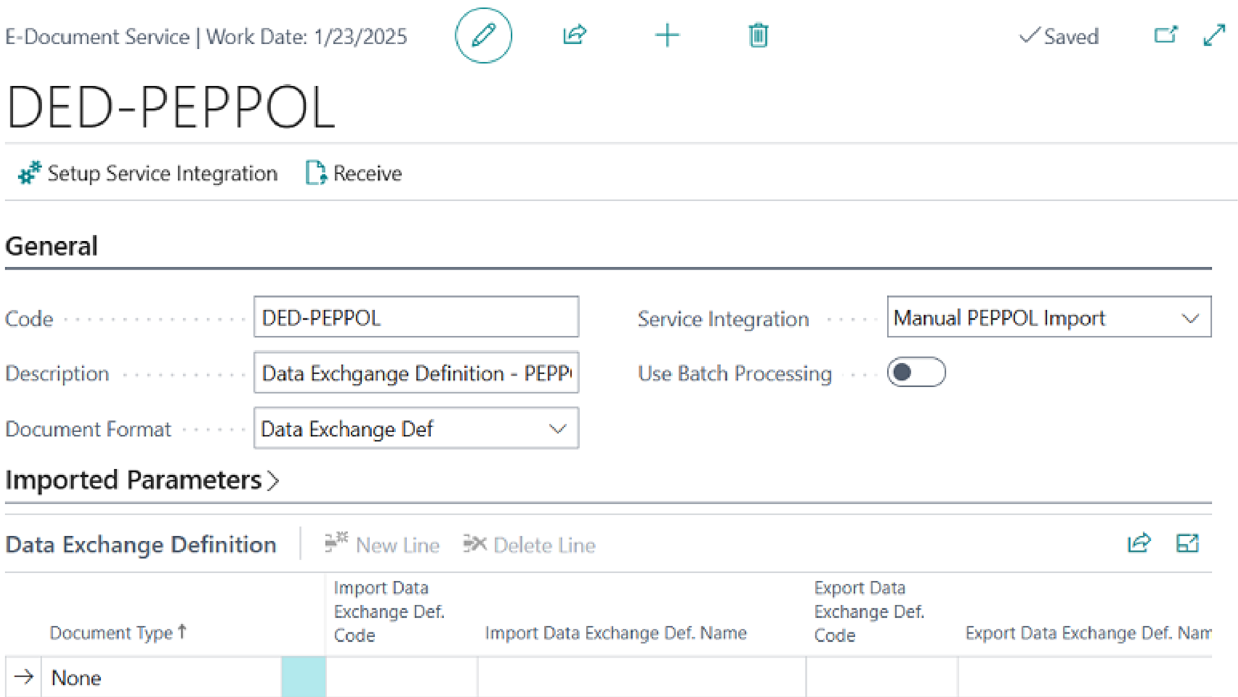
Enabled for	Public preview	General availability
Users, automatically	✔ Dec 1, 2023	✔ Jan 1, 2024

Business value

Danish companies can use e-invoicing with the NemHandel as required by the new Danish Bookkeeping Act.

Feature details

Because the new Danish Bookkeeping Act requires an embedded feature for e-invoicing that's connected with the NemHandel service, a new e-invoicing app has been created on top of our new global e-documents core app. This new app enables all the features that are required by Danish authorities and provide OIOUBL and PEPPOL formats. The app also enables the connection of e-documents in Business Central with NemHandel by using certified access points.



Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Set up electronic invoicing with NemHandel (docs)

E-submission of VAT return in Denmark

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Dec 1, 2023

Business value

Danish companies can use e-submission of VAT return as required by the new Danish Bookkeeping Act.

Feature details

E-submission of VAT return is a mandatory requirement of the new Danish Bookkeeping Act. This process is enabled in the Danish localization for Dynamics 365 Business Central with additional automation of the VAT return process where you can submit VAT returns directly to the Skat APIs.

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.

Iceland localization app - delocalization

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Dec 1, 2023

Business value

The new and upgraded localized version for Iceland is delivered as an extension.

Feature details

The localized version for Iceland is now delivered as an extension on top of the W1 base app. The solution offers a data upgrade so that it's easy to move from the previous localization to the new extension. This release is a step toward delocalization so that ISVs can release their apps for a broader market.

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.

Intercompany posting cues to the Accountant Role Center - Czechia

Article • 11/15/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 1, 2023	✓ Oct 2, 2023

Business value

Adding intercompany posting cues to the Accountant CZ Role Center helps users get a better overview of intercompany transactions.

Feature details

Intercompany posting lets you manage accounting activities for a group of companies. With this feature, we have added new Role Center cues to the Accountant CZ profile to provide a better overview of incoming and outgoing intercompany transactions in Czech localization.

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.

New design for report Language and Region settings

Article • 11/15/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Sep 1, 2023	✓ Oct 2, 2023

Business value

We've simplified language and regional settings, and you can change them to suit your needs for each specific report.

Feature details

The **Format Region** feature in Business Central introduces simplified language and regional settings that provide flexibility for users. This feature addresses existing design flaws:

- The inability to customize formats for individual reports.
- The lack of support for setting the same format as the report language on **Customer/Vendor** cards.
- The dependency of report language and format on **My Settings**.

To address these design flaws, the **Format Region** feature introduces the following changes:

- The Region (Format) setting is available on the Customer Card and Vendor Card pages. The Language setting was already available.
- Both the **Language** and **Format** settings are available on report request pages.

The behavior and order of priority that determine the report output language and format are defined as follows (in order of importance):

1. Language and Format from the request page.
2. Language and Format defined on the document. These come from the customer or vendor settings.
3. Language and Format defined on the Report AL object.
4. Language and Format defined in My Settings.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Run and Print Reports (docs)

New Intrastat - Czechia

Article • 11/15/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 1, 2023	✓ Oct 2, 2023

Business value

The new feature covers the Intrastat functionality in Czechia, including document and status history and a configurable reporting method.

Feature details

The new Intrastat solution provides a document with different statuses that show the history of any previously reported periods. Intrastat works for both purchase and sales documents. The subject of Intrastat entries includes Items whose **Type** = **Inventory**, and Fixed Assets. Many existing capabilities are improved in this release wave, and reporting is configurable without hard-coding file exports using the data exchange framework.

The new Intrastat CZ capability is provided as an extension depending on Intrastat Core application.

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.

Registration and notification functionality for Denmark

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Nov 1, 2023

Business value

Danish companies can be notified for registration in the Nemhandelsregisteret as required by the new Danish Bookkeeping Act.

Feature details

The new Danish Bookkeeping Act requires you to register companies that use Dynamics 365 Business Central as their bookkeeping system in the Nemhandelsregisteret. If there are companies that aren't registered, Business Central will notify them and provide registration instructions. This feature is enabled for the Danish localization of Business Central.

This functionality will be enabled by default begining in 2024. The **Registered with Nemhandel** field on the **Company Information** page is marked automatically when a user registers with NemHandel. If this field isn't marked, the system provides a notification that this software isn't registered in the Nemhandelsregisteret yet. Before a user can register with NemHandel, the company must have properly populated the **Registration No.** field on the **Company Information** page with an accurate CVR number.

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.

Responsibility Centers are supported for Advance Payments in Czechia

Article • 11/15/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Oct 2, 2023	✓ Oct 2, 2023

Business value

This new feature adds support for Responsibility Centers to CZ Advance Payment documents so that Business Central retrieves only the documents relevant for a particular user.

Feature details

Responsibility centers provide the ability to handle administrative centers. A responsibility center can be a cost center, a profit center, an investment center, or other company-defined administrative centers.

You can set up users so that Business Central retrieves only the documents that are relevant for their particular work areas. Users are usually associated with one responsibility center and work only with documents related to specific application areas at that particular center. This feature adds support for Responsibility Centers to the Advance Payment CZ documents.

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.

Supporting more countries and regions

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users, automatically	✓ Nov 1, 2023	✓ Dec 1, 2023

Business value

More countries and regions are now supported, bringing Business Central online to 155 countries and regions.

Feature details

We're expanding Business Central to more countries and regions through partner-led localization. Our partners create the relevant localization apps and publish them to AppSource. In combination with the built-in language offerings, we are making Business Central online available to serve customers in 150-plus countries and regions worldwide. In this release, we plan to expand to the following countries and regions:

- American Samoa
- Anguilla
- Aruba
- Brunei
- Cape Verde
- Chad
- Côte d’Ivoire
- Curacao
- Dominica
- Eritrea
- Grenada
- Guam
- Guinea
- Guyana
- Haiti
- Micronesia
- New Caledonia

- Palau
- Papua New Guinea
- Samoa
- Seychelles
- Suriname
- Vanuatu

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.

Development

Article • 12/21/2023

ⓘ Important

Some of the functionality described in this release plan has 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 empower AL developers and increase their productivity, we've laid the foundation for introducing namespace support in the platform and application. Namespace support makes it easier to structure apps, create better object names, and avoid identifier clashes. As apps mature, the need to refactor is inevitable, so we've added the ability to move ownership of a table and its data between extensions. Additionally, developers can hide specific variable data so that other parties can't access it during debugging, which protects internal data.

When it comes to data analysis and reporting, developers have more control. For example, you can turn off Analysis Mode on pages and specify how to embed content from Power BI.

Consultants and developers can easily open Visual Studio Code for a production or sandbox environment to investigate and understand objects across installed extensions, view code for owned extensions, and perform troubleshooting—all without having to set up Visual Studio Code manually. Similarly, we've improved profiling from the client and Visual Studio Code so it's easier to find database-related performance issues.

AppSource publishers can sell through CSPs, and better handling for AppSource runtime packages gives seamless development and troubleshooting across app dependencies for publishers and resellers.

Add a new FieldGroup to an existing table

Article • 11/15/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 12, 2023	✔ Oct 2, 2023

Business value

One of the highest-voted extensibility gaps in AL is the ability to add field groups to tables through table extensions, when the table doesn't have one. Apart from a functional gap, this also impacts moving existing on-premise customizations to extensions, be it on-premises still or to cloud.

Feature details

While it's currently possible to add a FieldGroup (a dropdown list, for example) in an extension in a new table or to add fields to an existing FieldGroup for a core table, it isn't possible to add a FieldGroup to a core table that doesn't have one already defined. With this new feature, table extensions will be able to add a FieldGroup to existing tables.

The way this works is that a table extension can add fields by using the "addlast" keyword in the Dropdown or Brick field groups, just as today. However, if the field group doesn't exist on the table, which is being extended, it will be created. If multiple table extensions each add fields, the field group will contain the merged result, in the order that the extensions are loaded (first AppSource apps, then PTEs).

```
0 references
tableextension 50120 MyExtension extends MyTableWithNoDropdown
{
    fields
    {
        0 references
        field(50100; "newField"; Decimal) { }
    }

    fieldgroups
    {
        addlast(DropDown; newField) { }
    }

}
```

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:

- Add a new FieldGroup to an existing table

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Adding new field groups (docs)

Add teaching tooltips on queries and report request pages

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 2, 2023	✔ Oct 2, 2023

Business value

Teaching tips are used to increase the user's chance of success with the query or report. Using a teaching tip also facilitates an easy transition for the user to navigate to the help pane, if more help is needed.

Feature details

The primary purpose of a teaching tip is to increase the user's chance of success with the query or report. Therefore, the title and description of the teaching tip should answer the following hypothetical user questions:

- AboutTitle: What is this query/report about?
- AboutText: What can I do with this query/report?

Both of these properties (or their equivalent multilanguage versions) must be defined on the query or request page for the teaching tip to appear.

With teaching tips, you can help explain logic that is relevant to the query/report, therefore allowing users to get on with a analytics task right away without blocking them. After users dismiss a teaching tip, they can choose or hover over the query/report title in the page. This action will reopen the teaching tip.

See also

Adding teaching tips to your reports (docs)

AppSource ISV publishers can preview their AppSource apps with select customers

Article • 11/20/2023

ⓘ Important

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

Expand table

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

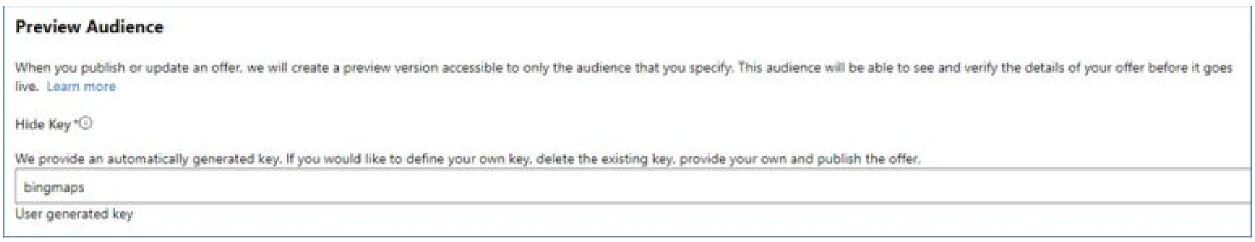
Business value

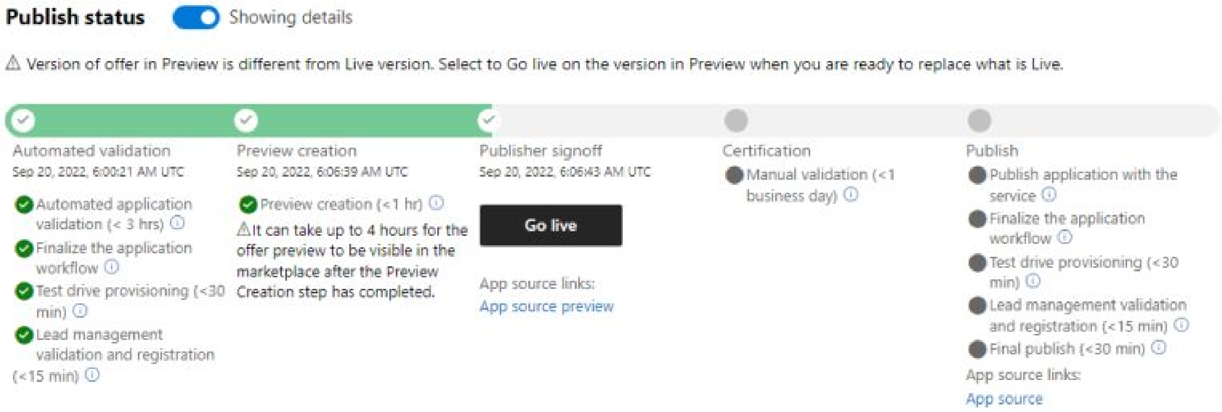
Allow AppSource ISV publishers to test and collect early feedback on the new version of their app by organizing a private preview with a select group of their customers.

Feature details

When uploading an app to AppSource, publishers will be able to keep the app in preview mode. This will provide publishers with a link to the preview app that includes a custom "flight code," which can be sent to selected customers. Customers who opt in to the preview can then install and test that app in their environments and provide feedback to the ISV.

As a publisher, you can choose the flight code, or have one generated automatically.




Publish status
Showing details
⚠ Version of offer in Preview is different from Live version. Select to Go live on the version in Preview when you are ready to replace what is Live.
Automated validation
Sep 20, 2022, 6:00:21 AM UTC
Automated application validation (< 3 hrs)
Finalize the application workflow
Test drive provisioning (<30 min)
Lead management validation and registration (<15 min)
Preview creation
Sep 20, 2022, 6:06:39 AM UTC
Preview creation (<1 hr)
⚠It can take up to 4 hours for the offer preview to be visible in the marketplace after the Preview Creation step has completed.
Publisher signoff
Sep 20, 2022, 6:06:43 AM UTC
Go live
App source links:
App source preview
Certification
Manual validation (<1 business day)
Publish
Publish application with the service
Finalize the application workflow
Test drive provisioning (<30 min)
Lead management validation and registration (<15 min)
Final publish (<30 min)
App source links:
App source

Call Microsoft Graph with AL Microsoft Graph module

Article • 01/19/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Jan 10, 2024

Business value

The AL Microsoft Graph module contains methods to support calling Microsoft Graph with just a few lines of code.

Feature details

The AL Microsoft Graph module contains methods to support the following scenarios:

- Create Microsoft Graph authorization
- Initialize the Microsoft Graph Client
- Process GET,PATCH,POST,DELETE requests with Microsoft Graph

Here are some examples that use the Microsoft Graph module.

```
> //Create Microsoft Graph Authorization
> MicrosoftGraphAuthorization :=
MicrosoftGraphAuth.CreateAuthorizationWithClientCredentials(TenantId,
ClientId, ClientSecret, 'https://graph.microsoft.com/.default');
>
> //Initialize Microsoft Graph Client
> MicrosoftGraphClient.Initialize(Enum::"Microsoft Graph API
Version"::"v1.0", MicrosoftGraphAuthorization);
```

```
>
> ResponseInStream := TempBlob.CreateInStream();
>
> //Create Microsoft Graph GET,PATCH,POST,DELETE
> if not MicrosoftGraphClient.Get('groups', ResponseInStream) then
>
Error(MicrosoftGraphClient.GetDiagnostics().GetResponseReasonPhrase());
> ResponseInStream.Read(ResponseContent);
> Message(ResponseContent);
```

> **Note**
>
> We'd like to thank our community for making this valuable contribution through our **System Application open-source repo on GitHub**

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:

- New Microsoft Graph Module for the System Application

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

Call web services with AL Rest Client module

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Nov 3, 2023

Business value

The new AL Rest Client module contains methods to support calling web services with just one line of code, creating request content and reading the response from different types of data and authenticating using basic authentication.

Feature details

The new AL Rest Client module contains methods to support the following scenarios:

- Calling web services with just one line of code.
- Creating request content from Text, JSON, XML, or binary data.
- Read the response as Text, JSON, XML, or binary data.
- Authenticate using basic authentication.

Here are examples of new methods:

> // Getting text
> ResponseText := ALRestClient.Get(Url).Content().AsText();
>
> // Getting binary data
> TempBlob := ALRestClient.Get(Url).Content().AsBlob();
>
> // Posting binary data and returning binary data
> ALHttpContent.Create(TempBlob) TempBlob := ALRestClient.Post(Url, ALHttpContent).Content().AsBlob();
>
> // Getting a JsonObject
> JsonObject := ALRestClient.GetAsJson(Url).AsObject();

> // Posting a JsonObject and returning the result as JsonObject
> JsonObject := ALRestClient.PostAsJson(Url, JsonObject).AsObject();
>
> // Using Basic Authentication
> HttpAuthenticationBasic.Initialize('user01', 'Password123');
> ALRestClient.Initialize(HttpAuthenticationBasic); ALHttpResponseMessage :=
> ALRestClient.Get('https://httpbin.org/basic-auth/user01/Password123');

> **Note**
>
> We'd like to thank our community for making this valuable contribution through our **System Application open-source repo on GitHub**

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.

Choose between more sampling intervals for snapshot and in-client profiling

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 16, 2023	✔ Oct 2, 2023

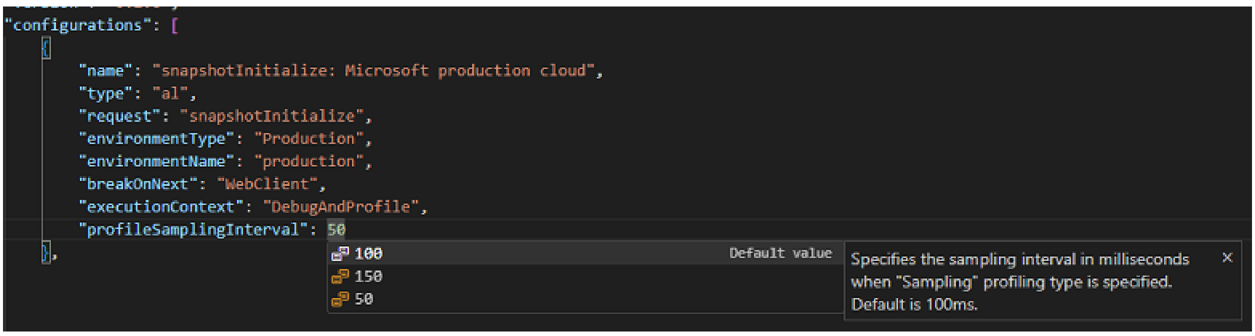
Business value

Some releases ago we introduced a great new tool to investigate AL performance, namely profiling—either as the AL profiler for developers in a snapshot debug session from within Visual Studio Code, or as part of the in-client performance profiler accessible to customer admins and consultants as well as developers.

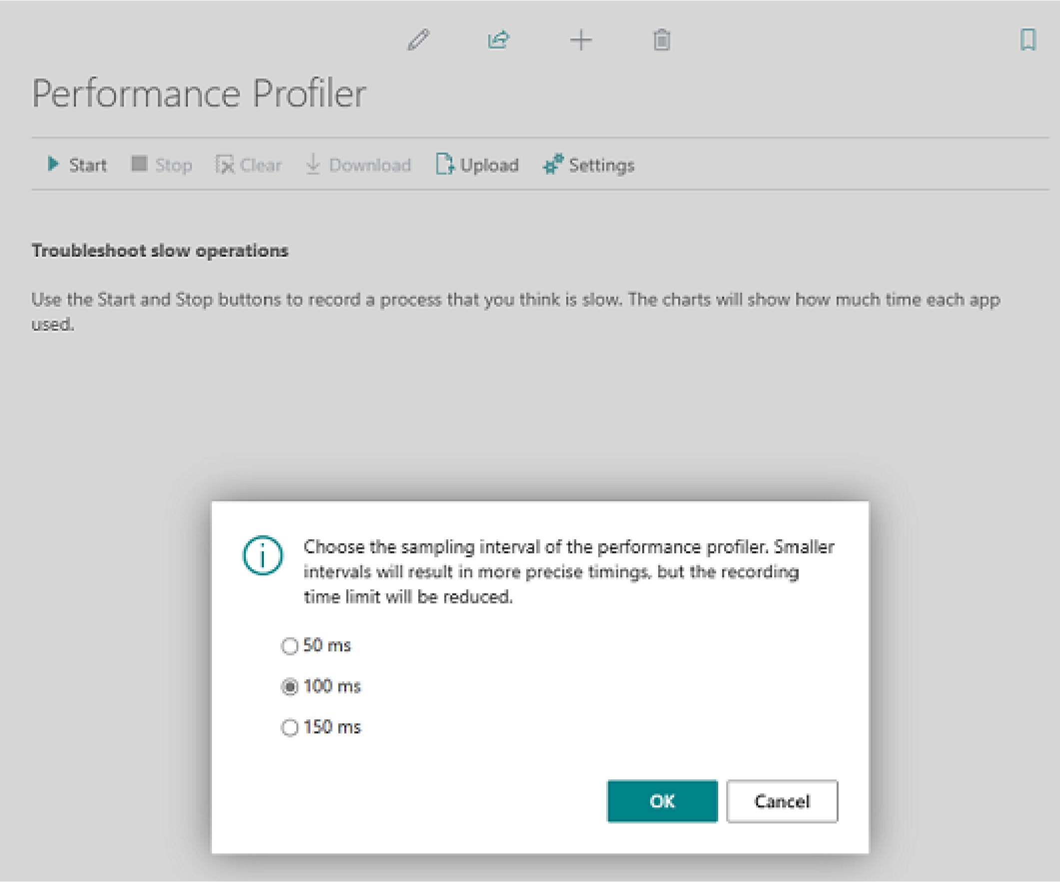
In the in-client performance profiler, and optionally in the AL profiler, sampling is used to determine at what intervals the system monitors what is running. At launch we supported 100ms sampling interval only. Based on feedback we are now allowing the user to choose between 50, 100 and 150ms. This allows for both finer and coarser granularity of insights, for example, to catch smaller operations and get more accurate durations, or to limit dates being captured and displayed to larger operations only.

Feature details

With the *launch.json* snapshot configuration parameter *profileSamplingInterval*, AL developers can specify the interval at which the sampling will be collected. Current options are {50ms, 100ms, 150ms}. The default value is 100ms.



Likewise, in the *in-client performance profiler*, there is a new **Settings** action, where you can select the same sampling internal options. Again, 100ms is the default.



Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Initialize a snapshot debugging session on a cloud production environment (docs)

Define multi-worksheet datasets for Excel reports

Article • 11/15/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 2, 2023	✔ Nov 1, 2023

Business value

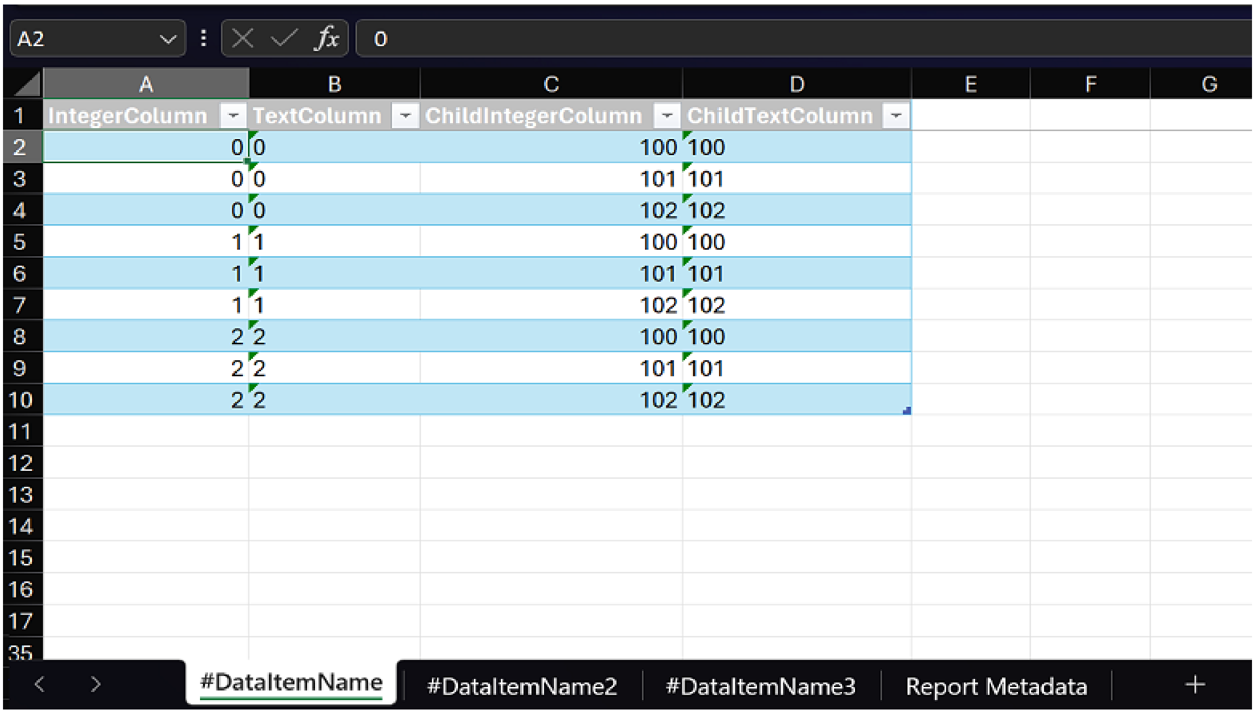
AL developers can now define AL report datasets so that when running with Excel layouts, multiple top-level data items are stored in their own worksheets in Excel. This makes data models such as parent-child easier to model in Excel, and enables them to use powerful modeling tools such as PowerPivot in Excel.

Feature details

Prior to this release, developers who wanted to create an Excel report on a data model with multiple top-level data items, such as a parent-child relationship, had to do a lot of extra modeling in Excel to separate the two before they could use that data in the Excel layout.

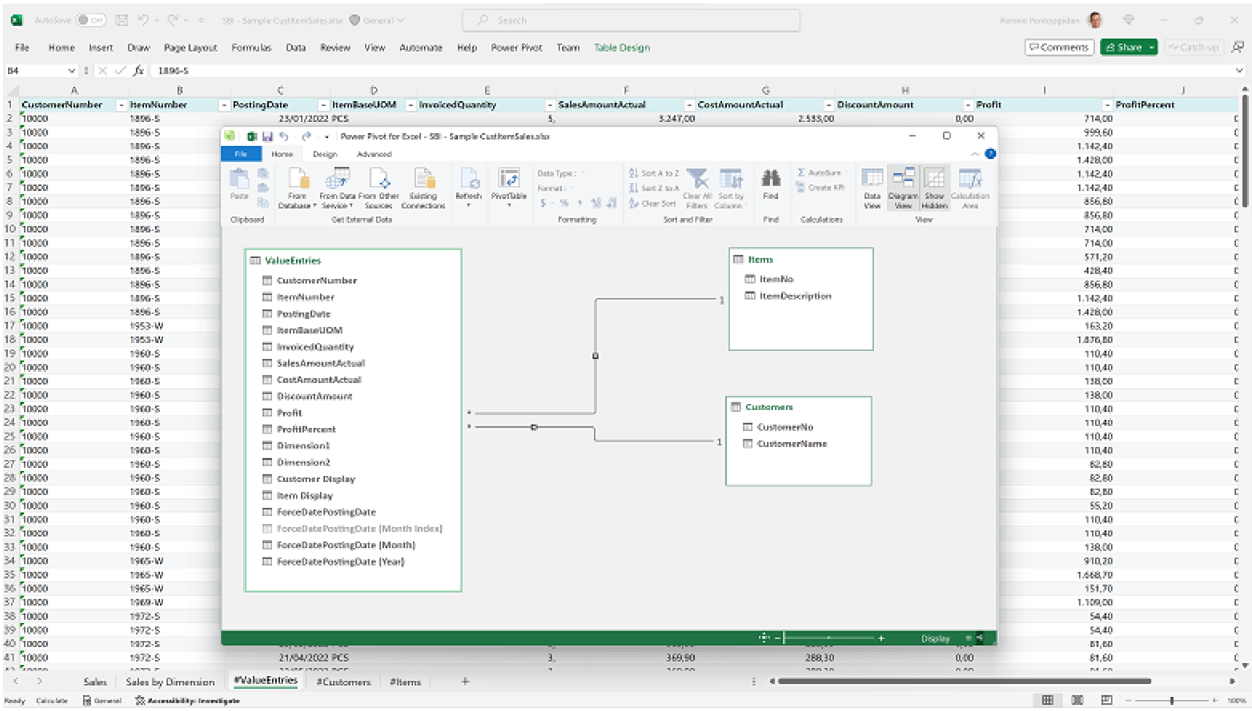
With this release, the developer can set a new ExcelLayoutMultipleDataSheets property to True. The AL runtime will generate an Excel worksheet for each data item and place its data there.

Multiple sheets will be named **#DataItemName**, where DataItemName is the dataitem name in the report design. Adding new empty Excel layouts to the report uses the property value to determine the sheet structure.



The default is to use a single sheet for all data.

With data in multiple worksheets, the report layout can easily include data models defined with the PowerPivot feature in Excel:



See also

Creating an Excel layout report (docs)

Document your extensions with the ALDoc tool for partners

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 17, 2023	✔ Oct 2, 2023

Business value

Business Central has a large and continuously growing number of ISV apps on AppSource, some of which are being built upon, both by apps from the same publisher, other publishers and resellers (in the form of per-tenant extensions). To aid consuming apps downstream, documentation is a major benefit, but until now it has been a large manual process to create and keep that in sync with app changes, unless the publisher has invested in automation themselves.

Based on the recent investments for generated documentation for the Business Central base, system, and other first-party applications, we are giving publishers a new ALDoc tool. This allows generating documentation from symbolic and syntactical information, code comments, and overall application structure based on input .app files. Publishers can host the resulting documentation either internally—for example, for R&D usage—or externally for downstream partners.

Generating content based on source code has many advantages such as accuracy, 100 percent reflection of the current codebase, less error-prone documentation, and time savings.

Feature details

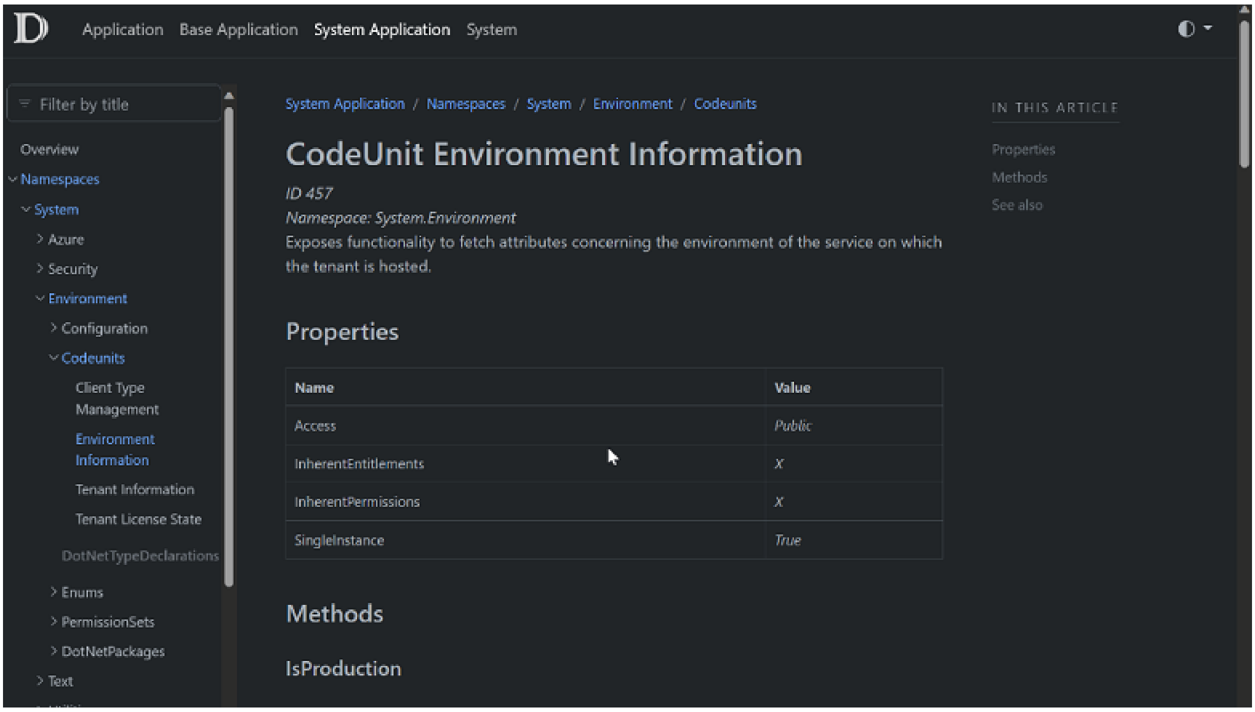
It’s our pleasure to announce that with the latest prerelease update of the AL Language extension for Microsoft Dynamics 365 Business Central, we have included a **preview** of the ALDoc tool for partners.

The ALDoc tool generates documentation from symbolic and syntactical information, code comments, and overall application structure based on input .app files. You can use it to generate internally or externally facing reference documentation for your solution.

The tool also generates a help site with the reference articles, sorted by the application structure, based on the provided custom template.

Read more about the tool in our docs Generating help with the ALDoc tool.

Also, as usual, we want to hear what you think. Use AL issues for tool feedback.



Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Generating help with the ALDoc tool (docs)

Easier management of System Application permissions

Article • 10/09/2023

Enabled for	Public preview	General availability
Users, automatically	-	✔ Oct 2, 2023

Business value

A streamlined and organized permissions management system can save time and effort for IT administrators. Having fewer permissions that an IT administrator needs to grant to users can improve security, simplify administration, increase productivity, enhance compliance, and lead to cost savings for businesses.

Feature details

Reducing the number of permissions that you need to control in the System Application makes it easier to manage permissions because you need to consider fewer objects. Managing fewer permissions also reduces the risk of permission errors, such as if you or a partner accidentally leave out certain objects in custom permission sets.

Inherent permissions are applied across System Application modules.

For example, we've reduced the number of objects that require permissions to be set in System Application - Basic by 60 percent. In the remaining objects, you no longer have to manage some individual permissions. For example, you no longer need to manage Read permission for the Language table because everyone needs access to that table.

Extend general ledger posting aggregations

Article • 12/21/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Nov 3, 2023

Business value

Regulations in different countries and industries, and customer business practices, might require a change to how general ledger entries are aggregated during posting.

Feature details

The **Invoice Posting Buffer** table has been at the center of localizations and partner customizations when changes to G/L posting are needed, or when G/L entries must be aggregated in a different way when they're posted to the general ledger. The previous design was not extensible because the primary key in that table cannot be changed without introducing a breaking change across partner solutions and localizations. There are significant differences in this table across localizations—in particular for APAC, BE, ES, IT, NA, and RU, which has made it difficult to extract localizations to extensions.

This refactoring makes the posting process for sales, purchase, and service transactions extensible. Partners can also change the way the posting algorithm aggregates G/L entries—for example, by specific document lines, posting groups, or any tax setup that is required by local legislation. Partners can replace customizations by using the interface for G/L invoice posting, resolve legacy issues for the Invoice Posting Buffer table, and use their own implementation of G/L invoice posting.

We remove the dependencies from the Invoice Posting Buffer table in the base application and build an invoice posting component with an interface and an extensible enum for the implementation setup.

ⓘ Note

This feature is currently available only for developers and can't be turned on in production environments yet.

See also

Extending G/L Entry Aggregations When Posting Invoices (docs)

Find all references now works on triggers, system methods, and trigger events

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 13, 2023	✔ Oct 2, 2023

Business value

The CodeLens for **Where used** reference counts and the **Find all References** tool in Visual Studio Code has not supported triggers, system methods, or trigger events, making it much harder for users to understand and navigate. With Business Central 2023 release wave 2 we are adding support for this, making developers more productive.

Feature details

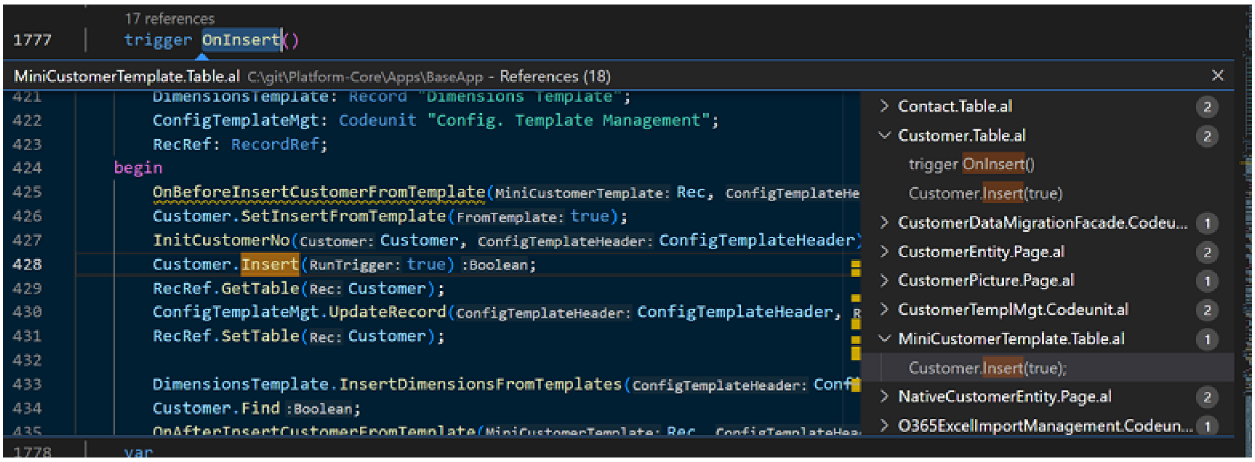
We are now finding only relevant references to built-in methods. As an example, **Shift+F12** on the `Customer.Insert` method will now only give you Insert references on the customer record, whereas before you would get any `Insert` on any record.

We also support finding references to triggers/events/built-in methods that are relevant. For instance, we are finding:

- References to triggers in event subscribers and vice versa (ex: Table.OnInsert <-> OnAfterInsertEvent)
- References to triggers in other triggers and vice versa (ex: Table.OnInsert <-> TableExt.OnBeforeInsert)
- References to triggers in procedures and vice versa (ex: Table.OnInsert <-> Rec.Insert)
- References to procedures or events in event subscribers and vice versa (ex: Table.OnInsert <-> OnAfterInsertEvent)

In this release, the above is enabled on page fields, table fields, page actions, and table methods/triggers/events.

This illustration shows an example of the CodeLens count (the grey "17 references" at the top) and **Find all References** used on the Customer table trigger OnInsert:



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 .

Get inlay hints in source editor for AL method parameters and return types

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓ Aug 13, 2023	✓ Oct 2, 2023

Business value

Visual Studio Code supports an editor concept called inlay hints. These add additional inline information to source code to help you understand what the code does. In this release we're adding the ability to get inlay hints for AL parameter names and return types.

Feature details

Visual Studio Code supports inlay hints, which render additional information about the source inline. More information: Inlay Hints

With this release we're adding inlay hints for AL parameter names and method return types.

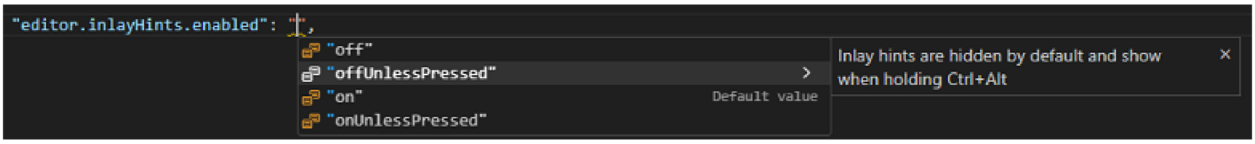
Here's an example of inlay hints enabled for both return type and parameters (these are the grey names):

```
trigger OnRun()
begin
    today := TODAY() :Date;
    code.CreatePostedDeferralSchedule(SalesLineVar: line, NewDocumentType: 2, NewDocumentNo: 'D12345', NewLineNo: 5, PostingDate: today);
end;
```

By default, neither of these inlay hints is shown, but with the new *al.inlayhints* settings you can enable each individually.

```
"al.inlayhints.functionReturnTypes.enabled": true,
"al.inlayhints.parameterNames.enabled": true
```

Note that even though you have AL inlay hints enabled, you also need to enable the inlay hints feature itself in Visual Studio Code, because it's not enabled by default. You can do that with the general "editor.inlayHintsEnabled" setting. You can decide whether you want the hints always on or off, or shown/hidden using the **Ctrl+Alt** keyboard shortcut.



You can even control the appearance of the inlay hints in the Visual Studio Code settings.

```
"editor.inlayHints.fontFamily": "",
"editor.inlayHints.fontSize": 8,
"editor.inlayHints.padding": false,
```

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

AL Language extension configuration (docs)

Get IntelliSense for adding variables in Visual Studio Code AL debugger console

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 16, 2023	✔ Oct 2, 2023

Business value

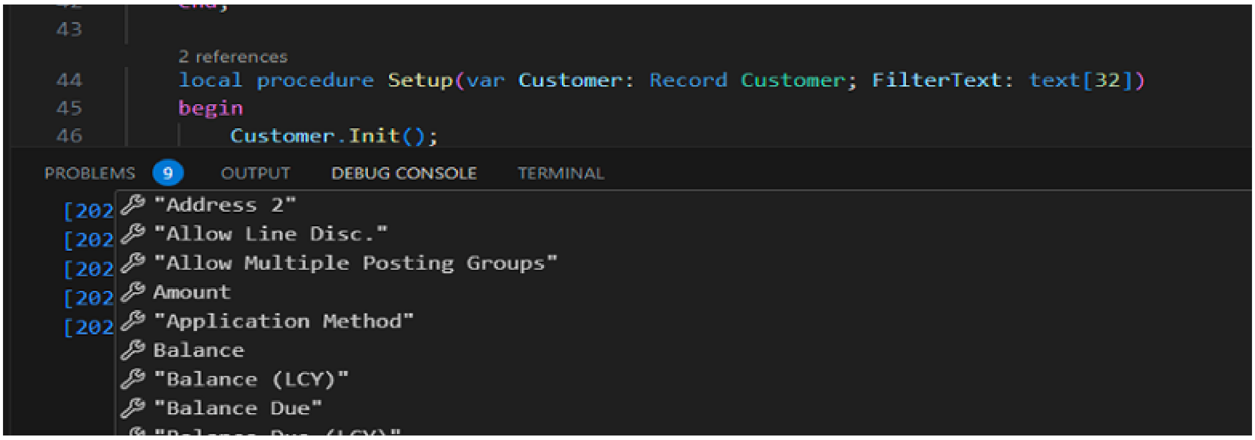
Usually when debugging code, the developer wants to see variable contents by adding it in the debug console window. To help raise discoverability and make it easier to add variables, the debugger console window now support IntelliSense.

Feature details

The console supports IntelliSense for object types and members that can be evaluated in the context of the debugger: fields, locals, globals, and member symbols that are not methods on a data type.

We still don't allow evaluations of methods in the console.

The debugger watch window is not supported for now due to lack of integration points with Visual Studio Code.



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Get smarter method signature recommendations in IntelliSense

Article • 10/24/2023

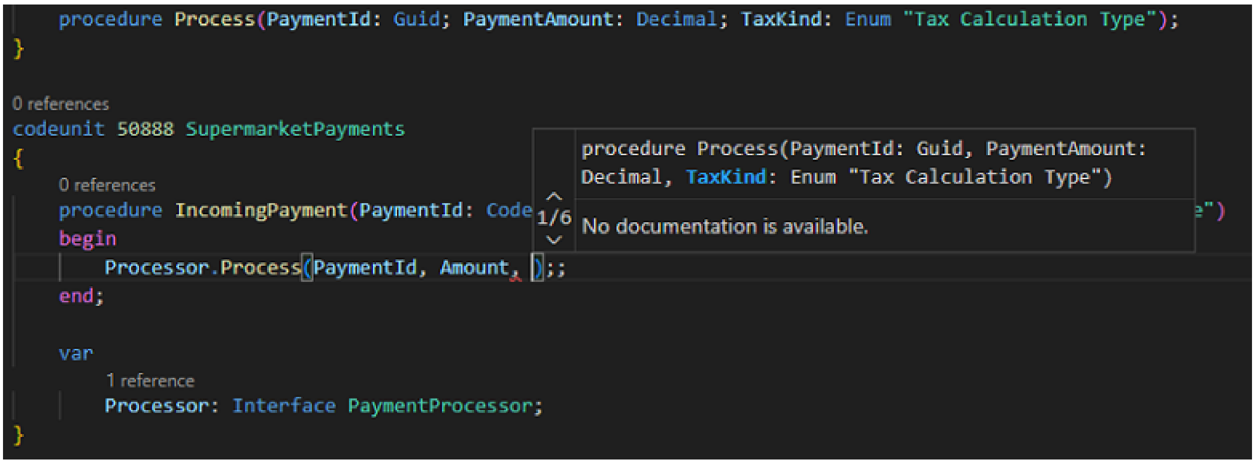
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 16, 2023	✔ Oct 2, 2023

Business value

One of the most common uses of IntelliSense when authoring code is getting parameter help on methods. IntelliSense is a great help, but not when showing options that don't apply. Until now in AL, when there were multiple method overloads, the user would have to switch between them to get help matching the chosen overload. In this release, IntelliSense will be smarter and actually prioritize the first valid overload.

Feature details

The AL Language extension will now reorder and prioritize relevant overloads when the developer starts typing a method invocation. If the typed expression corresponds to a valid overload, it will always be the first recommendation and the correct active parameter will be highlighted. The rest of the recommendations will be sorted in the order of relevance based on the provided parameters.



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Get syntax highlighting for AL in Azure DevOps

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 2, 2023	✔ Oct 2, 2023

Business value

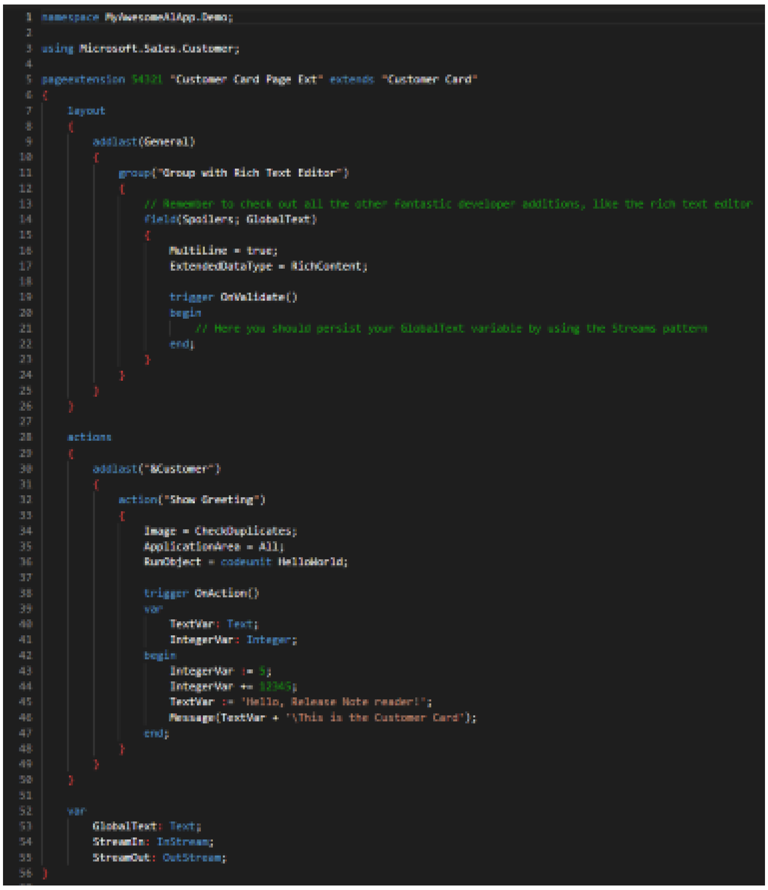
Syntax highlighting really improves readability of source, including AL. Until now, we've had highlighting inside of the AL Language extension editor in Visual Studio Code and in GitHub, but not in Azure DevOps, which is used by a lot of partners. There, all AL code is just shown as plain text. This is inefficient because all pull request reviews and all other code investigations are a lot slower to do without.

To address the many votes for this, and increase developer productivity, we are adding support for AL syntax highlighting in DevOps, in large thanks to an effort by our German partner GOB, which created the majority of the initial syntax coverage.

Feature details

Syntax highlighting for AL in Azure DevOps is enabled by installing the following free extension in Azure DevOps:

https://marketplace.visualstudio.com/items?itemName=Dynamics365BusinessCentral.allanghighlights



```
namespace MyAwesomeALApp.Demo;

using Microsoft.Sales.Customer;

pageextension 54321 "Customer Card Page Ext" extends "Customer Card"
{
    layout
    {
        addlast(General)
        {
            group("Group with Rich Text Editor")
            {
                // Remember to check out all the other fantastic developer additions, like the rich text editor
                field(Spoilers; GlobalText)
                {
                    MultiLine = true;
                    ExtendedDataType = RichContent;

                    trigger OnValidate()
                    begin
                        // Here you should persist your GlobalText variable by using the Streams pattern
                    end;
                }
            }
        }
    }

    actions
    {
        addlast("&Customer")
        {
            action("Show Greeting")
            {
                Image = CheckDuplicates;
                ApplicationArea = All;
                RunObject = codeunit HelloWorld;

                trigger OnAction()
                var
                    TextVar: Text;
                    IntegerVar: Integer;
                begin
                    IntegerVar := 5;
                    IntegerVar += 12345;
                    TextVar := 'Hello, Release Note reader!';
                    Message(TextVar + '\This is the Customer Card');
                end;
            }
        }
    }

    var
        GlobalText: Text;
        StreamIn: InStream;
        StreamOut: OutStream;
}
```

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.

Get the AL Language extension in prerelease versions on Visual Studio Code Marketplace

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓ Jul 1, 2023	✓ Oct 2, 2023

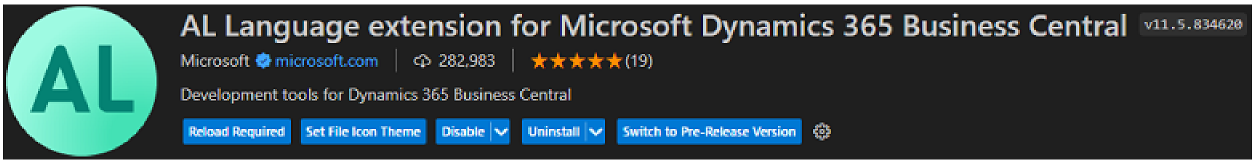
Business value

Prerelease versions of the AL Language extension for Dynamics 365 Business Central are currently only available as part of Business Central Insider builds. This requires partners to regularly download Insider builds to get the latest prerelease AL Language extension. This situation can cause compatibility issues when Business Central launches a preview close to general release because it's not clear to partners that they need to download the latest AL Language extension version from the Insider build. However, Visual Studio Code already supports the ability to notify users about and install prerelease versions of extensions. Using this mechanism will make it easier for developers to be aware of and opt in to prerelease AL Language extensions.

Feature details

The AL Language extension prerelease versions are now available through the existing Visual Studio Code mechanism for getting notified about and installing prerelease versions. To learn more about this mechanism, visit Prerelease Extensions in the Visual Studio Code documentation.

To install the prerelease version, use the drop-down list to select **Install Pre-Release Version**, or if already installed, use the **Switch to Pre-Release Version** option in the Visual Studio Code extension management page for the AL Language extension.



When you have switched to the prerelease version, the Visual Studio Code extension management page for the AL Language extension will display that the prerelease is used, and offer the option to switch back to the release version.

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Handle multiple file uploads and file drop zones

Article • 01/11/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

Business value

The ability for AL developers to handle multiple file uploads and designate different page parts as file drop zones in Business Central provides greater flexibility and usability. This enhancement benefits developers working on applications or customizations that require multifile upload functionality and adds value to organizations by improving productivity and the user experience.

Feature details

Developers can handle multiple file uploads and designate different page parts as file drop zones.

This improvement empowers AL developers to create more flexible and user-friendly interfaces within Business Central. Designating specific page parts as file drop zones lets people upload multiple files at the same time, which improves efficiency.

This feature is particularly valuable for developers working on applications or customizations that require users to upload multiple files simultaneously. By allowing users to drag and drop files onto designated page parts, developers can streamline the file upload process and simplify data entry.

The following example designates a group and field as file drop zones by referencing the ProductImageUpload action in the FileUploadAction property. The FileUploadAction action's AllowMultipleFiles property lets developers specify whether an action can handle a single file, or multiple files. The AllowedFileExtensions property allows developers to specify the file types that people can drag to a drop zone. After you drag one or more files to a group or field on a HappyDragAndDrop page, the OnAction trigger in the FileUploadAction property is called with the list of files.

AL

```
> page 50102 HappyDragAnddropPage
> {
>     PageType = Card;
>     SourceTable = item;
>     UsageCategory = Administration;
>
>     layout
>     {
>         area(Content)
>         {
>             group(GroupName)
>             {
>                 FileUploadAction = ProductImageUpload;
>
>                 field(name; 'Name')
>                 {
>                     FileUploadAction = ProductImageUpload;
>                 }
>             }
>         }
>     }
>
>     actions
>     {
>         area(Processing)
>         {
>             fileUploadAction(ProductImageUpload)
>             {
>                 Caption = 'Upload product Image';
>
>                 AllowMultipleFiles = false;
>                 AllowedFileExtensions = '.jpg', '.jpeg', '.png';
>
>                 trigger OnAction(files: List of [FileInfo])
>                 var
>                     currentFile: FileInfo;
>                     stream: InStream;
>                 begin
>                     foreach currentFile in files do begin
>                         currentFile.CreateInStream(stream);
>                         // Code here to handle the file
>                         Message('%1 has a length of %2',
```

```
currentFile.FileName, stream.Length);
>                     end;
>                 end;
>             }
>         }
>     }
> }
```

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Hover over label variable to see text string value

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 13, 2023	✔ Oct 2, 2023

Business value

When label variables are used in AL code, only the label name is shown inline in the source code. To understand what the value of the label is, the developer has had to navigate to the label definition or use Peek Definition. In this release we add the ability to just hover over the label variable and instantly see the text string value in the tooltip inline, thereby avoiding switching context to see the value.

Feature details

To easily see the text string value of a label variable, you can now just hover over the variable and the value will be shown in the tooltip. Thus you avoid too much content switching by navigating to the label definition or use Peek Definition (**Alt+F12**).

Here's a small example:

Tell us what you think

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Open Visual Studio Code from web client to investigate or troubleshoot extensions

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 10, 2023	✔ Oct 2, 2023

Business value

Recreating a locally installed Visual Studio Code workspace to investigate or troubleshoot a customer environment includes manually creating workspaces, projects, and launch configurations, and downloading symbols, all of which require knowledge as well as time to go through it.

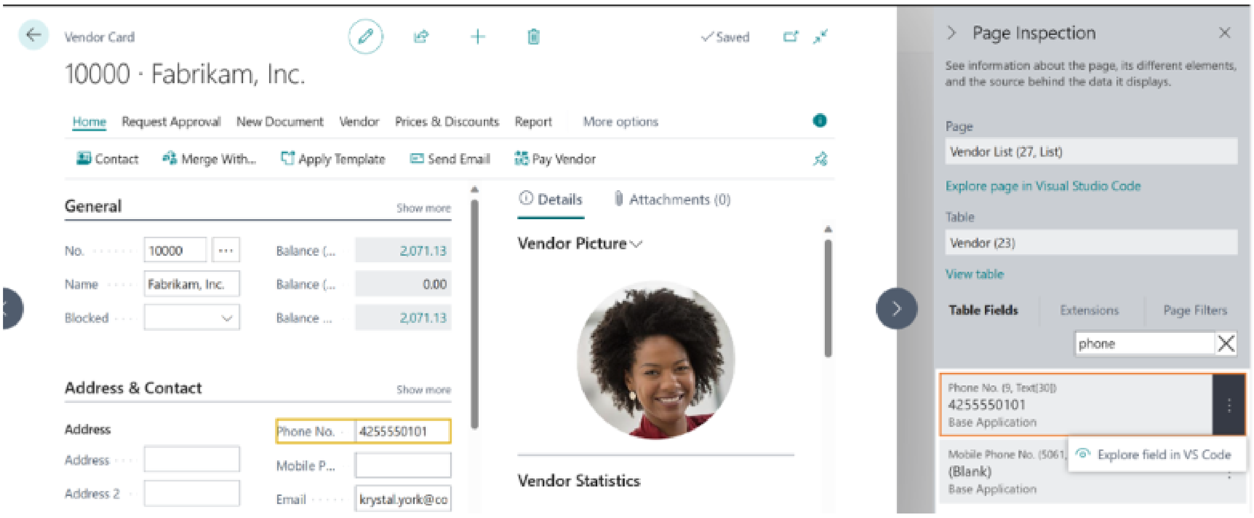
To simplify and speed up this process, a new option to open a local Visual Studio Code instance for the current extension and environment will be added to the web client, allowing just a single click to set up a matching Visual Studio Code project for investigation or troubleshooting.

Feature details

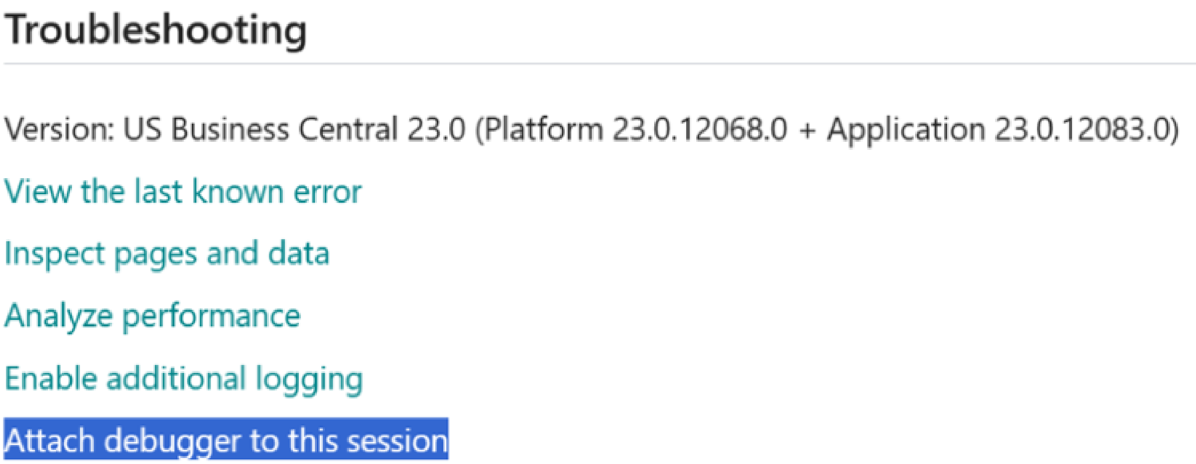
As a developer or consultant, you can open a new Visual Studio Code session from within the web client for a specific customer production or sandbox environment. Two different contexts will be supported:

- Open a page from within the **Page Inspector**.
- Troubleshoot the current session from within the **Help and Support** page.

Here's an example of provisioning Visual Studio Code from the **Page Inspector** on a specific field:



Provisioning Visual Studio Code and attaching to the current session from the **Troubleshooting** section of the **Help & Support** page:



Depending on the context, Visual Studio Code will open to allow inspecting objects and source, and allow attaching to debug or snapshot debug and profile the current web client session. Regardless, access to the source code will be gated by the resource exposure profile settings for each extension:

- If Visual Studio Code is already open, the last active session will be used; otherwise, a new Visual Studio Code will open. If the AL Language extension isn't installed, the user will be asked to install it, and the process ends.
- A new project will be created or updated, and a matching launch configuration will be created, depending on production or sandbox environment.
- If invoked for page in the **Page Inspector**, symbols for that page will be downloaded
- If the user chooses to debug, Visual Studio Code will attach to the web client process, which it was invoked from and await breaking on error.

When using this feature and choosing to generate new projects, you should delete the projects once in a while to not accumulate many unused projects. Another option is to use the feature to specify a new default project location, but you might also want to use that for real projects.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Troubleshoot in Visual Studio Code directly from the web client (docs)

Segment AL code and reduce naming conflicts with namespaces

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 17, 2023	✔ Oct 2, 2023

Business value

AL for Business Central will now support namespaces, similar to other code languages. Namespaces provide a way of organizing objects and code in a logical and hierarchical manner. They can be used to help avoid naming conflicts between different extensions, making it easier to maintain and understand extensions, including the relationship between different objects.

Feature details

An AL file can now define a namespace at the top, which will apply to all objects in the code file. A given object can only belong to one namespace, but the same namespace can be used for multiple AL files and objects.

When objects are resolved, the closest scope is used first. Therefore, to resolve to a similarly named object in a dependent extension, the reference must use a fully qualified name. Alternatively, it's possible to define `using` directives to include external namespaces and thereby omit fully qualifying names.

Because namespaces are useful for logical segmentation of extensions, the AL Explorer also shows namespaces for objects and allows grouping objects by namespace, making it easier to discover related objects, focus on app subareas, and identify inconsistencies when adding new objects.

Nested namespaces provide better naming of objects than expressing the full structure in the 30-character object name. However, renaming existing objects is a breaking change, so this capability mainly helps with the logical structure of existing objects and new names going forward.

Code actions will be available to help developers add namespaces to existing sources.

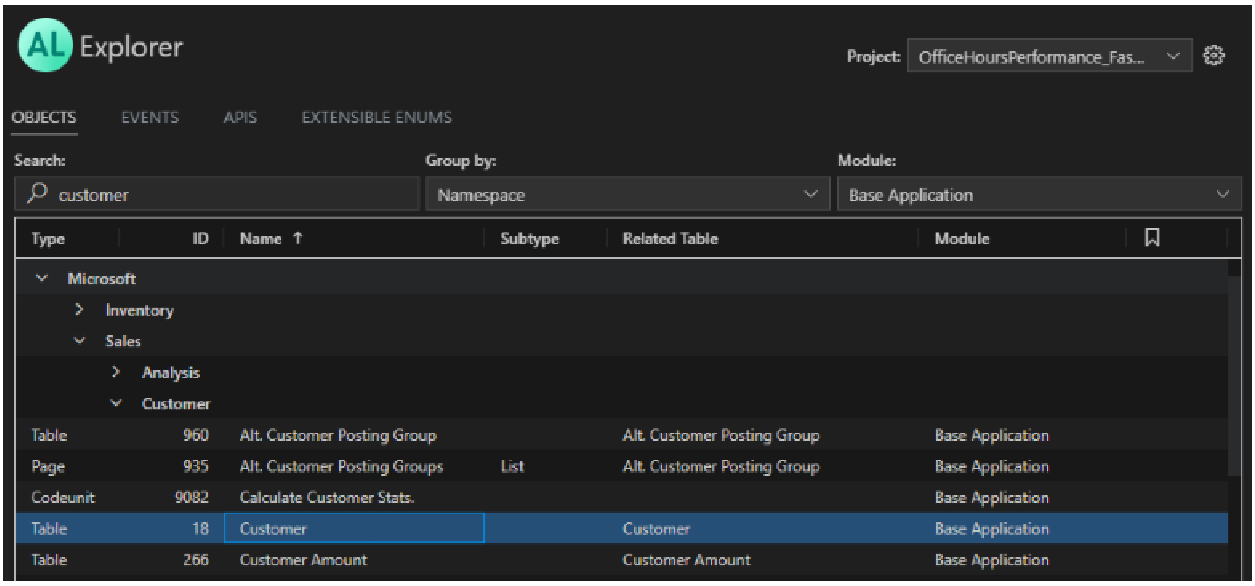
Here are some examples, first on defining namespace in code.

```
// -----------------------------------------------------------------
// Copyright (c) Microsoft Corporation. All rights reserved.
// Licensed under the MIT License. See License.txt in the pro
// -----------------------------------------------------------------
namespace System.Text;

table 2000000132 "Entity Text"
{
    ReplicateData = false;

    fields
```

Then on how you can include objects in other namespaces in your scope to use them.

```
using System.Email;
using System.Globalization;
using System.IO;
using System.Reflection;
using System.Security.User;
using System.Utilities;

table 18 Customer
{
    Caption = 'Customer';
    DataCaptionFields = "No.", Name;
```

Finally, here is an example of base app objects grouped by namespace, with Customer table residing in the Microsoft.Sales.Customer namespace. Grouping objects by namespace like this makes it easier to focus on and find related objects.



See also

Namespaces in AL (docs)

Sell Business Central apps through AppSource

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Apr 2, 2023	✔ Oct 9, 2023

Business value

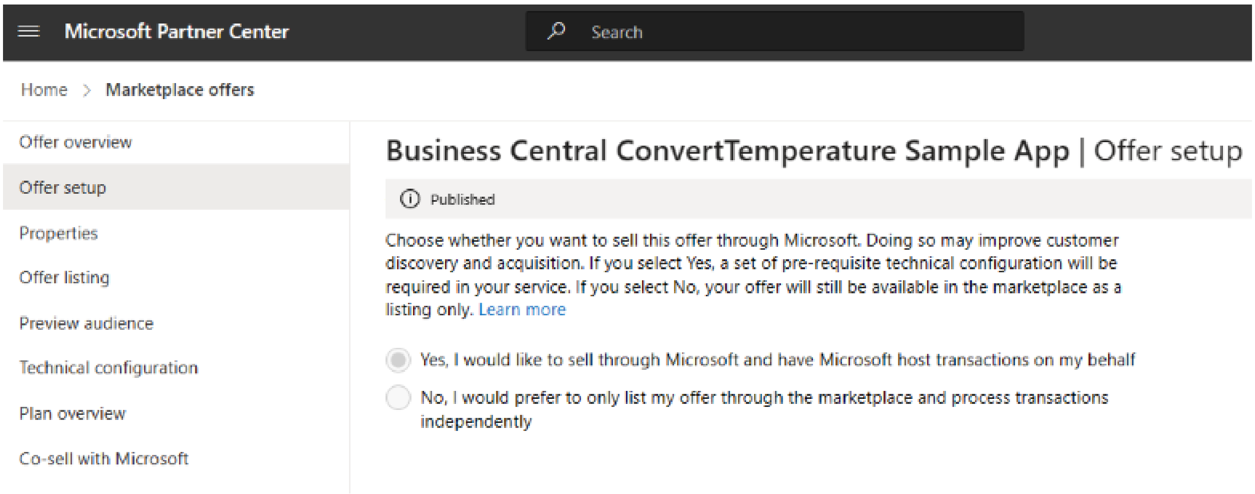
For years, AppSource publishers and customers have been waiting for the ability to transact Business Central apps via the AppSource marketplace. Due to the lack of such support, publishers have had to build their own custom sales and licensing support, adding unnecessary work and maintenance. Some publishers have even delayed entry to AppSource due to this gap.

Customers haven't been able to see pricing options for apps directly in AppSource. Instead, they had to rely on external publisher price lists and contact the publisher directly or via a reseller. Since each publisher would have their own licensing and billing process, this added additional overhead for the customer or reseller.

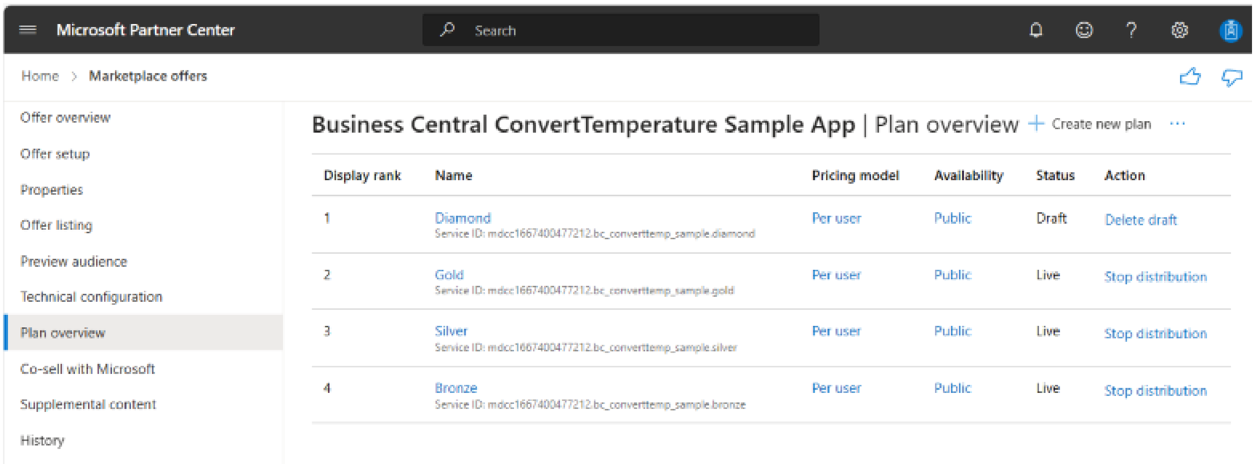
We are excited to announce that with the 2023 release wave 2, transacting Business Central apps through AppSource will go live after having gone through both private and public previews. Initially, credit card payment or direct billing is supported along with per-user monthly or yearly subscription licensing managed through the Microsoft admin center.

Feature details

To enable transactability for an AppSource app, publishers opt in to selling through Microsoft on their existing offer in Partner Center.



When the transact option is enabled, publishers can define plans, or variants, of their offer. Plans can be used to sell various levels of functionality, such as Gold, Silver, and Bronze variants at different prices. Plans can also be used for waterfall pricing, which means selling the same level of functionality with a discount based on the number of users bought.



Each plan can specify the supported markets, and can have market-specific pricing. Monthly and yearly billing terms are supported, with the customer being able to choose automatic recurrence when they purchase in AppSource. A one-month free trial is also an option for publishers.

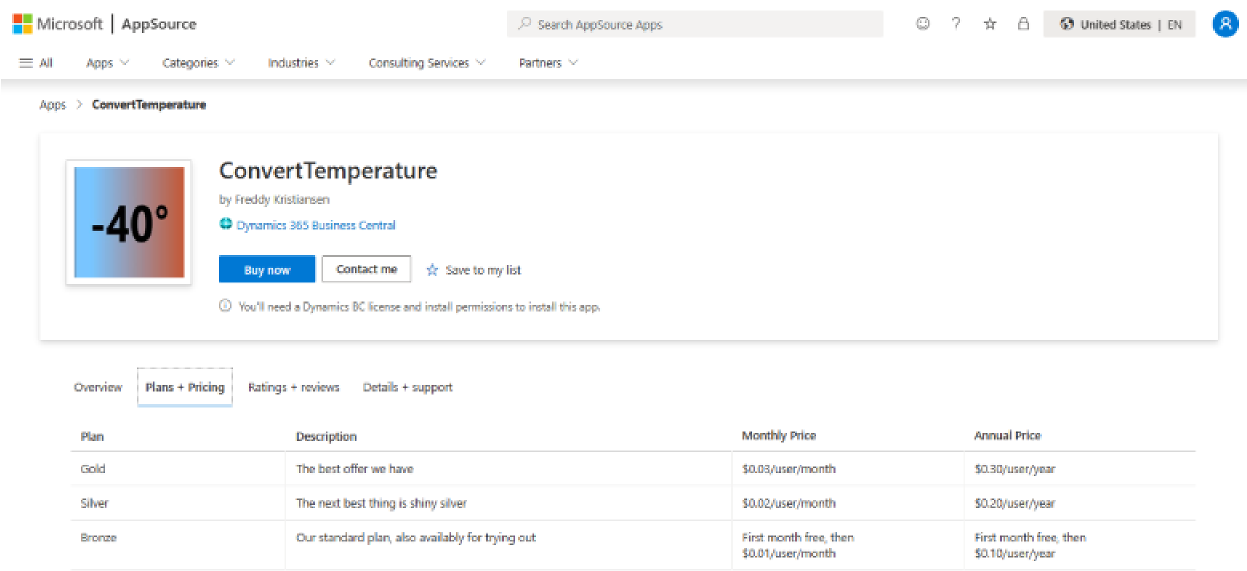
Plans are usually public and surface for all prospect customers on AppSource. However, they can also be made private, in which case they only surface for customers that the publisher has specified.

Once the publisher has defined the plans to sell, they can map those plans to functionality in their Business Central app. This is done through the Entitlement object, which links a license, such as the plan, with Business Central permission sets. Entitlements also allow mapping access to delegated admins, as well as publisher developers, so that these can run the app without any purchased license—for example, to demo, configure, test, or troubleshoot.

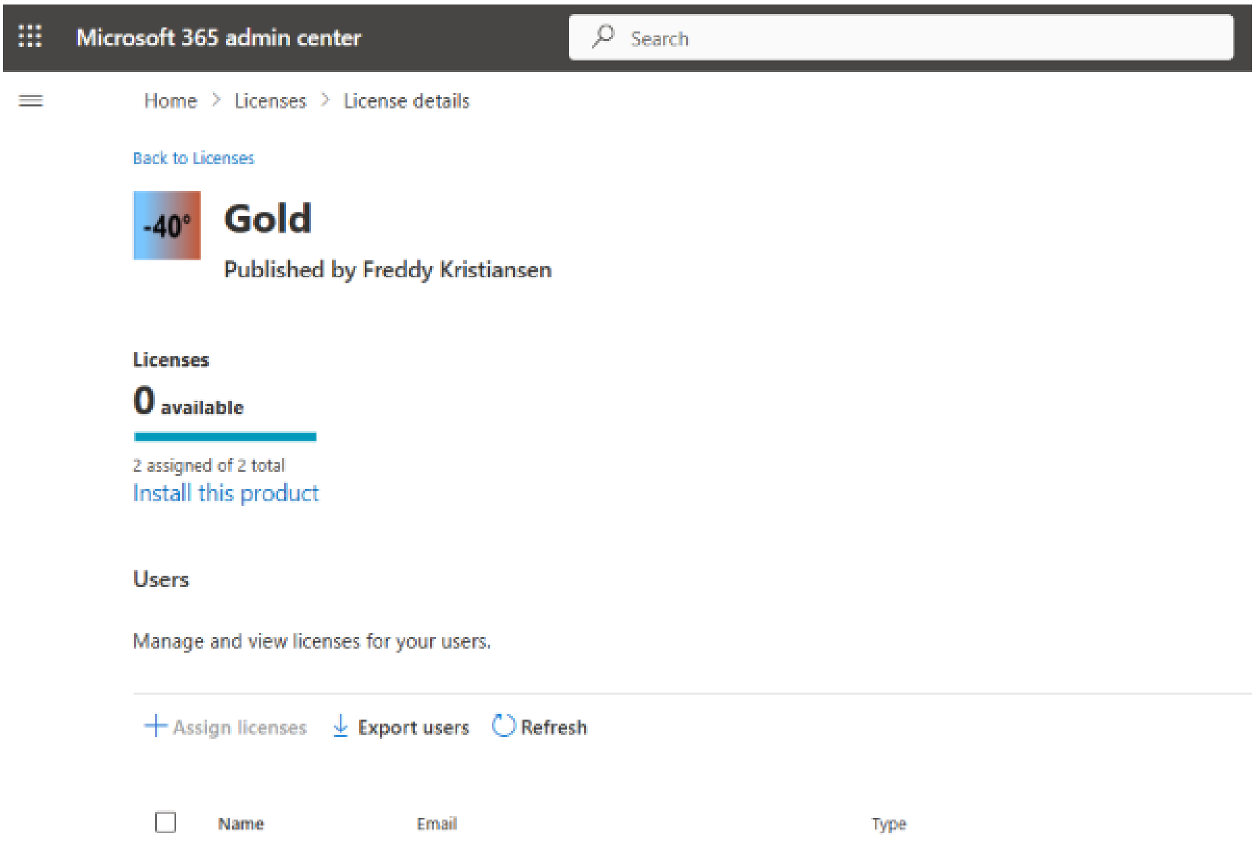
You can find examples of entitlements for our Converttemperature sample app in the BusinessCentralDemos repo.

Note that if the publisher already has existing customers on custom licensing, they shouldn't opt in to using transactability and entitlements until they have implemented side-by-side support, which is the ability to fall back to their custom licensing for existing customers in a transition period. Otherwise, those existing customers would be locked out once they upgrade to the app version using entitlements. To implement side-by-side support, publishers must create an entitlement mapping `Unlicensed` user to the required permission sets to run their custom licensing check.

When the app has been updated with entitlements and opted in to transact, it'll surface in AppSource with the different plans and pricing, allowing customers to purchase directly in the AppSource marketplace.



Once a number of licenses have been purchased, they appear in the customer's Microsoft 365 admin center, and can be assigned to individual users.



Note that even if a user has an assigned license (plan) that maps to permission sets through the entitlement for that license, the user must still be granted those permissions inside Business Central to have access. The license only defines the maximum permission to app functionality paid for, but users with the license might be granted less inside Business Central.

Set new output folder setting for storing app files at AL project build

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 13, 2023	✔ Oct 2, 2023

Business value

By default, when you build AL projects, the output app file is stored in the project folder. However, if you work on multiple apps that aren't in the same workspace and depend on each other, outputting to a shared app folder can be a benefit.

Feature details

In the "al.compilerOptions" settings, you can now use the "outFolder" property to specify which output folder to use when generating an app file as part of building an AL project.

This makes it easier to manage and reuse generated apps in a single location. The AL project in Visual Studio Code will still contain a node for the output file, but the file will then physically be stored outside of the project folder.

Here's an example of saving built app files in "myappfolder" on the user's C drive.

```
"al.compilationOptions": {
    "outFolder": "C:/myappfolder"
},
```

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

AL Language extension configuration (docs)

Set the default folder location for new AL projects

Article • 10/24/2023

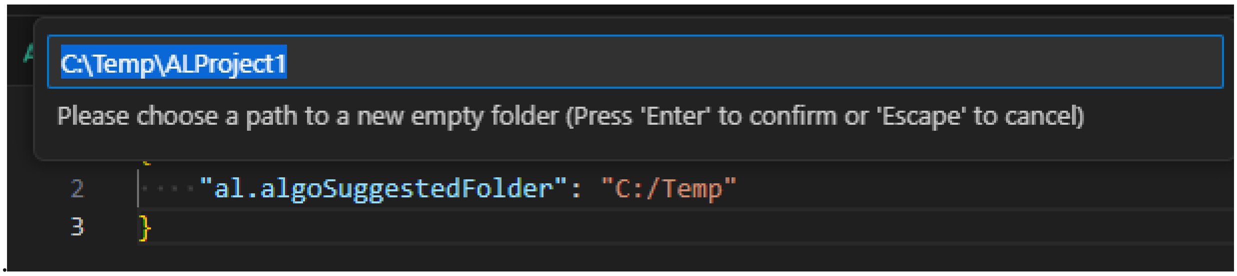
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 16, 2023	✔ Oct 2, 2023

Business value

The AL Language extension for Microsoft Dynamics 365 Business Central has a command to generate a new AL project. Since the start, the folder location for projects has been fixed to the users' Documents folder in Windows. Based on asks, we are now adding the ability for partners to define a different default location for AL projects in the settings, making the project creation workflow easier.

Feature details

There is now an *al.algoSuggestedFolder* setting for specifying the default folder location for new AL projects. This can be set per user or per workspace, offering some flexibility in the location for new projects.



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Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

AL Language extension configuration (docs)

Show list of keys while working on AL code

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 17, 2023	✔ Oct 2, 2023

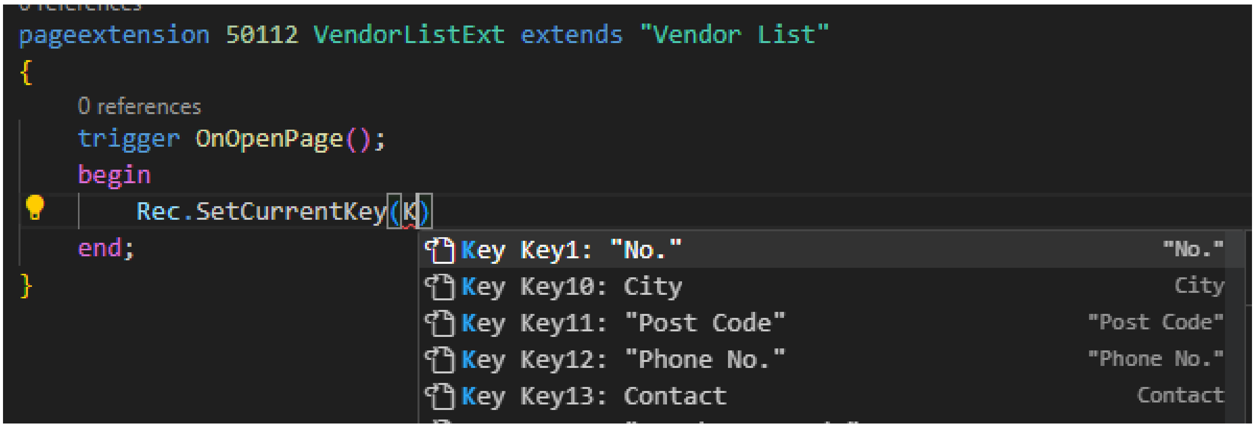
Business value

IntelliSense offers great productivity features. On request, we have now added support for suggesting available keys when calling methods accepting key parameter. This improves speed and accuracy of coding and thus productivity.

Feature details

AL methods accepting keys, such as SetCurrentKey(), now have IntelliSense listing key parameters that are available. Until now it has only shown the list of fields.

Note that IntelliSense still suggests table fields, in case the developer wants to just perform sorting on specific fields. Keys are only suggested for the first parameter; subsequent parameters just suggest fields.



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.

Track source and build metadata on extensions

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓ Aug 16, 2023	✓ Oct 2, 2023

Business value

To help track extensions that are created as part of DevOps pipelines, we are introducing Source and Build properties in the app.json manifest of extensions. This allows easily finding the relevant source repo, commit ID, and build system used to create the extension.

Feature details

The app.json manifest of extensions now contains two new properties, *Source* and *Build*. These can be used to track source location and the build context.

For source, we support:

- *repositoryUrl*, which is the URL of the repository where the source code of the project can be found.
- *commit*, which is an ID of the source code for the current version of the project, that allows getting back to the commit that triggered building the extension.

For build, we support:

- *by*, which is useful for tracking the build agent/system that orchestrated the build; for example, AL-Go for GitHub.
- *url*, which can be used for the URL to the build system invocation where the build can be found.

You can define these values directly in the app.json, but given the dynamic nature, the usual scenario would be to set these as part of build pipelines via command line parameters for the used alc.exe compiler executable. The values passed here will overwrite any values in the app.json source file.

If using *BcContainerHelper*, the functions *Compile-AppInBcContainer* and *Compile-AppWithCompilerFolder* now take parameters for "SourceRepositoryUrl", "SourceCommit", "BuildBy", and "BuildUrl". These are now being set if you use AL:Go for GitHub to build your extensions.

In this release none of these values are yet surfacing in the **Extension Management** page, in TAC, or via PowerShell commands like NAV-AppInfo. If you want to read the values, the option is currently to use the BcContainerHelper "Extract-AppFileToFolder", which will allow getting the app.json file with the settings.

Here's an example of build and source metadata in app.json. This is normally set by the build process and not manually.

```
"source": {"commit": "cf2e5d5c-9940-4c2b-94a3-1e7d5d56a981","repositoryUrl": "https://github.com/microsoft/AL"},
"build": {"by": "AL-Go for GitHub,dev", "url": "https://github.com/microsoft/AL/actions/runs/123456789"}
```

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

JSON files (docs)

Turn off data analysis mode on pages and queries

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 8, 2023	✔ Oct 2, 2023

Business value

When first introduced, the data analysis mode was available on all list pages. However, for some list pages, using the data analysis mode doesn't make much sense. In addition, in this release, it's now also possible for users to analyze data that's defined in query objects. With query objects, as with list pages, it doesn't always make sense to use the data analysis mode. This is especially true with existing query objects, which were typically developed for a different purpose.

Therefore, we've made it possible for tenant admins and AL developers to turn off the analysis mode on list pages and query objects that aren't suited for analytical usage.

Feature details

The data analysis mode feature was introduced as a public preview feature in 2023 release wave 1 as a new way of interacting with data on list pages. Instead of running reports using different options and filters, you can simply add multiple tabs that represent different tasks or views on the data. Examples could be "My customers," "Follow-up items," "Recently added vendors," "Sales statistics," or any other view you want. For some list pages this capability doesn't make much sense.

Therefore, we make the following possible:

- AL developers can turn off the data analysis mode using page object metadata.
- Administrators can turn off the data analysis mode for specific users with a new system permission DATA ANALYSIS EXEC.

See also

Analyze list page and query data using data analysis mode (docs)

Use Azure Files with Azure File Service API module

Article • 01/19/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Jan 10, 2024

Business value

Use Azure Files to take advantage of a fully managed file share service in the cloud. The Azure File Services API module provides you with all the procedures you need to manage your Azure Files in Business Central. Integrating Azure Files in your app has never been easier.

Feature details

You can now easily take advantage of Azure Files, which offers fully managed file shares in the cloud that are accessible via the industry standard Server Message Block (SMB) protocol, Network File System (NFS) protocol, and Azure Files REST API.

The Azure File Services API module leverages the REST API to provide you with all the procedures you need to manage your Azure Files in Business Central. Azure file shares can be mounted concurrently by cloud or on-premises deployments for easy access to your Business Central files. For directories in Azure File Share Services, use AL to list, create, delete, and rename them. For files in the directories, use AL to create, delete, upload, download, copy, and rename them. Integrating Azure Files in your app has never been easier.

ⓘ Note

We'd like to thank our community for making this valuable contribution through our **System Application open-source repo on GitHub**

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.

Use cookies in HTTP calls from Business Central

Article • 05/06/2024

ⓘ Important

This content is archived and is not being updated. For the latest documentation, go to [What's new or changed in Business Central](). For the latest release plans, go to [Dynamics 365, Power Platform, and Cloud for Industry release plans]().

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Mar 1, 2024	✔ Apr 2, 2024

Business value

In scenarios where third-party HTTP endpoints require cookie customization, this can now be built into Business Central apps and extensions.

Feature details

We're adding official support for cookies to the HttpClient datatype. This allows AL developers to efficiently send and receive cookies when sending HTTP requests.

A new Cookie datatype has been introduced, as well as several AL interfaces to handle cookies:

- `UseResponseCookies` AL interface to the HttpClient data type enabling and disabling caching for server cookies.
- `Cookie` data type representing a cookie object.
- AL interfaces to retrieve cookies from an `HttpResponseMessage`.
- AL interfaces to retrieve, add to, and remove cookies from an `HttpRequestMessage`.

Developers can choose to automatically reuse response cookies, handle cookies manually, or a mix of both.

Thank you for your ideas

Thank you for submitting these ideas:

- Business Central - cookies
- Allow to add Cookies with HttpClient

We listened to your ideas, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Cookie data type (docs)

Use SecretText type to protect credentials and sensitive textual values from being revealed

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 16, 2023	✔ Oct 2, 2023

Business value

With an increasing amount of integrations to external systems, it's not uncommon in AL code to work with secrets such as credentials and other sensitive textual values. Given the need to protect these from being revealed through debugging, the latter has often been blocked through resource exposure policies, at the cost of easy troubleshooting. To support enabling debugging, while protecting credentials and other sensitive textual values from being revealed, we are introducing a new *SecretText* type for variables. In addition, some of the common scenarios in the system app will get support for passing in SecretText parameters for credentials—for example, the HttpClient and Isolated Storage types.

Feature details

A new type, SecretText, has been added to protect credentials and other sensitive textual values from being revealed through debugging. The declaration syntax will be similar to the Text data type, with the sole difference that it won't support constraints on the length.

SecretText will be usable as a:

- Variable value
- Return value
- Parameter value

Its use will be limited to carrying, for example, credentials from the point of creation to the destination method. The destination method must accept a SecretText value.

Any text type will be assignable to the SecretText type as long as it can be converted to the Text type. The SecretText type encapsulates a Text type. If a Code or other text type is to be stored, it'll be converted into the Text type. A Dotnet string type will also be convertible to SecretText. However, a constant or other types won't be assignable to a SecretText type.

For exceptional cases where it must be used as a text, a built-in Unwrap method will be supported. This will only be usable when the project scope is on-premises. Given on-premises only, it will be allowed outside of boundaries of a procedure marked as NonDebuggable, but it will result in a warning, and can thus also be blocked through the use of a ruleset for specific projects.

Initially, events won't support SecretText parameters; however, triggers will. The latter scenario is to support the case of control add-ins like the OAuth control add-in to return the credentials in a secure container.

In the system app, HttpClient will get support for passing SecretText parameters—for example, for credentials.

In the following example, the return value and parameter will not be debuggable:

```
procedure Send(ContentTxt: SecretText; Credential: SecretText; TargetUri: SecretText)
    var
        Request: HttpRequestMessage;
        Response: HttpResponseMessage;
        Client: HttpClient;
        Headers: HttpHeaders;
        Content: HttpContent;
    begin
        Request.SetSecretRequestUri(TargetUri);
        Content.WriteFrom(ContentTxt);
        Request.GetHeaders(Headers);
        Headers.Add('Authorization', SecretText.SecretStrSubstNo('Bearer %1', Credential));
        Request.Content := Content;
        Client.Send(Request, Response);
    end;
```

See also

Protecting sensitive values with the SecretText data type (docs)

Use the AL Language extension for Linux in preview

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 17, 2023	✔ Oct 2, 2023

Business value

To allow developers to choose the environment that fits their needs as a platform for developing amazing Business Center extensions, we are releasing a preview of the AL Language extension for Linux with the Business Central 2023 release wave 2.

Feature details

The AL Language extension for Microsoft Dynamics 365 Business Central now includes a Linux variant.

Just install the extension from https://marketplace.visualstudio.com/items?itemName=ms-dynamics-smb.al in your Visual Studio Code installation on Linux.

Since this is a **preview**, feedback is particularly welcome, as usual on https://github.com/microsoft/al/issues .

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 .

Use the built-in rich text editor to enter data

Article • 10/09/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 6, 2023	✔ Oct 2, 2023

Business value

Rich text editing capabilities improve the user experience by providing an intuitive and easy-to-use way to create and edit content in Business Central.

Feature details

Until now, you could only use rich text editing capabilities, such as the font and style formatting, in email scenarios. Now, we're bringing the power of our built-in rich text editor to all media fields in Business Central. Developers can also customize rich text capabilities for their extensions and applications.

At first iteration we will support multiline text but not in full screen mode and have a rich content toolbar intended for multimedia scenarios that may include tables, pictures, and more.

This can increase productivity and efficiency by reducing the time and effort required to perform tasks. Additionally, the rich text editor can help to ensure consistency and accuracy in the formatting and presentation of information, which enhances the overall quality and professionalism of the content you enter in Business Central.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Validate AppSource app hotfixes against latest app version

Article • 01/11/2024

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓ Dec 6, 2023	✓ Dec 6, 2023

Business value

In Business Central 2023 release wave 1, we introduced the ability to apply hotfixes to AppSource apps that target older versions of Business Central.

To ensure that customers can upgrade from your hotfixed older version to the next version available in AppSource, we're validating the hotfixed version against a newer version for the next Business Central major/minor release.

Initially, we validated against the first AppSource app version targeting the next Business Central major/minor release, but based on partner feedback and a suggested idea, we've changed the validation to now validate against the latest AppSource app version that targets the next major/minor release of Business Central.

This ensures compliance with the latest version at the time of the hotfix, and allows partners to perform more changes in their hotfix version. For example, partners can backport features if there are no breaking changes.

Feature details

The service that validates submitted AppSource apps for breaking changes now validates a hotfix against the latest AppSource app version targeting the next major/minor release of Business Central.

For more details and examples, see the updated documentation What is the extra validation done for a hotfix submission?.

For more details on what we shipped with Business Central 2023 release wave 1, see Deploy hotfixes for older AppSource apps.

For background information on the idea suggested for this feature, see AppSource validation for previous versions should compare against the latest available.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

What is the extra validation done for a hotfix submission? (docs)

Governance and administration

Article • 12/21/2023

ⓘ Important

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

We're giving Business Central administrators more tools for managing environments, apps, and data migrations. The goal is for administrators to be self-sufficient, able to solve their customer needs, and handle a wide variety of administrative scenarios.

- More granular administrator roles to give more control over the access granted to (delegated) administrators.
- Improved processes for minor update releases.
- The ability to link Business Central and Power Platform environments to set up integrations consistently and to apply Power Platform environment settings to Business Central.
- The ability to cancel Cloud Migration replication runs.

Analyze telemetry events across browser and server for a session or user

Article • 05/06/2024

ⓘ Important

This content is archived and is not being updated. For the latest documentation, go to [What's new or changed in Business Central](). For the latest release plans, go to [Dynamics 365, Power Platform, and Cloud for Industry release plans]().

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 31, 2024	✔ Apr 2, 2024

Business value

Telemetry events emitted from the browser/client have been enhanced to make it even easier to troubleshoot performance and stability issues.

Feature details

The following events have been improved in browser/client telemetry:

- Pageviews (CL0001)
- Error message quality votes (CL0002)
- Client-side action (CL0003)

For each of these events, the columns user_Id and session_Id are now aligned with events from the server. This means that you can now track all events for a session or user across browser/client and server.

Learn more about Business Central telemetry at Monitoring and Analyzing Telemetry.

See also

Analyzing page view telemetry (docs)

Automatically update AppSource apps with minor updates

Article • 01/11/2024

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Oct 31, 2023

Business value

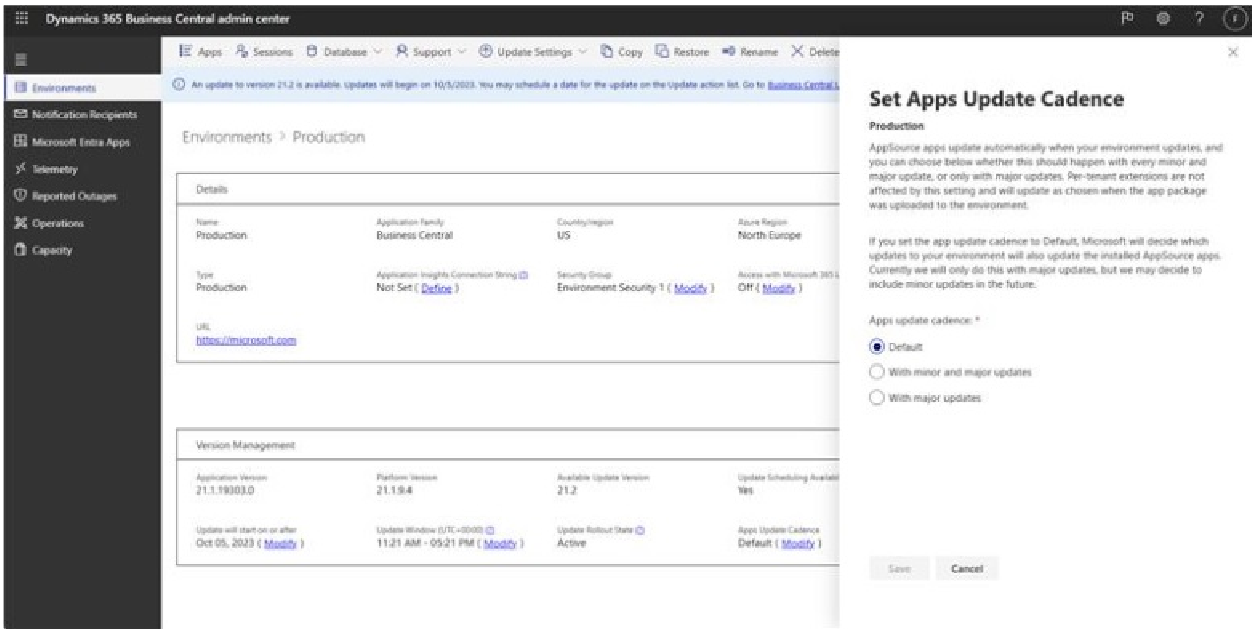
With this release wave, it's easier to make sure that apps installed in an environment are always up to date with the latest version.

Feature details

You already can update individual apps from the **App Management** page in the Business Central admin center, or wait for your environment to receive a major update that will automatically update AppSource. In 2023 release wave 2, we're introducing an environment-level setting that automatically updates all installed apps with every minor update, and lets you schedule individual app updates to take place during the environment's update window:

- Opt in to automatically update apps installed on your environment with each minor update to the environment. This way, you can always enjoy the latest features and bug fixes from the app developers without any manual intervention.
- Schedule individual app updates to run in the first upcoming update window set for your environment. This way, you can control when and how often your apps are updated, and minimize the impact on your business operations.

Using the **App Update Cadence** setting for your environment, you can choose whether apps update with each major update, each major and minor update, or stick to the default update cadence set by Microsoft. Currently, the default update cadence is for apps to update with each major update, but we may increase this frequency in the future.


Dynamics 365 Business Central admin center
Environments
Notification Recipients
Microsoft Entra Apps
Telemetry
Reported Outages
Operations
Capacity
Apps
Sessions
Database
Support
Update Settings
Copy
Restore
Rename
Delete
Environments > Production
Details
Name
Production
Application Family
Business Central
Country/region
US
Azure Region
North Europe
Type
Production
Not Set (Define)
Environment Security 1 (Modify)
Off (Modify)
URL
https://microsoft.com
Version Management
21.1.19303.0
21.1.9.4
21.2
Yes
Oct 05, 2023 (Modify)
11:21 AM - 05:21 PM (Modify)
Active
Default (Modify)
Set Apps Update Cadence
Production
AppSource apps update automatically when your environment updates, and you can choose below whether this should happen with every minor and major update, or only with major updates. Per-tenant extensions are not affected by this setting and will update as chosen when the app package was uploaded to the environment.
If you set the app update cadence to Default, Microsoft will decide which updates to your environment will also update the installed AppSource apps. Currently we will only do this with major updates, but we may decide to include minor updates in the future.
Apps update cadence: *
Default
With minor and major updates
With major updates
Save
Cancel

Copy companies with Dataverse integration safely

Article • 03/26/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 4, 2024	To be announced

Business value

Administrators in small or medium-sized companies often wear multiple hats and do many different tasks. It's important that you can efficiently and safely copy companies if you integrate with Dataverse or Dynamics 365 Sales, reducing the risk of data inconsistencies and saving you valuable time. This enhancement streamlines your workflow so you can focus on strategic tasks, driving your business forward.

Feature details

When an administrator copies companies in an environment that has Dataverse or Dynamics 365 Sales integration enabled, Business Central clears the following settings while copying to the target company:

- Dataverse and Dynamics Connection Settings to ensure that integration correctly re-initiates in the target company.
- Integration records to ensure that the target company doesn't point to records that are coupled in the source company.
- Integration synchronization jobs to stop synchronization background jobs.
- Synchronization errors, if they exist, because they're in the source company and would just be considered noise in the target company.

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.

Delete data from uninstalled extensions as an admin

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓ Sep 8, 2023	✓ Oct 2, 2023

Business value

Before this change, when administrators uninstalled an extension but didn't delete its data, they had to raise a support case or reinstall the extension to do so. Administrators can now easily delete data for an extension after they uninstall it, which saves time and effort.

Feature details

The **Extension Management** page gives administrators access to the extensions that are installed on their tenant. However, the page doesn't list extensions that were uninstalled before their data was deleted. This situation might mean that the tenant is storing unneeded data from old extensions. It can also result in reduced performance because the data model for table extensions loads data from uninstalled extensions. Administrators can quickly delete old data to avoid these potential problems.

To address these issues, we've introduced the **Delete Orphaned Extension Data** page. To delete data, on the **Delete Orphaned Extension Data** page, select the extensions, and then choose **Delete Data**.

See also

Install and Uninstall Extensions (Apps) in Business Central (docs)

Detect invalid cloud migration configurations with proactive warnings

Article • 02/13/2024

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Jan 1, 2024

Business value

Avoid errors and issues with proactive warnings for cloud migration.

Feature details

In 2023 release wave 2, you get more proactive warnings to help you avoid common errors and issues that may occur during the cloud migration process, such as:

- You have table mappings that haven't been used in the cloud migration. This may indicate that you've missed some important data or you've configured the table mappings incorrectly.
- You have tables with a mismatching number of records between the source and the target environments. This may indicate that some data has been lost or duplicated during the cloud migration process.
- You have overwritten a per database table in the target environment. This may affect the functionality or performance of your cloud environment.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Get more information about effective permissions

Article • 10/09/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 6, 2023	✔ Oct 2, 2023

Business value

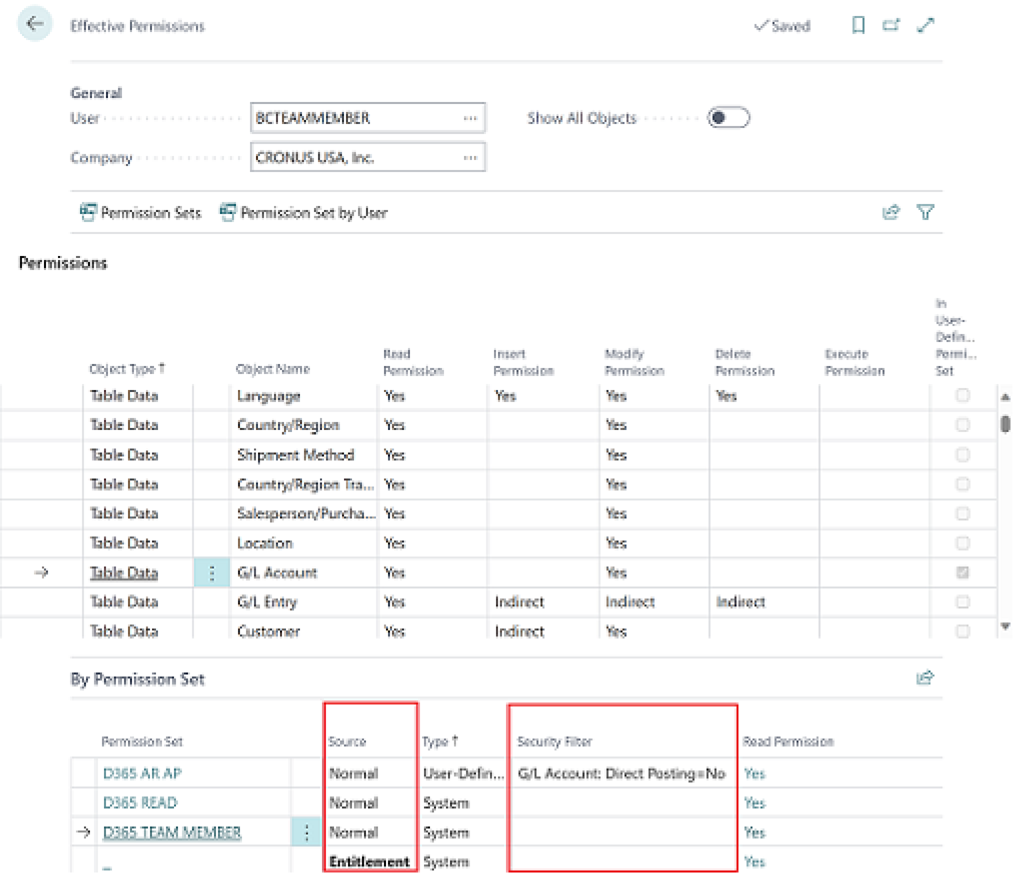
It's important that Business Central grant the right level of access to business data, so admins need to be able to verify the permissions that their users have. To give administrators deeper insight, the Effective Permissions page shows the source of permissions and the applied security filters.

Granting the right level of access to business data is important for Business Central administrators. To ensure that they've done so, administrators use the Effective Permissions page to view the permissions they've granted to each user.

Feature details

Users can only see their own permissions in the **Effective Permissions** page. You can view other users' effective permissions only if you're assigned to the SECURITY or SUPER permissions. Otherwise, if you try to access the effective permissions assigned to another user, an error message displays.

The **Effective Permissions** page offers additional information about the source of each permission. For example, whether the source is a security group, or a permission is inherited. The page also contains a column where administrators can review the security filters that are applied.



Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Assign Permissions to Users and Groups (docs)

Granular administration as Dynamics 365 Business Central Administrator

Article • 12/21/2023

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may 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	-	Jan 2024

Business value

Administrators' access rights can be better controlled by assigning roles that exclude access to other Microsoft products.

Feature details

To date, the **Dynamics 365 Administrator** Microsoft Entra ID role was the most restricted role for internal and delegated users that still enables access to Business Central environments and admin center. In 2023 wave 2, we will introduce a new **Dynamics 365 Business Central Administrator** role that grants access to Business Central without also giving rights to other Dynamics 365 or Power Platform products—giving a more granular control over what internal and delegated users can access and administer within a tenant.

Along with introducing the **Dynamics 365 Business Central Administrator** role, we also provide partners with a way to grant their delegated users limited access to Business Central environments for support scenarios, without being able to administer environments from the admin center. Delegated users who are assigned the **Helpdesk Administrator** role as part of the granular delegated admin privileges (GDAP) relationship with a customer will no longer have access to the admin center. However, they'll still be able to access customer environments using the **Delegated Helpdesk agent - Partner** license configuration.

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:

- New Admin Role in Azure Active Directory called "Business Central Admin"
- Splitting Admin role and User role of Delegated users

We listened to your ideas, along with comments and votes, to help us decide what to add to our product roadmap.

Improved data upgrade troubleshooting for Dynamics GP migration

Article • 02/13/2024

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Dec 1, 2023

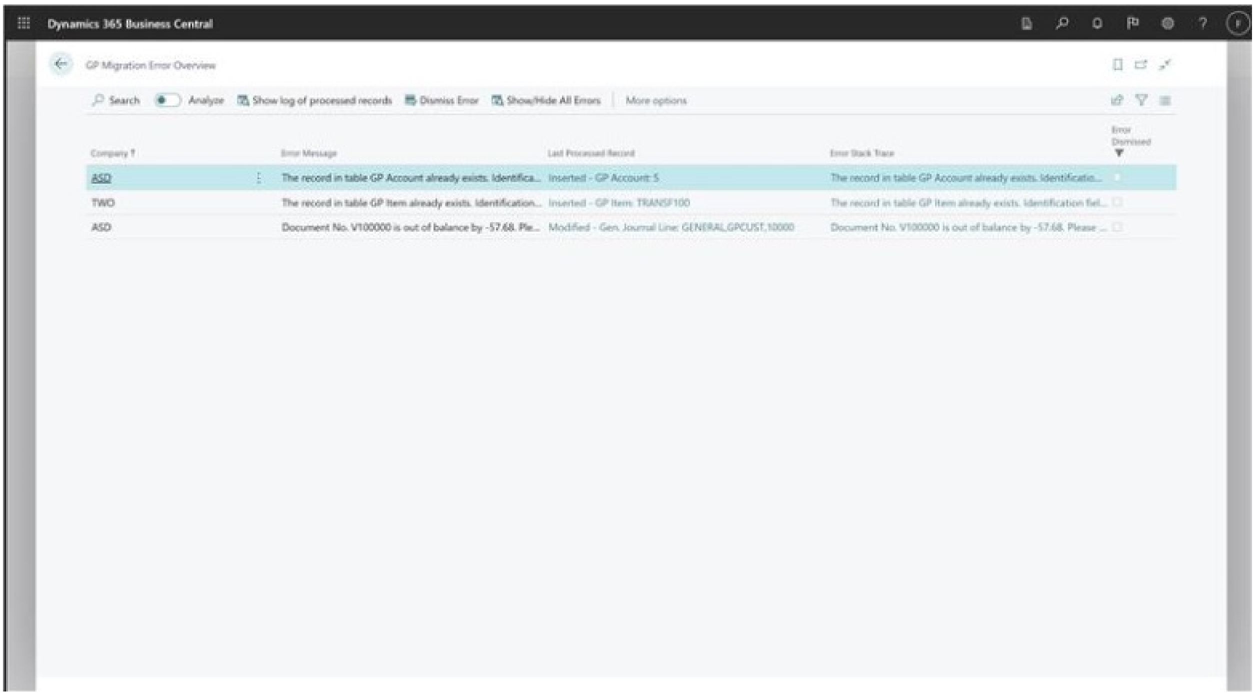
Business value

Troubleshoot data upgrade for Dynamics GP migrations with ease and accuracy.

Feature details

We've improved the cloud migration tooling for Dynamics 365 Business Central to make it easier to troubleshoot data upgrade issues for migrations from Dynamics GP. This feature helps you identify and resolve errors that occur during the data upgrade process. This feature includes the following enhancements:

- View a summary of all the companies that have data upgrade failures. This will help you quickly identify the ones that need your attention.
- Drill down into each company and identify the exact record on which the data upgrade failed. This will help you pinpoint the root cause of the error and take appropriate actions.
- Access a log of the last 100 records that successfully upgraded before the error occurred. This will help you verify the integrity of your data and resume the data upgrade process.



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 .

Include or exclude tables from cloud migration

Article • 01/10/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Nov 1, 2023

Business value

Customize your data migration to the cloud by including or excluding specific tables in or from your cloud migration to Dynamics 365 Business Central.

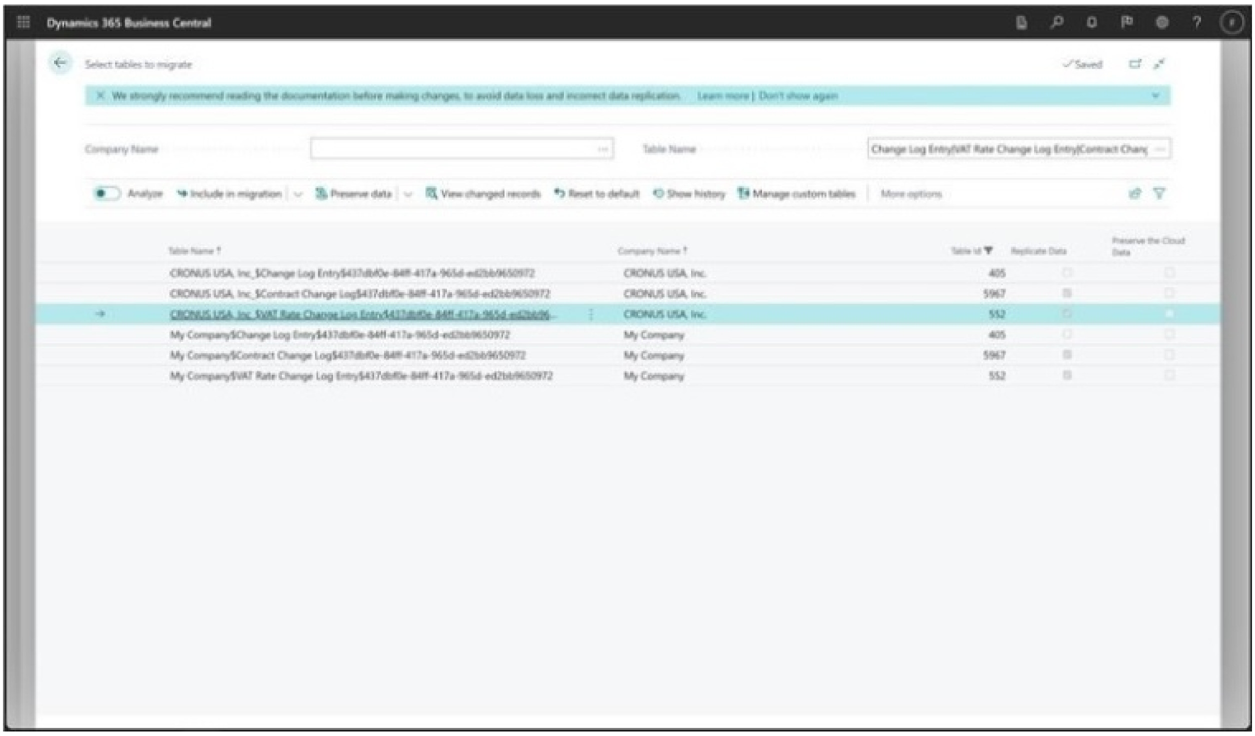
Feature details

In 2023 release wave 2, it's easier to customize your data migration to the cloud to fit your needs. You can now choose which tables to include or exclude from the cloud migration, as long as the table is accessible by AL code and not marked as internal or on-premises only. This feature is useful for customers who have specific requirements for their data migration, such as:

- You want to migrate only a subset of your data to the cloud to reduce the size or complexity of your cloud environment.
- You want to include additional data that's not part of the default cloud migration, such as change log data.
- You want to overwrite an entire table or only use a delta sync to replicate only new and changed data.

To use this feature, go to the **Cloud Migration Setup** page. In the **Actions** menu of the page, you'll find a new action called **Include/Exclude Tables**. This action opens a new page where you can view all the tables that are available for cloud migration. For each table, you can select whether to include or exclude it from the cloud migration. You can also specify whether to preserve or replace the existing data in the cloud for each table. This feature has the following limitations and restrictions:

- You can't change the behavior on system tables, like **Object Metadata**, **Session Event**, or **User Personalization**.
- You can't include tables that are marked with the on-premises scope, such as **Company Information** or **User Setup**.
- You can only include tables on which it's possible to write a per-tenant extension targeting a cloud environment.



See also

Change how data is replicated to Business Central online (docs)

Retain permissions when enabling cloud migration

Article • 10/24/2023

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Oct 2, 2023

Business value

Keeping permissions during cloud migration provides greater flexibility and convenience for users and certain operations that work with data.

Feature details

We're introducing a new option to the cloud migration tooling for Dynamics 365 Business Central that allows users to retain their current permissions while you migrate data to the cloud. This option is useful in the following scenarios:

- You want to move additional data into live environments for Dynamics GP migration. Note that migration from Business Central on-premises to live cloud environments isn't officially supported.
- You want to use service-to-service (S2S) authentication during the cloud migration.

By default, user permissions are replaced with the **Intelligent Cloud** permission set, which means only users with SUPER permissions have access to modify data while an environment is under replication. This behavior ensures data integrity and security during the migration process. However, you may want some users to keep their original permissions, for various reasons. For example, you may want users to continue working on your data while it is being replicated, or you may want to use S2S apps that require specific permissions.

To enable this option, you need to run a new action called **Enable/Disable Removing Permissions from Users** before you set up the cloud migration. This action will preserve your current user permissions when you set up cloud migration. You can find this action on the **Cloud Migration Management** page, in the **Actions** menu.

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.

Transfer environments between Microsoft Entra tenants

Article • 01/03/2024

ⓘ Important

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

Expand table

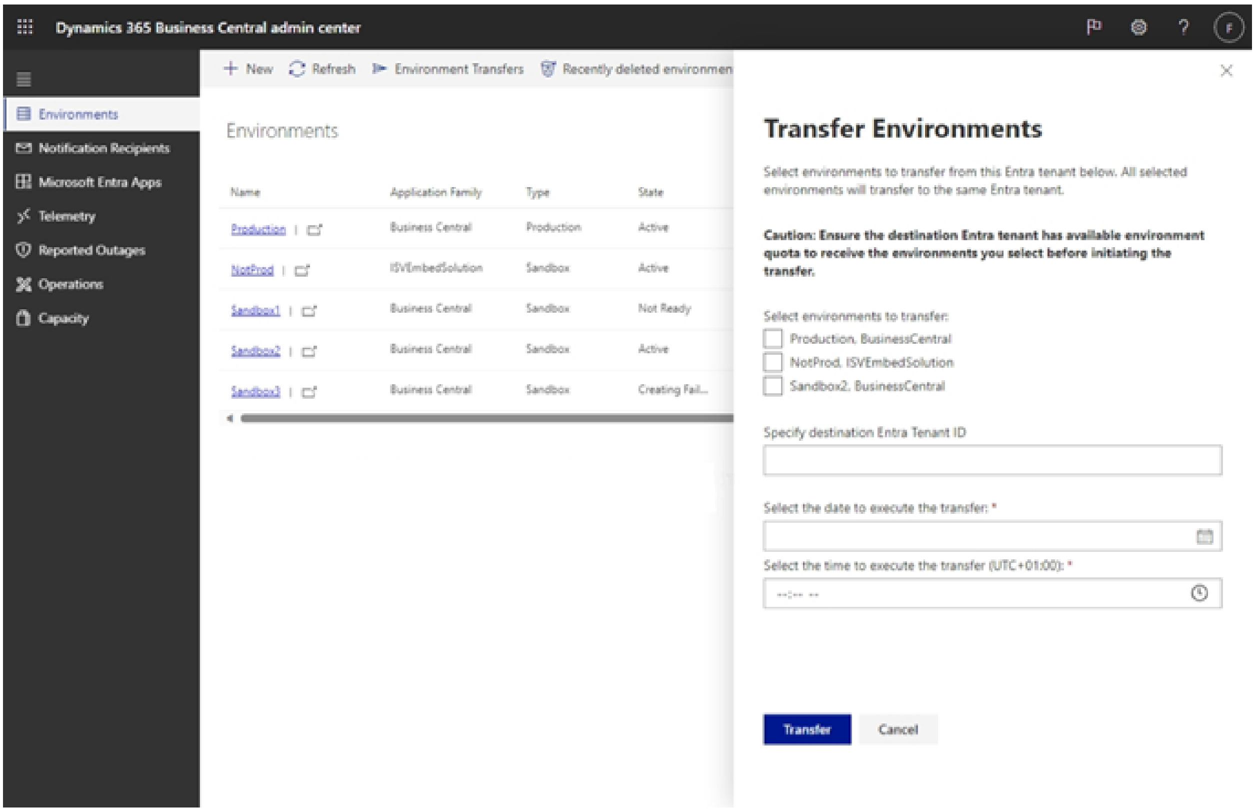
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Feb 2024

Business value

In some cases, administrators may want to transfer their Dynamics 365 Business Central environment to another Microsoft Entra tenant (formerly Azure Active Directory tenant). For example, this could be done to consolidate environments belonging to the same company in a single tenant when one company is acquired by another, or for partners to transfer a demo environment to their customer to test with. Until now, this scenario was supported through service requests that required paperwork to ensure consents from all involved parties were in place.

Feature details

In 2023 release wave 2, the process for transferring a Business Central environment to a different Microsoft Entra tenant will be a self-service scenario. Internal administrators can request an environment transfer from the source tenant, and then accept the transfer from the target tenant.


Dynamics 365 Business Central admin center
Environments
Notification Recipients
Microsoft Entra Apps
Telemetry
Reported Outages
Operations
Capacity
New
Refresh
Environment Transfers
Recently deleted environmen
Environments
Name
Application Family
Type
State
Production
Business Central
Production
Active
NotProd
ISVEmbedSolution
Sandbox
Active
Sandbox1
Business Central
Sandbox
Not Ready
Sandbox2
Business Central
Sandbox
Active
Sandbox3
Business Central
Sandbox
Creating Fail...
Transfer Environments
Select environments to transfer from this Entra tenant below. All selected environments will transfer to the same Entra tenant.
Caution: Ensure the destination Entra tenant has available environment quota to receive the environments you select before initiating the transfer.
Select environments to transfer:
Production, BusinessCentral
NotProd, ISVEmbedSolution
Sandbox2, BusinessCentral
Specify destination Entra Tenant ID
Select the date to execute the transfer: *
Select the time to execute the transfer (UTC+01:00): *
Transfer
Cancel

View and filter users with additional user details

Article • 02/13/2024

ⓘ Important

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

Expand table

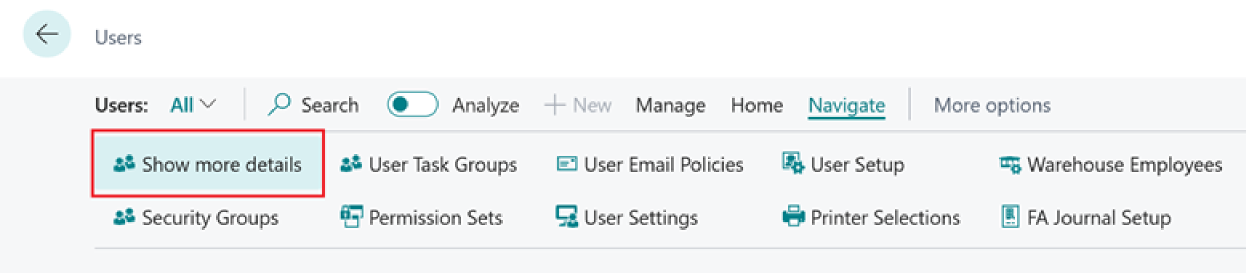
Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

Business value

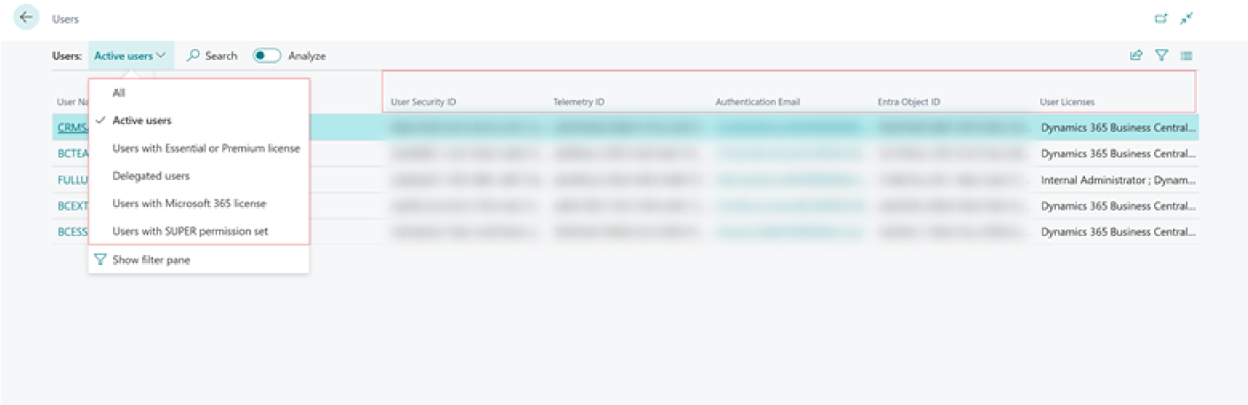
Additional user details and technical data helps administrators be more effective when they handle user requests and resolve issues.

Feature details

You can view additional details about users on the **Users** page by choosing the **Show more details** action.



The **Users** details page offers multiple views that administrators can filter. For example, an administrator might want to view all users with a Microsoft 365 license, or users who are assigned to the SUPER permission set.



Additional information such as user security, telemetry, and Microsoft Entra object IDs helps administrators quickly find users who have access to Business Central through external identifiers.

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.

Legislation

Article • 11/20/2023

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

Business Central offers updates to regulatory features based on popular requests for improvements and ever-changing requirements from local authorities. To give our customers peace of mind and enable them to focus on their core business, we automate many processes and ensure that features comply with the regulations set by government agencies. For example, if local regulations require that you create vouchers that serve as proof of transactions and a detailed audit trail, you can automate the process. Business Central can automatically generate and attach vouchers to general ledger entries, so that accountants can rest assured that they're compliant, without extra steps. The retention policy features let you specify how long you need to store vouchers before you clean them up, giving you more control over the amount of data you store.

We're working to make regulatory features a standard part of Business Central, so that we can deliver improvements out of the box across the countries and regions where they're relevant. For example, the E-documents module is a foundation that supports processes for sales and purchase invoicing, and it's easy for partners to extend by building country-specific apps for e-invoicing.

Achieve sustainable compliance with Business Central

Article • 03/26/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Mar 1, 2024	To be announced

Business value

This feature enables you to collect and report on your sustainability activities. The solution is the foundation that will be used for compliance with the European Union's Corporate Sustainability Reporting Directive (CSRD) and other ESG standards.

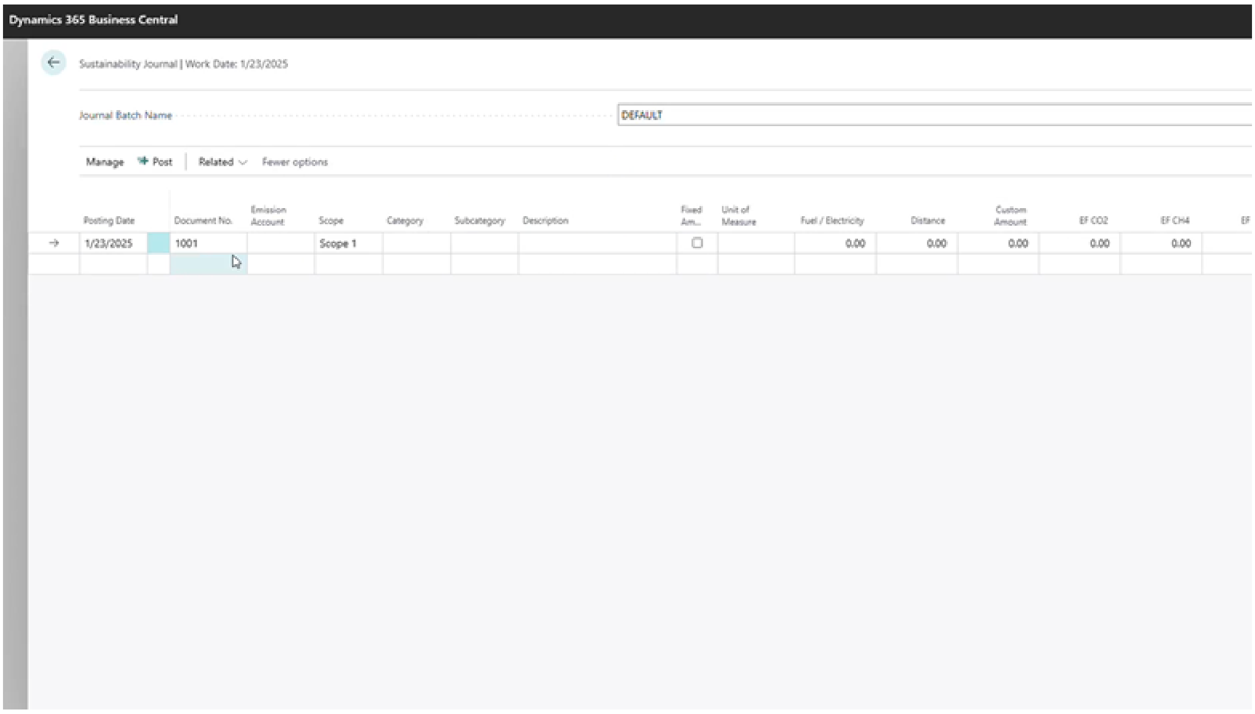
Feature details

We're introducing a groundbreaking feature focused on sustainability reporting. This new, easily extendable functionality lets you record and report on a wide spectrum of sustainability information, encompassing both qualitative and quantitative aspects, and forward-looking and retrospective data. You can also leverage the feature to actively reduce emissions, making it a valuable tool for small and midsized organizations seeking to comprehensively report on sustainability initiatives.

This feature ensures compliance with the European Union's CSRD, which requires companies to report on the sustainability of their activities. The CSRD introduces a heightened requirement for reporting, impacting approximately 50,000 companies in the European Union—more than four times the number covered by the previous Non-Financial Reporting Directive (NFRD), which the CSRD supersedes. However, the solution will be built to ensure that ESG compliance aligns with other standards.

You can use **Sustainability Journals** and **Recurring Sustainability Journals** to record data, based on the **Chart of Emission Accounts**. You can use different emission groups, subgroups, and formulas to make the collection of emissions as easy as possible. This feature also has **Sustainability Entries** where data is recorded and used for reporting. It's important to understand that Business Central supports other emissions besides carbon footprint.

You can benefit from streamlined business processes and enhanced productivity, irrespective of your current stage in the sustainability journey. The initial release lays the foundation for future expansion and automation, promising ongoing advancements in the functionality.



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:

- CO2 calculation per unit

We listened to your idea, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Sustainability management overview (docs)

Digital vouchers

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Dec 1, 2023

Business value

You can have one or more sourced documents for each of GL entry as proof of a transaction and a full audit trail. You can set up the system to require documents be attached if it's required by law.

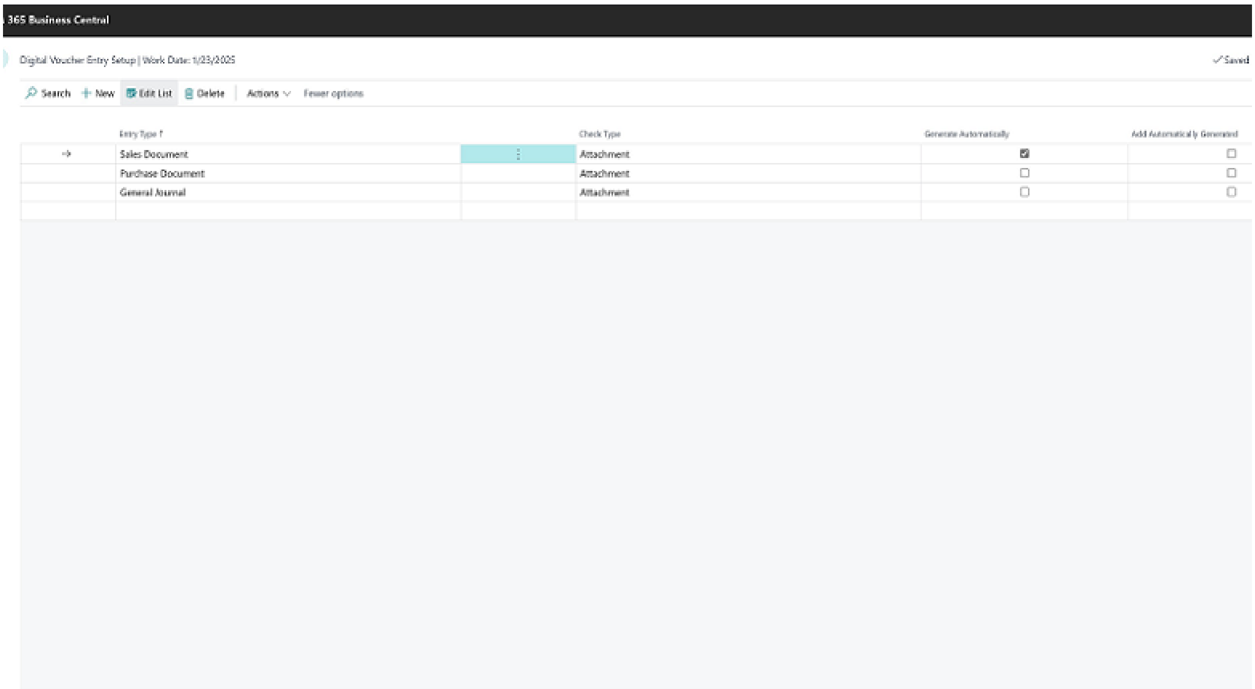
Feature details

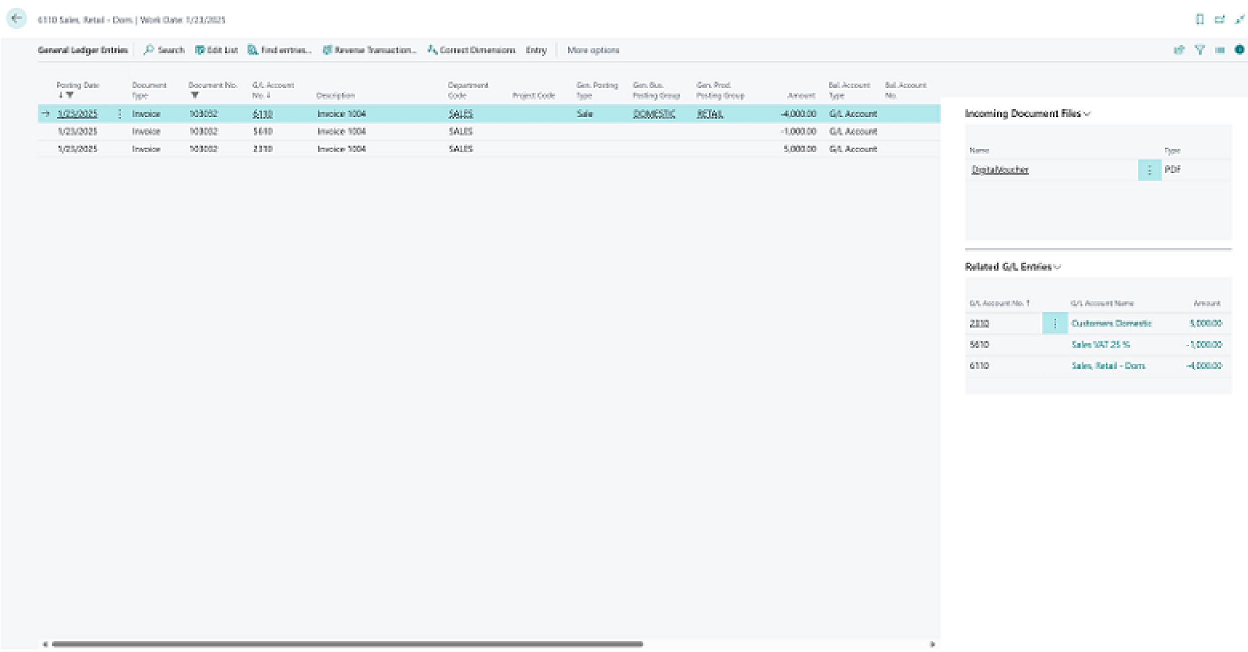
You can choose to require mandatory vouchers or to use this feature voluntarily. Starting in 2024, as part of the new Danish bookkeeping act, Danish localization will require mandatory vouchers.

When you attach the document to the specific transaction, the document is added as an attachment to the **GL Entry** after the transaction is posted. If the system is configured to require the use of vouchers, the system prevents the document, journal, or other type of posting if an attachment doesn't exist. You can set up the requirement per entry type using the **Digital Voucher Entry Setup** page. There, you can configure what type of voucher is required using the **Check Type** option. When there isn't a space to upload a specific document, for example a cost adjustment or an adjusted exchange rate and this is still required by the law, the system can be configured to create a source document based on the required transaction. The source document is then uploaded to the related GL register automatically, using the following options:

- **Generate Automatically**: Generate the file
- **Add Automatically Generated**: Automatically add the document when posted

When you post the document in Business Central, attachments can be viewed from the **General Ledger Entries** in the **Incoming Document Files** area. After the document is uploaded, it can't be deleted or modified as an attachment during the **Retention Policy** period. You can also set up the **Max. Document Size** to prevent uploading big documents and a **Retention Policy** to set the requirements for keeping attached documents.





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.

E-documents core as a global solution

Article • 11/15/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 1, 2023	✓ Oct 2, 2023

Business value

The Dynamics 365 Business Central E-documents module enables different models of electronic invoicing required by different countries.

Feature details

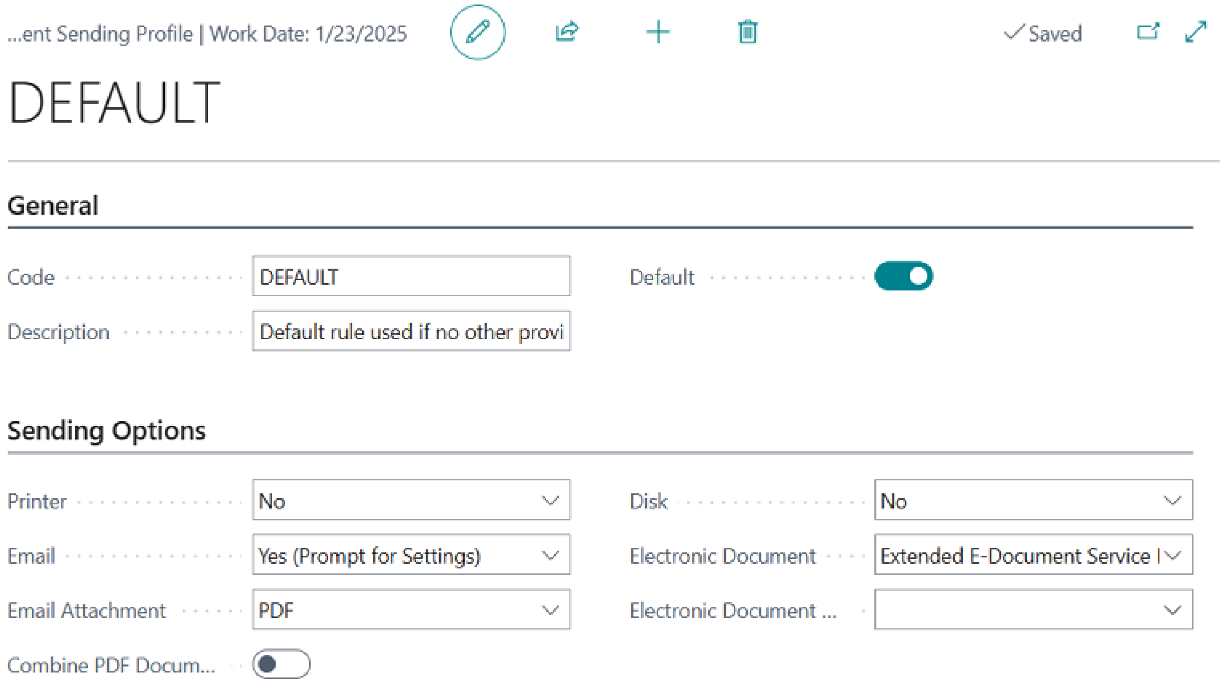
The Continuous Transaction Control (CTC) package is a relatively new term that's used to describe mandatory “real-time” invoice reporting and validation by the tax authorities through e-invoicing or transaction listings. This model of invoicing is becoming the standard method of communication, but in some countries it's already mandatory by law.

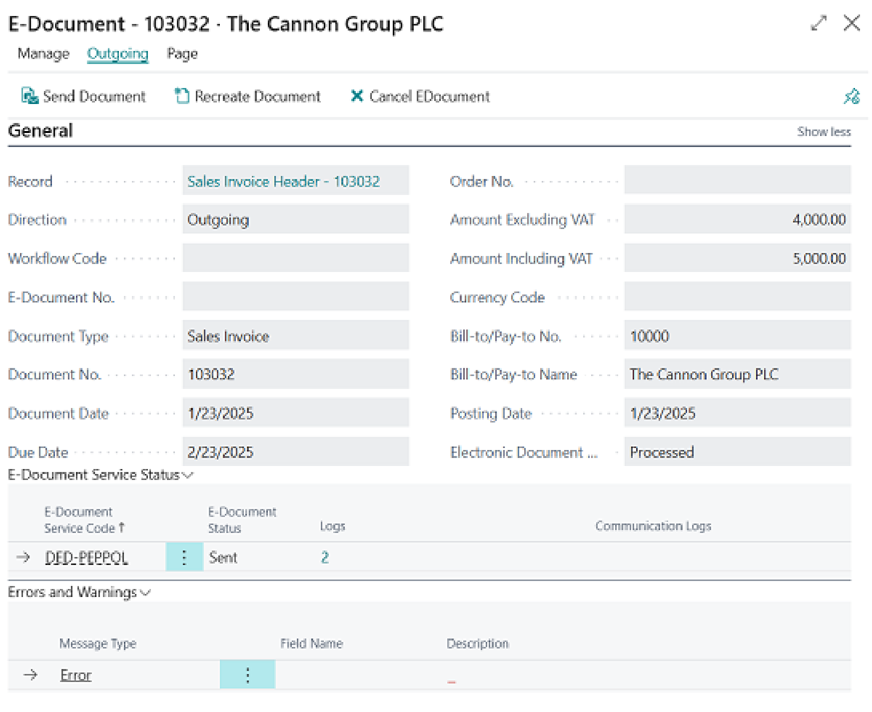
Business Central's new E-documents module is the foundation layer for all e-invoicing standards covering most common processes, but the idea is to be used in the future for other electronic documents. The module is easily extendable with the country-based e-invoicing apps. The E-documents app covers both sales and purchase processes and can have different lifecycles from standard invoices in Business Central. The system has an additional set of configurations including different codes, methods, schemas, and security models and can also track specific e-invoicing processes, like statuses, logs, changings, and versions. This module covers both clearance and post-audit models.

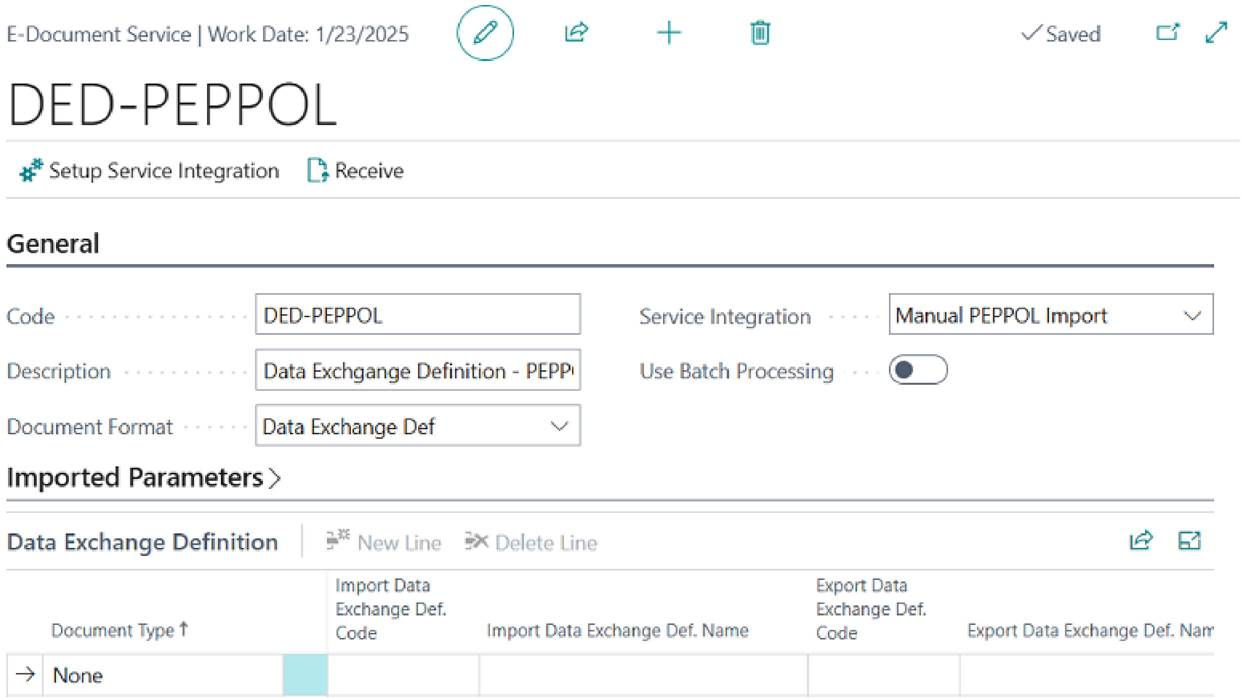
To start with the setup, the administrator must open the **E-Document Service** page and create a new service, using a specific **Document Format** and **Service Integration**. After that, they can specify specific workflow based on local requirements, where they can define the **Response** using created **E-Document Service**. The configured flow should be added to the **Document Sending Profile**, choosing the **Electronic Document** option, **Extended E-Document Service Flow**.

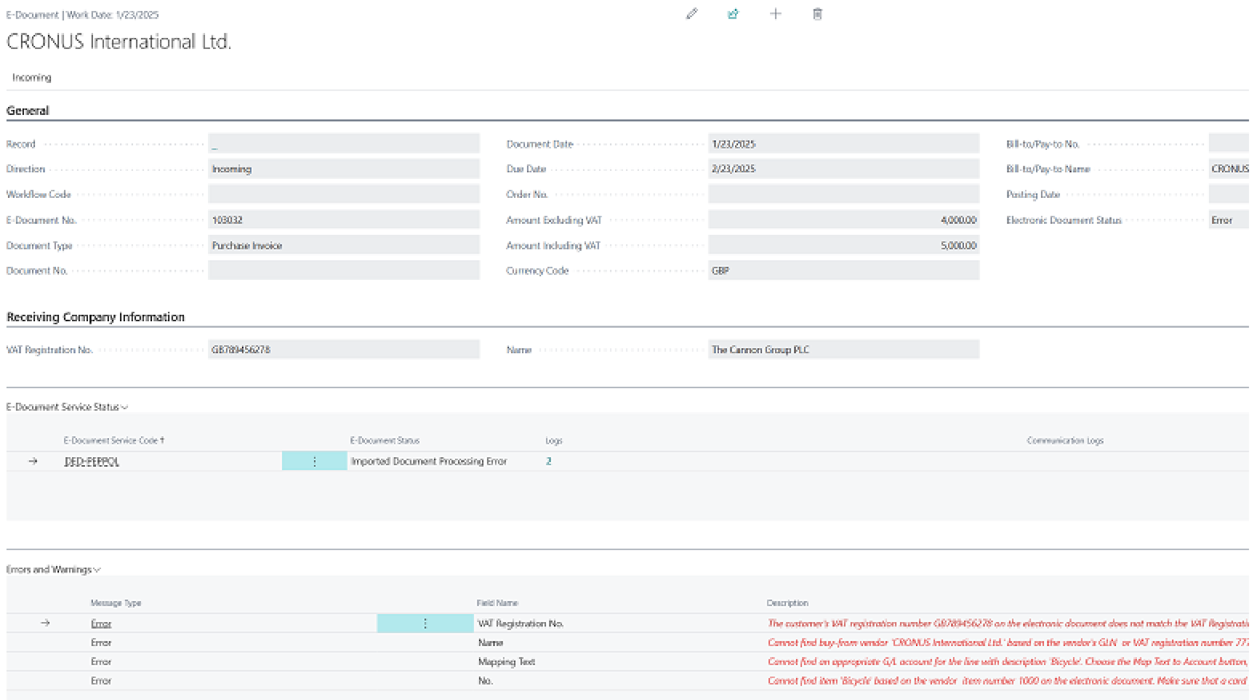
When you use this functionality and, for example, post the sales invoice, on the **Posted Sales Invoice** page, you can find the related **E-Document** with the current status and all the details related to the electronic document.

You can also receive external purchase electronic documents by selecting the **Receive** action. To populate lines, define **Item References** or map to the **Item to G/L Account** in **Text-to-Account Mapping**.









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 .

Large companies to report payment times

Article • 11/15/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2023	✔ Oct 2, 2023

Business value

In countries where it's required, companies can report payment times as defined by local authorities.

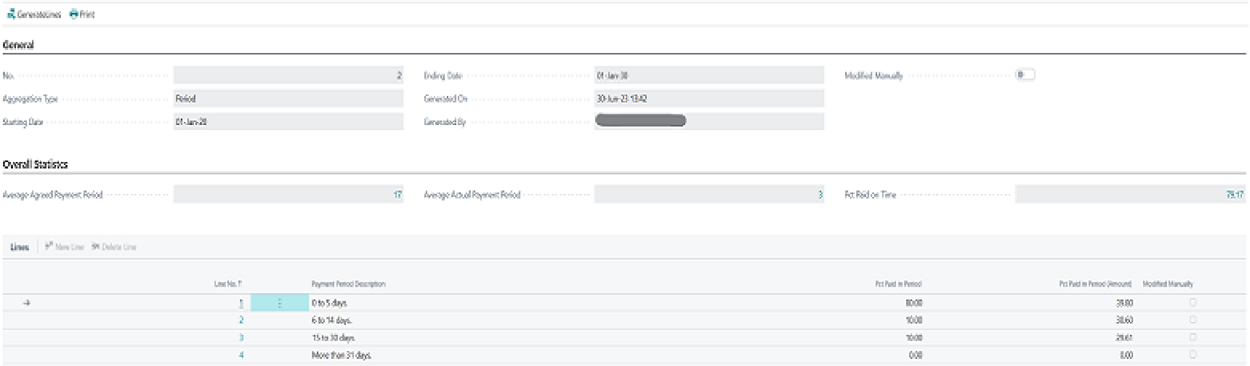
Feature details

Each year, Swedish companies with 250 and more employees must report to the Swedish Companies Registration Office what payment times they have for purchases from companies that are smaller than themselves. Similar acts exist in the United Kingdom, Australia, and New Zealand, so this app is a global feature for this kind of reporting.

This new feature sorts vendors based on size or payment terms, and provides reporting for the vendors for the following as required by local authorities:

- The average agreed payment period.
- The average actual payment term.
- The proportion of invoices paid after the end of the agreed payment period.

You can select the period for which you want to run a calculation and to find details based on a grouping you choose. For each of these groupings, you can find sourced entries.



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.

Start faster with refreshed and enhanced setup data

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023

Business value

To help businesses quickly get up and running with Business Central, we provide preconfigured setup data that enables customers to use features right away.

Feature details

This release provides updated setup data for the following countries and regions:

- Australia (AU)
- Canada (CA)
- Germany (DE)
- Netherlands (NL)
- United Kingdom (GB)
- United States (US)

We've updated the following setup data for those country versions:

- Chart of accounts
- General posting groups and setup
- Inventory posting groups and setup
- Jobs posting group
- Tax/VAT/GST posting groups and setup

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.

Use drop shipments for triangular Intrastat trade

Article • 11/15/2023

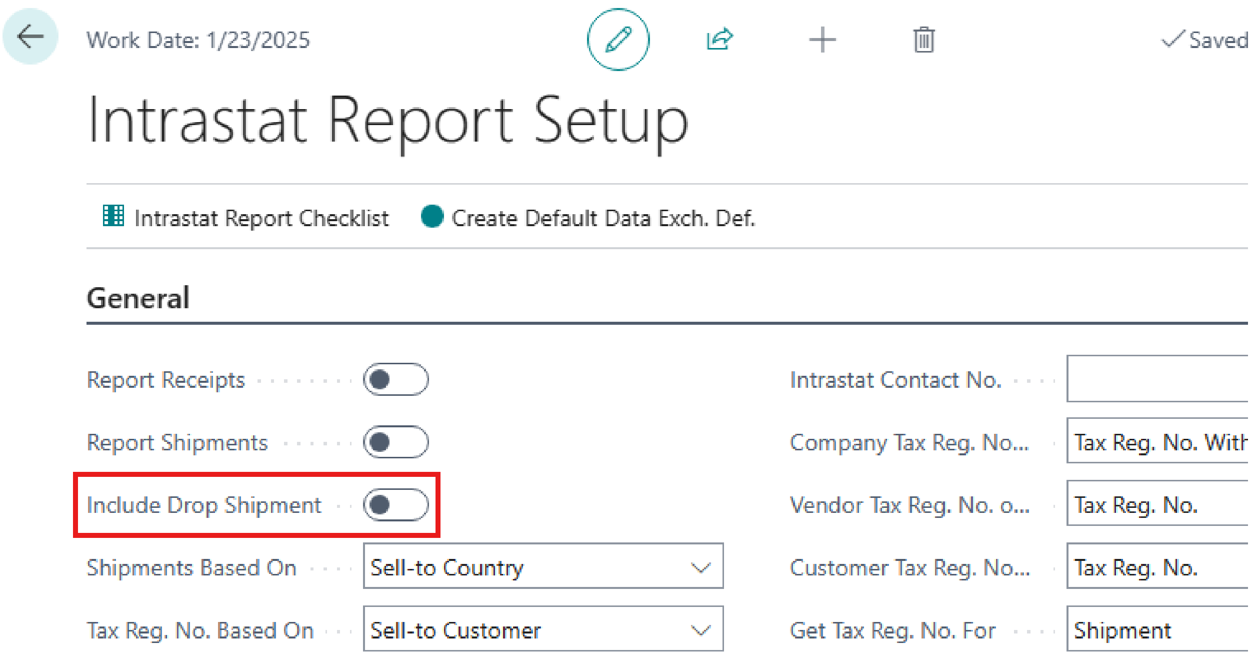
Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2023	✔ Oct 2, 2023

Business value

Businesses that ship goods directly from a vendor in another EU country to a customer in a third EU country can exclude those transactions from their Intrastat reports, which makes the reports more accurate.

Feature details

Triangular trade involves trade between companies located in three countries or regions where goods bypass the reporting company's country. In Business Central, you can use drop shipments to handle triangular trade. To use drop shipments, you must turn on the **Include Drop Shipment** toggle on the **Intrastat Report Setup** page.



This feature allows for scenarios where a company orders goods from one EU country and drop ships the goods directly to another EU country, without importing the goods into its own country. In such cases, the **Intrastat Report** will exclude these transactions because the goods were directly delivered between two other EU countries. The calculation is based on the following information from the item ledger entries:

- Entries are marked as **Drop Shipment**.
- The **Country/Region Code** is different than the **Country/Region Code** on the **Company Information** page.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Work with Intrastat Reporting (docs)

VAT posting in General Ledger setup

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Nov 1, 2023	✔ Dec 1, 2023

Business value

You can limit the VAT dates for posting independently from the posting dates.

Feature details

Currently, when you use the **VAT Date** functionality, the validation is the same for the **Posting Date** in the **General Ledger Setup** and the **User Setup**. This means you can't backdate VAT entries without opening prior posting periods and sometimes, the **Posting Date** and **VAT Date** range isn't the same.

This feature introduces new separate setups to control the **VAT Date** independent of the **Posting Date**. You can configure the **VAT Date** range in the **VAT Setup** page using the following options:

- Allow VAT Date From
- Allow VAT Date To

The same option will exist on the **User Setup** page and will extend options for configuration for users.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Limit posting based on Allow from/to period (docs)

Onboarding

Article • 11/20/2023

ⓘ Important

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

It's important that customers can quickly get up and running with Business Central. Their daily business doesn't stop just because they're adopting a new business management application. We're committed to delivering a speedy transition, and we'll keep building on the onboarding framework and continue to invest in tools and resources that enable partners to onboard faster to Business Central.

Demo tool and data for service scenarios

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023

Business value

To help partners demonstrate the advanced capabilities of Business Central, we're making a demo tool that provides setup and data for service scenarios.

Feature details

The Contoso Coffee app provides a demo tool and a related set of demo data for service scenarios. You can install the extension in any environment. Presales specialists can run the tool on Cronus or My Company and get the setup and demo data needed to demonstrate various scenarios. For Business Central on-premises, the demo tool and data are available on the product media as source code.

Contoso Coffee is a fictitious company that produces consumer and commercial coffee makers. The Contoso Coffee apps for Business Central add demo data that you can use to learn how to use the Service Management capabilities in Business Central.

This app provides several elements that are used for the main walkthroughs:

- Resources with assigned skills
- Items configured to create service items
- Loaner items
- Standard service codes
- Fault and resolution samples

Scenarios

The Contoso Coffee demo data currently supports the following service scenarios for testing and training:

- Create service items through the sale of items, place and receive loaners, register time, and invoice customers with Walkthrough of Service Orders for Service Items.

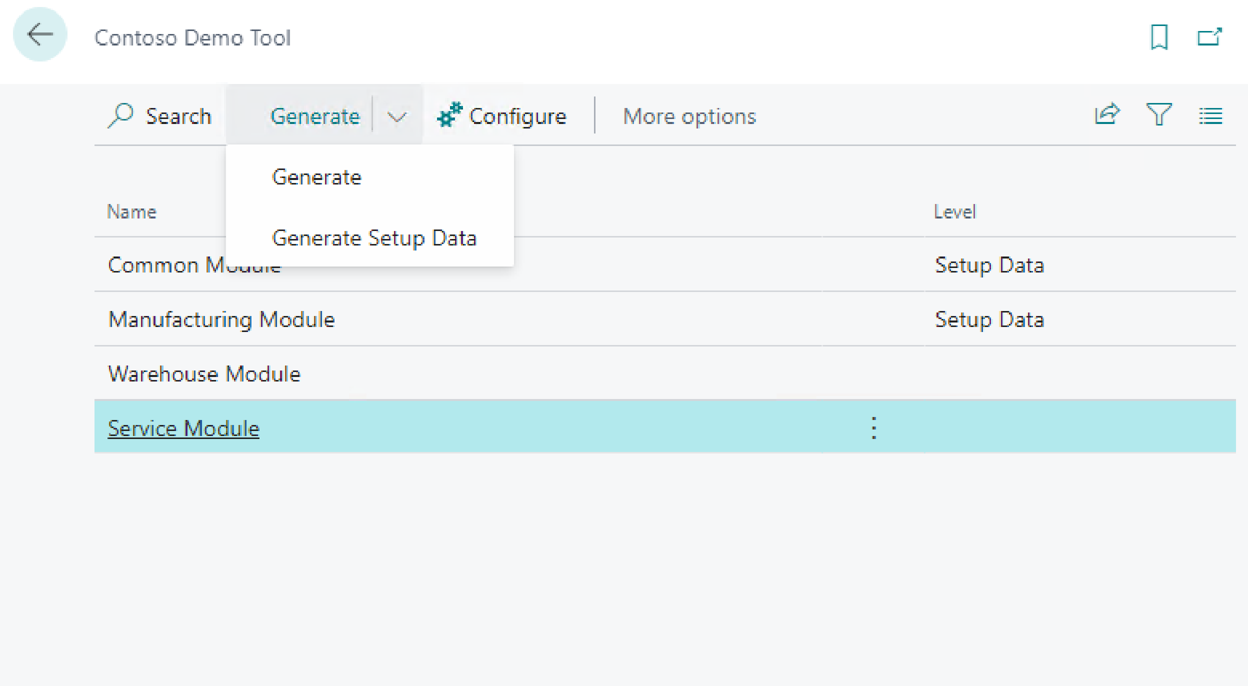
- Create service contracts, generate service orders, invoice contract fees, and allocate resources with Walkthrough of Service Contracts for Service Items.

To learn more about the Contoso Coffee extension, go to Contoso Coffee Demo Data.

Demo tool

Also note that the demo tool itself was updated and simplified. Now, you'll find all available demo packages and dependencies in one place.

1. Search for the **Contoso Demo Tool** and select modules you're interested in.
2. Review configurations per module. Notice that shared settings were moved to Common Module.
3. Then choose the **Generate** action.



You can run the tool in two modes:

- Generate with produce settings, master data, and transactions.
- Generate Setup Data will stop after you create settings, such as number series or a posting setup.

The tool identifies dependencies and runs them automatically.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Introduction to Contoso Coffee Demo Data (docs)

Modify texts on the welcome banner and skip banner intro state

Article • 11/15/2023

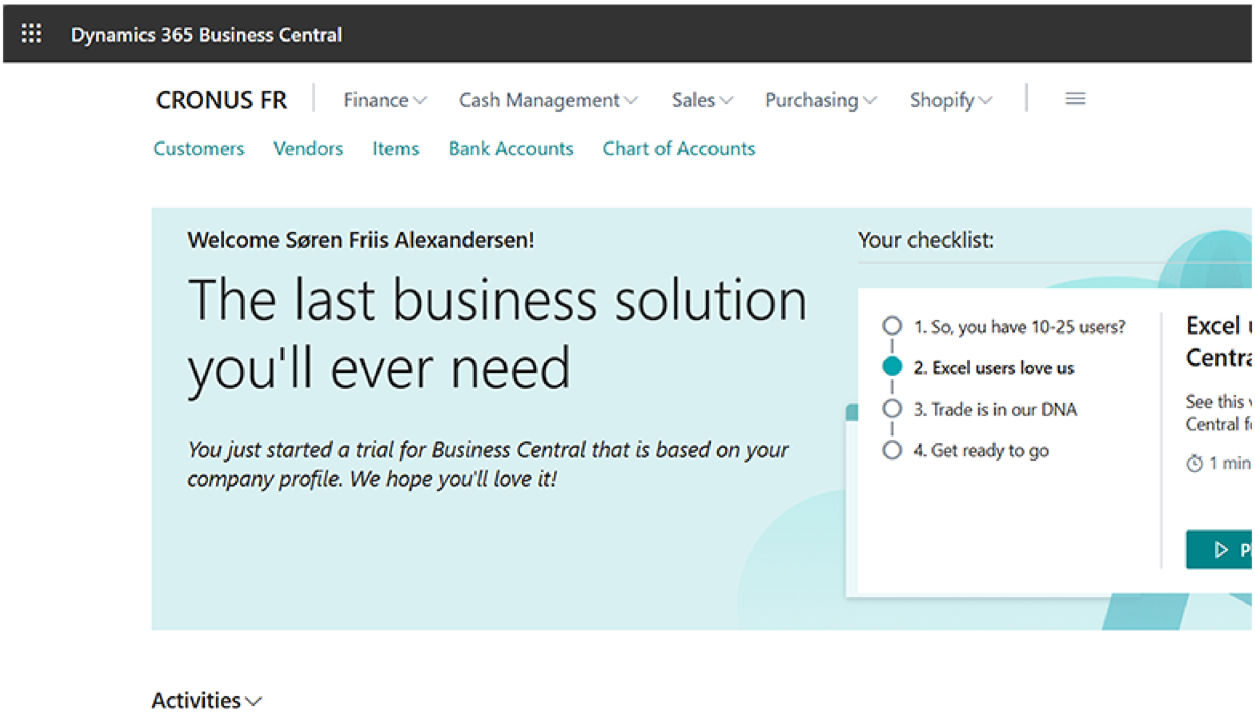
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023

Business value

Partners can give new users a warm welcome experience by showing personalized greetings in the welcome banner.

Feature details

The welcome banner in Dynamics 365 Business Central greets the user with a message when they sign in. The banner has two static contents used for evaluation and non-evaluation companies, respectively. The welcome banner is great for welcoming users because it helps them feel recognized and appreciated, and it provides information that helps people get started with Business Central. Partners can dynamically modify the message in the banner to suit their customers—for example, based on their type of company. Shaping the welcome message creates an experience that's even more customer-centric, especially when they do so in combination with the sign-up context and customer profiling features.



Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Onboard new users with the Welcome banner (docs)

Set initial role before first sign-in for a better first-run experience

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 8, 2023	✓ Oct 2, 2023

Business value

Trial and onboarding experiences that are based on the sign-up context can pivot using prospect profiles to set the initial role for users when they sign up.

Feature details

By default, everyone who signs up for a trial version starts with the Business Manager (Evaluation) role center when they sign in for the first time. Now, partners can specify the role that's the best match for the user, which provides a better first-run experience. This mechanism also provides a better way to set user roles through code.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Reporting and data analysis

Article • 12/21/2023

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

In the modern world, data has become an invaluable resource, forming the foundation of decision-making and progress across all sectors. Recent advances in AI technology and data analytics tools bring radically new ways for businesses to distill complex information into actionable intelligence, reveal hidden patterns, trends, and find correlations that were previously concealed. The critical insights gained from data analysis empower organizations to optimize their strategies, enhance customer experiences, identify potential risks, gain unprecedented insights into the details of their operations and environments, and innovate in ways that were once inconceivable.

As data continues to fuel innovation and drive transformative advancements, harnessing its potential has become essential for staying competitive and shaping a more efficient and sustainable future for SMBs.

Our reporting strategy revolves around building universal BI and analytics within the Business Central experience. We aim to seamlessly integrate in-context, rich, and immersive BI and analytics content from 1st and 3rd parties into Business Central. Alongside flexible self-service capabilities, you can effortlessly access and leverage your data for maximum value.

Analyze, group, and pivot data from queries

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 8, 2023	✔ Oct 2, 2023

Business value

End users and data analysts can analyze data from queries directly in the client without the need to open the page in Excel or run a report.

The ability to analyze data directly on queries raises the bar for what you can do without having to switch applications, while still allowing customers and partners to do more in report objects, Excel, Power BI, or other data analysis applications.

Feature details

Analysis mode was introduced as a public preview feature in 2023 release wave 1 as a new way of interacting with data on list pages. Instead of running reports using different options and filters, you can simply add multiple tabs that represent different tasks or views on the data. Examples could be "My customers," "Follow-up items," "Recently added vendors," "Sales statistics," or any other view you want. For more information about the analysis mode on list pages, visit Analyze list data using data analysis mode.

In this release, we take this concept even further and make it possible to also analyze data from any query, the same way as you can on a list page.

Using a query object, a developer can join data from multiple tables. For example, they can combine data about sales orders with extra information about the customer or the salesperson involved. They can then add the query as an action on pages using the RunObject property.

The ability to analyze data directly on queries expands the range of data analysis that you can do without having to switch applications. The data is analyzed in real time and respects the data security that has been set up for the users.

See also

Analyze list page and query data using data analysis mode (docs)

Analyze, group, and pivot data on lists

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 2, 2023

Business value

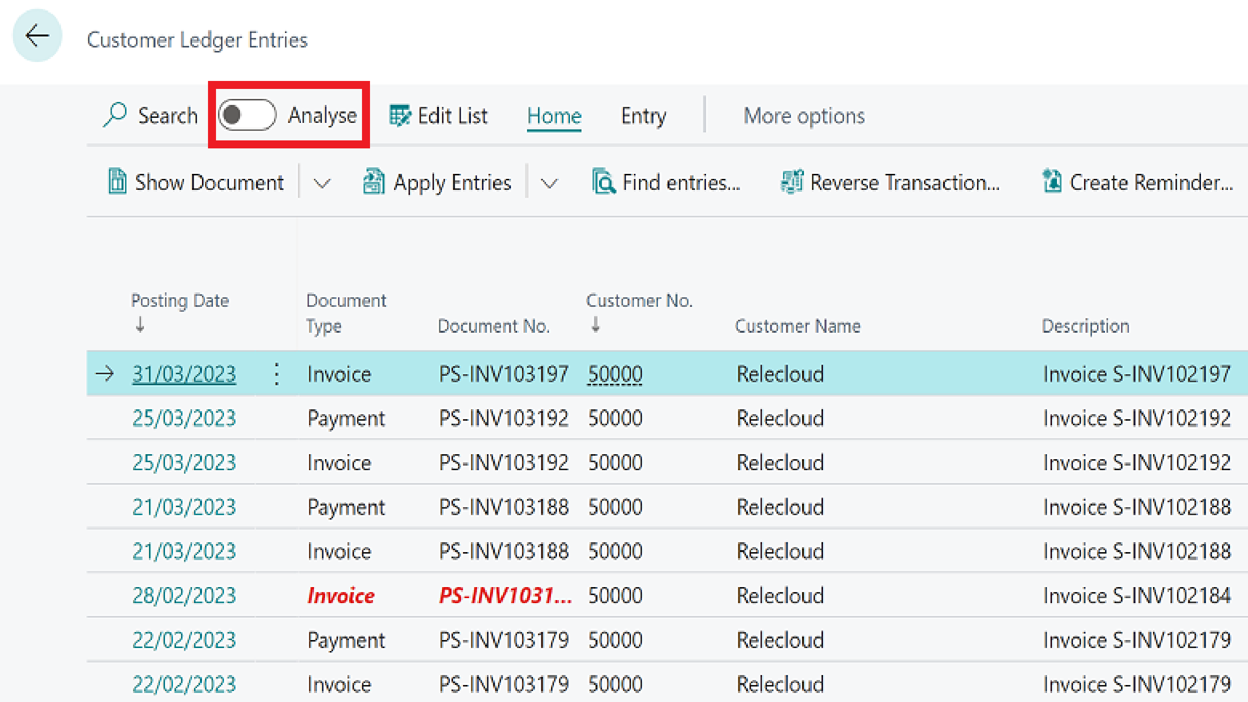
End users and data analysts can analyze data from lists directly in the client without the need to open the page in Excel or run a report.

The ability to analyze data directly in lists raises the bar for what you can do without having to switch applications, while still allowing customers and partners to do more in report objects, Excel, Power BI, or other data analysis applications.

Feature details

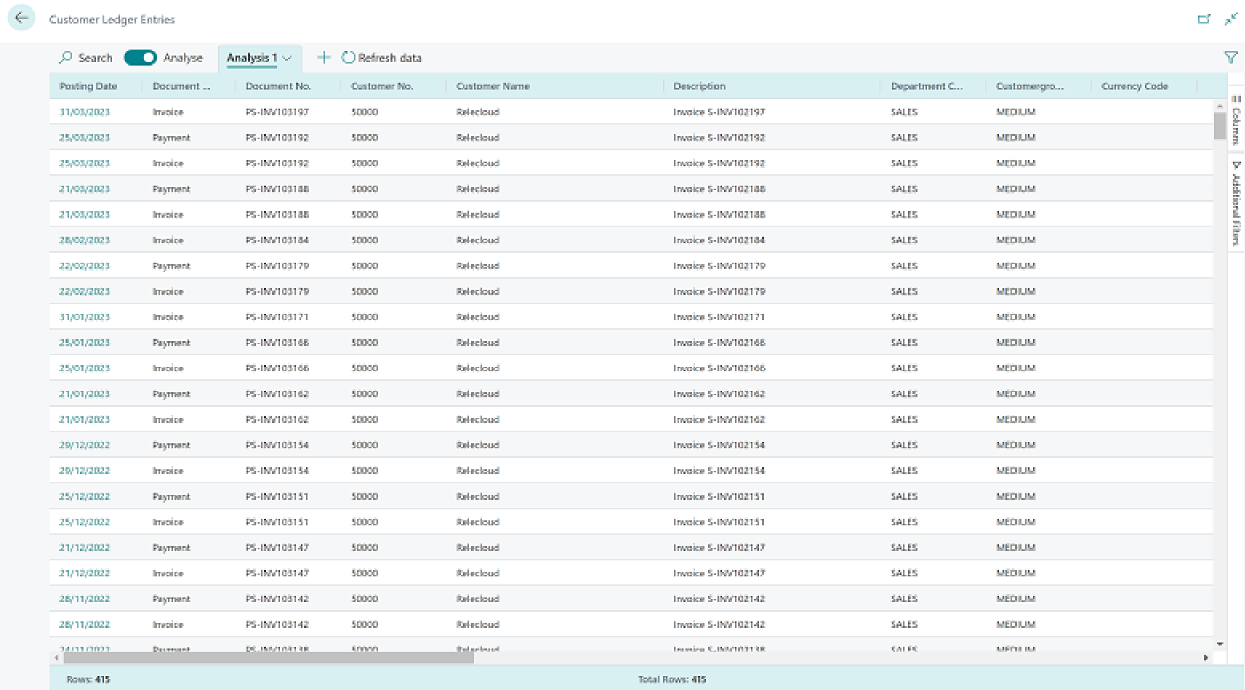
Analysis mode is a new way of interacting with data on lists. Instead of running reports using different options and filters, you can simply add multiple tabs that represent different tasks or views on the data. Examples could be "My customers," "Follow-up items," "Recently added vendors," "Sales statistics," or any other view you want.

When you're ready to analyze data on a list page (where you might have filtered data using a view or filter pane), simply switch to analysis mode:

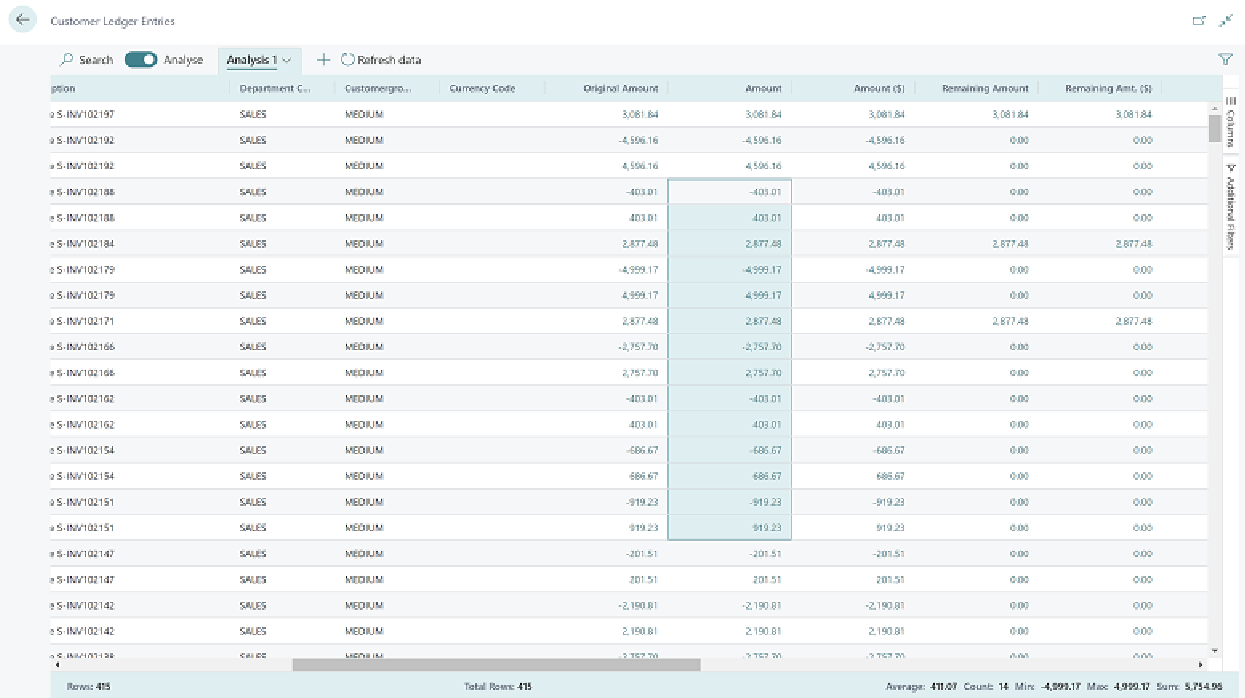


Analysis mode opens the data in a new experience that's optimized for data analysis. When a page is in analysis mode, it's split into two areas:

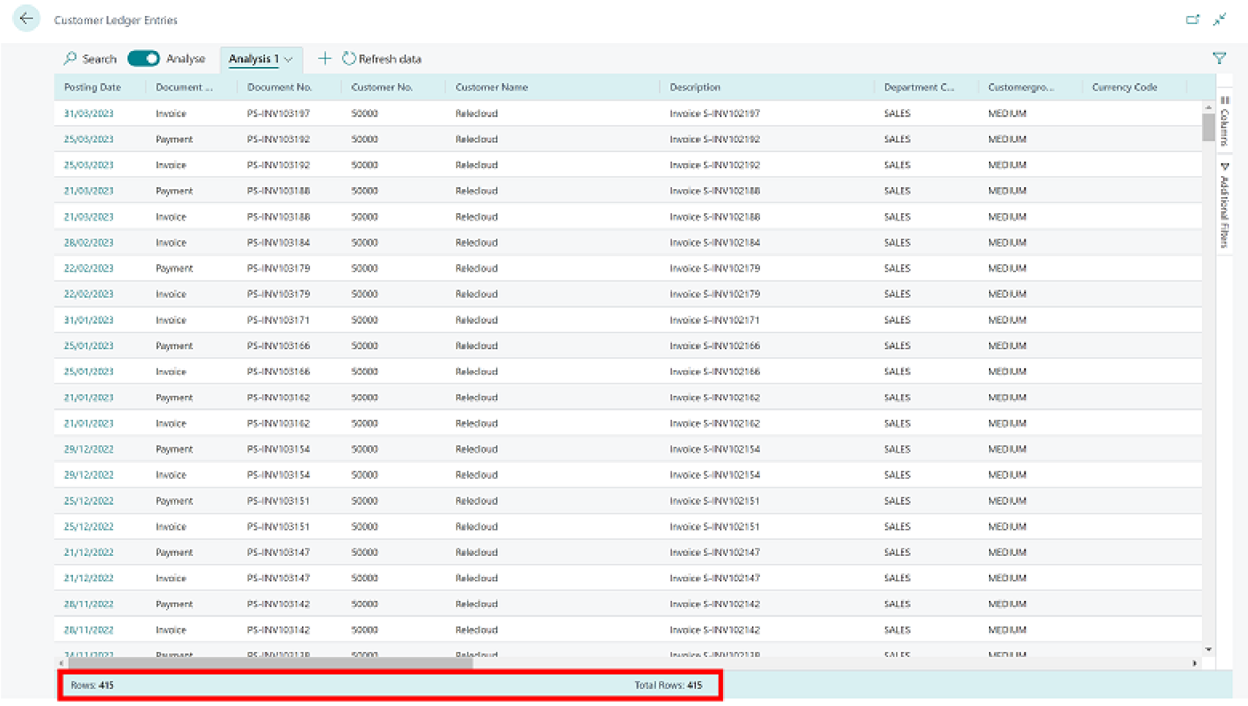
- The main *data area* (including a Tabs pane)
- The *field modifier* area



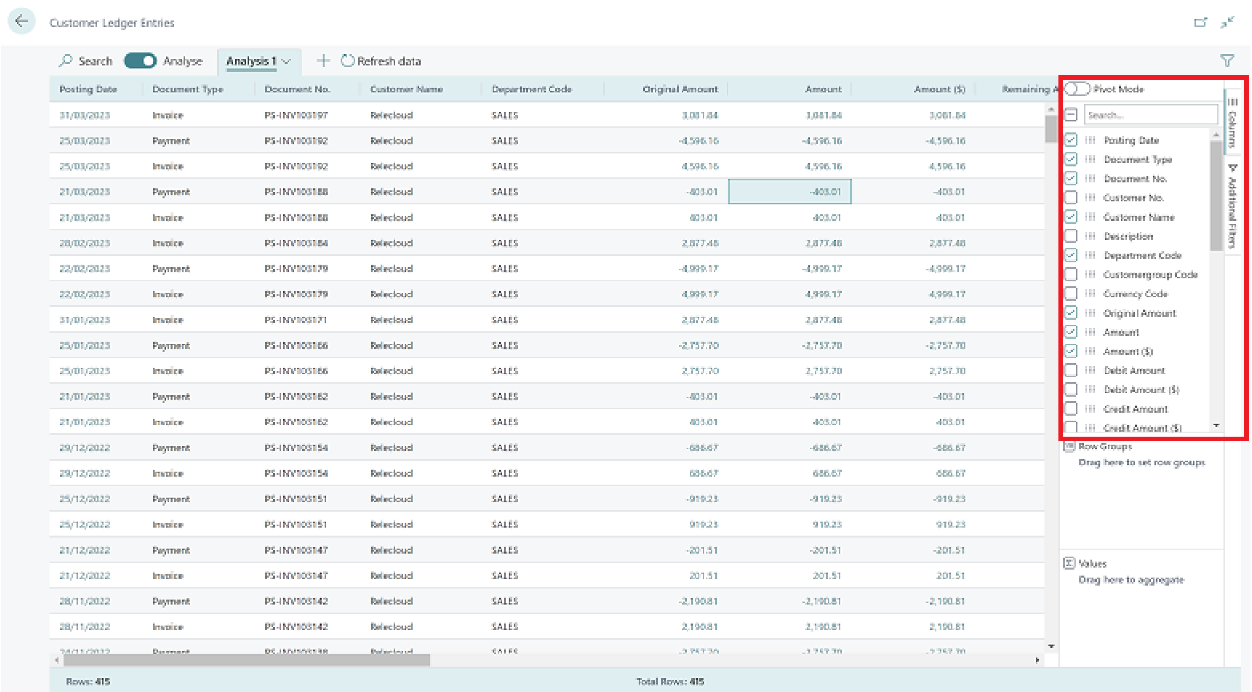
Use the *data area* to interact with the data. For columns that are summable, you can easily get descriptive statistics on a set of fields by marking them.



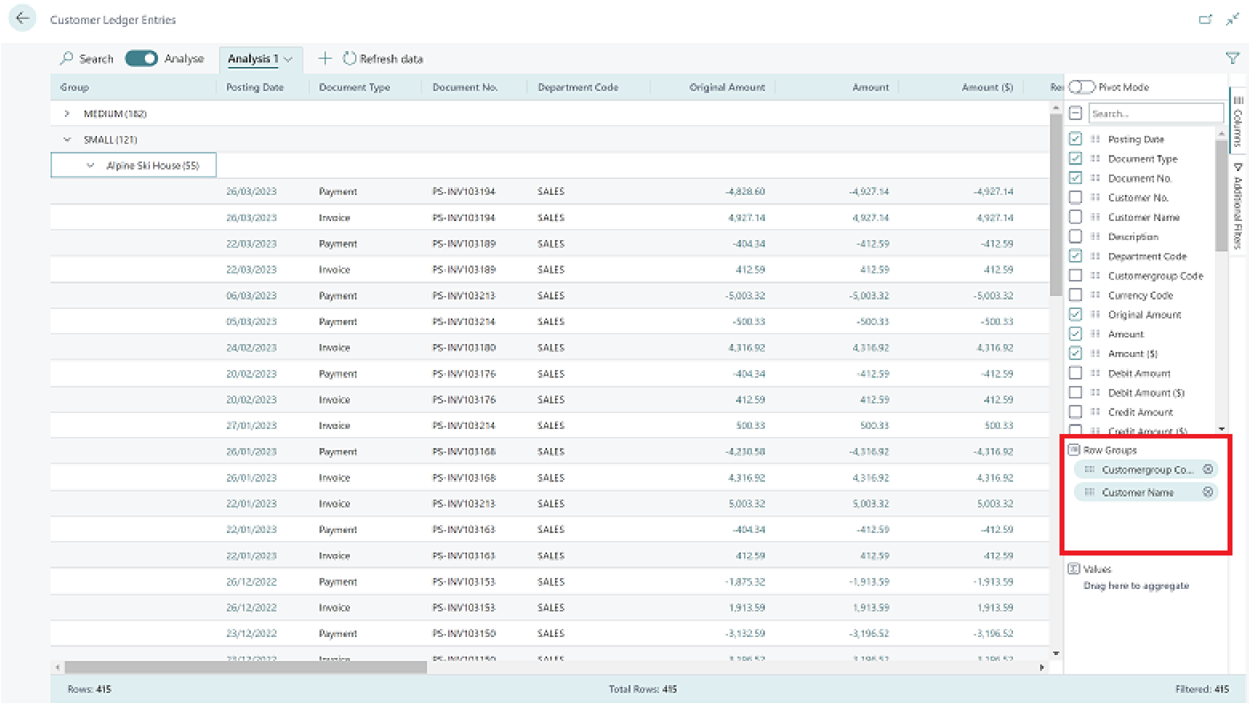
The bottom of the data area shows the total row count on the column.



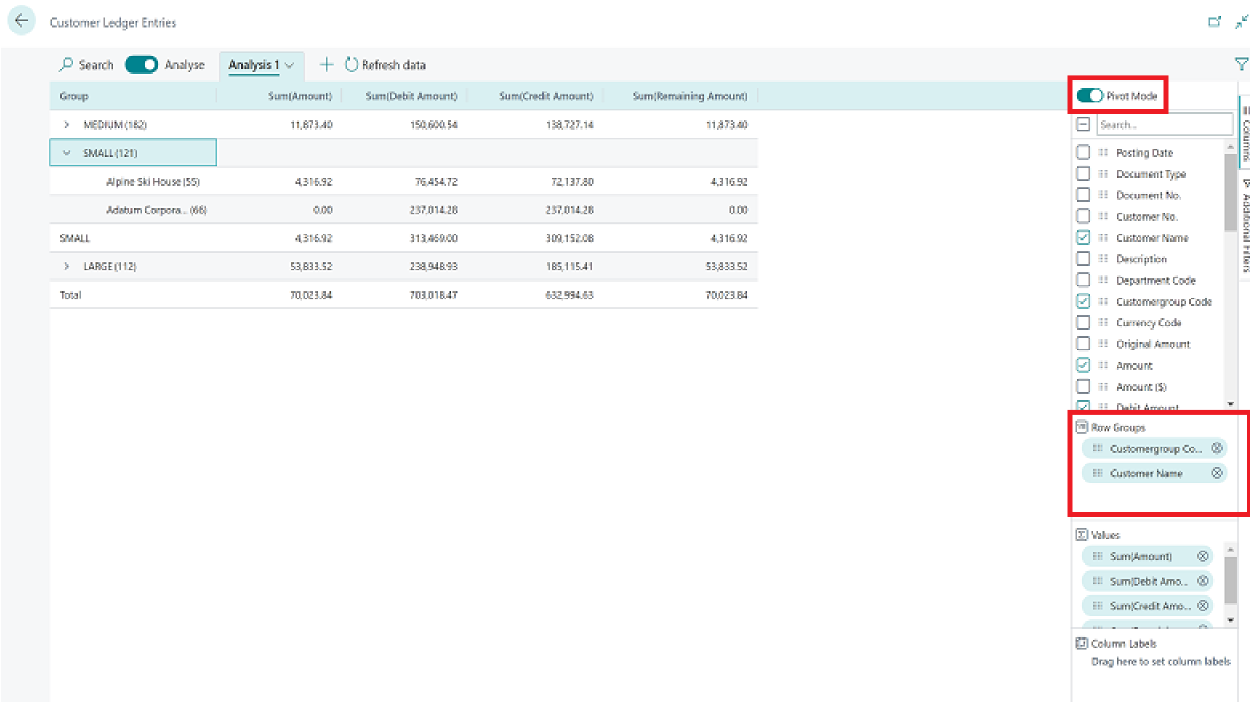
Use the *field modifier* area to control the data to show and its format. On the menu, you choose the fields to show or hide.



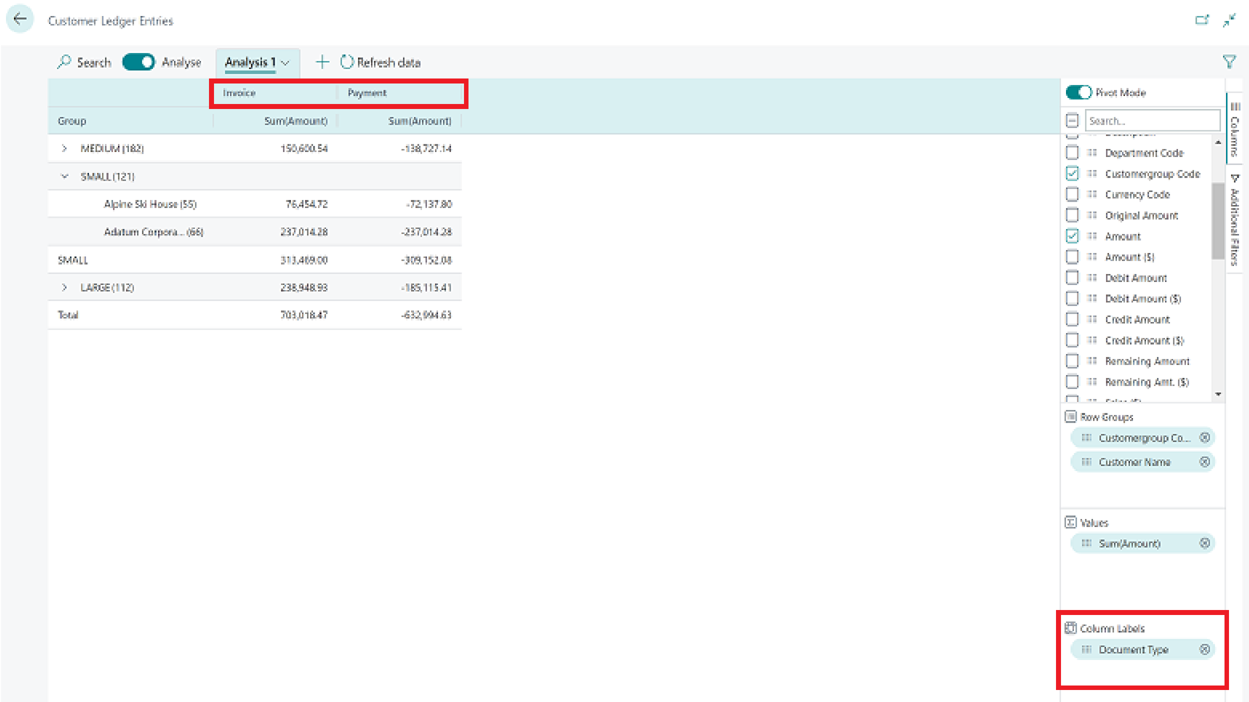
You can group data by dragging fields to the **Grouping** part of the **Columns** menu. This lets you explore data grouped by one or more fields to the left of the data area.



Grouping works great in *pivot mode*. To enable pivot mode, turn on the **Pivot Mode** toggle switch and then drag fields that are to be summed to the **Values** part.

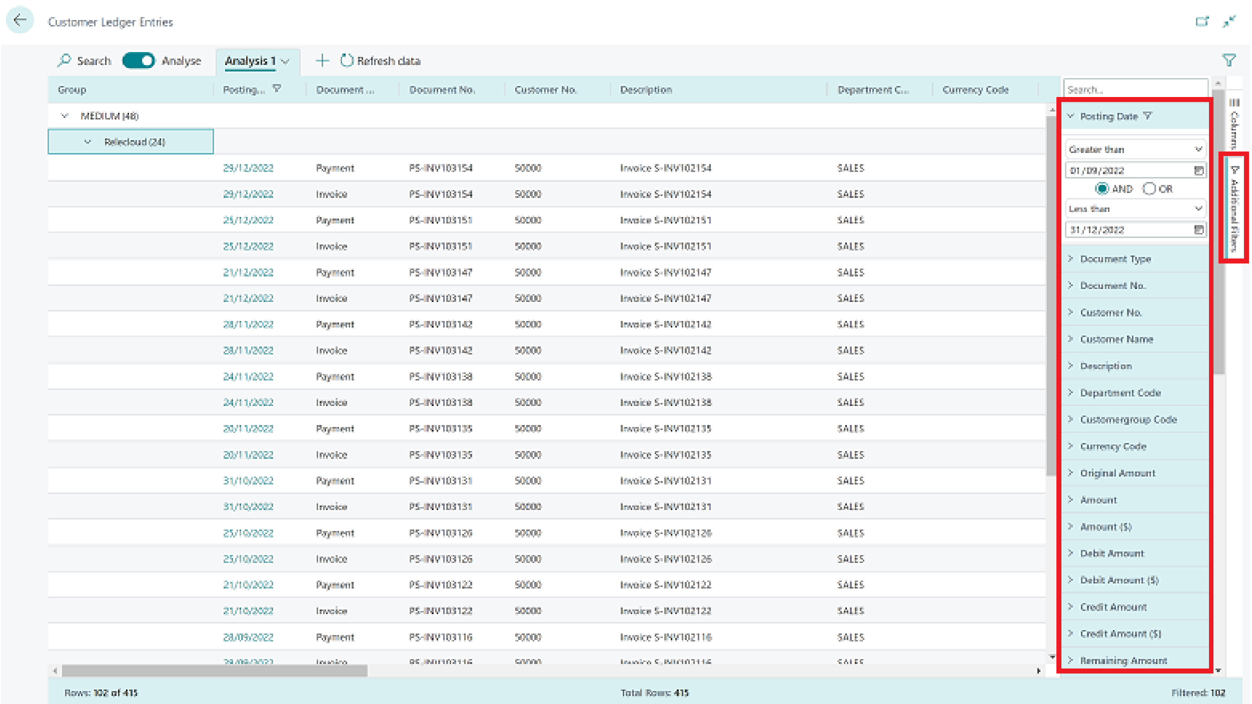


In pivot mode, you can define groups that show up in the column part of the data area. Do this by dragging fields to the **Column Labels** part of the **Columns** menu.



Column grouping works best if the grouping field only contains a few values.

Use the **Additional Filters** menu of the field modifier area to apply more filters to the dataset. In this part of an analysis, you might want to focus on a specific customer or period of time.

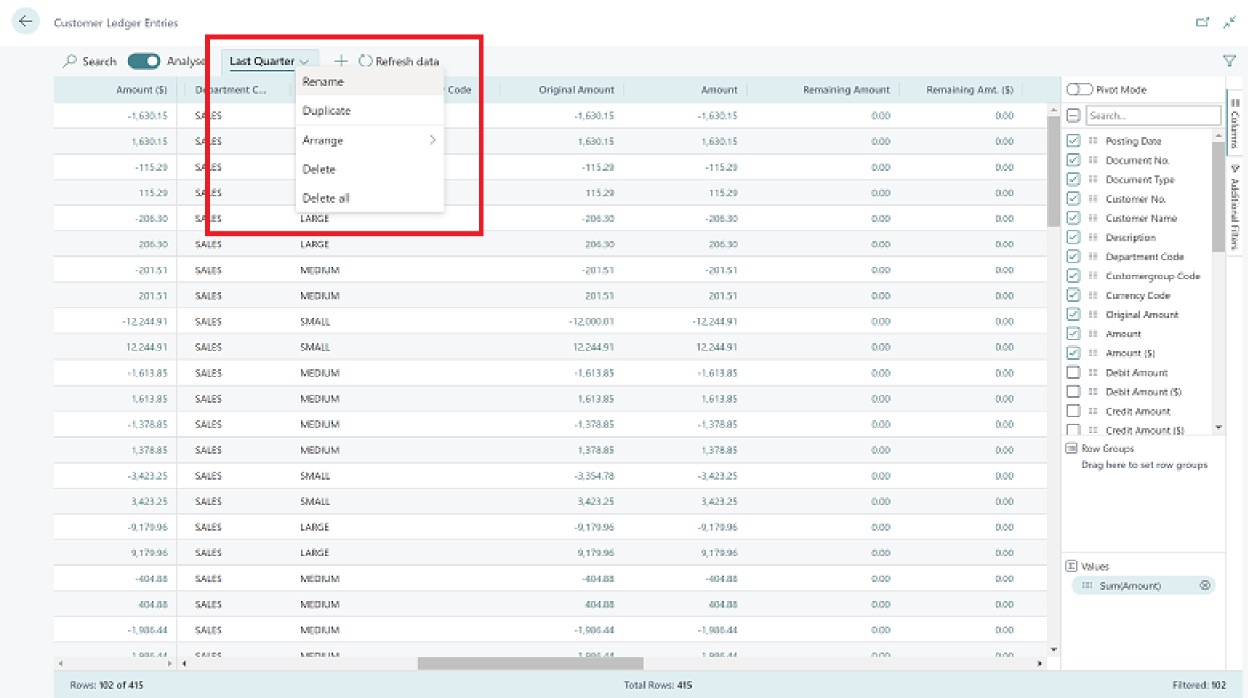


The data area gives you rich control of the layout of columns.

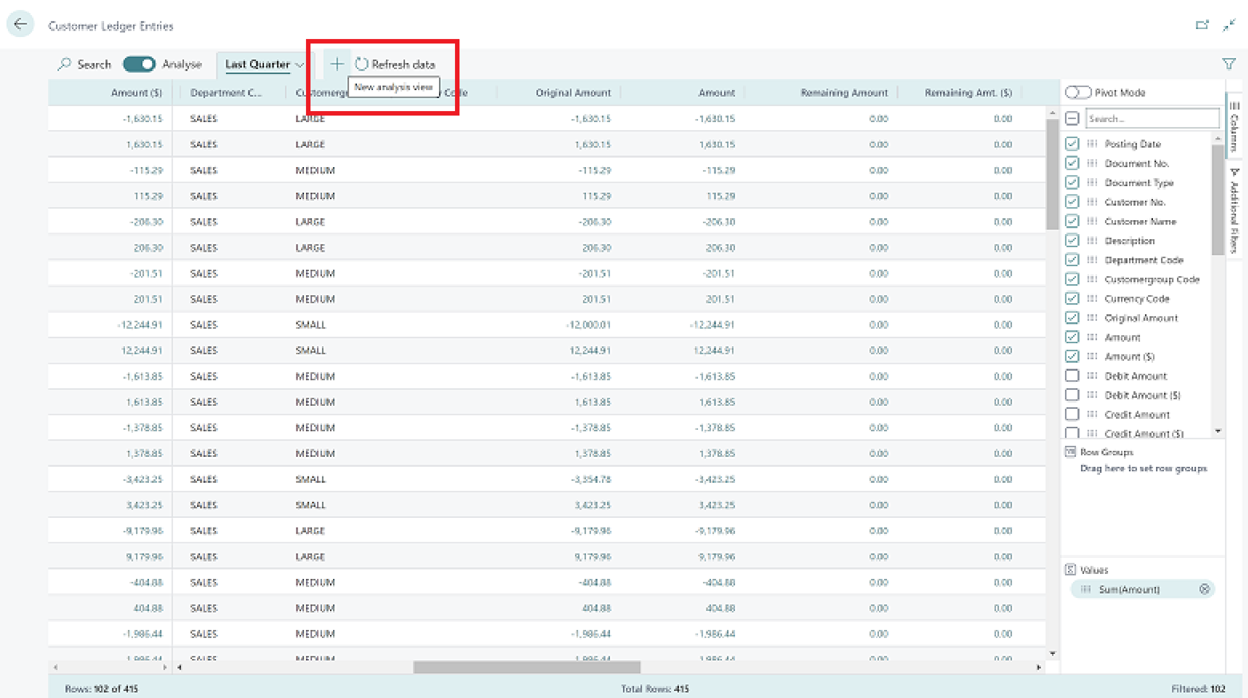
- Drag columns to where they make the most sense in your analysis.
- Pin a column to the left or right side of the column part.
- Define data filters directly on the column definition instead of going to the field modifier area. You can still peek in on details about related data and for each line,

and open the card to learn more about a given entity.

Business Central can save multiple column setups and filters. The next time you switch to analysis mode you can dive straight in to analyzing data. On the **Tabs** pane, you can rename or remove a tab.



The **Tabs** pane also lets you add new tabs.



Using tabs allows you to save different setups that you frequently use to analyze a dataset. For example, you might have tabs for analyzing data with pivot mode, and other tabs that filter to a subset of rows. Some tabs might show a detailed view with many columns, and others only display a few key columns.

> ⓘ **Note**
>
> These tabs are saved for your use only.

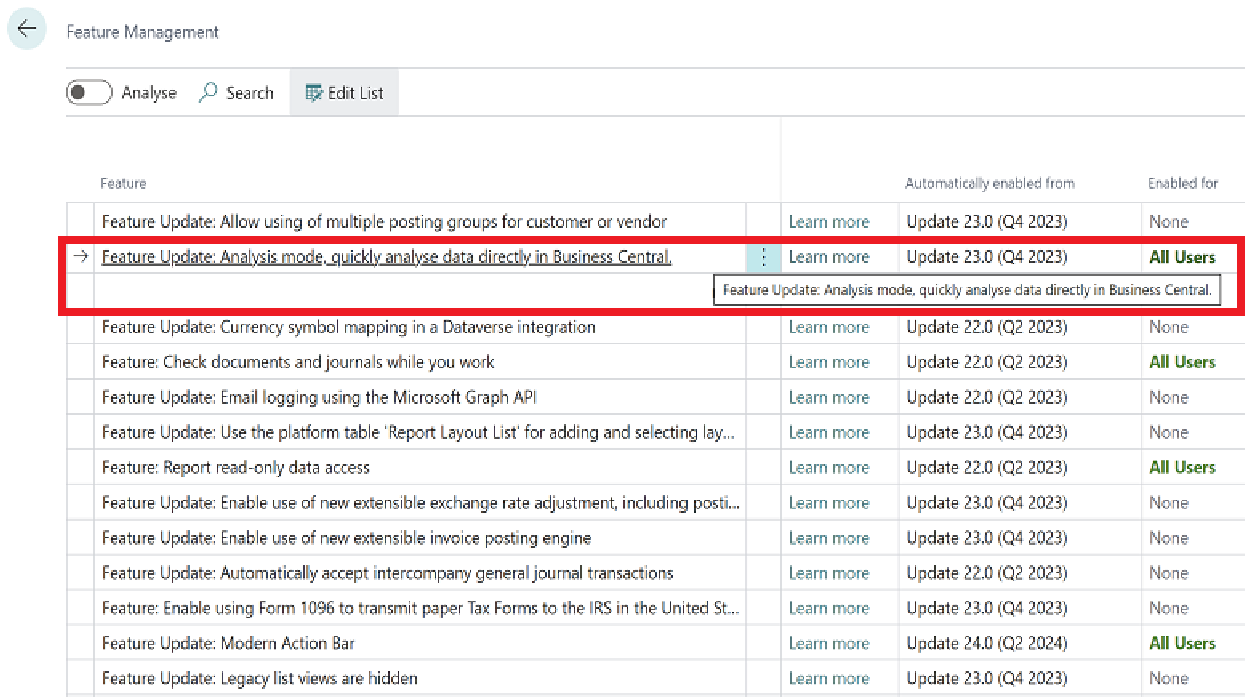
How much data can I analyze?

On a list page, as a starting point you can set filters to limit the data. Maybe you want to analyze a certain group of customers, or maybe you want data from the current year only. You can also choose a page view to perform this action. You don't have to do this prefiltering step, but going to analysis mode will load all data into your browser, so it might be needed for larger datasets (currently above 100,000 rows).

In the 2023 release wave 2, we allow users to analyze more data than 100,000 rows.

How do I get started with analysis mode?

The feature is turned on by default. Your administrator can turn it off using the **Feature Management** page by disabling **Analysis mode**.



What we changed based on feedback from the public preview

- Added the ability to control on which list pages the analysis mode is enabled.
- Added the ability to share an analysis mode tab with a co-worker.
- Increased the data set size to above 100,000 rows.

- Added persistence for the user's choice of analysis mode on list pages, so that their preferences are remembered from their last visit.

As a Business Central partner, you can give feedback on the feature in this Yammer group: https://www.yammer.com/dynamicsnavdev/#/threads/inGroup?type=in_group&feedId=119944077312&view=all

See also

Analyze list page and query data using data analysis mode (docs)

Make use of static and runtime metadata available in Excel layouts

Article • 01/10/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jan 3, 2024	✔ Jan 3, 2024

Business value

This feature makes it easier for layout authors to access and use metadata in their reports. This means less coding in AL and allows for more self-service and greater efficiency in report creation.

Advanced layout authors can now call Business Central APIs from Power Query, enabling them to create refreshable reports.

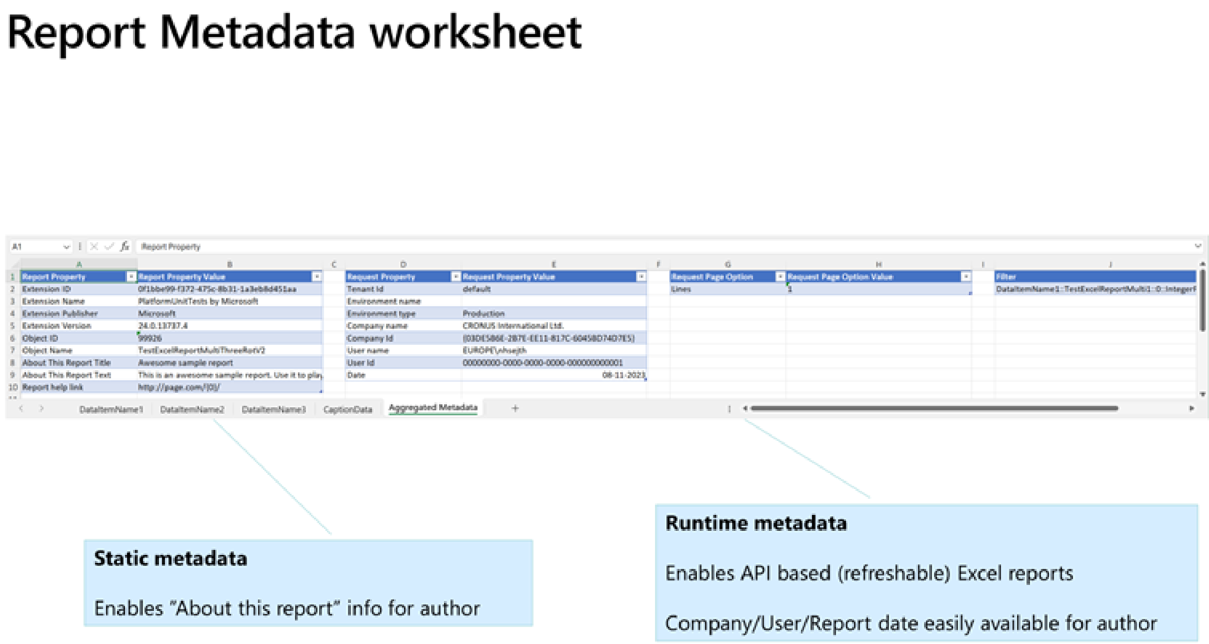
Feature details

Prior to this release, authors of Excel layouts couldn't use data from the report metadata or runtime of the report request unless it was available in the dataset provided by the report developer.

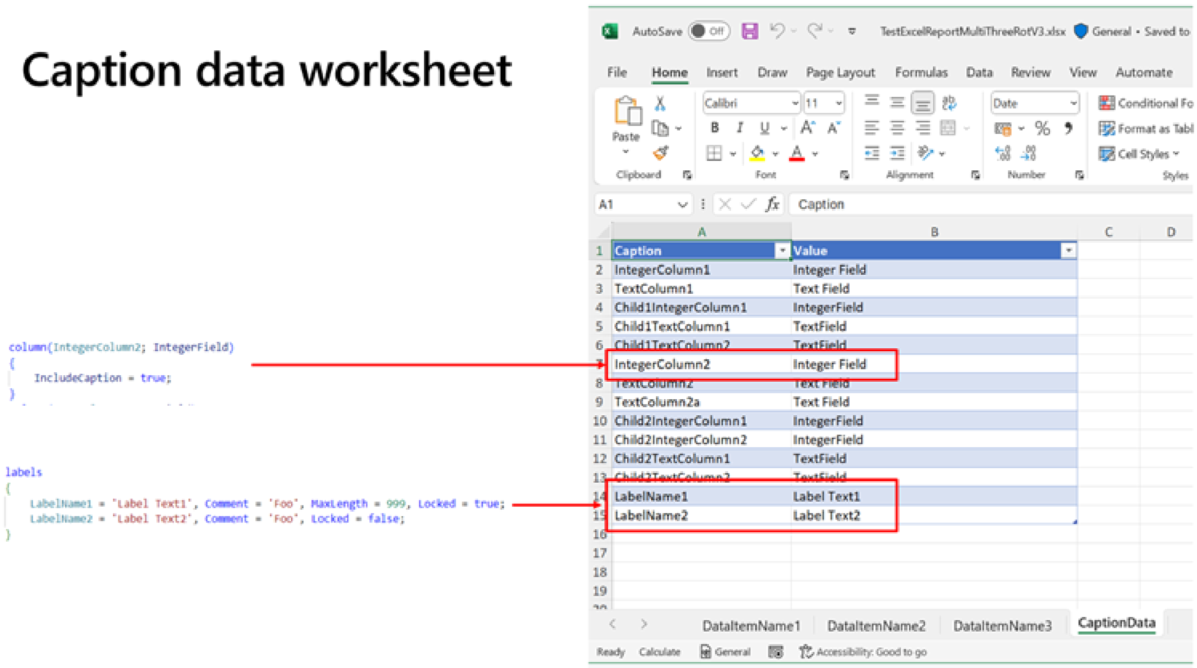
With this release, Excel reports will always have hidden worksheets with the following data:

- Report AL metadata
- Request metadata
- Request page options
- Request page filters
- Report captions

The following figure illustrates how data from the report AL metadata, request metadata, request page options, and filters shows up in Excel as multiple tables.



The following figure illustrates how data from the report field captions and labels shows up in Excel.



The layout author can then use all of this information in their layouts.

Share a data analysis with a co-worker

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Sep 1, 2023	✓ Oct 2, 2023

Business value

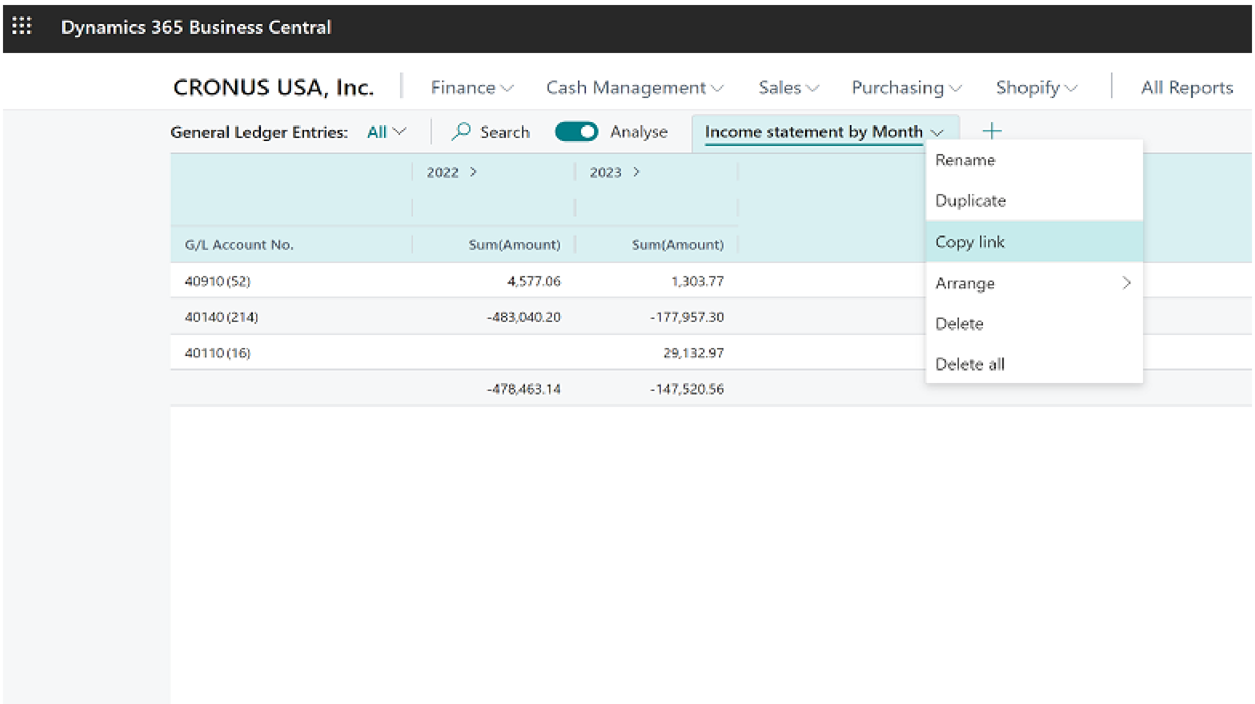
Data analysis mode lets you calculate and analyze data directly from a list page, without having to run a report or switch to another application, such as Excel. After you've prepared an analysis on a tab, you can easily communicate your findings with your colleagues by sharing a link to the tab.

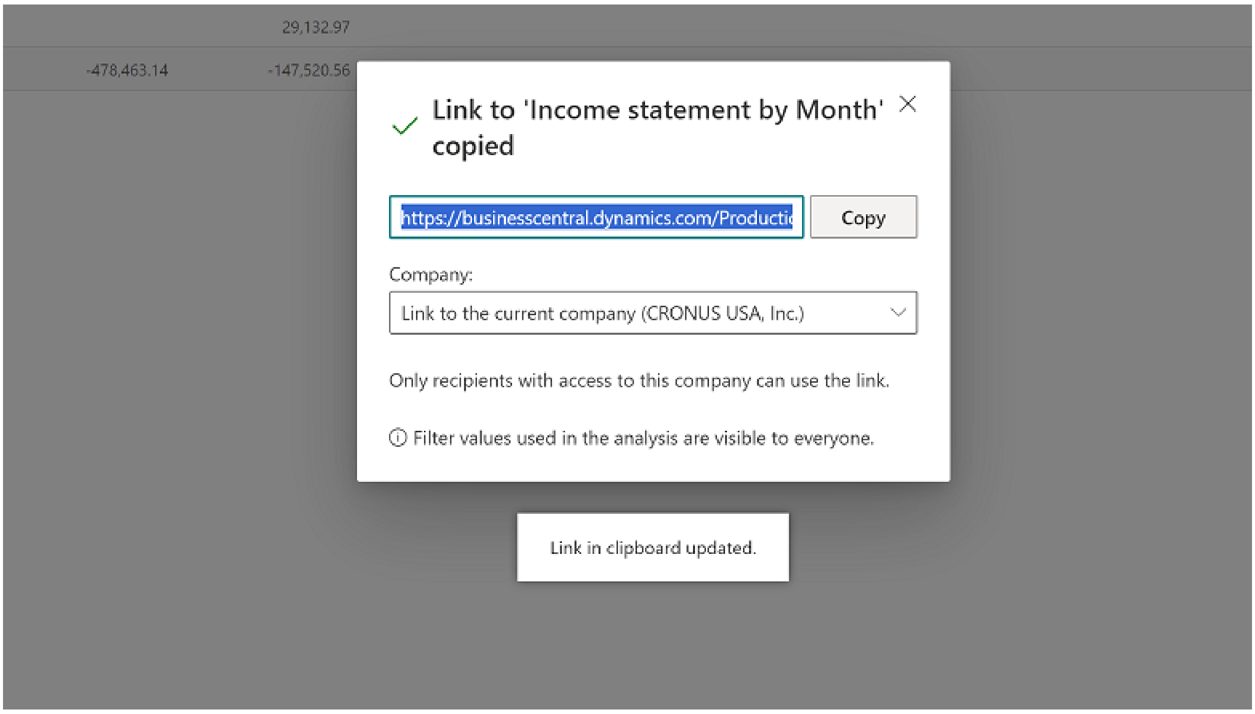
Feature details

Data analysis mode was introduced as a public preview feature in 2023 release wave 1, and provided a new way to interact with data on list pages.

In this release, we're taking data analysis mode even further:

- From any analysis tab, you can share a link to the tab with co-workers.
- Shared links can also be used as a click-once installation of good out-of-the-box analysis.





When a user clicks a shared link, the page opens in data analysis mode and the analysis is created as an analysis tab.

See also

Share data analysis (docs)

Translatable Excel layouts

Article • 01/19/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jan 3, 2024	✔ Jan 3, 2024

Business value

If a business operates in multiple countries or regions, it's helpful to be able to generate reports in multiple languages. ISVs can ship reports with Excel layouts where the Excel output can be translated into the user's language when they run the report.

Feature details

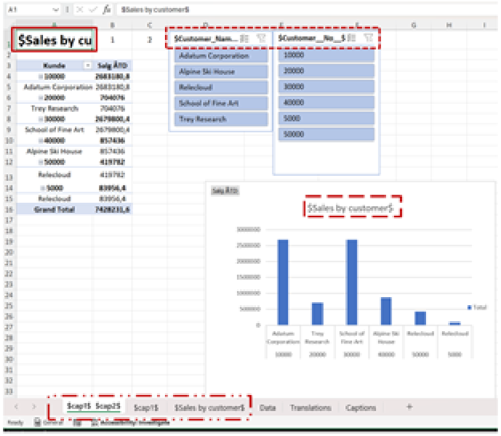
Excel layout authors can create reports that work in multiple languages. Layout authors can use $$ tags in Excel for the following:

- Worksheet names
- Chart headers
- Pivot elements
- Slicers
- Shared strings

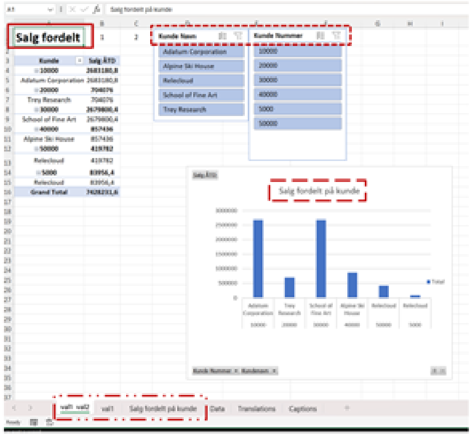
Business Central replaces the tags at runtime when it renders the report. The following image shows an example.

Translatable Excel layouts - example

Layout using $$ syntax



Report when user runs it



Service and platform

Article • 11/20/2023

ⓘ Important

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

Users have fewer interruptions, Business Central generally feels faster, and web services and certain scenarios are noticeably so. We're continuing to invest in the fundamentals of our service, with a focus on performance, stability, resource governance, security, and compliance. This focus lets Business Central continue to grow in scale along with our customers' needs.

To enhance the overall experience, sign-ins for interactive users are more stable and users experience fewer interruptions in their sessions. We're optimizing our language (AL) runtime to minimize database locking and the effect of table extensions on performance.

Additionally, we're fine-tuning several application scenarios that our customers frequently use.

Better performance when working with multiple extensions

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023

Business value

Improving the data loading speed on the server benefits all usage scenarios, including web service integrations, background jobs, and interactive sessions.

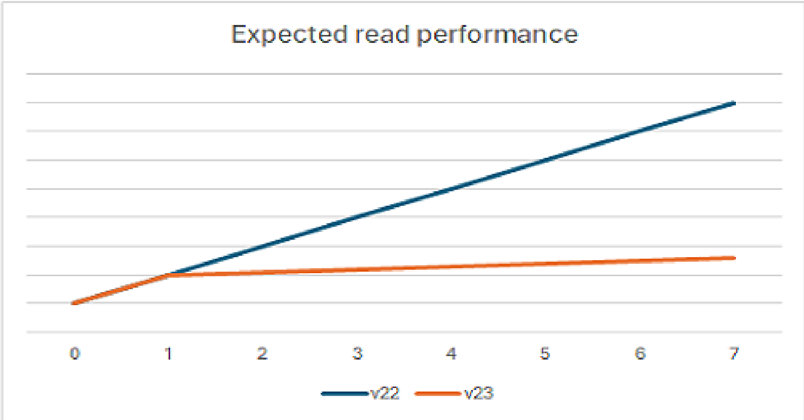
Feature details

This release focuses on optimizing an essential part of the data stack in the Business Central server: The data model for table extensions.

In previous releases, when a developer extended a table, the fields from the table extension were stored in a separate table called a *companion table* in the database. This design was chosen to make the app lifecycle (install, update, uninstall) nondisruptive to normal usage of the base table. Unfortunately, it also had impact on the runtime performance on the system because the Business Central server needed to join data from table extensions when reading data from a table. As an example, for a table with 7 table extensions, the server might need to do a 7-way join.

In this release, we change the data model for table extensions so that added fields from all extensions to a table are now stored in the same companion table. In this new model, the server will never need to do more than a single join of the base table to its companion table. We expect this to drastically reduce the performance impact of table extensions to base tables, while still maintaining good stability of app lifecycle events. The cloud migration tool supports this new schema when migrating data from earlier versions to version 23.

Expected read performance by number of table extensions



Note that this change does not impact the table model as seen from the AL language, so no code changes are needed from extension/app publishers. An additional benefit of this new data model on the database is that developers can now organize code with table extensions the way they want to, without having to think about the performance impact of where table extensions are located in apps.

Faster application scenarios

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023

Business value

By optimizing the speed of select scenarios in the application, you experience a Business Central application that's more swift and responsive.

Feature details

This release includes optimizations for the following scenarios in the Business Central base application:

- Running country-specific (long-running) reports
  - Report 11 "G/L - VAT Reconciliation" performance improved by optimizing key in VAT Entry table.
  - Report 10085 "Aged Accounts Payable NA" optimized by using temporary records and the SetLoadFields method to limit amount of data loaded.
  - Report 10139 "Inventory Valuation" performance improved by optimizing keys in ValueEntry and Item Application Entry tables together with code improvements.

- Synchronizing Microsoft Entra security groups (formerly Azure Active Directory security groups)

Faster tab opening and navigation and action bar rendering

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023

Business value

By optimizing the opening of most page types in the client, you'll find that the Business Central client is swift and responsive.

Feature details

We are pleased to announce that we've made significant optimizations to the Business Central client. These optimizations will improve the user interface and the user experience and make it more efficient and enjoyable.

- **Opening a new tab**: We have optimized the opening of most page types in the client, such as lists, cards, reports, and documents. You'll notice that the Business Central client is swift and responsive, and that you can switch between tabs faster and easier.
- **Rendering the navigation bar and action bar**: We've optimized the rendering of the navigation bar and action bar on all pages in the client. You'll notice that the Business Central client is more consistent and smooth, and that you can access and perform actions quicker and simpler.

Who can benefit: These optimizations will benefit all users of Business Central who use the web client. You'll have a better and more satisfying experience, and save time and effort when using Business Central.

How to use: You don't need to do anything to enable these optimizations. They'll be applied automatically to your online service in the next update.

New operational limits on scheduled tasks and web requests improve throughput

Article • 01/11/2024

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Dec 21, 2023	-

Business value

The new operational limits will improve protection, ensure fairness among users, and inspire elasticity and scalability of our service, while providing higher throughput for environments with many users.

Feature details

Business Central online handles diverse customer workloads with varying load patterns based on seasonality and many other factors, such as the number of active users, external integrations, BI and analytics tasks, and more. To manage these workloads efficiently, we've built a highly automated system that performs traffic management, load balancing and distribution, scheduled task execution, and capacity allocation based on the factors mentioned. We continuously improve the elasticity and scalability of our service with more insights to provide the highest performance and throughput for all customers and their workloads.

We're excited to announce some of these improvements in this release, specifically our increased operational limits. The new limits will significantly benefit our customers with large, complex environments that have many users, scheduled tasks, or web service integrations. They substantially raise the number of web service requests that can be submitted, as well as the number of scheduled tasks and web service requests that can be concurrently processed in each environment.

Here are the planned limit changes:

Concurrency limit for scheduled tasks

Old: **3** concurrently running tasks per **environment**

New: **5** concurrently running tasks per **user** (expected: late Q4CY23)

Speed limit for web service requests

Old limit: **600** web service requests per **environment** per **minute**

New limit: **6,000** web service requests per **user** in the previous **5-minute sliding window** (expected: early Q1CY24)

Concurrency limit for web service requests

Old: **100** concurrently handled (5 processed, 95 queued) web service requests per **environment**

New: **100** concurrently handled (5 processed, 95 queued) web service requests per **user** (expected: early Q1CY24)

Throughout Q4CY23/Q1CY24, these new limits are in preview and subject to change, as we monitor and fine-tune them to ensure that they provide higher throughput than the old limits. We'll communicate any changes to them in our release plans and documentation. As always, we appreciate your feedback and suggestions.

See also

Operational limits (docs)

Performance gain by reducing locks in the database

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✓ Sep 8, 2023	✓ Oct 2, 2023

Business value

We will minimize the use of database locks when running business logic. This will benefit all usage scenarios, both for web service integrations, background jobs, and interactive sessions.

Feature details

Data stack optimization

We changed the default locking behavior in AL for subsequent data modifications on the same table in the same session. Previously, the default locking behavior was UpdLock, which meant that the session would acquire an update lock on data from the table until it committed or rolled back its changes. This could cause blocking and contention issues when multiple sessions tried to access or modify the same table.

```
trigger OnAction()
var
    curr1: Record Currency;
    curr2: Record Currency;
begin
    curr1.FindFirst(); // READUNCOMMITTED

    curr1.Code := 'BTC';
    curr1."ISO Code" := 'XBT';
    curr1.Symbol := '₿';
    curr1.Insert();

    curr2.FindLast(); // UPDLOCK
end;
```

Now, the default locking behavior is ReadCommitted, which means that the session will release the exclusive lock after each data modification and only acquire a shared lock when reading data. This allows other sessions to read and write to the same table concurrently, as long as they don't conflict with each other's changes. This improves the throughput and responsiveness of your online service and reduces the likelihood of deadlocks and timeouts.

```
trigger OnAction()
var
    curr1: Record Currency;
    curr2: Record Currency;
begin
    curr1.FindFirst(); // READUNCOMMITTED

    curr1.Code := 'BTC';
    curr1."ISO Code" := 'XBT';
    curr1.Symbol := '฿';
    curr1.Insert();

    curr2.FindLast(); // READCOMMITTED
end;
```

Who benefits

This improvement benefits all users of Business Central, especially those who have large or complex datasets or who perform frequent or intensive data operations on their online service. You'll notice a faster and smoother experience when using Business Central and fewer errors or interruptions due to locking issues.

How to use

With new environments created on version 23.0 and later, you don't need to do anything to enable this improvement; it will be turned on by default in version 23.0. For existing environments, the feature is available but turned off by default. If you have any custom code or extensions, there's a possibility that it may require some adjustments to adopt the new locking behavior. Therefore, we recommend that you verify this change. You can do so by copying the production environment into a sandbox and turning on the feature in the sandbox from the Feature Management page. Once you've turned on the feature, test, review, and adjust the code if needed. When all tests pass, you can turn the new locking behavior feature on in your production environments as well to obtain better performance and throughput gains.

Service-to-service apps and device license users can schedule tasks

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	✔ Oct 2, 2023

Business value

In typical commerce, point of sale, and warehousing scenarios, where there's a high volume of transactions and workloads to be processed by service-to-service apps or device license users, the ability to schedule tasks and execute them in background sessions can greatly improve throughput and reduce risk of errors.

Feature details

Scheduling tasks has been enabled for app (S2S) and device license users since the updates 21.2 and 22.5, respectively. In situations that required processing many transactions and workloads—such as posting sales orders, printing receipts, and updating inventory—S2S apps and device license users can now increase throughput by parking these workloads as scheduled tasks that will be automatically and asynchronously run later in background sessions. In this way, they avoid waiting for the completion of these workloads and reduce the risk of errors, timeouts, and performance issues that may occur if processing these workloads synchronously.

See also

[Using Service-to-Service (S2S) Authentication (docs)

Synchronize multiple Business Central companies with the same Dataverse environment

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 6, 2023	✔ Oct 2, 2023

Business value

Unlock scenarios where multiple companies must access data in the same Dataverse environment. This enables partners to build new experiences when working in more than one company.

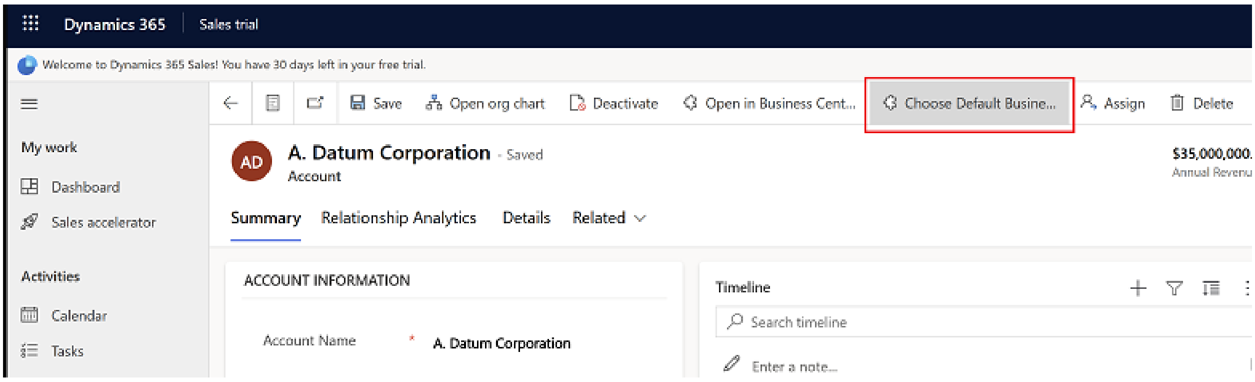
Feature details

When you set up the connection to Dataverse, you can select several Business Central companies from one Dataverse environment.

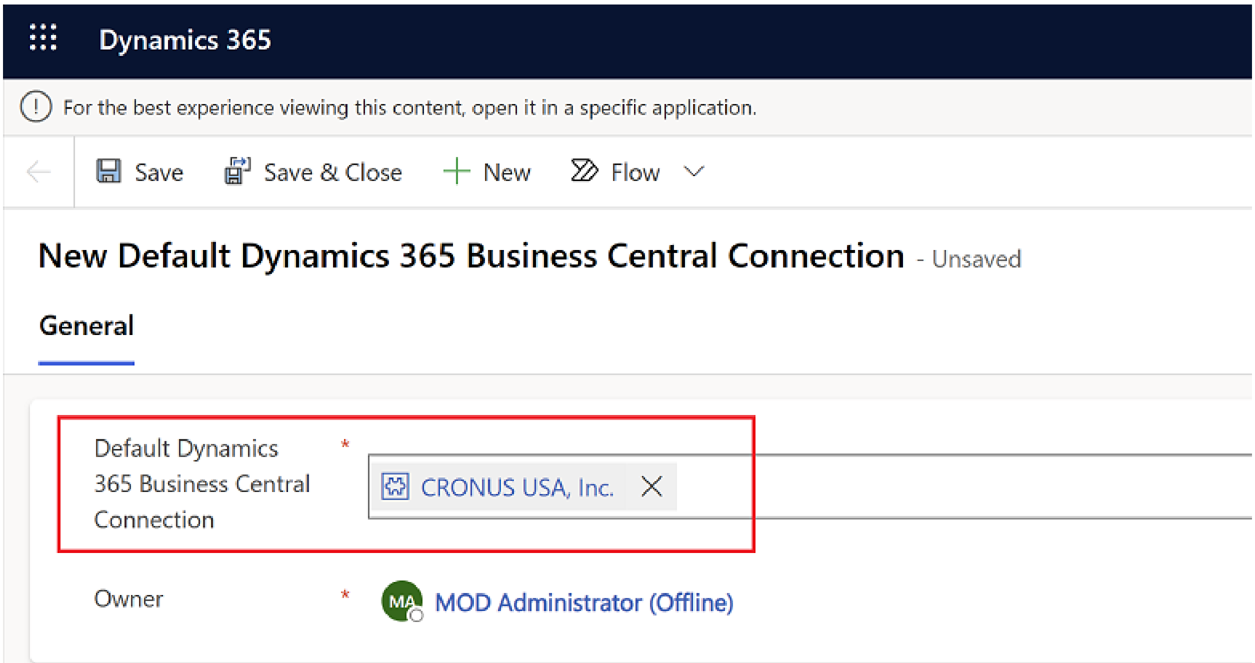
You can enable multicompany synchronization for each table mapping. On the **Integration Table Mappings** page, select the **Enable Multicompany Synchronization** checkbox. Enabling multicompany synchronization has the following effects:

- Removes company filters on user- or team-owned tables, such as the Account and Contact tables.
- Makes sales quotes and orders synchronization more restrictive with respect to the company filter. You must use the company picker in Dataverse or Dynamics 365 Sales to specify the Business Central company that will process a particular document.
- Doesn't affect tables that are organization-owned, such as the Currency table.

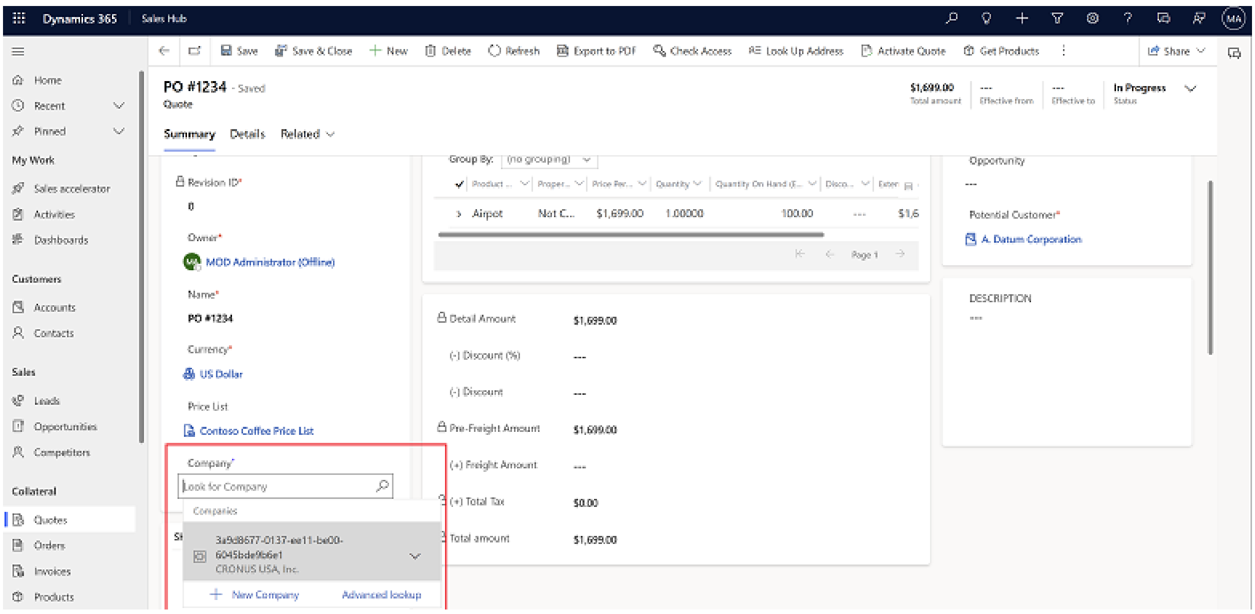
You can open coupled records in different companies using the **Open in Business Central** action in Dataverse or Dynamics 365 Sales.



Each user can choose their default Business Central company on the **Default Business Central Connection** page.



On documents, such as quotes or orders, you can specify the Business Central company that will process and fulfill specific documents.



If you're already integrating Business Central with Dynamics 365 Sales, we suggest you choose the **Redeploy Integration Solution** on the **Dynamics 365 Connection Setup** page to use the company picker on integrated entities. This is particularly important on documents such as **Quotes** or **Orders** because it sets the company that will be allowed to pick up a particular quote or order when synchronizing them to Business Central.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Synchronizing Data in Business Central with Microsoft Dataverse (docs)

User experiences

Article • 12/21/2023

ⓘ Important

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

Business Central offers a broad portfolio of user interfaces that enable our customers to work with their data from anywhere, and on any device. User interfaces include an installable desktop app, a browser-based web app, and mobile apps. Whether you need to enter data at high speed, casually update entries, or analyze relational data, Business Central offers numerous features that are easy to get started with and powerful when needed.

Every release includes enhancements to usability, accessibility, performance, and reliability. In this release wave, we're boosting efficiency when you're working with actions across selections in lists of records and viewing summarized data to help you easily fix data entry mistakes.

Add existing table fields to optimize your pages

Article • 10/24/2023

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 2, 2023	-

Business value

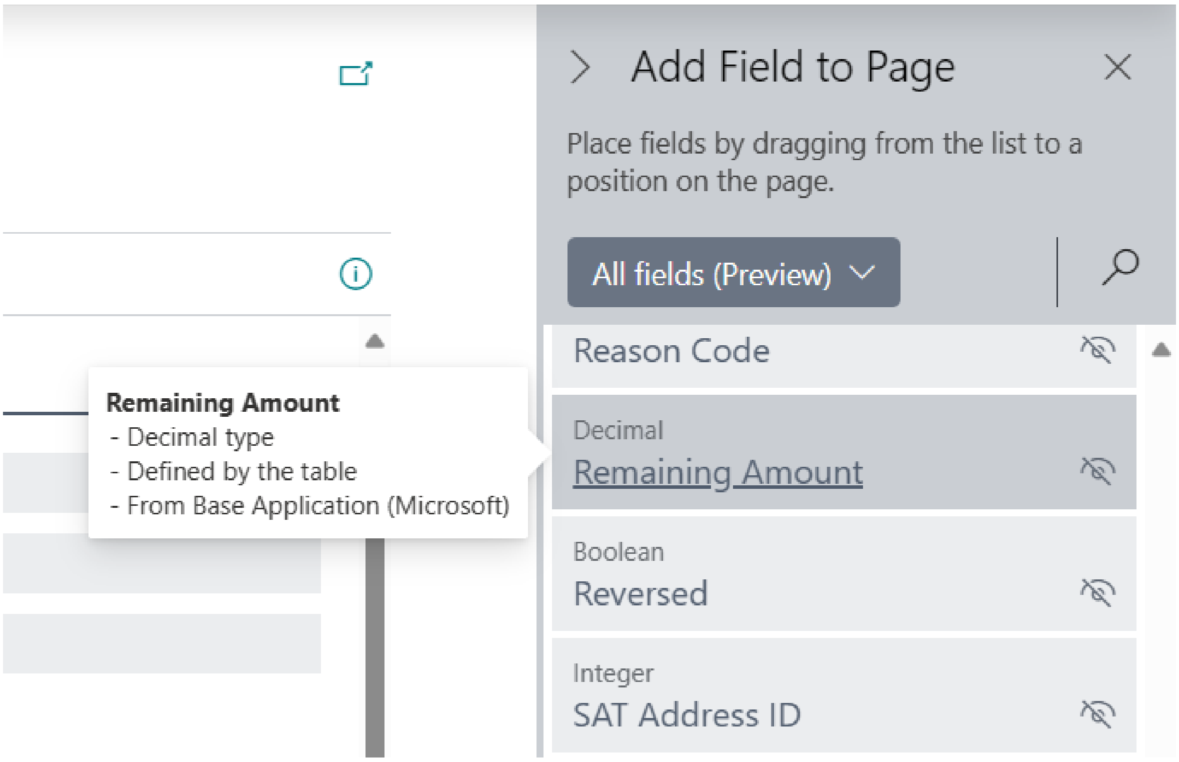
The Microsoft Cloud empowers SMBs to adapt quickly to changing conditions. Each line of business often needs to optimize for data entry and data insights by customizing which fields are displayed and relevant for the organization. Business Central already provides a rich toolbox to hide, show, or move various UI elements. Now, we're also unlocking table fields so that administrators, department owners, and partner consultants can easily and immediately add them to their pages without having to develop code extensions. By adding existing table fields to a page, customers can self-serve and reduce time to value while cutting implementation costs. Conversely, this frees up time for pro developers to focus on more rewarding implementations.

Feature details

From the Business Central web client, you can:

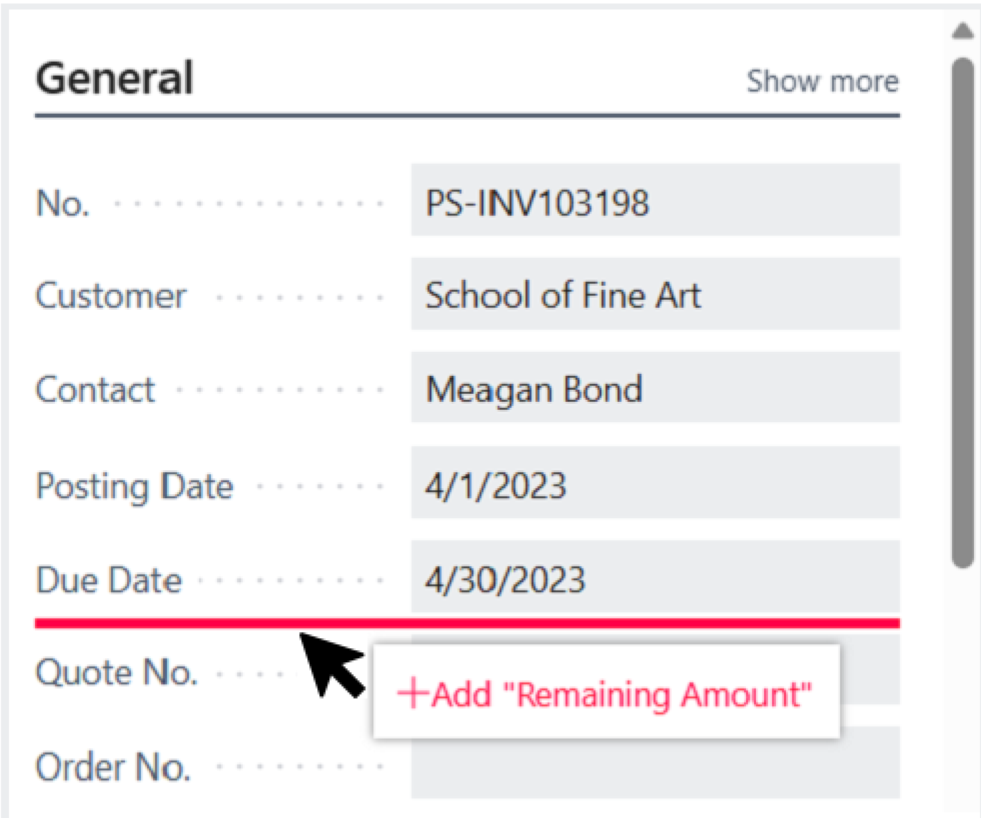
- Get access to more fields.

  The **Add field** pane is used to manage which fields are displayed on the page. Apart from the recommended fields that are already shown or hidden on the page, choose from additional fields that originate from the source table that powers that page, including fields from table extensions. Search, filter, or use tooltips to learn more about each field before choosing to add it to the page.

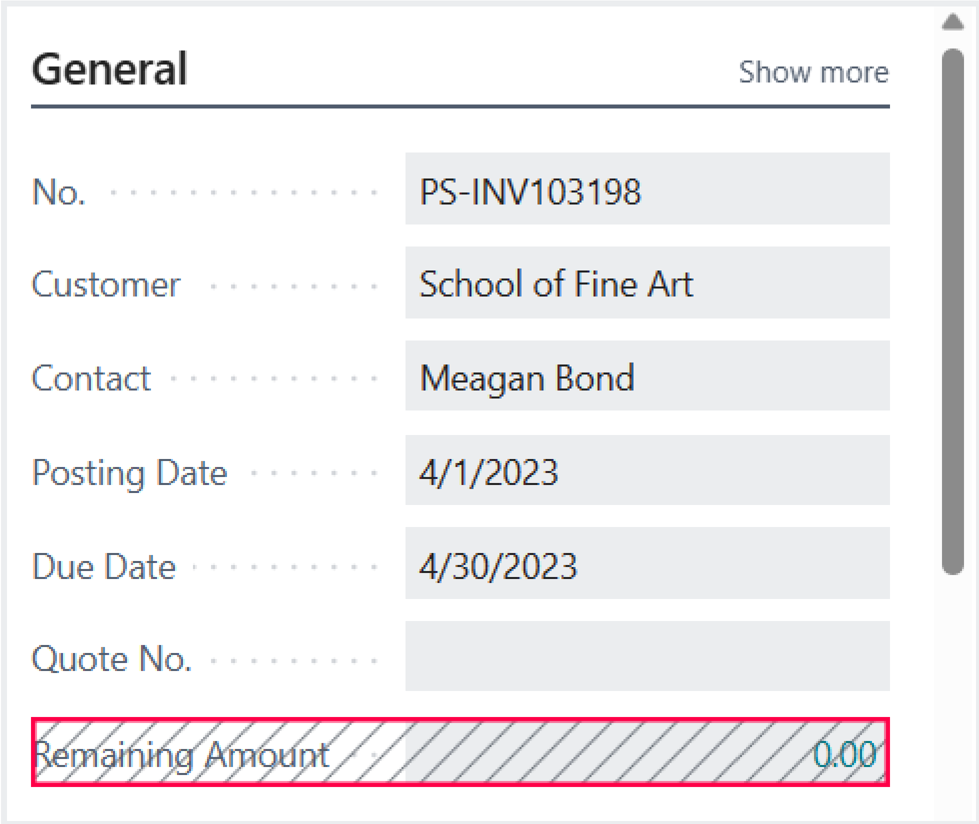


- Add to all the right places.

  Drag and drop fields from the **Add field** pane to a precise location on the page canvas.



Click to scroll a field into view or show the suggested place where it could be added on any type of page, such as card pages or lists. Adjust the content around them for an optimal experience.



- Customize per role.

  Role-tailor Business Central by choosing which user profile to customize from the **Profiles** list page. Roll out minor customizations immediately in production, or start safely in a sandbox environment to get feedback from your users and roll out the change to production at the right time.

- Start using fields immediately.

  Changes come into effect immediately once you finish customizing a user profile, and users assigned that profile will be able to view the field value.

- Govern your data and extensions

  Administrators can choose precisely which persons are allowed to add table fields to pages using a new system permission. Developers can protect sensitive table fields by excluding them from UI customization using a new AL property.

This feature is initially in preview and subject to change. This feature isn't intended for creating new fields on tables and will still require developer support when used to add complex, existing table fields.

Try it out

To experience adding table fields to pages, sign in to Business Central and follow this example (or similar):

1. Navigate to the **Profiles (Roles)** list and choose **Customize Pages** for your current profile.
2. When the new tab loads, navigate to the **Posted Sales Invoices list**.
3. Expand the customization banner and choose **+Field** to display the pane. If the pane filter shows "All fields (Preview)," then you are ready to add your first table field by dragging it onto the list page. For example, you can drag the **Opportunity No.** field as a new column in the list.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcIdeas.

See also

Customize pages for profiles (docs)

Distinguish between browser tabs when multitasking

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 8, 2023	✓ Oct 2, 2023

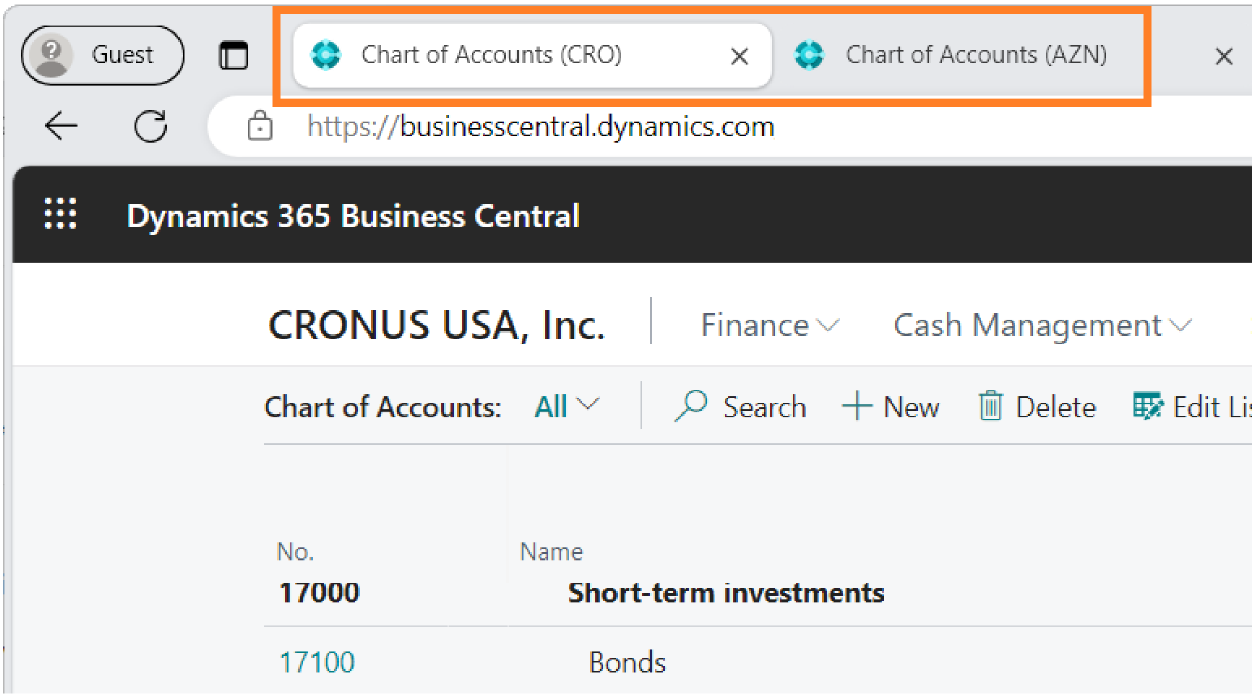
Business value

Users work more efficiently in Business Central when they use multiple browser tabs or windows to compare data, even across companies, or deal with new tasks as they appear. But navigating across open windows—for example, by selecting the Alt+Tab keys—quickly becomes challenging when all windows look alike. In this wave, Business Central helps to distinguish one open window from the next, making it easier to switch context.

Feature details

Business Central now uses a simple and clear schema for naming browser tabs and windows:

- **Context**: The tab name for list, card, and document pages reflects the current record, page or view, no matter how you navigated to that page.
- **Readability**: To improve readability, the tab name has been trimmed of all secondary information. For example, the full product branding is no longer included, and the view or edit state of the page is also omitted.
- **Current**: The tab name is automatically updated while you navigate within the web client.
- **Multicompany**: The company badge is included in the tab name, if the company has been assigned a badge.



The following table includes examples of browser tab naming:

Pattern	Example	Browser tab name
list page	**Items** list page	"Items"
list view	**Open** filtered view on **Sales Orders** list	"Sales Orders - Open"
single record	**Item Card** showing single record	"Item Card - 1896 · ATHENS Desk"
setup pages	**Sales and Inventory Forecast Setup** page	"Sales and Inventory Forecast Setup"
draft records	**Customer Card** for new customer	"New - Customer card"
root URL	**Business Manager Role Center** home page	"Dynamics 365 Business Central"
profile override	URL includes ?profile=DISPATCHER	"Service Manager - Dynamics 365 Business Central"

Try it out

You can experience this enhancement today by signing in to the Business Central Web client. For example, you can open Business Central in two separate browser tabs, where one tab shows one sales order and the other tab shows another.

See also

Display company badge (docs)

Get to data search from anywhere in Business Central

Article • 10/24/2023

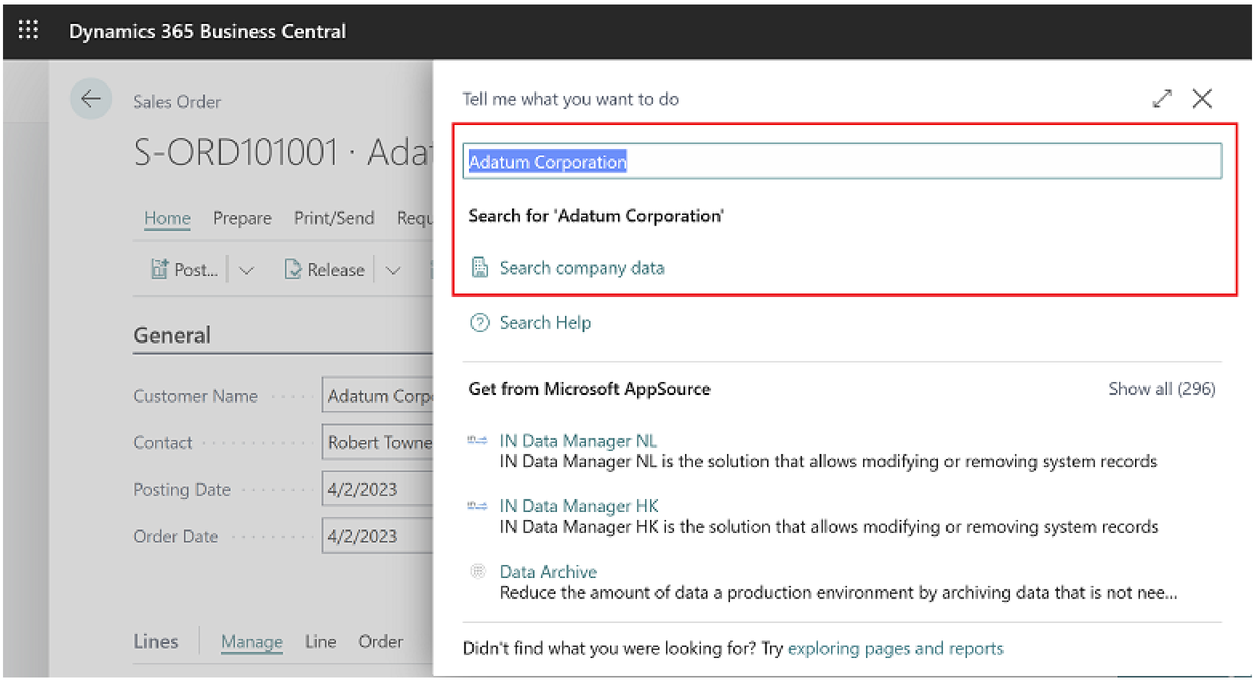
Enabled for	Public preview	General availability
Users, automatically	✓ Oct 2, 2023	-

Business value

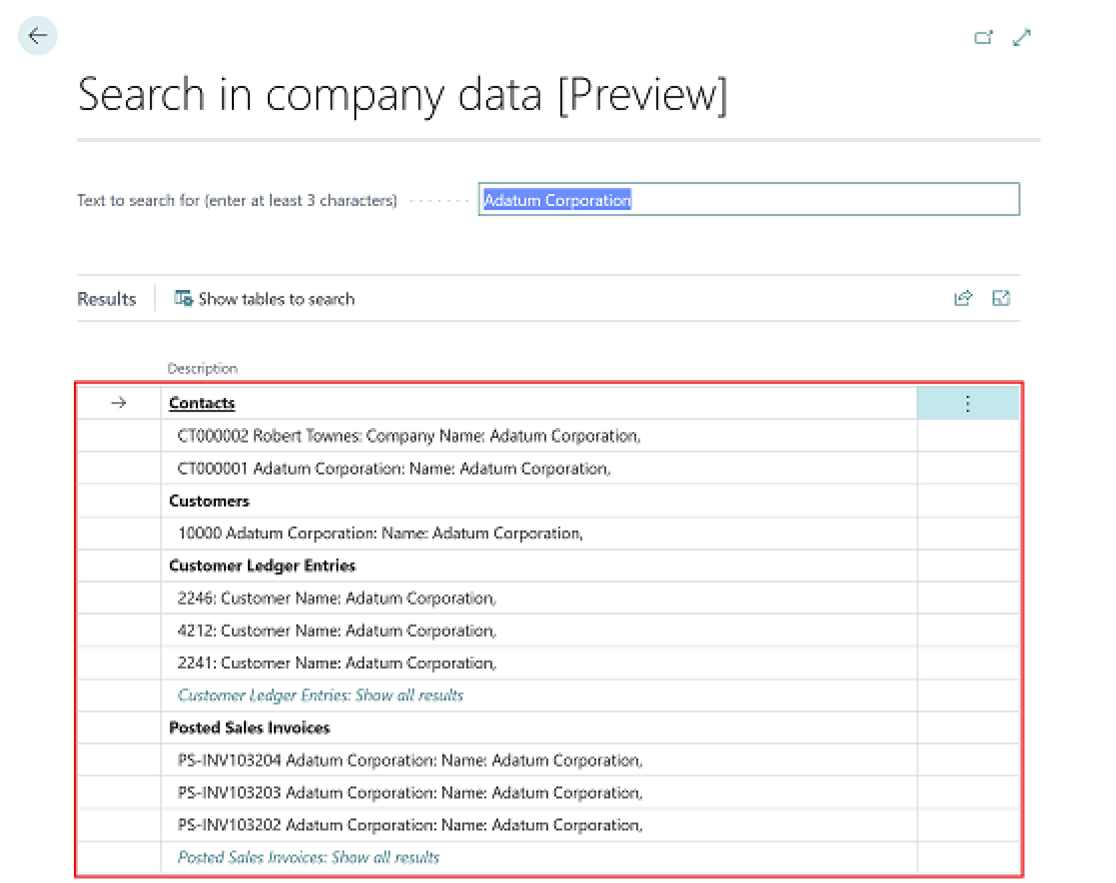
Office workers spend up to 20 percent of their working time searching for information. Finding specific information in a timely manner across different areas of a business management solution often requires tailored queries within its different parts. Because the volume of data constantly increases, it becomes increasingly important to get relevant content fast. Business Central lets you search across all data that's relevant for your role, and not just business transactions. The most relevant results show first, which saves valuable time and lets you focus on higher-value tasks.

Feature details

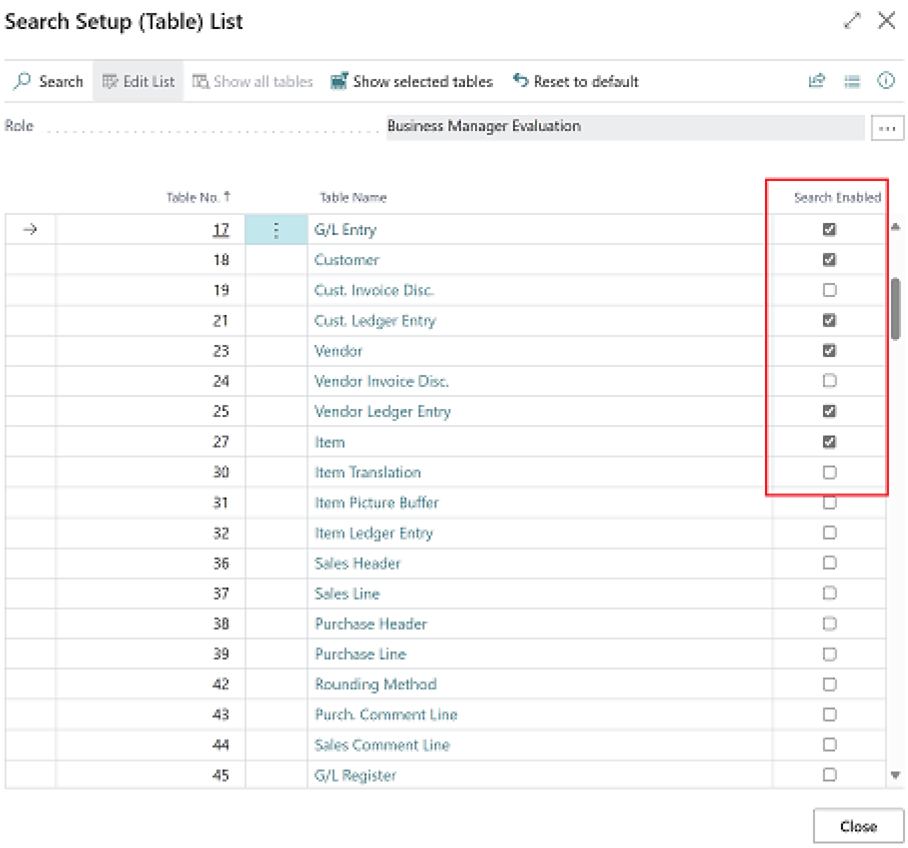
You can start a search directly from the Tell Me dialog by using the **Alt+Q** shortcut key combination from anywhere in Business Central. To search for data, enter one or more keywords in Tell Me. Or, when you run Tell Me in the context of an editable page, it will automatically search for the value in the currently selected field.



The search results include the top results in the tables you have access to.

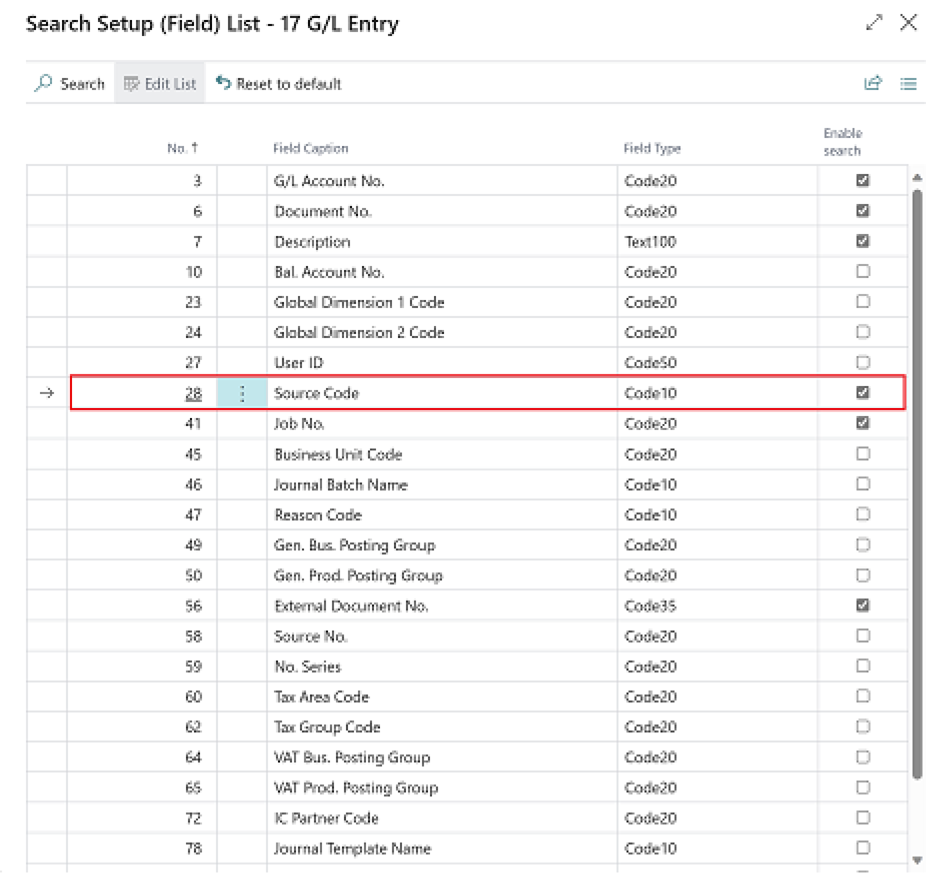


By default, search is scoped to data that's available in your Role Center and the tables you can access. However, you can customize the search scope by selecting **Show tables to search** on the **Search in company data** page. Limiting the scope can make search results show even faster.



The **Show tables to search** action opens the **Search Setup (Table) List** page, where you can pick the tables to search in. By default, only the tables that are relevant for specific roles are selected, but you can browse other tables by using the **Show all tables** and **Filter to selected tables** actions.

When you choose a table, the **Search Setup (Field) List** page opens. You can tailor the search to include fields in the selected table by turning on the **Enable search** toggle. By default, only indexed code and text type fields, and fields that are used to identify the search result record, are enabled.



Search Setup (Field) List - 17 G/L Entry

Search | Edit List | Reset to default

No. ↑	Field Caption	Field Type	Enable search
3	G/L Account No.	Code20	☑
6	Document No.	Code20	☑
7	Description	Text100	☑
10	Bal. Account No.	Code20	☐
23	Global Dimension 1 Code	Code20	☐
24	Global Dimension 2 Code	Code20	☐
27	User ID	Code50	☐
28	Source Code	Code10	☑
41	Job No.	Code20	☑
45	Business Unit Code	Code20	☐
46	Journal Batch Name	Code10	☐
47	Reason Code	Code10	☐
49	Gen. Bus. Posting Group	Code20	☐
50	Gen. Prod. Posting Group	Code20	☐
56	External Document No.	Code35	☑
58	Source No.	Code20	☐
59	No. Series	Code20	☐
60	Tax Area Code	Code20	☐
62	Tax Group Code	Code20	☐
64	VAT Bus. Posting Group	Code20	☐
65	VAT Prod. Posting Group	Code20	☐
72	IC Partner Code	Code20	☐
78	Journal Template Name	Code10	☐

Because the number of tables fields that the search includes can impact performance, you can restore the default settings by choosing the **Reset to default** action on the **Search Setup (Table) List** and **Search Setup (Page) List** pages.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Search for a Record in Your Data (docs)

Use actions to navigate and highlight or fix platform-generated errors

Article • 12/06/2023

ⓘ Important

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

Expand table

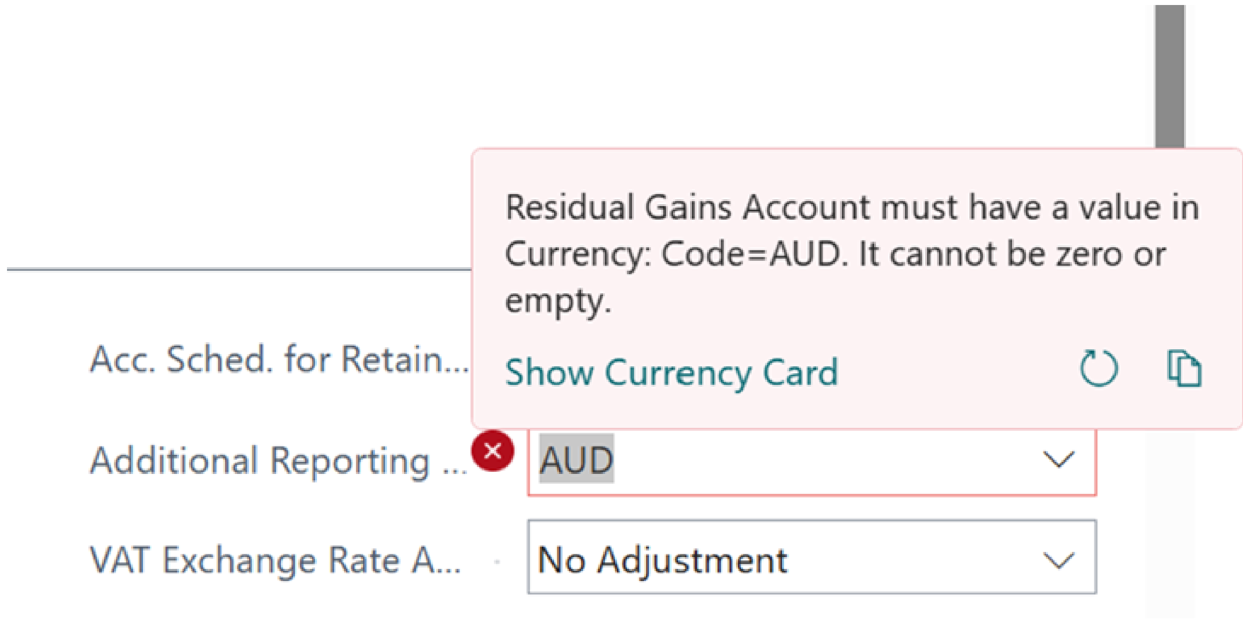
Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

Business value

We're making it easier for you to help yourself when something goes wrong in Business Central. Error messages provide actions that take you to the page, or even a specific field on a page, so you can quickly resolve the issue. The actions provide value to organizations by enhancing productivity and ensuring smooth workflows.

Feature details

We've enhanced the user experience by making it easier to understand, go to, and resolve errors that come from the platform. Previously, when an error occurred, you had to manually go to the relevant page or area to address the issue.



The error messages that the Business Central platform generates are now easier to read and understand because they no longer contain field names. However, messages still contain the full technical details, including field names, in the Detailed error message section. Select the **Copy details** icon on inline validation errors or in an error message to access the technical information.

Actions on error messages take you directly to the page or field that's causing the error, so you don't have to take time to find them on your own. Just choose the action in the error message and Business Central will take you to the appropriate location to resolve the error.

There's also a highlighting feature that indicates the relevant field, so you can quickly identify and focus on the areas that need attention. By scrolling the field in the view, you can easily find and fix the issues and enjoy a more efficient and streamlined workflow.

If you're developer, when you call the TestField method and don't pass in the ErrorInfo object, Business Central automatically generates the link to a page where a user can correct the issue. Business Central first gets the lookup or drill-down page for the record, and then finds card page or lookup page and adds a navigation link to that card page. Business Central doesn't add a link in the following situations:

- If the error is on the page that's currently open.
- If the user doesn't have permission to modify the underlying record.

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.

Mark fields as read-only when customizing UI

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023

Business value

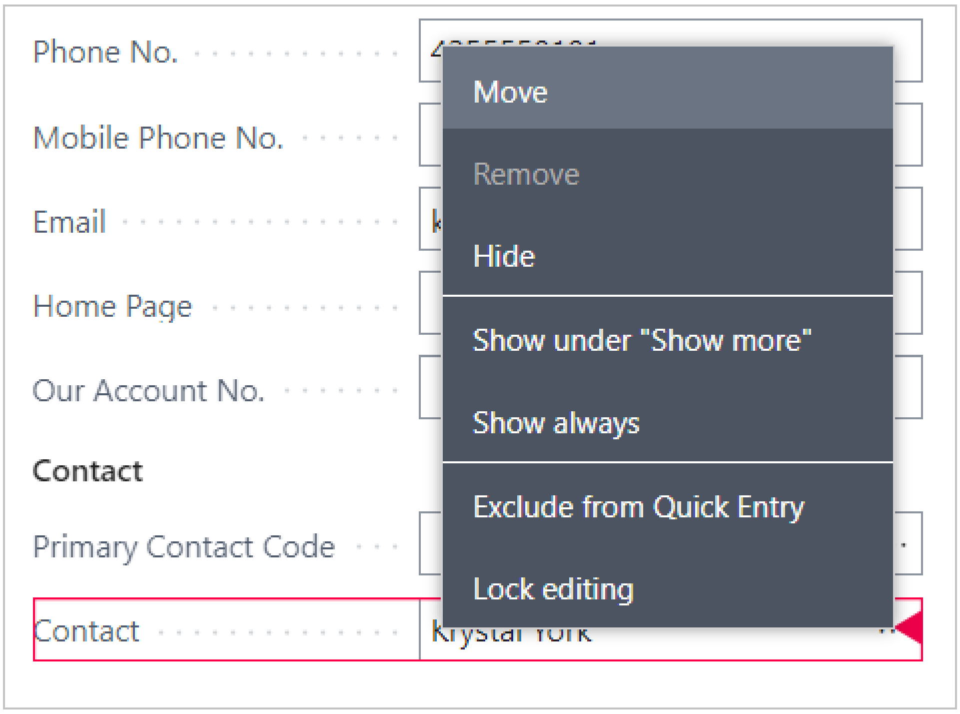
Business Central offers a powerful suite of user interface (UI) customization tools that empowers customers to quickly optimize the experience for individual users, for each role, or for the entire organization. Customers often ask their supporting partner to simplify how data is presented on a page, to improve readability and optimize data entry. Now, customers can self-serve by making fields non-editable directly in the UI, adding to the existing UI simplification capabilities such as hiding or moving fields on the page.

Feature details

Business Central now includes the following:

- **Make fields non-editable**: When customizing the UI, use the context menu to specify that a field should be read-only. You can always undo your customization later. Setting the editable state of a field is not a security feature and should only be used to optimize pages for readability and efficient data entry. This enhancement does not allow making fields editable if the application developer has specified that a field should be read-only.

- **Choose the scope of your change:** Personalize your own workspace or roll out the change safely for one or more roles (profiles) starting with a sandbox or directly in production.



Try it out

To experience making fields read-only, sign in to Business Central and follow this example (or similar):

1. Navigate to the **Profiles (Roles)** list and choose **Customize Pages** for your current profile.
2. When the new tab loads, navigate to the **Item card** or another page of your choice.
3. For any editable field, bring up the field customization menu and choose **Lock editing**.

See also

Customize pages for profiles roles (docs)

Scan barcodes with Business Central mobile app for iOS and Android

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Sep 1, 2023	✔ Oct 3, 2023

Business value

The barcode scanner control increases warehouse users' productivity as they can scan barcodes using the device camera or even the dedicated barcode scanner. This feature also opens scenarios for partners to create more advanced experiences using a barcode scanner.

Feature details

The new barcode scanning feature supports three different scenarios, each with varying levels of complexity. The scenarios range from simple user interface (UI) features to more advanced approaches that cater to ISVs.

- Scenario 1: UI button

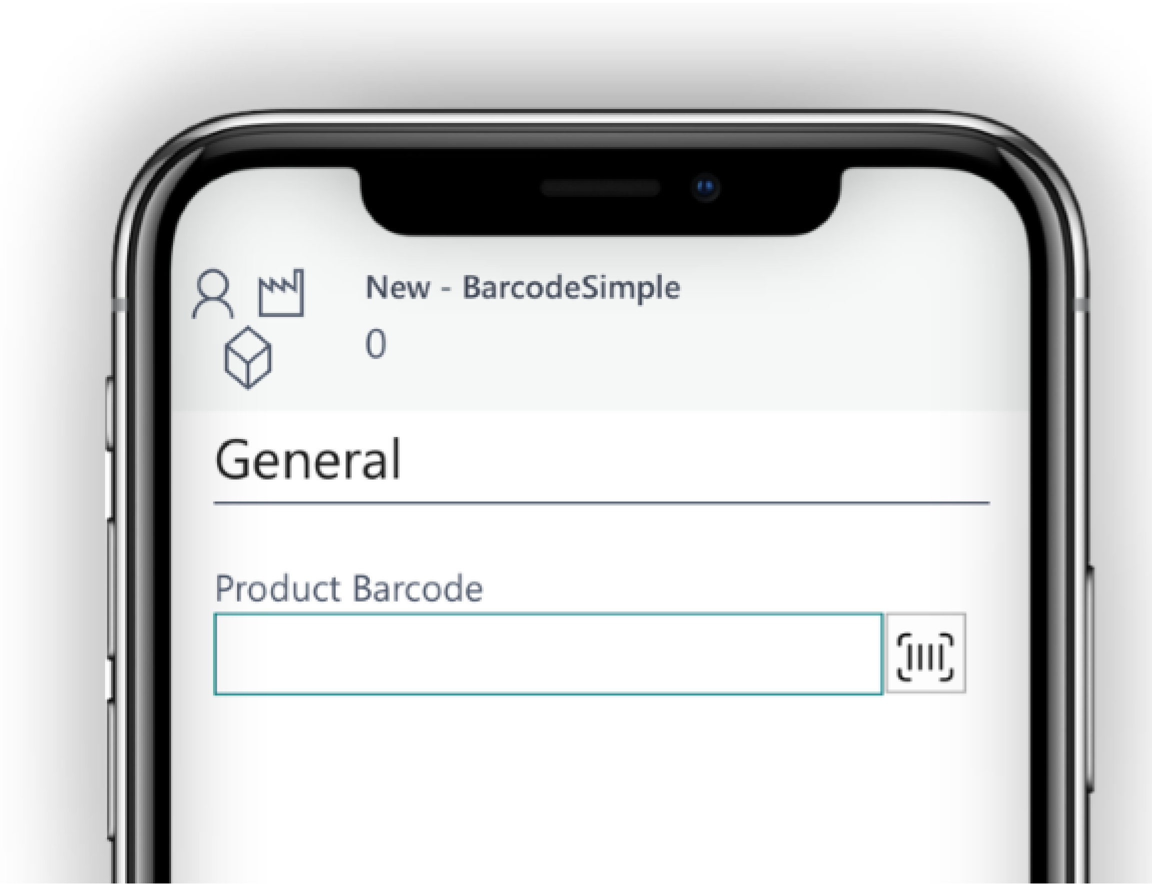
  The mobile client renders a user-friendly control on page fields for starting the barcode scanner. To enable the barcode scanning action on a field, the `ExtendedDatatype` property in AL code must be set to `Barcode`. Pages with such fields, which are only supported for text and code data types, will automatically display a barcode scanning button in the UI, enabling scanning via the device camera. This scanning is highly efficient and responsive, featuring mobile OS level processing and supporting the most well-known 1D and 2D barcode formats. Once a barcode is scanned, its value is entered in the field on the page, and the focus moves to the next quick-entry field on the page. This feature is supported on both iOS and Android platforms.

- Scenario 2: AL action

  AL developers are also able to trigger the barcode scanning UI via an AL-based action, so the barcode scanning can be started via a button, link, or some other semiautomated logic (for instance, when a page is opened). Also supported on iOS and Android platforms, this scenario uses the same camera-based scanning technology as scenario 1 and returns the scanned barcode value to AL code for further processing.

- Scenario 3: Barcode event

  This scenario targets professional hardware devices, typically with laser-based barcode scanners, offering greater flexibility to developers. It is only supported by hardware barcode scanners, such as Zebra or Datalogic, running Android 11 and above (there's no support for iOS). With this scenario, developers register a barcode subscriber that listens for subsequent barcode events on the AL side. When the hardware scans a barcode, its value is sent to the Business Central mobile app and then to AL code. In other words, AL code can intercept an event from an Android device and process the decoded barcode further. Additionally, this scenario supports scanning barcodes and building up a document without interacting with any UI.



Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas .

See also

Reserve Items (docs)

Search for pages and data in the mobile app

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 1, 2023	✔ Oct 3, 2023

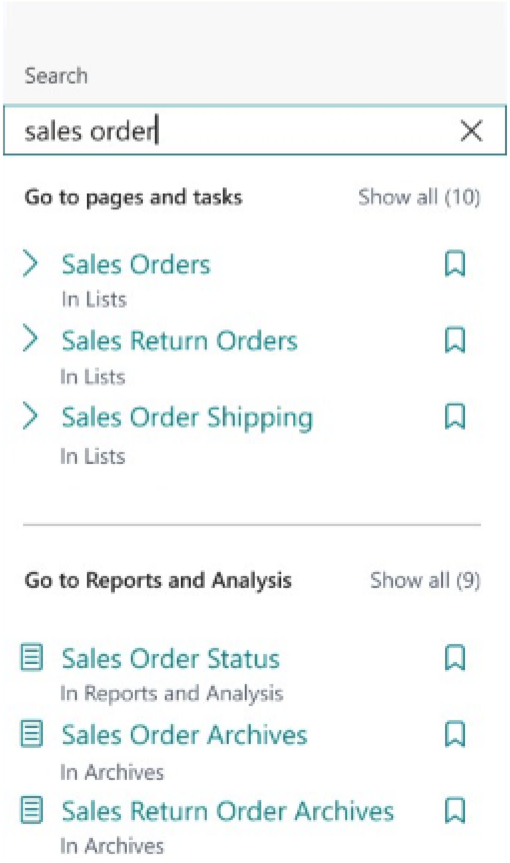
Business value

More and more people use mobile phones or tablets to access Business Central. The ability to quickly find pages or data on mobile devices opens up many new possibilities for mobile scenarios.

Feature details

This feature adds the popular Tell Me experience to mobile devices that run the Business Central app. It also provides access to the Tell Me built-in data search.

- The Tell Me feature is enabled in the mobile app (phone and tablet mode on iOS and Android), and users can access any page they're allowed to.
- Permissions are respected. Users can't access pages they don't have permissions to open.
- Pages that weren't allowed on phones before—for example, worksheet pages—aren't available.
- The Alt+Q keyboard shortcut is available for devices that have a physical keyboard.
- You must turn on this feature on the Feature Management page.
- The AppSource section is hidden on mobile devices.
- You can bookmark pages on mobile devices like you would on your computer.



Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Finding Pages and Information with Tell Me (docs)

Share error details to get help from another user

Article • 01/11/2024

ⓘ Important

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

Expand table

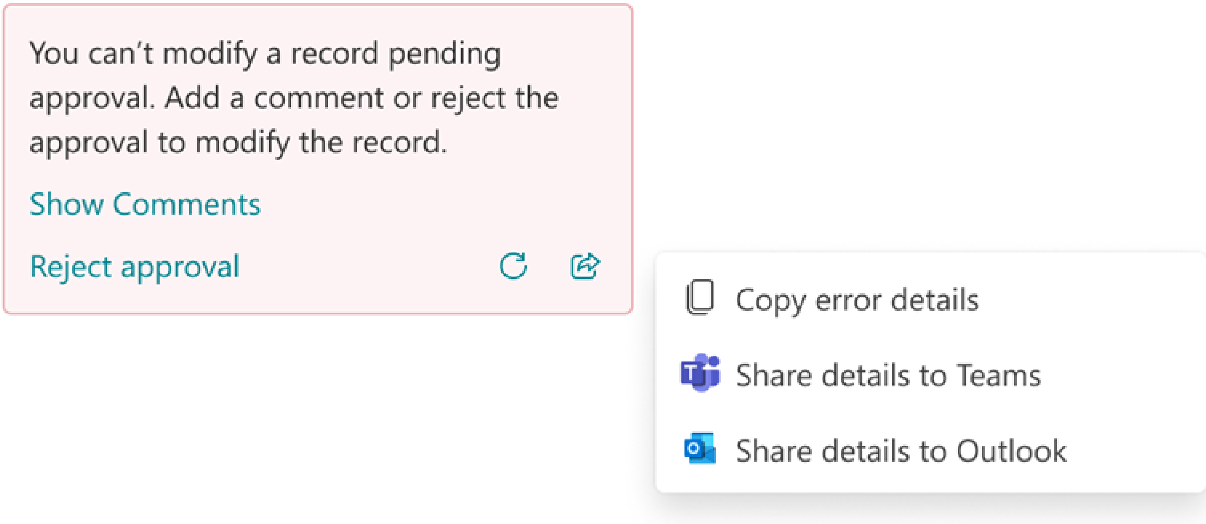
Enabled for	Public preview	General availability
Users, automatically	Mar 2024	To be announced

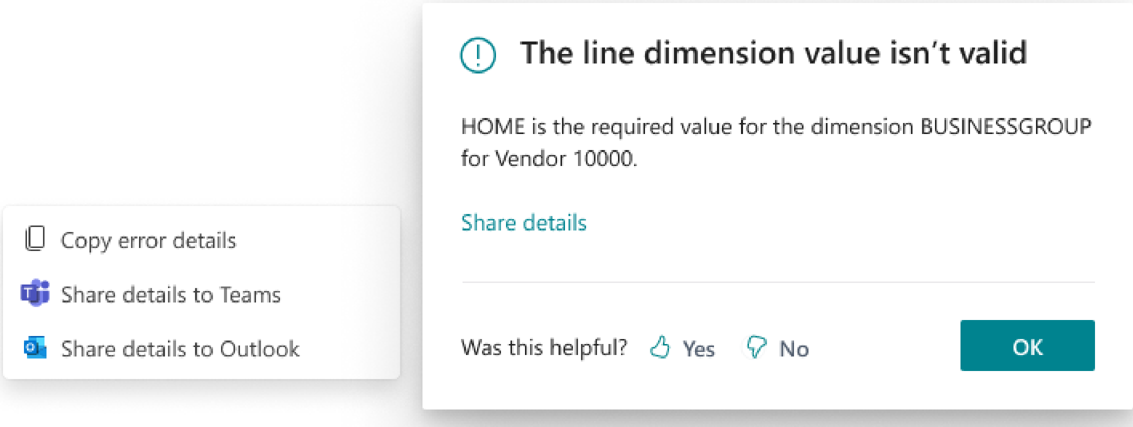
Business value

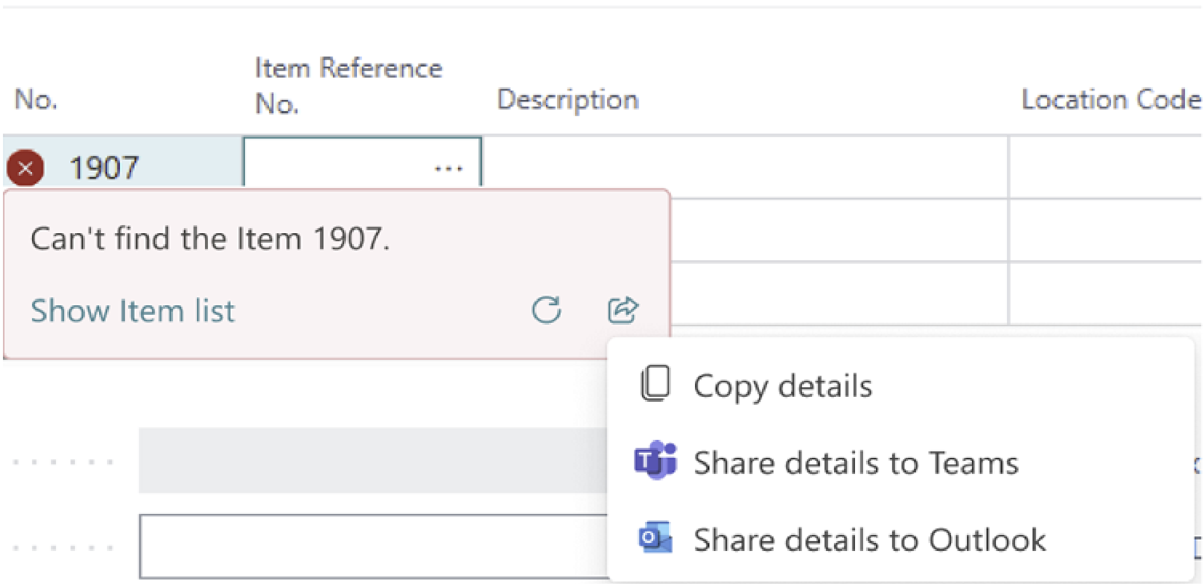
By facilitating collaboration and knowledge sharing, we're enabling teams to work together more effectively and efficiently. You can leverage the expertise of colleagues or subject matter experts to overcome obstacles and minimize downtime. The ability to share error details in Business Central enhances collaboration and problem-solving capabilities.

Feature details

When you're blocked by an error, you can quickly and easily share the error details with colleagues, subject matter experts, or other users to get assistance. The details include the exact error message, error code, and other information that's helpful when troubleshooting an error. By sharing the error details, you can effectively communicate the specific issue you're facing, which helps your colleagues provide targeted support and guidance.


You can't modify a record pending approval. Add a comment or reject the approval to modify the record.
Show Comments
Reject approval
Copy error details
Share details to Teams
Share details to Outlook


Copy error details
Share details to Teams
Share details to Outlook
The line dimension value isn't valid
HOME is the required value for the dimension BUSINESSGROUP for Vendor 10000.
Share details
Was this helpful?
Yes
No
OK


No.
Item Reference No.
Description
Location Code
1907
Can't find the Item 1907.
Show Item list
Copy details
Share details to Teams
Share details to Outlook

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.

Share readable deep links to pages and records

Article • 10/24/2023

Enabled for	Public preview	General availability
Users, automatically	✔ Sep 8, 2023	✔ Oct 2, 2023

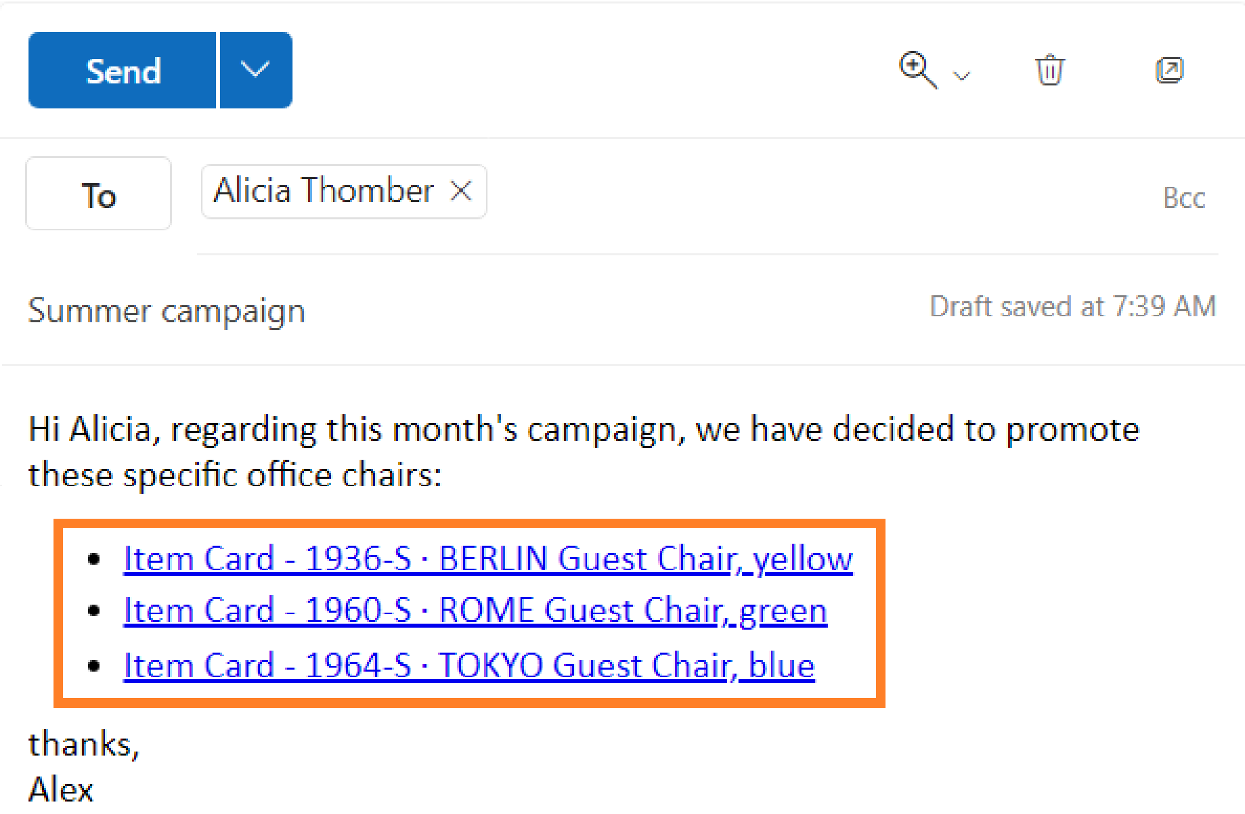
Business value

Like many web applications, Business Central offers deep linking to pages and records, enabling users to copy the current URL and share that with others, or add links to their browser favorites. In this wave, the Business Central web client introduces a simple and consistent naming convention so that pasting a link to any Business Central page or record results in a readable hyperlink that clearly indicates context but hides the full URL, which is often daunting to work with. Not only does this feature enrich hyperlinks pasted into rich text editors such as in Outlook, OneNote or Teams, it also delivers a better experience when you use Business Central with modern browser features, such as collections in Microsoft Edge.

Feature details

Business Central uses a simple and consistent naming convention for deep links when you copy the URL in the browser or use the **Copy link** action and paste the link into any rich text editor:

- **Context**: The hyperlink for a list, card, or document page reflects the current record, page, or view, no matter how you got to that page.
- **Readability**: To improve readability, secondary information is trimmed from the hyperlink. For example, the full product branding is no longer included, and the view or edit state of the page is also omitted.
- **Multicompany**: If the company has a badge, the hyperlink includes it.



The following table includes examples of deep links pasted in a rich text editor.

Pattern	Example	Hyperlink caption
List page	Items list page	"Items"
List view	"Open" filtered view on Sales Orders list	"Sales Orders - Open"
Single record	Item card showing single record	"Item Card - 1896 · ATHENS Desk"
Setup pages	Sales and Inventory Forecast Setup page	"Sales and Inventory Forecast Setup"
Draft records	New customer card	"New - Customer card"
Root URL	Business Manager Role Center home page	"Dynamics 365 Business Central"
Profile override	URL includes ?profile=DISPATCHER	"Service Manager - Dynamics 365 Business Central"

When you paste a link into a simple text field or plain text editor, the URL is pasted instead of a readable hyperlink.

Try it out

You can experience this enhancement today by signing in to the Business Central Web client. For example, you can navigate to the **Item Card** for any item, select the **Copy link** action, then use the `Ctrl`+`V` shortcut to paste into a draft email.

See also

Sharing Business Data from Business Central (docs)

Show related record details from lookup

Article • 10/09/2023

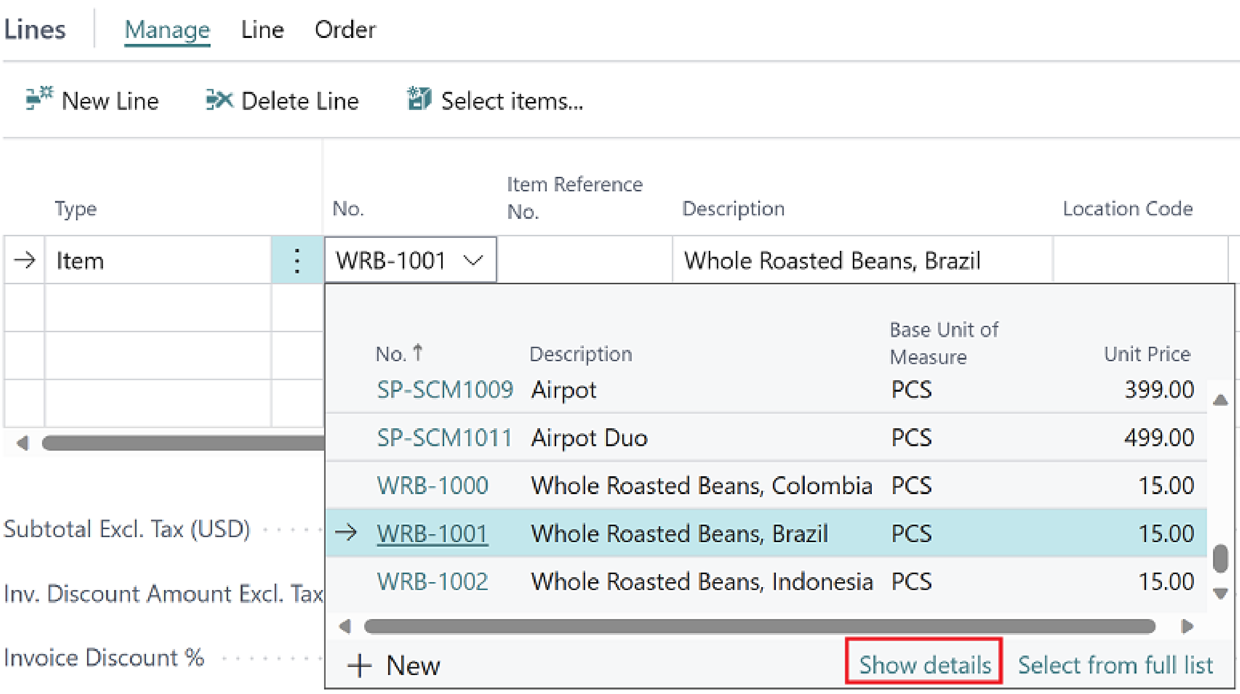
Enabled for	Public preview	General availability
Users, automatically	✔ Sep 6, 2023	✔ Oct 2, 2023

Business value

The **Show details** action on lookup dialogs offers easy access to information about records that are related to the one you're interested in, which can make you more efficient and help you make good decisions.

Feature details

It used to take multiple clicks to get to the details about related records on their card pages from lookups or advanced lookup dialogs. Now, you can use the **Show details** action in lookup dialogs to quickly access information about related records on every page.



If you prefer to primarily use your keyboard, the shortcut key combination for the **Show details** action is **Ctrl+Alt+Down arrow**.

> ⓘ **Note**

For developers: The **Show details** action is available in lookups where the related table has a list page with a defined CardPageID. Otherwise, **Show details** is not shown.

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.

Use actions to go to or fix errors inline

Article • 12/06/2023

Expand table

Enabled for	Public preview	General availability
Users, automatically	✓ Sep 6, 2023	✓ Nov 3, 2023

Business value

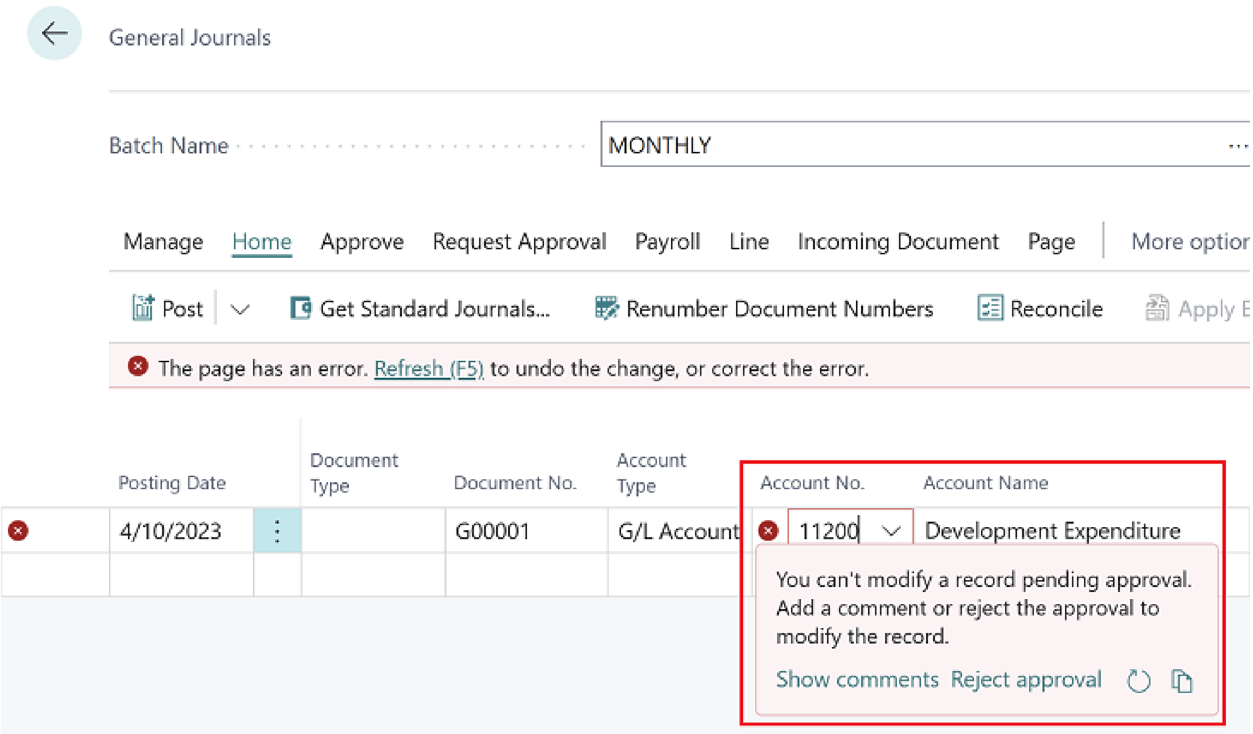
Business Central validates data to improve its accuracy and reliability. When there's an error, Business Central shows a small validation dialog to inform you. We've added actions on validation dialogs that take you to the problem so you can fix it, or have Business Central fix it for you when possible. The clear and actionable information in validation messages helps you quickly resolve errors so you can get about your business.

Feature details

Validating data helps reduce the risk of errors and inconsistencies and raises its overall quality. However, finding errors is one thing, resolving them can be another. In the previous release wave, we introduced actions on error messages that either take you to the page where you can fix an error or have Business Central fix it for you.

To further increase your ability to resolve errors yourself, we're bringing those same capabilities to validation dialogs. If you enter data that causes an error, you can go to the page where you can fix the problem or have Business Central do that for you.

For example, when approving a general journal, the approver changes the G/L account by mistake. Business Central shows an inline validation error with actions.



- The **Show comments** action takes you directly to the **Approval Comments** page where you can add a comment about a change, removing the need to browse and find an action that will do the same.
- The **Reject approval** action rejects the approval request and enables the approver to make the change, removing the need to browse and find an action that will do the same.

Choosing the **Refresh** icon reverts the change the user made. The Refresh icon is available in the inline validation error message, which gives it more context and makes it easier to access.

Choosing the **Copy details** icon copies the technical details from the error to your clipboard, which makes it easy to share the information for troubleshooting with support.

Users who prefer keyboard navigation will appreciate easy access to inline validation error actions. The **Alt+Up** keyboard shortcut opens and sets focus on the first action in an inline validation error. Use the **Tab** key to go through the other actions that are available in an inline validation error.

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.

Plan and prepare for Dynamics 365 Guides in 2023 release wave 2

Article • 12/21/2023

> ⓘ **Important**
>
> The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Guides**.

Overview

Microsoft Dynamics 365 Guides is a mixed-reality application that displays step-by-step holographic instructions right where the work happens, enabling employees to learn and perform complex tasks quickly. Guides helps reduce errors, increase safety, close knowledge gaps, and strengthen skills. You can improve training and processes because it adapts to your work in real time.

Guides seamlessly works with Microsoft Teams, providing comprehensive remote support scenarios. Frontline technicians can collaborate with remote experts in real time, sharing their live view and getting immediate guidance with mixed-reality annotations. This combination empowers technicians to troubleshoot and resolve issues faster, reducing downtime and improving overall productivity. Organizations with geographically dispersed teams get instant collaboration and support without the need for costly travel or delays.

Authors can easily create guides without 3D or programming skills by using a simple PC app and a HoloLens app. Operators use guides on HoloLens in training and on the job to get guidance while they work in a heads-up, hands-free style. Trainers and managers can analyze usage data to optimize their workflows, ensuring that both Guides and Teams contribute to a more efficient and effective work environment.

For the coming wave, Dynamics 365 Guides will be bringing several new capabilities and enhancements throughout the application. Azure Object Anchors enables the application to recognize specific objects in the environment and will become generally available in this wave. The application will be available on Government Community Cloud (GCC) High, ensuring the safe usage of Guides for sensitive information for customers that need this level of security. Guides will be adding Azure Remote Rendering to the application, which makes it significantly easier to use any 3D assets on

HoloLens 2. Lastly, Guides will be updated to integrate more seamlessly with systems of record so that customers can build mixed-reality workflows that are integrated with their business data.

Updates to Dynamics 365 Guides 2023 release wave 2

Investment areas

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

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Guides.
Product documentation	Find documentation for Guides.
User community	Engage with Guides experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Guides.

What's new and planned for Dynamics 365 Guides

Article • 01/08/2024

This topic lists features that are planned to release from October 2023 through March 2024. 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 2023 release wave 1 plan.

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

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

Expand table

Feature	Enabled for	Public preview	General availability
Export guide as a shareable file with all guide content	Users, automatically	-	✔ Oct 19, 2023
Dynamics 365 Guides on Government Community Cloud High	Users by admins, makers, or analysts	-	Feb 2024
Object Anchors in Dynamics 365 Guides is generally available	Users by admins, makers, or analysts	-	✔ Oct 17, 2023

- You are able to opt into some features as part of early access on July 31, 2023, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

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

Export guide as a shareable file with all guide content

Article • 11/15/2023

Enabled for	Public preview	General availability
Users, automatically	-	✔ Oct 19, 2023

Business value

This feature lets you to securely export a guide and its content to a single file. You can then publish a read-only version that customers can easily share with operators. This will also allow customers to archive guides for audit and compliance purposes.

Feature details

Authors can export an instance of a guide by using the Guides model-driven app. The packaged folder (master version that will persist for editing purposes) is stored on Microsoft Dataverse and contains the guide file, the rich media content, and 3D models used in the guide. You can copy this package to any file drive and share the package with operators to run in their own environments as they would any other guide.

See also

Package a guide (docs)

Object Anchors in Dynamics 365 Guides is generally available

Article • 12/21/2023

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	✔ Oct 17, 2023

Business value

With Object Anchors, it's easier and faster to anchor guide content to the real world. Customers can use Object Anchors in Guides in their production environments.

Feature details

Object Anchors is a mixed-reality service that automatically aligns and anchors 3D content to objects in the physical world. It's available on HoloLens devices and allows Dynamics 365 Guides to recognize specific objects in the environment. When an author or an operator goes to their work area and opens a guide, the holographic content is automatically anchored. They don't have to manipulate a hologram or scan a printed marker to anchor the guide.

With this update, object anchoring is now generally available and ready for use in production environments.

See also

Anchor a guide in Dynamics 365 Guides by using object anchors (docs)

Plan and prepare for Dynamics 365 Customer Insights in 2023 release wave 2

Article • 12/21/2023

ⓘ **Important**

The 2023 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2023 to March 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Insights**.

Overview

https://aka.ms/ReleaseHighlight/2023W2/CustomerExperience

In a rapidly evolving market landscape, generative AI plays a pivotal role in revolutionizing the way businesses across all industries operate and engage with their customers. By harnessing the power of AI-driven insights and automation, companies can now deliver exceptional experiences, adapt to emerging trends, and stay ahead of the competition. This transformation enables organizations to uncover hidden opportunities, streamline their processes, and foster innovation at an unprecedented scale.

As customer expectations continue to rise, businesses must adopt a proactive approach to anticipating and meeting their needs. Generative AI offers cutting-edge solutions for understanding complex customer behaviors, predicting their future preferences, and tailoring offerings to cater to their unique requirements. It enables marketers to deliver highly personalized marketing journeys, sellers to offer tailored product recommendations, and customer service representatives to provide superior support, all of which contribute to enhancing customer satisfaction and driving long-term loyalty.

At Microsoft, we aspire to empower every organization to create amazing experiences for their customers, translating into business success. To achieve this, Copilot in Customer Insights brings the power of next generation AI capabilities and natural language to work alongside business professionals. Copilot speeds up and democratizes access to insights by using simple prompts, so anyone can explore large amounts of data, understand and predict customers' needs, and identify new patterns. Copilot enables businesses to quickly convert their data into valuable insights previously out of reach, and to act on them in a timely manner.

With this release, we are introducing real-time capabilities in Customer Insights so businesses can create and update customer profiles with demographic and activity data in real time. Responding to customers' needs in the moment raises the likelihood of engagement and conversion, and results in higher ROI.

Additionally, we continue to bring your sales and marketing teams closer together, so they can stop working in silos and gain a shared understanding of their customers, through a unified view of data across the organization. We aim to enable every department to build on insights by accessing them directly within their workflow to improve business outcomes across marketing, sales, and service.

Our guiding principles are to make your job easier by providing you with real-time insights, by using AI to simplify data analysis and accelerate your customer understanding so you can deliver experiences that win new customers and build loyalty with your existing ones.

Our release revolves around three themes:

- Revolutionize how your business users interact with data leading to unprecedented productivity with **Copilot and AI innovation**.
- Meet your customers where they are by capturing updating and harmonizing data in **real time**.
- Build customer loyalty with a unified platform and ambient insights that **unify sales and marketing**.

Updates to Dynamics 365 Customer Insights 2023 release wave 2

Investment areas

Copilot and AI innovation Unleash the full potential of your data and boost your team's productivity with copilot by effortlessly analyzing, exploring, and receiving pertinent insights derived from your data, enabling you to tailor the customer experience to meet their unique needs and preferences.

Real-time data processing Get a unified customer profile, containing the latest customer interactions, so you can respond to customer needs in the moments that matter, raising the likelihood of conversion with Dynamics 365 Customer Insights real-time capabilities.

Unify sales and marketing Tear down data silos and gain a ubiquitous understanding of your customers through a unified view of data across the organization and improve your business outcomes across marketing, sales, and service.

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

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Customer Insights.
Product documentation	Find documentation for Customer Insights.
User community	Engage with Customer Insights experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Customer Insights.

What's new and planned for Dynamics 365 Customer Insights

Article • 01/19/2024

This topic lists features that are planned to release from October 2023 through March 2024. 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 2023 release wave 1 plan.

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

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

Copilot and AI innovation

Revolutionize how your business users interact with data leading to increased productivity with copilot and AI innovation.

Expand table

Feature	Enabled for	Public preview	General availability
Identify and eliminate data quality issues effortlessly with copilot	Admins, makers, marketers, or analysts, automatically	✔ Aug 4, 2023	Feb 2024
Receive task assistance from copilot based on docs	Admins, makers, marketers, or analysts, automatically	✔ Oct 13, 2023	-
Address issues with environment status summary copilot	Admins, makers, marketers, or analysts, automatically	✔ Aug 4, 2023	Mar 2024
Increase seller productivity with lead profile summaries in Dynamics 365 Sales	Admins, makers, marketers, or analysts, automatically	Feb 2024	-

Feature	Enabled for	Public preview	General availability
Get insights by asking questions in natural language with Copilot in Customer Insights	Admins, makers, marketers, or analysts, automatically	✔ May 31, 2023	Jan 2024

Real-time data processing

Meet your customers where they are by capturing, updating, and harmonizing data in real time.

Expand table

Feature	Enabled for	Public preview	General availability
Accelerate time to insights with data in Delta Lake format	Admins, makers, marketers, or analysts, automatically	Jan 2024	Feb 2024
Elevate customer experiences in real time	Admins, makers, marketers, or analysts, automatically	Feb 2024	To be announced
Seamlessly onboard customer data from your Delta Lake with no data integration	Admins, makers, marketers, or analysts, automatically	✔ Oct 12, 2023	Feb 2024
Personalize omnichannel experiences with no code using Optimizely	Admins, makers, marketers, or analysts, automatically	Feb 2024	-
Improved accuracy of the deduplication process	Admins, makers, marketers, or analysts, automatically	-	✔ Oct 5, 2023

Unify sales and marketing

Build customer loyalty with a unified platform and ambient insights that unify sales and marketing.

Expand table

Feature	Enabled for	Public preview	General availability
Leverage customer insights in other business applications	Admins, makers, marketers, or analysts, automatically	✔ Dec 2, 2023	Feb 2024
Protect customer data by controlling who can see it	Users by admins, makers, or analysts	Mar 2024	To be announced
Increase control and flexibility when attaching to data in Microsoft Dataverse	Admins, makers, marketers, or analysts, automatically	Mar 2024	-
Personalize customer experiences using calculated metrics	Admins, makers, marketers, or analysts, automatically	-	✔ Dec 15, 2023
Share customer profiles and insights via Data Lake	Admins, makers, marketers, or analysts, automatically	-	Mar 2024
Move specific configurations between environments	Admins, makers, marketers, or analysts, automatically	Jan 2024	-

- You are able to opt into some features as part of early access on July 31, 2023, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Copilot and AI innovation

Article • 12/21/2023

ⓘ Important

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

Unleash the full potential of your data and boost your team's productivity with copilot by effortlessly analyzing, exploring, and receiving pertinent insights derived from your data, enabling you to tailor the customer experience to meet their unique needs and preferences.

Receive task assistance from copilot based on docs

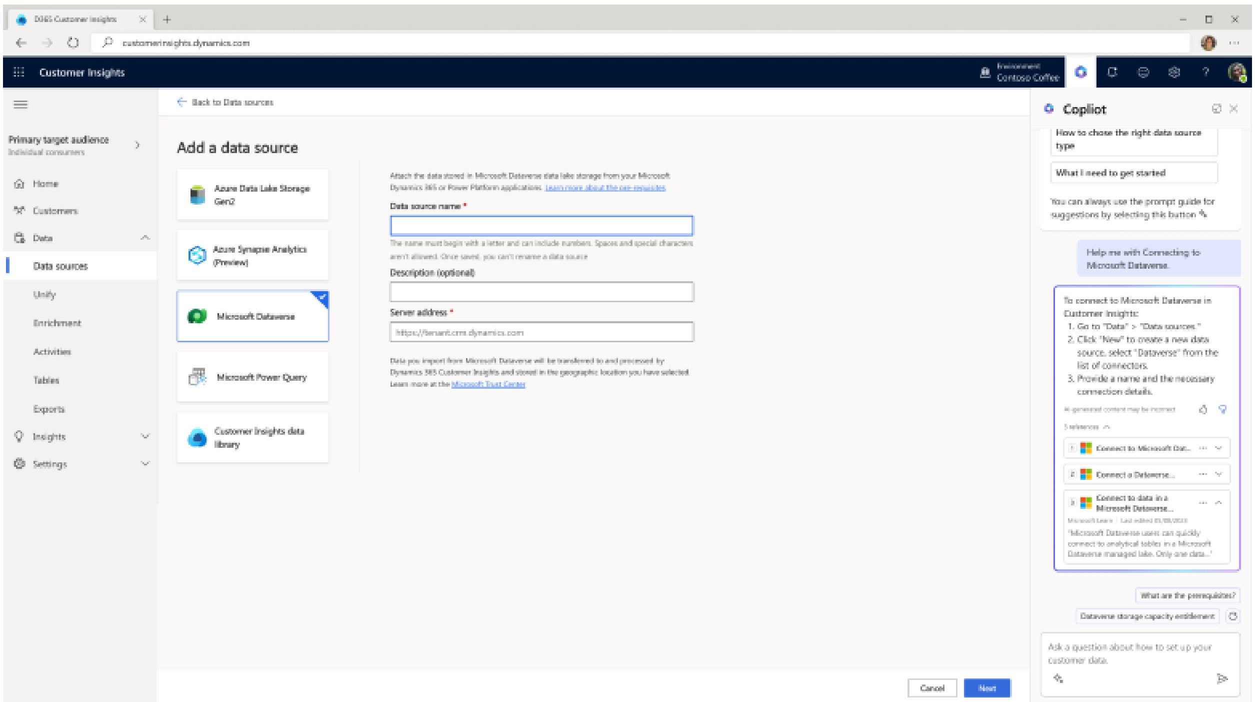
Article • 11/15/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 13, 2023	-

Business value

Setting up Customer Insights with all your data and managing it to stay healthy can be complex at times. Now, Copilot in Customer Insights assists you by providing timely guidance that adapts, depending on where you are in the configuration process. In addition to this guidance, you can also ask your own questions to help clarify concepts or understand what you need to do next to successfully configure your solution.

Feature details



- See suggested questions to help you configure your environment. For example, where to find required information for adding new data sources.
- Ask natural language questions to complete configuration steps and receive actionable responses. For example:
  - How do I connect to a data lake database in Azure Synapse Analytics?
  - What are source fields used for in data unification?

- Manage your Customer Insights environment by asking natural language questions about problems that might occur, and what you can do to quickly resolve them.

Geographic areas

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

- United States

See also

Get answers to questions about capabilities from Copilot (docs)

Real-time data processing

Article • 11/20/2023

ⓘ **Important**

Some of the functionality described in this release plan has 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, containing the latest customer interactions, so you can respond to customer needs in the moments that matter, raising the likelihood of conversion with Dynamics 365 Customer Insights real-time capabilities.

Improved accuracy of the deduplication process

Article • 10/24/2023

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Oct 5, 2023

Business value

Customer Insights can now match and unify all the profile data for a specific customer, even if it requires several matching rules to identify all the customer's records. Fully unified customer data ensures you can confidently use profiles to personalize the customer experience and make smarter decisions.

Feature details

You may have customer data where a person has multiple records and has provided different emails and phone numbers over time, making it impossible to match all their records using a single rule. Because Customer Insights today can't combine customer records that were matched by different rules, the result can be the creation of separate profiles for that person, which fragments your view of the customer.

In a reimagined deduplication process, the system now runs every deduplication rule against every customer record in a table. The match results from all the rules are then analyzed and match groups that share a common record are combined into a single match group. This process can identify and combine potentially long and complex chains of matching relationships, which results in the creation of unified customer profiles with unparalleled accuracy.

See also

Remove duplicates in each table for data unification (docs)

Seamlessly onboard customer data from your Delta Lake with no data integration

Article • 12/21/2023

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	✔ Oct 12, 2023	Feb 2024

Business value

Data already prepared and stored in your Azure Data Lake storage in the Delta Lake format can be readily attached in Customer Insights without additional data movement and formatting. This accelerates the processing time and reduces operations management of intermediate processing and data preparation leading to more regular and current insights. Delta format is also more resilient and fault tolerant, such as when a data partition is being updated by one process and read by a different process simultaneously, making for fewer data ingestion errors.

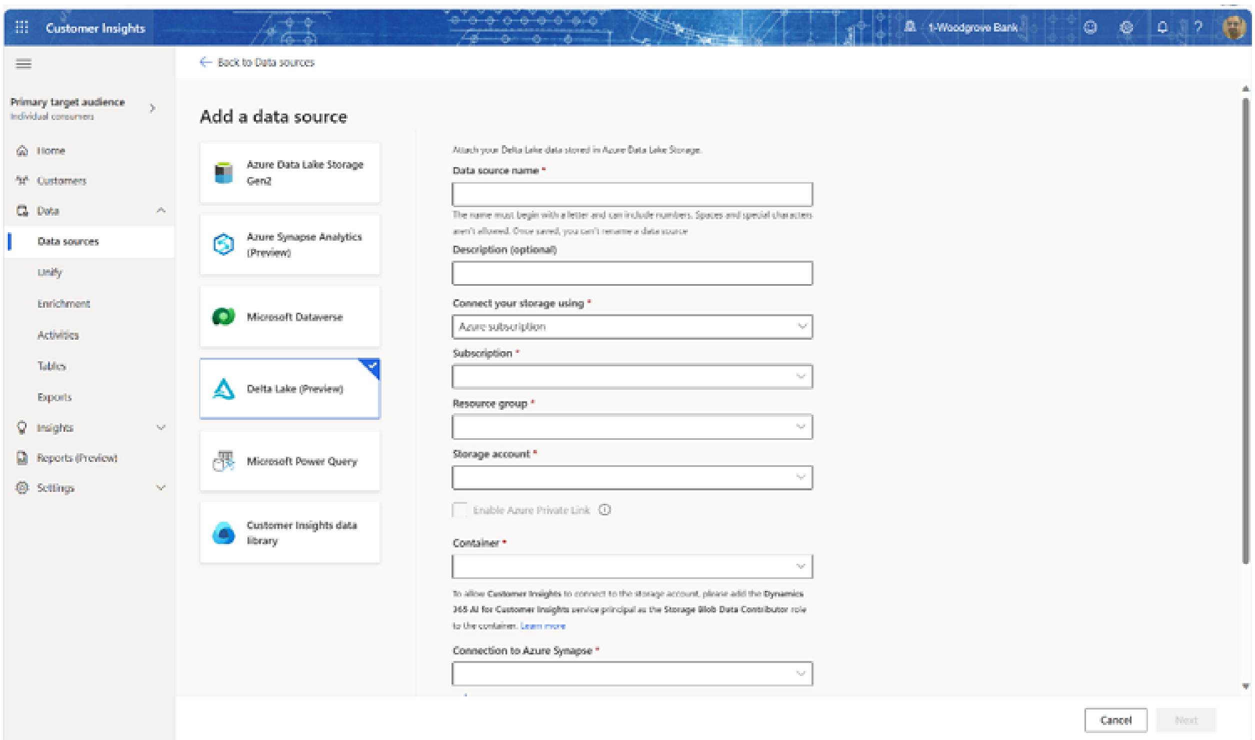
As a result, organizations can obtain more frequent and up-to-date insights, allowing them to make informed decisions faster and adapt to changing business environments more effectively.

Feature details

With this feature, you can:

- Attach your data stored in Delta Lake format as a data source in Customer Insights.
- Save time, effort and cost by eliminating any transformation pipeline that converts your Delta Lake data into another format for ingestion to Customer Insights - Data. Delta formatted data can be read natively.

- Take advantage of Delta Lake incremental processing without any work. Data stored in Delta Lake format doesn't need to be formatted in separate full or upserts folders.



See also

Connect to data stored in Delta format from your Azure Data Lake Storage (docs)

Unify sales and marketing

Article • 12/21/2023

ⓘ Important

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

Tear down data silos and gain a ubiquitous understanding of your customers through a unified view of data across the organization and improve your business outcomes across marketing, sales, and service.

Leverage customer insights in other business applications

Article • 12/21/2023

ⓘ Important

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

Expand table

Enabled for	**Public preview**	**General availability**
Admins, makers, marketers, or analysts, automatically	✔ Dec 2, 2023	Feb 2024

Business value

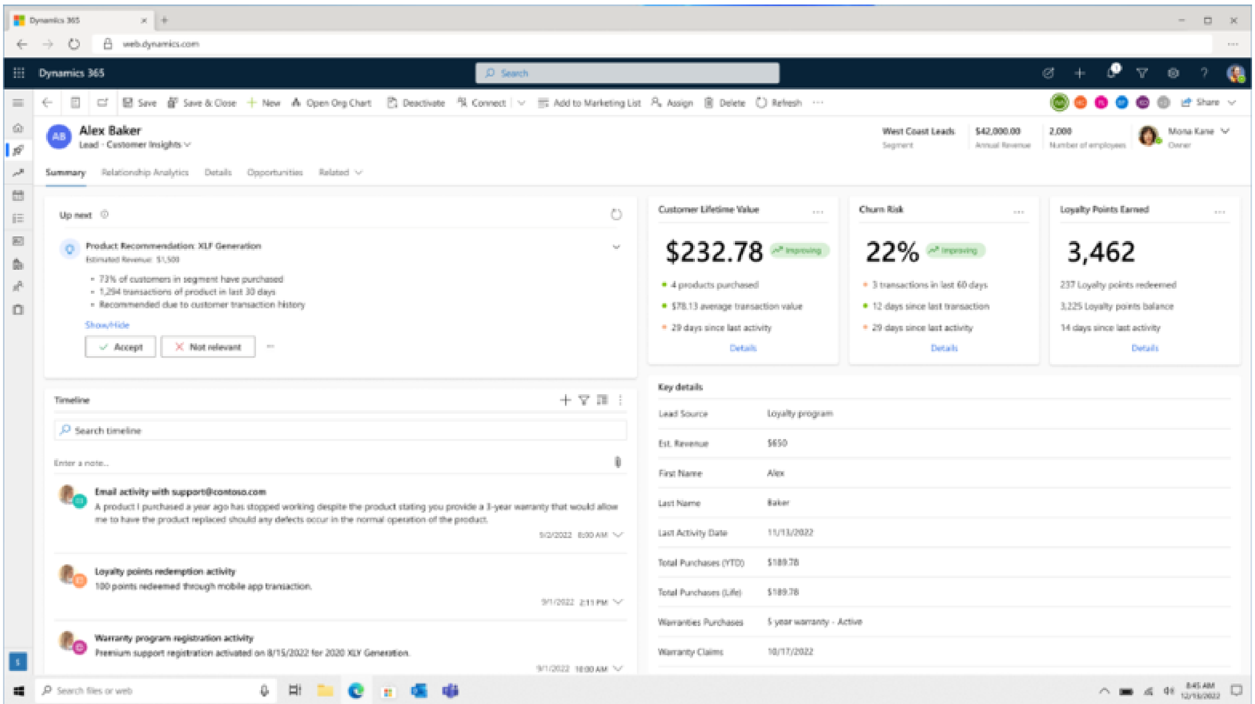
Insights are available to your business users through their Dynamics 365 applications in the flow of their work. This enables numerous scenarios. For example:

- Marketing teams can personalize the experience of customers with segments and dynamic content based on their lifetime value, irrespective of where they are on the buying journeys and whether they're targeted as a lead or a contact.
- Sales and account reps can win more deals and foster stronger relationships, knowing every customer's interests, activity history, insights such as CLV or predictions such as propensity to buy—all accessible seamlessly in their contact/lead view.
- Service reps can provide personalized service knowing the customer's loyalty tier or prediction to churn.

Feature details

Dynamics 365 Customer Insights makes it easy to create golden profiles and insights for your customers by unifying and enriching data from a variety of demographic, transactional, and behavioral data sources.

- Every unified customer profile now has a direct relationship to its corresponding contact and lead records in Microsoft Dataverse and indirect relationships to other tables such as opportunity, accounts, and more.
- Admins can augment customer records in model-driven apps, add insights from the corresponding customer profiles, and access the customer profile just like any other related table in Microsoft Dataverse.
- Users can access customer profiles in Dynamics 365 applications. For example, marketers using Customer Insights - Journeys can create segments of contacts or leads based on their customer lifetime value metric and add customer profile fields as dynamic content in messages even when targeting contacts or leads.



See also

Integrate with Dynamics 365 applications (docs)

Personalize customer experiences using calculated metrics

Article • 01/11/2024

Expand table

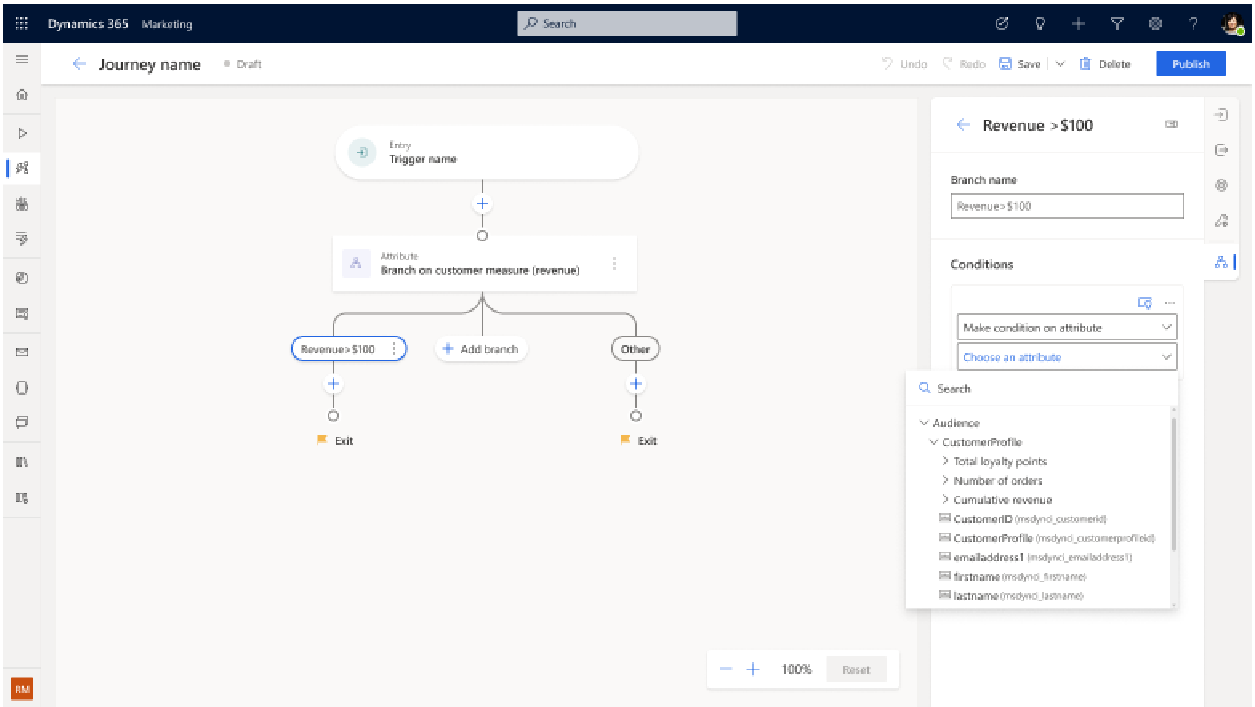
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	✔ Dec 15, 2023

Business value

You can already create highly personalized experiences for your customers when you use Dynamics 365 Customer Insights and Dynamics 365 Marketing together by using rich profile data about every customer. Now, you can further augment personalization by using customer measures from Dynamics 365 Customer Insights and tailor journeys and content based on loyalty, lifetime value, and any other calculated measure. With this data seamlessly accessible, you're empowered to deliver experiences such as personalizing offers based on their average order size or frequency of visits to the store.

Feature details

- Leverage attributes from tables related to the customer profile entity in Customer Insights for personalization in marketing messages and branch conditions in journeys.
- Easily access customer measures (for example, total revenue or loyalty points) from Customer Insights without moving data.
- Create journey branches or content variants with customer measures using the familiar no-code personalization experience in Dynamics 365 Marketing.


Dynamics 365
Marketing
Search
Journey name
Draft
Undo
Redo
Save
Delete
Publish
Entry
Trigger name
Attribute
Branch on customer measure (revenue)
Revenue>$100
Add branch
Other
Exit
Exit
Revenue > $100
Branch name
Revenue>$100
Conditions
Make condition on attribute
Choose an attribute
Search
Audience
CustomerProfile
Total loyalty points
Number of orders
Cumulative revenue
CustomerID (msdynci_customerid)
CustomerProfile (msdynci_customerprofileid)
emailaddress1 (msdynci_emailaddress1)
firstname (msdynci_firstname)
lastname (msdynci_lastname)
100%
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Share customer profiles and insights via Data Lake

Article • 11/15/2023

ⓘ Important

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

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

Business value

Customer Insights lets you securely share data with everyone in your organization or power advanced analytical and data warehousing workloads. With general availability of export destinations for Azure Blob Storage and Azure Data Lake Storage Gen2, you can confidently use them for the most mission-critical workloads.

Feature details

Share the customer profiles and insights you create in Customer Insights - Data easily and reliably to Azure Blob Storage and Azure Data Lake Storage Gen2. The tables that you select for export are exported with all data fields, metadata, schemas, and mapping details. A common use case for the export of full tables to Azure Data Lake Gen2 are custom-built solutions, which organizations use to further process the data that originates from Customer Insights.

Dynamics 365 Implementation Portal

Article • 07/18/2023

ⓘ **Important**

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

ⓘ **Note**

Check out what's new in the portal. **Share your feedback** and help us improve.

Overview

Dynamics 365 Implementation Portal is a tool to help customers and partners drive their Dynamics 365 implementations toward a successful launch. The portal provides contextual implementation guidance and risk mitigation practices for a project's different workloads and apps. It has been primarily used to support customer implementations within the FastTrack for Dynamics 365 program, but is now available to all customers as a unified self-service experience.

By onboarding a project to the Implementation Portal, customers will get access to direct guidance aligned with the Success by Design implementation framework, recommended by the FastTrack and product engineering teams.

In 2023 release wave 2, we focus on bringing value and improvements to several areas.

Project Guidance will bring:

- Enhancements in the guidance provided in context of the project profile and many other dimensions.
- Improved personalized experience, based on user preferences and persona.
- Implementation copilot at first to help navigate product documentation in a conversational way, with future plans to extend it to customer-specific guidance.

A new concept of **Telemetry-Based Insights** will be introduced:

- Customers and partners will now have access to personalized recommendations, optimization opportunities and usage-based guidance sourced from telemetry

insights.
- Recommendations will be presented based on results of assessments that are specific to product, implementation phase, environment, and customer usage patterns.

Onboarding projects will be made easier:

- A simple steps wizard will let users onboard their projects to the Implementation Portal.
- Partners will be able to onboard projects on behalf of customers, with all the customer consent steps included.
- The creation of test and demo projects will be possible, to allow users to learn and try out the features.

A new concept of **Deployments** will also be introduced:

- For projects that have gone live with some applications, it will be possible to logically group environments into a single deployment with multiple characteristics (applications, workloads, environment type, and others) and have all the guidance and review processes scoped to it.

Additional updates will include:

- Optimized project review content and user experience.
- Usability and notification enhancements.

See also

Dynamics 365 Implementation Portal documentation
Microsoft Dynamics 365 Implementation Guide
Success By Design for Dynamics 365

Deprecation of Dynamics 365 apps

Article • 07/18/2023

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

Other deprecations

For the lists of other deprecations, visit:

- Important changes (deprecations) coming in Power Apps and Power Automate

See also

- Release plans for Dynamics 365, Power Platform, and Cloud for Industry
- Microsoft Lifecycle Policy

Microsoft Power Platform: 2023 release wave 2 plan

Article • 05/06/2024

ⓘ **Important**

This content is archived and is not being updated. For the latest documentation, go to the Microsoft Power Platform documentation. For the latest release plans, go to Dynamics 365, Power Platform, and Cloud for Industry release plans.

The Microsoft Power Platform release plan for the 2023 release wave 2 announces the latest updates to customers as features are prepared for release. You can browse the release plan here online (updated throughout the month), view it in the Release planner, or download the document as a PDF file, which is updated with every publish. The plan for 2023 release wave 2 covers new features for Power Platform releasing from **October 2023** through **March 2024**.

Download the 2023 release wave 2 PDF for Power Platform or select the option at the bottom of the table of contents.

The Dynamics 365 features coming in the 2023 release wave 2 have been summarized in a separate release plan and a downloadable PDF.

The Microsoft Cloud for Industry features coming in the 2023 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

2023 release wave 2 overview

Microsoft Power Platform enables users and organizations to analyze, act on, and automate the data to digitally transform their businesses. Microsoft Power Platform today comprises five products: Power BI, Power Apps, Power Pages, Power Automate, and Microsoft Copilot Studio. It also includes the AI Builder add-in. The 2023 release wave 2 release contains hundreds of new features across Power Platform applications, including Power BI, Power Apps, Power Pages, Power Automate, Microsoft Copilot Studio, and AI Builder, as well as Microsoft Dataverse, Power Platform capabilities for governance and administration and pro development.

Power BI

Power BI is improving the creation experience for individuals by improving and aligning our experiences with Microsoft 365, bringing more parity on the web, and bringing the Power Query diagram view into Power BI Desktop. For teams, we are bringing enhancements to meetings and multitasking. For organizations, we are enabling GIT and source control integration to help developers maintain and collaborate on their BI solutions.

Power Apps

Power Apps is expanding the use of Copilot to bring AI assisted experiences to increase developer productivity, bring natural language to all users, and give insights to admins. We will bring modern controls and rich collaborative experiences to users, as well as improved deployment and governance support to ensure low code can be enabled organization wide.

Power Pages

Power Pages continues to make strides in the copilot maker experience to enable building a site. Managed environments will include Power Pages capabilities for maker usage and onboarding. For Data you can connect easily to data where it exists today. Low-code makers can collaborate and detect co-presence.

Power Automate

Power Automate will continue to make it easier to get started building new flows by using natural language across cloud flows and desktop flows, and by improving process mining to jumpstart creation of automation and authoring experiences. Additionally, we're making it easier to manage work at scale by introducing unified activity view and deeper notifications on capabilities across the product.

Microsoft Copilot Studio

Microsoft Copilot Studio will bring General Availability for capabilities including Multi-Lingual bot support, Generative Answers and Actions, Standalone IVR and IVR integration with Dynamics 365 Customer Service, and our integration with the Conversational Language Understanding service. Additionally, we will continue to enhance our offering for customers by delivering on new Enterprise Trust capabilities.

Microsoft Dataverse

Microsoft Dataverse continues to make investments focusing on enhancing maker experience by improving app building productivity infused with Copilot experiences, seamless connectivity to external data sources, and enabling integration into the Microsoft 365 Copilot ecosystem.

AI Builder

AI Builder will allow makers to easily process structured and unstructured documents. Using the power of GPT, responses to customer requests can be pre-generated according to enterprise guidelines and will be available in a human validation station allowing makers to easily review and enhance content that is automatically generated from intelligent Copilots.

Governance and administration, pro development, and ISV experiences

Governance and administration continues to provide more tools and insights for Admins. Managed Environments give administrators additional controls and more visibility into their low code adoption, and enhancements to the Power Platform admin center help make management at scale easier than ever before.

Key dates for the 2023 release wave 2

These release plans describe functionality that may not have been released yet. Delivery timelines and projected functionality may change or may not ship (go to Microsoft policy).

Here are the key dates for the 2023 release wave 2.

Expand table

Milestone	Date	Description
Release plans available	July 18, 2023	Learn about the new capabilities coming in the 2023 release wave 2 (October 2023 – March 2024) across Microsoft Power Platform, Dynamics 365, and Microsoft Cloud for Industry.
Early access available	July 31, 2023	Test and validate new features and capabilities that will be a part of the 2023 release wave 2, coming in October, before they get enabled automatically for your users. You can view the Microsoft Power Platform 2023 release wave 2 early access features now.

Milestone	Date	Description
Release plans available in 11 additional languages	August 7, 2023	The Microsoft Power Platform and Dynamics 365 release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish. Microsoft Cloud for Industry release plans are published in 4 additional languages: French, German, Dutch, and Spanish.
General availability	October 1, 2023	Production deployment for the 2023 release wave 2 begins. Regional deployments will start on October 1, 2023.

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 2023 release wave 2.

Let us know your thoughts. Share your feedback in the Microsoft Power Platform community forum. We'll use your feedback to make improvements.

Microsoft Cloud for Industry: 2023 release wave 2 plan

Article • 12/21/2023

ⓘ **Important**

This content is archived and is not being updated. For the latest documentation, go to the Microsoft Cloud for Industry documentation and resources. For the latest release plans, go to Dynamics 365, Power Platform, and Cloud for Industry release plans.

The Microsoft Cloud for Industry release plan for the 2023 release wave 2 announces the latest updates to customers as features are prepared for release. You can browse the release plan online (updated throughout the month) or download the information as a PDF file, which is updated with every publish. The plan for 2023 release wave 2 covers new features for Microsoft Cloud for Industry releasing from **October 2023** through **March 2024**.

Download the 2023 release wave 2 PDF for Microsoft Cloud for Industry or select the option at the bottom of the table of contents.

The Dynamics 365 features coming in the 2023 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

The Microsoft Power Platform features coming in the 2023 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

2023 release wave 2 overview

The 2023 release wave 2 for Microsoft Cloud for Industry brings new innovations that provide you with significant capabilities to transform your business. The release contains several new features across Microsoft Cloud for Industry applications, including Microsoft Cloud for Healthcare, Microsoft Cloud for Nonprofit, Microsoft Cloud for Retail, Microsoft Cloud for Sustainability, Azure Data Manager for Agriculture and Microsoft Cloud for Sovereignty.

Microsoft Cloud for Healthcare

Microsoft Cloud for Healthcare In the 2023 release wave 2, we focus on making our solutions more applicable to payors, providers, and pharma. Our critical investments include:

- Accelerate innovation building FHIR applications with low code and improve the performance of Dataverse healthcare APIs.
- Increase patient and member engagement, including patient journey orchestration and support for generative AI.
- Reliability improvements for hosting healthcare EHR/solutions from top ISVs.

Microsoft Cloud for Nonprofit

Microsoft Cloud for Nonprofit in 2023 release Wave 2, we continue to deliver capabilities that enable nonprofits to operate in a holistic and seamless way and empower partners to extend the capabilities of Microsoft Cloud for Nonprofit. Every nonprofit has unique business processes, workflows, and data needs, and a robust partner ecosystem adapts Fundraising and Engagement to meet these needs. We are empowering nonprofits to make strategic decisions with configurable AI/ML and payment processing capabilities and extending the integration between Microsoft Cloud for Nonprofit and the rest of the Microsoft portfolio used by nonprofit professionals.

Microsoft Cloud for Retail

Microsoft Cloud for Retail In Gallium/2023 Wave 2, our primary focus remains on executing our strategy to drive data gravity and enhance the Microsoft Intelligent Data Platform for retailers. Our main objective is to assist retailers in effectively ingesting data from diverse data sources and applications into the industry data model using new and existing Microsoft and partner solutions. This process will be facilitated through the utilization of platform capabilities, enabling connectors, data governance tools, and APIs for seamless data consumption.

Collaborating closely with prioritized Independent Software Vendors (ISVs), we aim to equip retailers with comprehensive access to rich data encompassing market intelligence and Line of Business (LOB) applications. This data will serve as a valuable resource for retailers, offering insights into various critical aspects such as customer engagement, advertising strategies, inventory management, and supply chain optimization. To achieve this, we will harness the power of AI/ML, enabling retailers to gain a competitive advantage. Ultimately, our goal is to enable retailers to take proactive and actionable steps based on the valuable insights derived from these data-driven models. These actions can be seamlessly integrated into relevant Microsoft

Dynamics 365 and other Microsoft applications, creating a cohesive and efficient ecosystem for retailers to thrive in the dynamic market landscape.

Microsoft Cloud for Sustainability

Microsoft Cloud for Sustainability delivers Microsoft and partner solutions across four solution plays to empower organizations in their sustainability efforts. These are: unify data intelligence, build a sustainable IT infrastructure, reduce the environmental impact of operations, and create sustainable value chains. This release reflects our commitment to expand the depth and breadth of our offering with new and enhanced features in Microsoft Sustainability Manager including supplier engagement portal, emission restatement, scope 3 categories, and facility digitization accelerator, data model enhancements for water and waste, additional emissions from our Cloud for Sustainability API, enhancements to our Environmental Credit Service as well as better together offerings with our third-party partners.

Azure Data Manager for Agriculture

Azure Data Manager for Agriculture extends the Microsoft Intelligent Data Platform with industry-specific data connectors and capabilities to connect farm data from disparate sources, enabling organizations to leverage high-quality datasets and accelerate the development of digital agriculture solutions. With 2023 release wave 2 we are providing key enhancements allowing for Azure Data Factory based ingestion of raw data and subsequent standardization across sources. Rich new analytics and AI capabilities are made available to help all stakeholders in the agriculture value chain to learn from unified data.

Microsoft Cloud for Sovereignty

Microsoft Cloud for Sovereignty enables governments to deploy workloads in Microsoft Cloud while helping meet their specific sovereignty, compliance, security, and policy requirements. Microsoft Cloud for Sovereignty creates software boundaries in the cloud to establish the extra protection that governments require, using hardware-based confidentiality and encryption controls.

Key dates for the 2023 release wave 2

These release plans describe functionality that may not have been released yet. Delivery timelines and projected functionality may change or may not ship (go to Microsoft policy).

Here are the key dates for the 2023 release wave 2.

Expand table

Milestone	Date	Description
Release plans available	July 18, 2023	Learn about the new capabilities coming in the 2023 release wave 2 (October 2023 - March 2024) across Microsoft Cloud for Industry, Dynamics 365, and Microsoft Power Platform.
Release plans available in additional languages	August 1, 2023	The Microsoft Power Platform and Dynamics 365 release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish. Microsoft Cloud for Industry release plans are published in 4 additional languages: French, German, Dutch, and Spanish.
General availability	October 1, 2023	Production deployment for the 2023 release wave 2 begins. Regional deployments will start on October 1, 2023

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 have done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We are looking forward to engaging with you as you put these new services and capabilities to work, and we are eager to hear your feedback as you dig into the 2023 release wave 2.

Let us know your thoughts. Share your feedback in the Microsoft Power Platform community forum. We will use your feedback to make improvements.

Dynamics 365: 2024 release wave 1 plan

Article • 04/17/2024

The Dynamics 365 release plan for the 2024 release wave 1 announces the latest updates to customers as features are prepared for release. You can browse the release plan online (updated throughout the month), view it in the Release planner, or download the information as a PDF file, which is updated with every publish. The plan for 2024 release wave 1 covers new features for Dynamics 365 releasing from **April 2024** through **September 2024**.

Download the 2024 release wave 1 PDF for Dynamics 365 or select the option at the bottom of the table of contents.

The Microsoft Power Platform features coming in the 2024 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

The Microsoft Cloud for Industry features coming in the 2024 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

2024 release wave 1 overview

The 2024 release wave 1 for Dynamics 365 brings new innovations that provide you with significant capabilities to transform your business. The release contains hundreds of new features across Dynamics 365 applications, including Sales, Customer Service, Field Service, Finance, Supply Chain Management, Project Operations, finance and operations cross-app capabilities, Human Resources, Commerce, Business Central, Guides, Customer Insights - Data, and Customer Insights - Journeys.

Sales

Dynamics 365 Sales, the leading sales application, enhances customer understanding and boosts sales through data, intelligence, and user-friendly experiences. The 2024 release wave 1 focuses on providing sellers timely customer information, expediting deals with actionable insights, improving productivity, and empowering organizations through open configurability and expanded generative AI leadership.

Microsoft Copilot for Sales continues to deliver and enhance cutting-edge generative AI capabilities for sellers by enriching the Copilot in Microsoft 365 capabilities with sales-specific skills, data, and actions. Additionally, the team will focus on assisting sellers on the go within the Outlook and Teams mobile apps.

Service

Dynamics 365 Customer Service will continue to empower agents to work more efficiently through Copilot filtering response verification, diagnostic tools for admins and agents, and usability improvements to multisession apps. Additionally, we are making enhancements to the voice channel, and improving unified routing assignment accuracy and prioritization.

Dynamics 365 Field Service is a field service management application that allows companies to transform their service operations with processes and experiences to manage, schedule, and perform. In the 2024 release wave 1, we are introducing the next generation of Copilot capabilities, modern experiences, Microsoft 365 integrations, vendor management, and finance and operations integration.

Finance and Supply Chain

Dynamics 365 Finance continues on its journey of autonomous finance, building intelligence, automation, and analytics around every business process, to increase user productivity and business agility. This release focuses on enhancing business performance planning and analytics, adding AI-powered experiences, easing setup of financial dimension defaulting with AI rules guidance, increasing automation in bank reconciliation, netting, expanding country coverage, tax automation, and scalability.

Microsoft Copilot for Finance will be available as a public preview for finance professionals using productivity applications such as Microsoft Excel and Outlook to complete financial tasks. The new capabilities will provide users with financial insights directly in Outlook and Excel and help craft timely and accurate email responses and store communication summaries in the central location. Users will also get support while reconciling financial data from two data sources in Excel, with Copilot-guided prompts when comparing the data and troubleshooting the discrepancies.

Dynamics 365 Supply Chain Management enhances business processes for increased insight and agility. Copilot skills improve user experiences, while demand planning transforms the forecast process, and warehouse processes are optimized for greater efficiency and accuracy.

Dynamics 365 Project Operations is focused on enhancing usability, performance, and scalability in key areas such as project planning, invoicing, time entry, and core transaction processing. The spotlight is on core functionality improvements, including support for discounts and fees, enhanced resource reconciliation, journals, approvals, and contract management, with added mobile capabilities to handle larger projects and invoices at an increased scale.

Finance and operations cross-app capabilities continues to invest in capabilities that apply to all finance and operations apps, including Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations, infusing Copilot experiences across applications, and bringing additional value and insights to finance and operations apps data.

Dynamics 365 Human Resources will continue to improve recruiting experiences with functionality to integrate with external job portals and talent pools. We will continue to expand our HCM ecosystem to include additional payroll partners and build better-together experiences that span the gamut of what Microsoft can offer to improve employee experiences in corporations of any size and scale across the globe.

Commerce

Dynamics 365 Commerce continues to invest in omnichannel retail experiences through advancements in mobile point of sale (MPOS) experiences like Tap to Pay for iOS and offline capabilities for Store Commerce on Android. The B2B buying experience is enhanced with new capabilities and a streamlined order management solution for buyers who work across multiple organizations.

SMB

Dynamics 365 Business Central is delivering substantial enhancements, with a central emphasis on harnessing the power of Copilot. Available in over 160 countries, the team is focused on Copilot-driven capabilities to streamline and enhance productivity through enhanced reporting and data analysis capabilities, elevated project and financial management, and simplified workflow automation. We've also upgraded our development and governance tools and introduced improvements in managing data privacy and compliance.

Guides

Dynamics 365 Guides is bringing several new capabilities and enhancements including high-detail 3D model support through Azure Remote Rendering and greatly improved web content support that enables customers to build mixed-reality workflows that are integrated with their business data. Additionally, support for Guides content on mobile will be generally available in the coming wave through a seamless integration with Dynamics 365 Field Service mobile application.

Remote Assist

Dynamics 365 Remote Assist will continue to invest in stability, performance optimization and usability improvements to across HoloLens 2, iOS and Android.

Customer Insights

Dynamics 365 Customer Insights - Data empowers every organization to unify and enhance customer data, leveraging it for insightful analysis and intelligent actions. With this release we are making it easier and faster to ingest and manage your data. AI enables quick insights and democratized access to analytics. Real-time data ingestion, creation, and updates further enable the optimization of experiences in the moments that matter.

Dynamics 365 Customer Insights - Journeys brings the power of AI to revolutionize how marketers work, enabling businesses to optimize every interaction with their customers with end-to-end journeys across departments and channels. With this release we empower marketers with a deeper customer understanding, we enable them to create new experiences within minutes, reach customers in more ways, and continuously optimize results. Thanks to granular lead qualification, we continue to boost the synergy between sales and marketing to achieve superior business outcomes.

Key dates for the 2024 release wave 1

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Here are the key dates for the 2024 release wave 1.

Expand table

Milestone	Date	Description
Release plans available	January 25, 2024	Learn about the new capabilities coming in the 2024 release wave 1 (April 2024 - September 2024) across Dynamics 365, Microsoft Power Platform, and Microsoft Cloud for Industry.
Early access available	February 5, 2024	Test and validate new features and capabilities that will be part of 2024 release wave 1, coming in April, before they are enabled automatically for your users. You can view the Dynamics 365 **2024 release wave 1 early access features** now.
Release plans available in	February 19, 2024	The Microsoft Power Platform and Dynamics 365 release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese

Milestone	Date	Description
additional languages		(Brazilian), Spanish, and Swedish. Microsoft Cloud for Industry release plans are published in 4 additional languages: French, German, Dutch and Spanish.
General availability	April 1, 2024	Production deployment for the 2024 release wave 1 begins. Regional deployments will start on April 1, 2024.

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

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Feedback