_guía

Novedades Microsoft Dynamics 365 2024 Release Wave 2.

ARBENTIA
Project Management

Microsoft

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

Article • 08/16/2024

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

Download the 2024 release wave 2 PDF for Dynamics 365 or select the option at the bottom of the table of contents.

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

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

2024 release wave 2 overview

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

Sales

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

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

Service

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

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

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

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

Finance and Supply Chain

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

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

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

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

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

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

Commerce

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

SMB

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

Remote Assist

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

Customer Insights

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

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

Key dates for the 2024 release wave 2

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

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

Expand table

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

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

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

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

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

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

Feedback

Was this page helpful? Yes No

Get started with this release wave

Article • 07/16/2024

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

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

2024 release wave 2

October 2024 – March 2025

Sales

See what's new and planned
Watch latest videos

Microsoft Copilot for Sales

See what's new and planned

Customer Service

See what's new and planned
Watch latest videos

Field Service

See what's new and planned
Watch latest videos

Finance

See what's new and planned
Watch latest videos

Supply Chain Management

See what's new and planned
Watch latest videos

Project Operations

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Human Resources

See what's new and planned
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Commerce

See what's new and planned

Business Central

See what's new and planned

Customer Insights Data

See what's new and planned
Watch latest videos

Customer Insights Journeys

See what's new and planned
Watch latest videos

Feedback

Was this page helpful? Yes No

Change history

Article • 08/16/2024

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

Dynamics 365 Customer Insights - Data

Features removed from release plan

Expand table

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

Dynamics 365 Customer Insights - Journeys

Features added to release plan

Expand table

Feature	Date added
Easily set up and execute pre- and post-event communications	Aug 05, 2024
Maximize event capacity with waitlist registrations	Aug 05, 2024
Export your data to your own storage for custom reporting	Aug 05, 2024

Release date changed

Expand table

Feature	Change	Date updated
Wait on segment membership to trigger the next step in a journey	Public preview date moved to Nov 2024 General availability date moved to Feb 2025	Jul 19, 2024

Features removed from release plan

Expand table

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

Dynamics 365 Customer Service

Features added to release plan

Expand table

Feature	Date added
Manage cases efficiently with enhanced case controls	Jul 09, 2024
Prioritize cases with improved case grids	Jul 09, 2024

Microsoft Copilot for Service

Features removed from release plan

Expand table

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

Dynamics 365 Contact Center

Features removed from release plan

Expand table

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

Dynamics 365 Field Service

Features removed from release plan

Expand table

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

Microsoft Copilot for Finance

Release date changed

Expand table

Feature	Change	Date updated
Collaborate and share out of variance	Public preview date updated to	Jul 24, 2024

Feature	Change	Date updated
analyses in Excel	Nov 2024	

Dynamics 365 Business Central

Release date changed

Expand table

Feature	Change	Date updated
Chat with Copilot and learn to use installed add-on apps	Public preview date moved to Jan 2025	Aug 05, 2024
Capture invoice and receipt data with Azure AI Document Intelligence	Public preview date updated to Jan 2025	Aug 04, 2024

Features removed from release plan

Expand table

Feature	Reason	Date removed
Create sales lines easily with Copilot	Merged this feature with the Create sales lines easily with Copilot feature.	Jul 18, 2024

Feedback

Was this page helpful? Yes No

2024 release wave 2 features available for early access

Article • 07/16/2024

This topic lists the features that can be enabled for testing in your environment beginning **July 29, 2024**. Features from the following apps are available as part of early access:

- Dynamics 365 Sales
- Dynamics 365 Customer Service
- Dynamics 365 Field Service
- Finance and Operations cross-app capabilities
- 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 2024 release wave 2 updates.

> **Important**
>
> Other early access features may impact your users. To learn more about these features visit:
>
> - Power Platform 2024 release wave 2 features available for early access

Dynamics 365 Sales

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

Expand table

Feature	Enabled for	Early access	General availability
Get 360-degree view with account AI-generated summary	Users, automatically	Jul 2024	Oct 2024
Work efficiently using AI-powered action suggestions	Users, automatically	Jul 2024	Oct 2024
Analyze opportunities with grouping and aggregating	Users, automatically	Jul 2024	Oct 2024
Customize lead qualification for a seamless experience	Users, automatically	Jul 2024	Oct 2024

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
Compose emails using improved attachment experience	Users, automatically	Jul 2024	Oct 2024
Default enhanced experience of handling recipients while composing an email	Users, automatically	Jul 2024	Oct 2024
View Copilot generated proactive prompts and insights	Users, automatically	-	Oct 2024

Dynamics 365 Field Service

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

Expand table

Feature	Enabled for	Early access	General availability
Initiate a Remote Assist in Teams call from the	Users,	Jul 2024	Oct 2024

Feature	Enabled for	Early access	General availability
Field Service mobile app	automatically		
Transition all users to the new schedule board	Users, automatically	Jul 2024	Oct 2024

Finance and operations cross-app capabilities

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

Expand table

Feature	Enabled for	Early access	General availability
Navigate and search using Copilot in finance and operations	Users, automatically	Jul 2024	Oct 2024
Get offline support for Dynamics 365 finance and operations virtual tables	Admins, makers, marketers, or analysts, automatically	Jul 2024	Oct 2024

Dynamics 365 Finance

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

Expand table

Feature	Enabled for	Early access	General availability
Analyze data using the Record to Report data model	Users by admins, makers, or analysts	✔ Apr 28, 2023	Oct 2024
Provide actionable insights that drive strategic decisions and operational efficiency	Users by admins, makers, or analysts	✔ Apr 28, 2023	Oct 2024
Try the reporting, analytics, and insights hub	Users by admins, makers, or analysts	✔ Apr 28, 2023	Oct 2024

Feature	Enabled for	Early access	General availability
Set dimensional row level security in Business performance analytics	Users by admins, makers, or analysts	✓ Apr 28, 2023	Oct 2024
Use Procure to Pay data models to report and gain insights	Users by admins, makers, or analysts	✓ Apr 28, 2023	Oct 2024
Use the Order to Cash data model to gain insights	Users by admins, makers, or analysts	✓ Apr 28, 2023	Oct 2024
Analyze business data in Excel	Users by admins, makers, or analysts	Jul 2024	Oct 2024
Add efficiency with enhanced bank reconciliation report	Admins, makers, marketers, or analysts, automatically	Jul 2024	Oct 2024
Increase the length of invoice numbers	Users by admins, makers, or analysts	Jul 2024	Oct 2024
Automatically clear bridged transactions	Admins, makers, marketers, or analysts, automatically	✓ Apr 1, 2024	Oct 2024
Experience matching rule enhancements in advanced bank reconciliation	Admins, makers, marketers, or analysts, automatically	✓ Apr 1, 2024	Oct 2024
Save time with automated cash application	Admins, makers, marketers, or analysts, automatically	✓ Apr 1, 2024	Oct 2024

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
Enable flexibility when determining financial dimension defaults	Users by admins, makers, or analysts	✓ Jun 7, 2024	Mar 2025
Copy quotes and contracts across legal entities	Users by admins, makers, or analysts	✓ Feb 29, 2024	Oct 2024
Support cost plus pricing for resource time	Users by admins, makers, or analysts	✓ Feb 16, 2024	Oct 2024

Feature	Enabled for	Early access	General availability
Use one grid for material and expense estimates	Users by admins, makers, or analysts	✔ Mar 8, 2024	Oct 2024

Dynamics 365 Supply Chain Management

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

Expand table

Feature	Enabled for	Early access	General availability
Add transactions when recalculating weighted average	Users by admins, makers, or analysts	Jul 2024	Mar 2025

Dynamics 365 Business Central

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

Expand table

Feature	Enabled for	Early access	General availability
Complete bank account reconciliation faster with Copilot	Users, automatically	✔ Nov 9, 2023	Oct 2024

Feedback

Was this page helpful? Yes No

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

Article • 07/16/2024

ⓘ **Important**

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

Overview

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

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

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

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

Investment areas

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

Seller experiences
Seller experiences focus on features and tools tailored to the unique needs and challenges sellers face daily. 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 navigate their professional responsibilities more seamlessly, discover avenues to optimize their time and resources, and ultimately boost productivity and close more deals successfully.

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
Application administrators should review features that impact users. This facilitates release change management and enables successful onboarding of new capabilities released to the 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 administrators, makers, or business analysts must enable or configure to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.

Get the most out of Sales

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Sales.
Product documentation	Find documentation for Sales.
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.

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Sales

Article • 07/16/2024

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

- For a list of the previous wave's release plans, go to 2024 release wave 1 plan.

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

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

Copilot and AI innovation

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
Elevate your sales pitch using Copilot email assistance	Users by admins, makers, or analysts	✔ Jun 16, 2023	-	Oct 2024
Stay efficient with the Copilot immersive homepage	Users by admins, makers, or analysts	Oct 2024	-	-
Streamline sales process with sales document summary	Users by admins, makers, or analysts	Jul 2024	-	Nov 2024
Get 360-degree view with account AI-generated summary	Users, automatically	-	Jul 2024	Oct 2024
Work efficiently using AI-powered action suggestions	Users, automatically	-	Jul 2024	Oct 2024

Feature	Enabled for	Public preview	Early access*	General availability
Summarize lengthy emails using Copilot in Dynamics 365 Sales	Users by admins, makers, or analysts	✔ Aug 11, 2023	-	Oct 2024

Seller experiences

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Analyze opportunities with grouping and aggregating	Users, automatically	-	Jul 2024	Oct 2024
Customize lead qualification for a seamless experience	Users, automatically	-	Jul 2024	Oct 2024

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ .

Description of **Enabled for** column values:

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

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

Feedback

Was this page helpful? Yes No

Copilot and AI innovation

Article • 07/16/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Elevate your sales pitch using Copilot email assistance

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

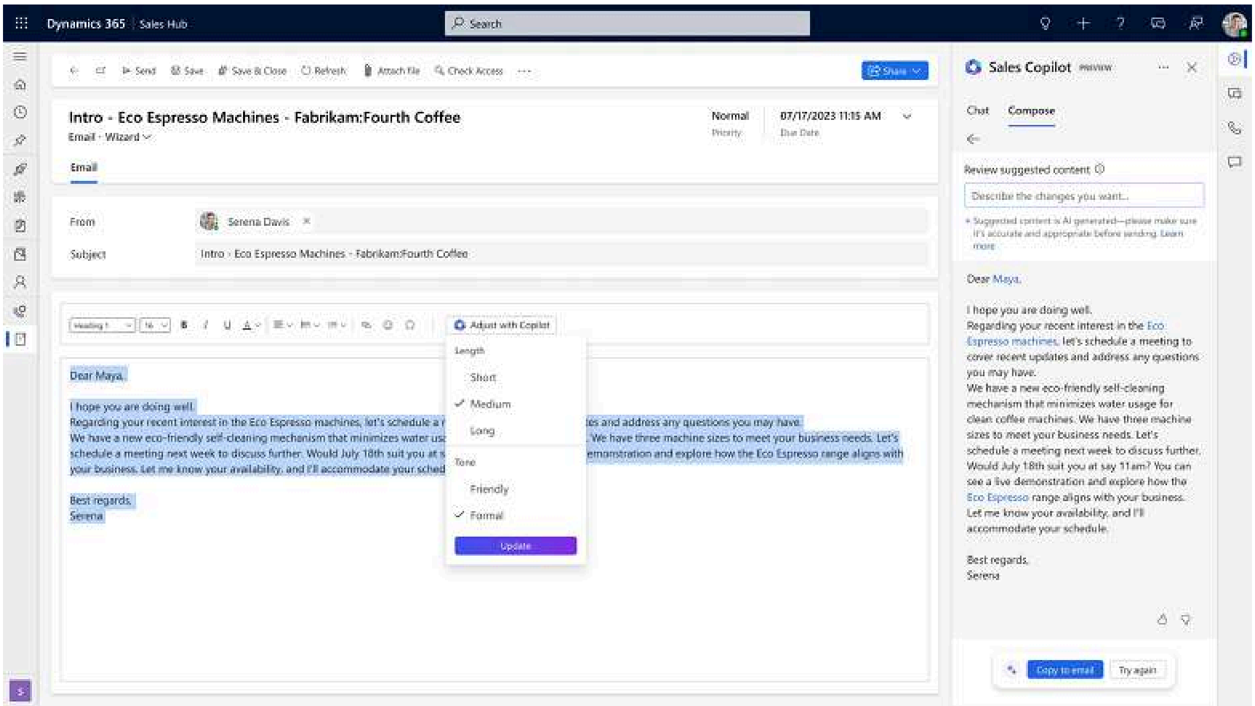
As a seller, you often struggle with writing effective emails to communicate with your customers. You may face challenges such as not knowing how to structure your emails, which information to include or exclude, or how to strike the right tone. This can lead to poor customer engagement, lost sales,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

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

Feature details

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

- Select a predefined category or enter your text and Copilot will suggest content with specific prompts and actions.
- Adjust the tone and length of the email.
- Customize the suggested content before you send it.



Geographic areas

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

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

See also

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

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

Feedback

Was this page helpful? Yes No

Get 360-degree view with account AI-generated summary

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

In the fast-paced world of sales, you often work on multiple accounts simultaneously. It can be challenging to stay on top of all your accounts and gather relevant information efficiently. With the Account summary feature, you can now access a consolidated summary of vital customer data, including buying behavior, associated opportunities, leads, marketing campaigns, and the latest news about an account through the power of AI. This enables you to quickly research an account.

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

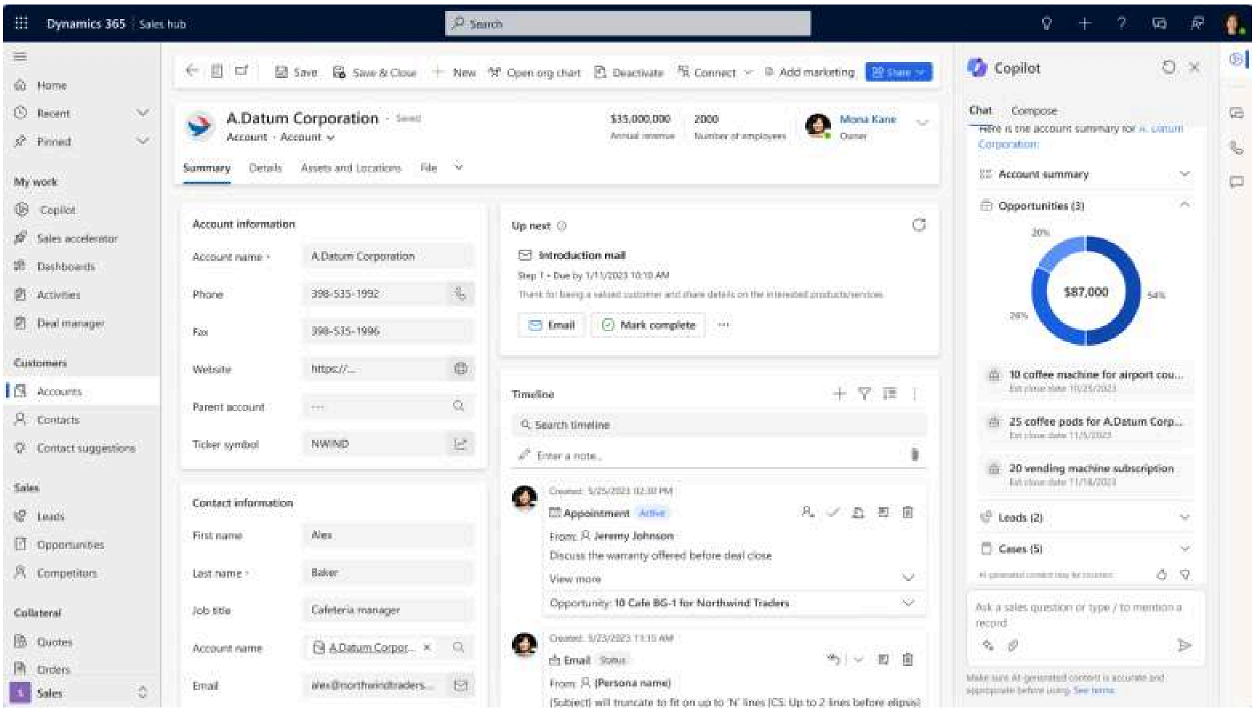
Feature details

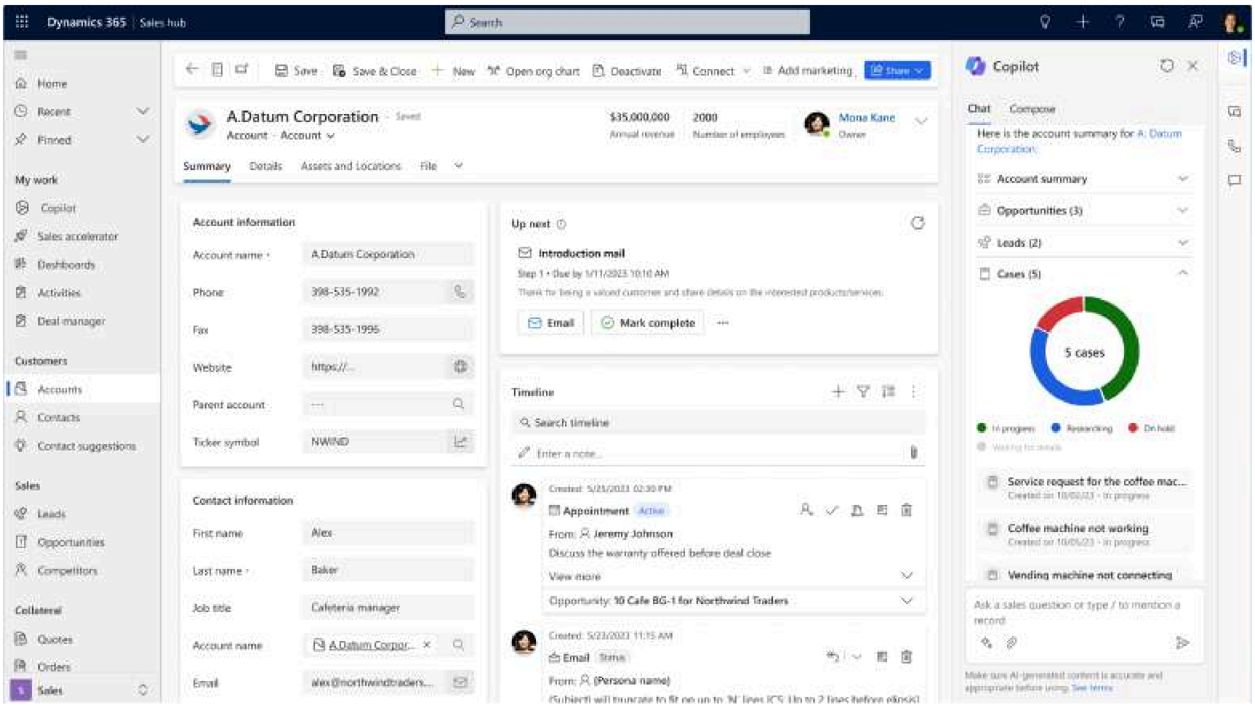
As an admin, you can:

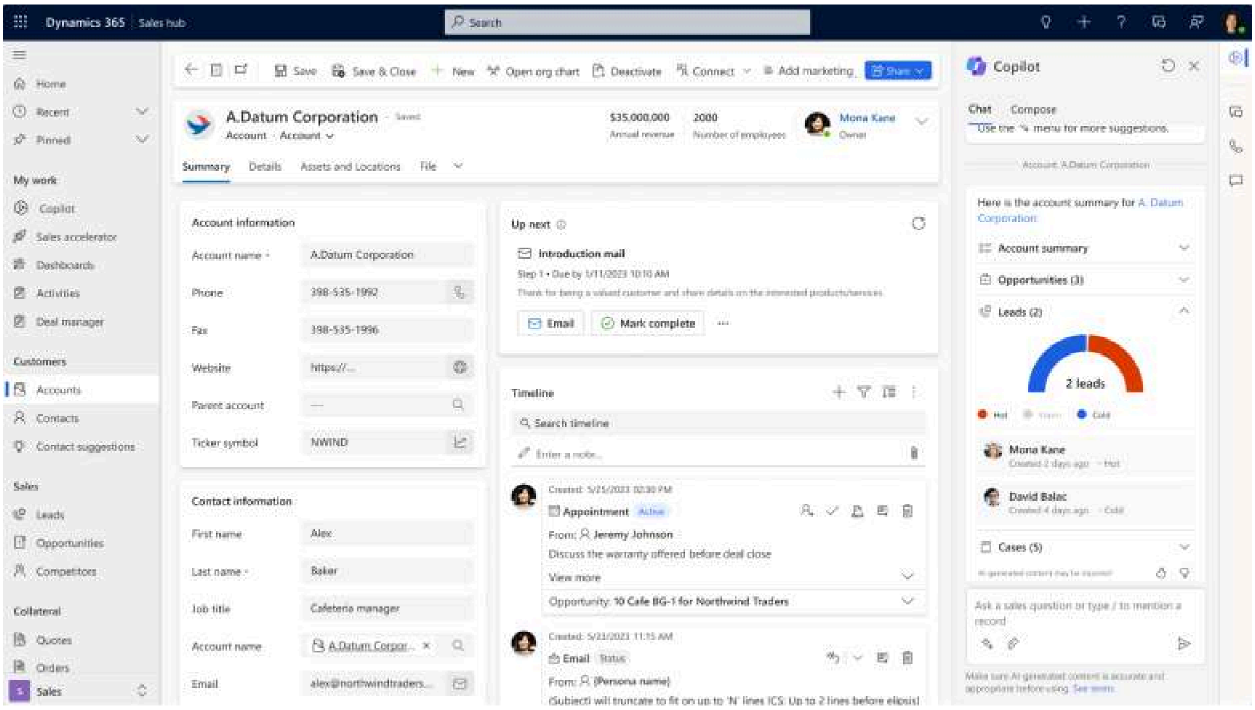
- Enable Copilot Account summary for any Dynamics 365 application.
- Configure the entities and fields to use for creating the account summary.

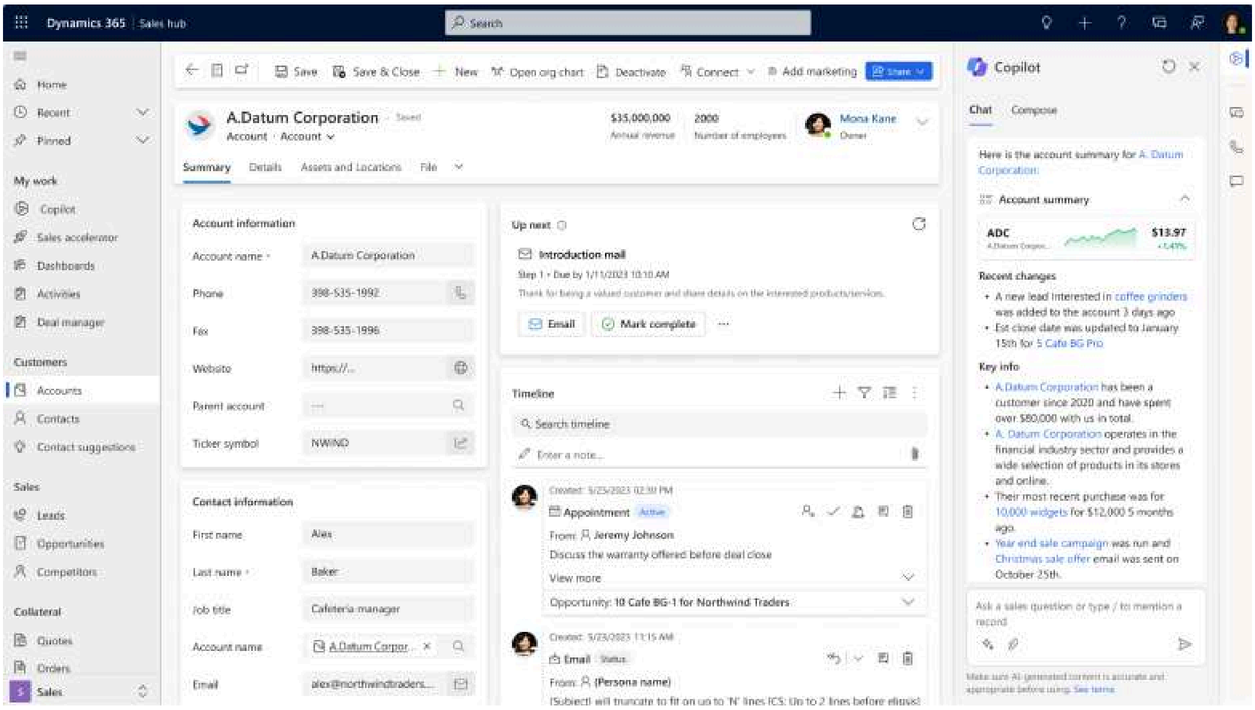
As a seller, you can:

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









Geographic areas

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

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

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

Feedback

Was this page helpful? Yes No

Leverage manager dashboards to coach sellers

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

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

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

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

See also

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

Feedback

Was this page helpful? Yes No

Stay efficient with the Copilot immersive homepage

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

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

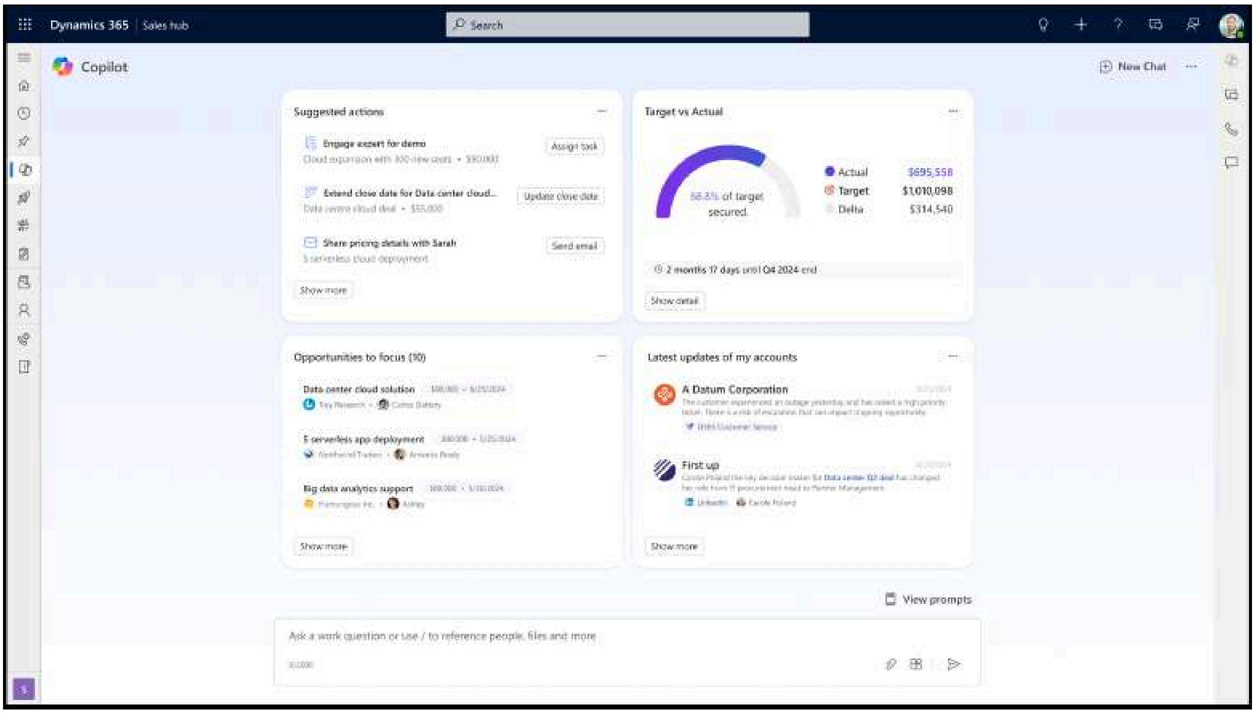
You can seamlessly access insights from various records and prioritize your actions intelligently. The natural language chat with AI-powered Copilot facilitates deeper insights and quick access to customer details, deal information, meeting schedules, and more. Furthermore, you can easily track your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

Feature details

As a seller, you can:

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

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



Feedback

Was this page helpful? Yes No

Streamline sales process with sales document summary

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

As a sales professional, you shift through lengthy documents to understand the customer's needs and preferences across multiple systems. This task is time-consuming, leading to decreased productivity and potentially missed opportunities. With the ability to automatically summarize important details from lengthy documents including proposals, reports, and agreements, you can save time and focus on building relationships with customers and closing deals. The sales document summarization feature can improve the quality of customer interactions by ensuring that you have a comprehensive understanding of customer needs, as per the BANT (Budget, Authority, Need, and Timeline) framework.

Feature details

As a seller, you can:

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

Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Summarize lengthy emails using Copilot in Dynamics 365 Sales

Article • 07/16/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Aug 11, 2023	-	Oct 2024

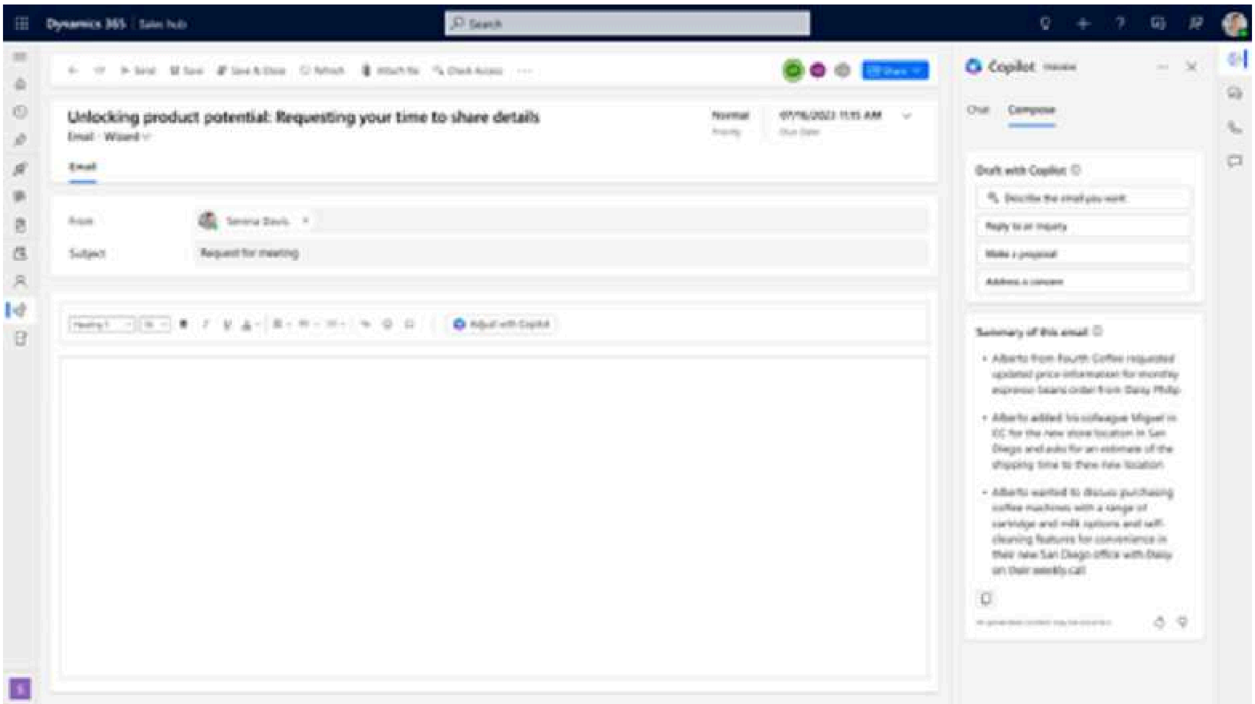
Business value

As a sales professional, you can use Copilot in Dynamics 365 Sales which offers a unique business value by being equally invaluable for sending and receiving email communication. When summarizing lengthy email threads, it saves valuable time and energy by condensing complex discussions into concise and easily understandable summaries. This streamlines the communication process, allowing teams to quickly grasp the key points and make informed decisions. By facilitating efficient comprehension, Copilot in Dynamics 365 Sales enhances productivity and enables effective collaboration within the organization.

Feature details

With this feature, as a sales professional, you will be able to:

- Review detailed summaries for emails exceeding 1,000 characters.
- Efficiently share feedback by copying and pasting the generated summary.



Geographic areas

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

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

See also

Leveraging Copilot in Dynamics 365 Sales to prepare for sales meeting (blog)

View and copy email summary (docs)

Feedback

Was this page helpful? Yes No

Work efficiently using AI-powered action suggestions

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

As a seller, you invest significant time and effort to stay informed about all your conversations and monitor developments within active sales processes. You visit multiple applications or contact team members to stay on top of all the active discussions and try to find optimal approaches for engaging with business decision-makers to take the assigned sales process forward. The actionable insights generated by Copilot in Dynamics 365 Sales help you plan and execute your daily tasks, thereby increasing the likelihood of attaining short and long-term goals. This capability is aimed to:

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

Feature details

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

As a seller, you can:

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

Feedback

Was this page helpful? Yes No

Seller experiences

Article • 07/16/2024

ⓘ Important

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

Seller experiences focus on features and tools tailored to the unique needs and challenges sellers face daily. 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 navigate their professional responsibilities more seamlessly, discover avenues to optimize their time and resources, and ultimately increase productivity and close more deals successfully.

Feedback

Was this page helpful? Yes No

Analyze opportunities with grouping and aggregating

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

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

This upgraded pipeline view allows you to further streamline your sales strategies. You can now group opportunities dynamically based on critical factors such as account name, seller name, or closing date/month. This functionality enhances your ability to segment and target specific areas of your pipeline, ensuring a more personalized and effective approach to each opportunity.

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

Feature details

As a seller, you can:

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

Feedback

Was this page helpful? Yes No

Customize lead qualification for a seamless experience

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Streamlined lead qualification in Dynamics 365 Sales empowers you to fine-tune the qualification process, aligning it precisely with your organization's unique needs and sales criteria. This agile configuration eliminates back-and-forth interactions and saves valuable time, promoting swift, informed lead evaluation.

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

Feature details

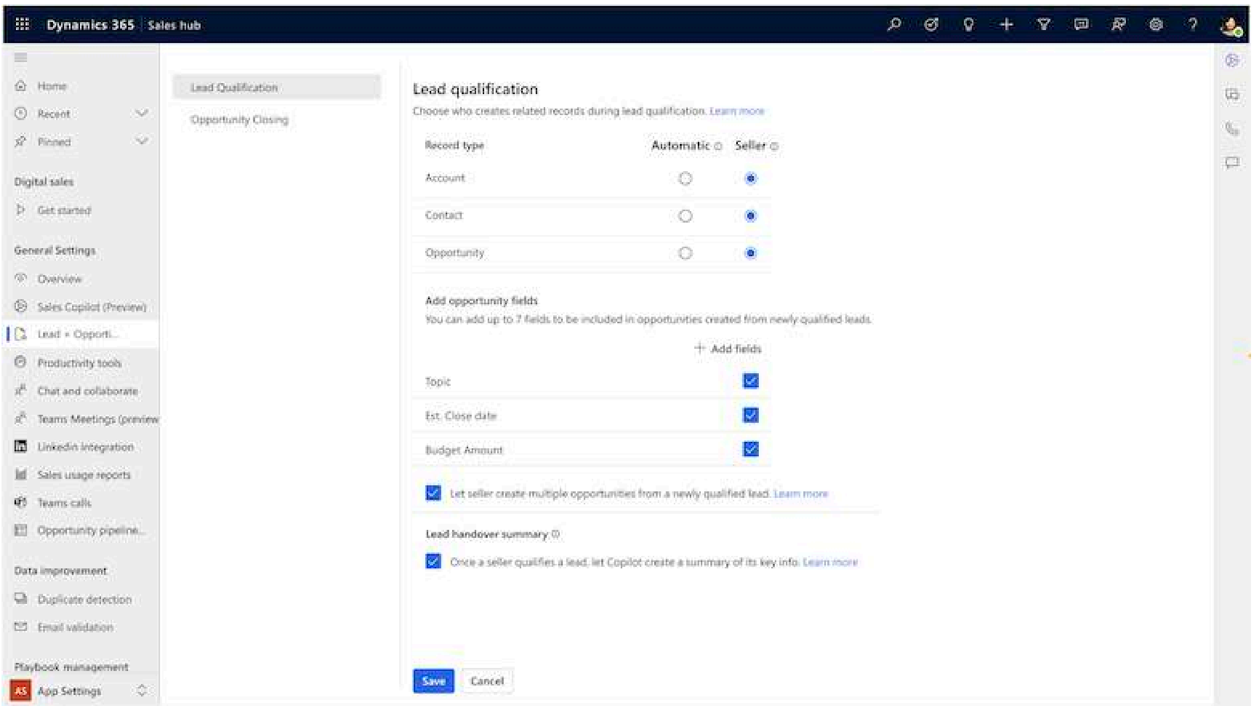
As an administrator, you can:

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

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

As a seller, you can:

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



Geographic areas

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

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

- Japan
- France
- Korea

Feedback

Was this page helpful? Yes No

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

Article • 07/16/2024

ⓘ **Important**

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

Overview

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

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

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

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

Investment areas

Cross-app experiences
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.

Microsoft OneNote experiences
Microsoft Copilot for Sales is an AI assistant designed for sellers. The Microsoft Copilot for Sales experiences in OneNote provide integration with your connected CRM to help you organize key details surrounding your customer engagements, summarize important meetings and notes, minimize data entry, and keep your sales organization updated on the latest customer interactions.

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

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

Check out the release plan

For application administrators

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

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

Get the most out of Microsoft Copilot for Sales

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
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.

Helpful links	Description
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Microsoft Copilot for Sales.

Feedback

Was this page helpful? Yes No

What's new and planned for Microsoft Copilot for Sales

Article • 07/16/2024

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

- For a list of the previous wave's release plans, go to 2024 release wave 1 plan.

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

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

Cross-app experiences

Experiences that span applications, helping sellers remain productive wherever they are working.

Expand table

Feature	Enabled for	Public preview	General availability
Manage customer objections in real time	Users, automatically	Oct 2024	Oct 2024
Create opportunities from sales meeting summary	Users, automatically	Nov 2024	Nov 2024
Monitor and alert sellers on adherence to playbook	Users, automatically	Nov 2024	Nov 2024
Update CRM directly from the post-meeting insights page	Users, automatically	-	Oct 2024
See adoption data in Copilot Dashboard	Users by admins, makers, or analysts	Oct 2024	Dec 2024

Feature	Enabled for	Public preview	General availability
Create meeting follow-up emails from meeting summary	Users, automatically	Nov 2024	Nov 2024

Microsoft OneNote experiences

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

Expand table

Feature	Enabled for	Public preview	General availability
Summarize and save notes into CRM directly from OneNote	Users, automatically	Oct 2024	Dec 2024

Microsoft Outlook experiences

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

Expand table

Feature	Enabled for	Public preview	General availability
See improved contact insights in Outlook	Users, automatically	Oct 2024	Oct 2024

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

enabled automatically.

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

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

Feedback

Was this page helpful? Yes No

Cross-app experiences

Article • 07/16/2024

ⓘ Important

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

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.

Feedback

Was this page helpful? Yes No

Create meeting follow-up emails from meeting summary

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

This feature saves your time and enhances your efficiency by automating post-meeting follow-ups. Increased transparency and alignment among stakeholders are expected to boost deal velocity, as everyone remains informed and accountable. The tailored sales-specific summaries and actions are anticipated to provide significant advantages over generic summaries.

Feature details

As a seller, you often face challenges with post-meeting follow-ups, needing to manually remember to send meeting recaps and next steps to all stakeholders. To streamline this process, a proactive nudge within Teams meeting recap prompts sellers to send a AI-drafted "Thank You and Next Steps" email, including a meeting summary and action items. This feature aims to keep deals progressing by ensuring all stakeholders are informed, aligned, and accountable.

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

Feedback

Was this page helpful? Yes No

Create opportunities from sales meeting summary

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

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

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

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

Feedback

Was this page helpful? Yes No

Get sales data and insights in Copilot chat

Article • 08/16/2024

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

Expand table

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

Business value

This feature enables you to get sales insights and perform sales-related actions directly from your system of productivity in Teams Copilot chat. With the Copilot for Sales plugin in Copilot chat, you don't need to leave Teams or Outlook to get the CRM data you need.

Feature details

You can use Copilot for Sales in various Microsoft 365 apps, Teams Copilot, and soon more Microsoft 365 Copilot surfaces to get insights and data for sales-related questions. The feature is available for Dynamics 365 and Salesforce customers.

You can request different types of information, including:

- Sales capabilities such as opportunity summary, account summary, meeting preparation report, and brand and competitor analysis.
- Sales KPIs including win rate, sales cycle, conversion rate, sales pipeline, and weighted sales pipeline.
- Sales questions related to CRM entities.

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

Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Improve customer understanding with seller coaching

Article • 08/16/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Dec 2024	Feb 2025

Business value

As a sales manager, when you conduct 1:1 meeting with your sellers, you want to give the best coaching tips on their past customer interactions, so your team can conduct more effective engagements and close deals faster.

Feature details

Copilot for Sales helps you to improve your coaching interactions with your teams. It helps you by:

- Automatically identifying coaching opportunities by categorizing interesting areas such as specific sales skills, knowledge gaps, and script adherence.
- Providing you with a structured and aggregated report of seller's status, including quota status, pipeline status, KPIs (close rate, average deal size), open tasks, interesting call snippets, and recommended content.

This feature is enabled by administrators through the Conversation Intelligence settings in the Copilot for Sales settings in Microsoft Teams.

Feedback

Leverage manager dashboards to coach sellers

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

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

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

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

Geographic areas

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

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

See also

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

Feedback

Was this page helpful? Yes No

Manage customer objections in real time

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

As a sales representative, you can build trust, demonstrate product knowledge, and show empathy towards client needs by effectively addressing and resolving potential clients' concerns and objections.

Feature details

To ensure sales representatives are well-equipped to handle objections effectively, the following features are applied:

- **Objection tracking**: Logs and categorizes objections raised during meetings, providing insights into common concerns and helping to refine future sales strategies.
- **Real-time suggestions**: As objections arise during the meeting, the system provides instant, context-specific responses and counter arguments tailored to the objection.
- **Knowledge base integration**: Access to a comprehensive, up-to-date repository of information, case studies, and FAQs to support responses with relevant data and examples.
- **Sentiment analysis**: Monitors the client’s tone and sentiment to gauge the intensity of objections, enabling a more nuanced and empathetic response.

- **Personalized coaching tips**: Offers customized coaching tips to sales representatives based on their past performance and common objections encountered. It helps them to improve their objection handling skills over time.
- **Response templates**: Predefined, customizable response templates for common objections to ensure consistency and effectiveness in replies.
- **Client-specific insights**: Utilizes CRM data to tailor objection handling strategies based on the client's history, industry, and specific needs.

Geographic areas

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

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

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

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Feedback

Was this page helpful? Yes No

Monitor and alert sellers on adherence to playbook

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Ensure that sellers are always prepared with the most relevant and impactful information for each meeting, tailored to the specific type of engagement. This can lead to more effective sales conversations, better customer relationships, and ultimately, increased sales and revenue growth. Additionally, it can help in aligning the sales approach with the company's strategies and goals, ensuring a consistent and professional representation of the organization.

Feature details

As a sales manager, you can upload a playbook that sellers need to go through during their sales meetings in Copilot for Sales. During the sales meeting, Copilot for Sales monitors how well they adhered to the provided playbook by detecting topics and items being discussed. Either in real-time or post meeting, seller receives signals on what they have missed and how well they did in covering the pre-defined topics.

Feedback

Was this page helpful? Yes No

Update CRM directly from the post-meeting insights page

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Smartly updating the system of record after a meeting, without switching context, saves sellers valuable time and helps sales organizations keep their business data fresh.

Feature details

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

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

Geographic areas

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

- Germany
- Norway
- Singapore

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

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

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Feedback

Was this page helpful? Yes No

Microsoft OneNote experiences

Article • 07/16/2024

ⓘ Important

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

Microsoft Copilot for Sales is an AI assistant designed for sellers. The Microsoft Copilot for Sales experiences in OneNote provide integration with your connected CRM to help you organize key details surrounding your customer engagements, summarize important meetings and notes, minimize data entry, and keep your sales organization updated on the latest customer interactions.

Feedback

Was this page helpful? Yes No

Summarize and save notes into CRM directly from OneNote

Article • 07/16/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	Dec 2024

Business value

OneNote is regularly used by sellers to organize customer notes. You are also required to regularly update your CRM regarding customer interactions. Today, Copilot in OneNote can help you summarize your customer notes, but you're taken out of your flow of work to save the summaries to your CRM. With this feature, you'll be able to summarize notes using Copilot and directly save the summary into CRM all within OneNote.

Feature details

With the feature you will be able to accomplish the following:

- Summarize your notes in OneNote leveraging the native summarization skill by Copilot in OneNote.
- Save your summarized notes to your CRM without leaving OneNote. Using a proactive suggestion made by Copilot post summarization, you can search for the CRM record to save the summary to.

This feature can be enabled by users by adding the Copilot for Sales plugin into the OneNote Copilot.

Feedback

Was this page helpful? Yes No

Microsoft Outlook experiences

Article • 07/16/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Support sellers with Copilot for Sales mobile experience in Outlook

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

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

Feedback

Was this page helpful? Yes No

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

Article • 07/16/2024

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

Overview

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

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

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

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

Investment areas

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

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

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

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

Check out the release plan

For application administrators

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

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

Get the most out of Customer Service

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
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.

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Customer Service

Article • 07/16/2024

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

- For a list of the previous wave's release plans, go to 2024 release wave 1 plan.

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

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

Agent experiences

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Compose emails using improved attachment experience	Users, automatically	-	Jul 2024	Oct 2024
Default enhanced experience of handling recipients while composing an email	Users, automatically	-	Jul 2024	Oct 2024

Copilot and AI innovation

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Extend Copilot with plugins	Users by admins, makers, or analysts	✔ Apr 30, 2024	-	Oct 2024
View Copilot generated proactive prompts and insights	Users, automatically	-	-	Oct 2024

Unified routing

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Update queue memberships for agents in real time	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2024

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Feedback

Was this page helpful? Yes No

Agent experiences

Article • 07/16/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Compose emails using improved attachment experience

Article • 07/16/2024

ⓘ Important

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

Expand table

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

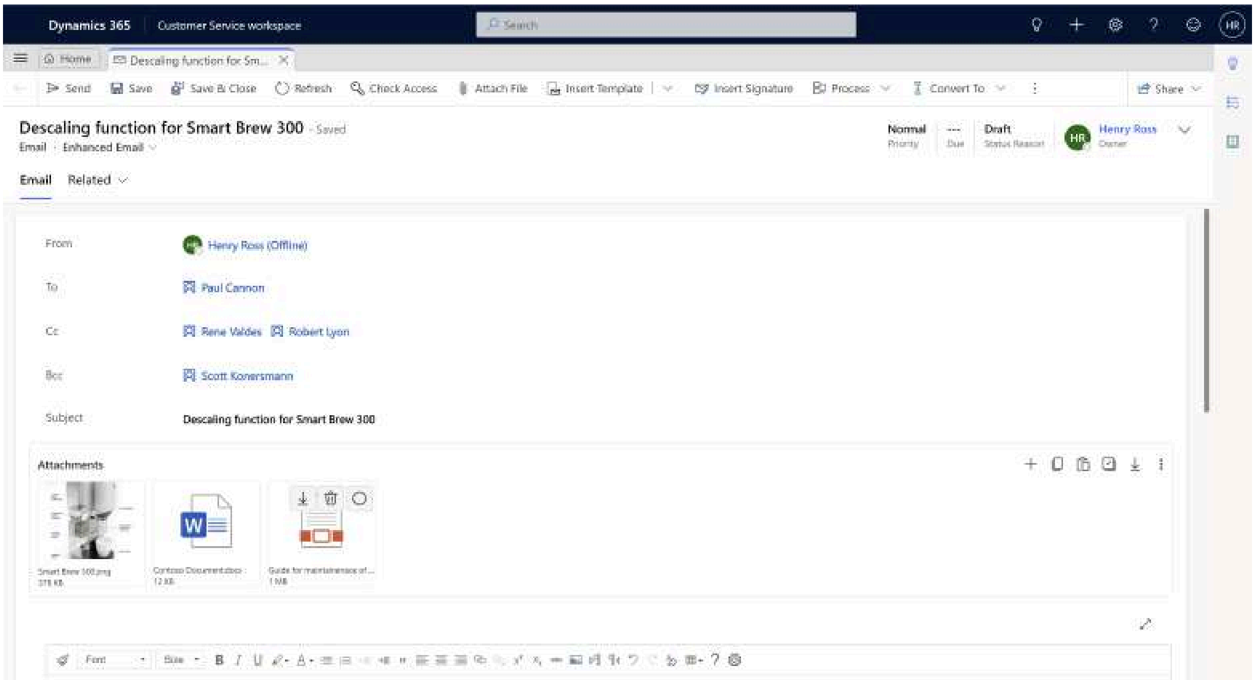
Business value

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

Feature details

With the enhanced email attachment experience, agents can:

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



Feedback

Was this page helpful? Yes No

Default enhanced experience of handling recipients while composing an email

Article • 07/16/2024

ⓘ Important

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

Expand table

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

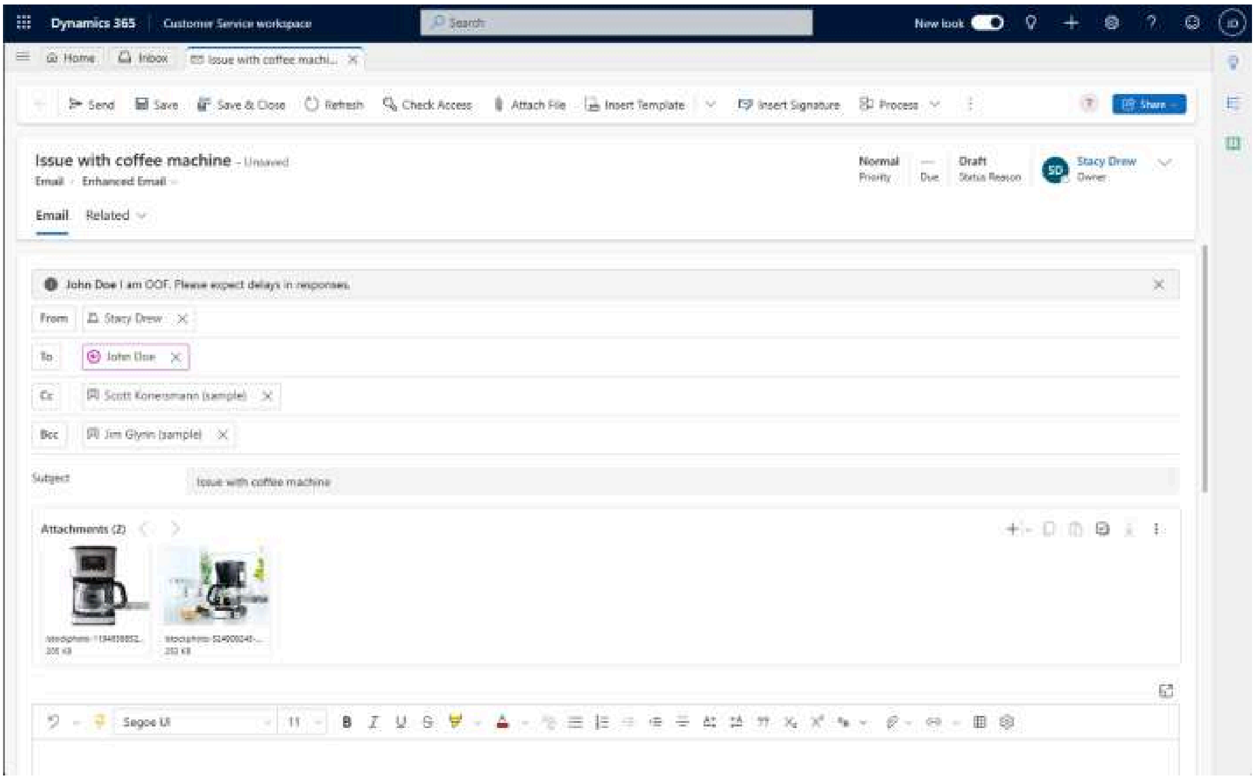
Business value

The enhanced recipient experience offers improved user experience in emails. Recipients can be configured to display email addresses along with how their names appear in records, drag and drop recipients among TO, CC and BCC fields, view recipients' presence status and out of office messages, and bulk resolve email addresses to Dynamics 365 records.

Feature details

Agents can use the enhanced email recipient experience to compose emails. The following are the key capabilities:

- Drag and drop recipients among To, CC, and BCC fields.
- View recipient's email address along with their names.
- Easily resolve email addresses to Dynamics 365 records.
- View recipients' presence status and out of office messages.
- Block the resolution of an unresolved email address to Dynamics 365 records for a read-only email.



Feedback

Was this page helpful? Yes No

Manage cases efficiently with enhanced case controls

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

Agents must upload attachments individually and then search for them in the case timeline in order to open them. Therefore, they require intuitive controls on the case form to easily locate and access the relevant information, allowing them to perform operations efficiently.

Enhanced case form controls are added on the default case form, Case for multisession experience in the Customer Service workspace application. This allows agents to easily upload and view multiple attachments, take quick notes, and use color-coded icons for efficient field identification during case creation. These enhancements streamline daily case management tasks, reducing effort and boosting productivity.

Feature details

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

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

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

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

See also

Enable enhanced case forms for multisession apps (docs)

Feedback

Was this page helpful? Yes No

Prioritize cases with improved case grids

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

Case grids displaying agents' active cases with color differentiators for columns like priority and origin, and information like Next SLA, Last Interaction, Is Escalated, and Case age, help them prioritize cases that require the most attention. Agents can also navigate directly to the latest interaction on the case. This improves their overall productivity while working on cases.

Feature details

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

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

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

See also

Manage cases with case grids (docs)

Feedback

Was this page helpful? Yes No

Copilot and AI innovation

Article • 07/16/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Enable Copilot plugins to connect with external systems

Article • 08/16/2024

ⓘ Important

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

Expand table

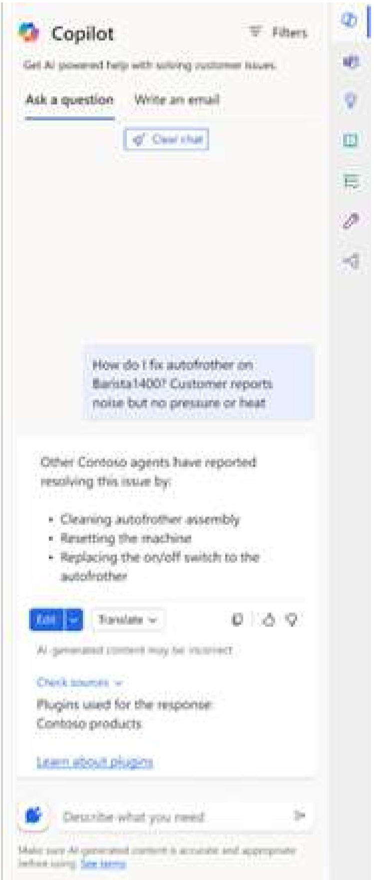
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Jun 14, 2024	-	Oct 2024

Business value

Your customer service representatives rely on data and information from a wide variety of systems. Now, you can connect external systems to Copilot through plugins and let your agents securely access data from these systems using Copilot.

Feature details

Your customer service representatives rely on data and information from a wide variety of systems. With plugins for Copilot in Customer Service, you can connect external systems to Copilot and let your agents securely access data from those systems using Copilot. With plugins, you can reduce the need for customer service representatives to switch to other tabs and tools to do their work and improve resolution time and customer satisfaction.



Geographic areas

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

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

See also

Enable plugins for generative AI (docs)

Feedback

Was this page helpful? Yes No

Extend Copilot with plugins

Article • 07/16/2024

ⓘ Important

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

Expand table

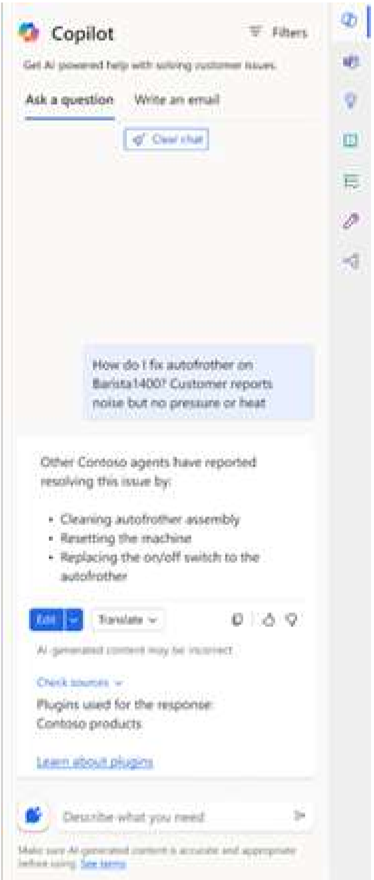
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Apr 30, 2024	-	Oct 2024

Business value

Your customer service representatives rely on data and information from a wide variety of systems. Now, you can connect Dataverse to Copilot through plugins and let your agents securely access data from these systems using Copilot.

Feature details

With plugins for Copilot in Customer Service, you can reduce the need for customer service representatives to switch to other tabs and tools to do their work and improve resolution time and customer satisfaction.



Geographic areas

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

See also

Enable plugins for generative AI (docs)

Feedback

Was this page helpful? Yes No

View Copilot generated proactive prompts and insights

Article • 07/16/2024

ⓘ Important

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

Expand table

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

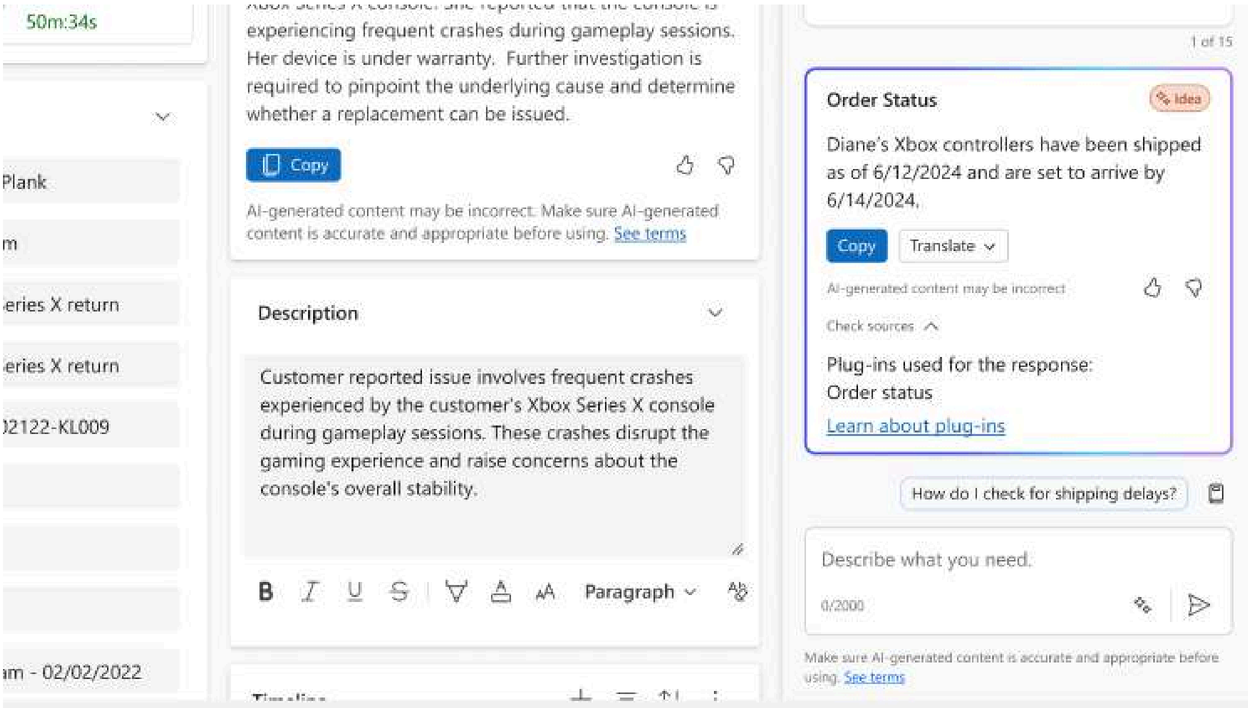
Business value

Proactive prompting will enable agents to easily discover Copilot skills and prompt Copilot without having to type. This will save agents time and improve the quality of their overall experience.

Feature details

Proactive prompting will provide the following benefits for agents:

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



Geographic areas

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

- Germany
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
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- Japan
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Feedback

Was this page helpful? Yes No

Unified routing

Article • 07/16/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Update queue memberships for agents in real time

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

When a contact center experiences a surge in conversations, admins and supervisors are suddenly faced with a staffing shortage. To handle these surges, they need to quickly add or redistribute the workforce between channels and lines of business represented by queues. With this enhancement, the queue membership updates made by admins will happen faster. This ensures that new agents can take work in their new queues as soon as they are added, and when you remove agents from queues, they won't receive work from the old queue while the membership changes. These benefits help maintain low customer wait times even during peak traffic periods and avoid unintended work assignments.

Feature details

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

Feedback

Was this page helpful? Yes No

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

Article • 07/16/2024

ⓘ **Important**

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

Overview

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

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

Learn more about Microsoft Copilot for Service:

- Microsoft Copilot for Service
- Microsoft Copilot for Service Guided Tour
- Microsoft Copilot for Service Documentation

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.

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.

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Get the most out of Microsoft Copilot for Service

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 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.

Feedback

Was this page helpful? Yes No

What's new and planned for Microsoft Copilot for Service

Article • 07/16/2024

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

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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
Introduce CRM connectivity to ServiceNow in Outlook and Teams	Admins, makers, marketers, or analysts, automatically	Jul 2024	Oct 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
Query over CRM data in Microsoft Copilot	Users by admins, makers, or analysts	✔ Jun 10, 2024	Oct 2024
Provide meeting summary and follow-ups to create CRM tasks	Users by admins, makers, or analysts	Jul 2024	Oct 2024

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
Schedule a meeting prompt based on the email context in Outlook	Users by admins, makers, or analysts	-	Oct 2024

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ .

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
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For a list of the countries or regions where Dynamics 365 business applications are available, go to the International availability guide . For more information about geographic areas and datacenters (regions), go to the Dynamics 365 and Microsoft Power Platform availability page .

Feedback

Was this page helpful? Yes No

Agent experiences in Microsoft Teams

Article • 07/16/2024

ⓘ Important

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

Feedback

Was this page helpful? Yes No

Provide meeting summary and follow-ups to create CRM tasks

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

As agents are talking to customers, they can now save time on documenting the discussion and action items. Copilot for Service will now provide meeting summaries and action items in integration with the Teams recap, providing all the service-specific follow-up items. Agents can also create CRM tasks right from the Teams recap section.

Feature details

Capabilities that will be enabled through this feature:

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

Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

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

Article • 07/16/2024

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

Overview

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

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

For 2024 release wave 2, we are focused on:

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

Investment areas

Administrator experiences

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

Agent experiences

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

Extensibility

For a greater reach, use extensibility to integrate the features in Dynamics 365 Contact Center with non-Microsoft CRM solutions using client-side and server-side integrations. Interoperability helps businesses adopt new offerings without disrupting their existing set-ups.

IVR capabilities

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

Omnichannel customer experiences

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

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

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

Check out the release plan

For application administrators

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

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

Get the most out of Contact Center

Expand table

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

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Contact Center

Article • 07/17/2024

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

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

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

Administrator experiences

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

Expand table

Feature	Enabled for	Public preview	General availability
Use Application Insights to monitor agent assignments	Users by admins, makers, or analysts	Dec 2024	Apr 2025
Configure embedded UX for third-party CRM solutions	Users by admins, makers, or analysts	-	Oct 2024

Agent experiences

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

Expand table

Feature	Enabled for	Public preview	General availability
Search for a customer in the outbound dialer	Users by admins, makers, or analysts	✔ Apr 8, 2024	Oct 2024
Use copilots to get customer feedback	Users by admins, makers, or analysts	Nov 2024	Apr 2025

Extensibility

Use extensibility to connect the Contact Center with other CRM solutions.

Expand table

Feature	Enabled for	Public preview	General availability
Extend Copilot with plugins	Users by admins, makers, or analysts	✔ Apr 30, 2024	Oct 2024

IVR capabilities

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

Expand table

Feature	Enabled for	Public preview	General availability
Customers can opt out of recording when they talk to IVR	Users by admins, makers, or analysts	-	Nov 2024
Use multilingual IVR bots	Users by admins, makers, or analysts	-	Nov 2024
Configure IVR to switch languages based on dialed number	Users by admins, makers, or analysts	-	Nov 2024
Mask sensitive data and prevent unauthorized access	Users by admins, makers, or analysts	-	Mar 2025

Omnichannel customer experiences

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

Expand table

Feature	Enabled for	Public preview	General availability
Play prerecorded audio during bot processing delays	Users by admins, makers, or analysts	Jul 2024	Oct 2024
Use SLA-based automated actions on conversations	Users by admins, makers, or analysts	-	Oct 2024
Hide transcripts for voice calls	Users, automatically	Jul 2024	Oct 2024
Monitor work item lifecycle in Application Insights	Users by admins, makers, or analysts	✔ Aug 23, 2023	Oct 2024

Unified routing

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

Expand table

Feature	Enabled for	Public preview	General availability
Use first-in, first-out order in custom prioritization	Admins, makers, marketers, or analysts, automatically	-	Dec 2024
Update queue memberships for agents in real time	Admins, makers, marketers, or analysts, automatically	-	Oct 2024

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

enabled automatically.

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

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

Feedback

Was this page helpful? Yes No

Administrator experiences

Article • 07/16/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Configure embedded experience for other CRM solutions

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

This feature allows organizations with multiple lines of business needs to be able to configure the embedded experience so that their agents can connect with their customers without navigating away from their workspace.

Feature details

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

Feedback

Was this page helpful? Yes No

Use Application Insights to monitor agent assignments

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Get greater visibility into how the routing engine assigns work items to agents. You can enable logging for the agent assignment stage and trace assignments.

Feature details

Agent assignment tracing will now be integrated into the conversation lifecycle within Application Insights for Dynamics 365 Contact Center. By offering this visibility, organizations can refine their routing configurations for optimal efficiency in serving their customers.

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

Feedback

Was this page helpful? Yes No

Agent experiences

Article • 07/16/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Search for a customer in the outbound dialer

Article • 07/16/2024

ⓘ Important

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Expand table

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

Business value

Placing a call has become easier for agents with the option to search for a customer in the outbound dialer and open the customer record from the call history.

Feature details

The enhanced outbound dialing experience enables agents to:

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

For more information, watch our Outbound dialer enhancements in Dynamics 365 Customer Service video.

Feedback

Was this page helpful? Yes No

Use copilots to get customer feedback

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

With this feature, you can:

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

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

Feedback

Was this page helpful? Yes No

Extensibility

Article • 07/16/2024

ⓘ Important

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

For a greater reach, use extensibility to integrate the features in Dynamics 365 Contact Center with non-Microsoft CRM solutions using client-side and server-side integrations. Interoperability helps businesses adopt new offerings without disrupting their existing set-ups.

Feedback

Was this page helpful? Yes No

Extend Copilot with plugins

Article • 07/16/2024

ⓘ Important

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

Expand table

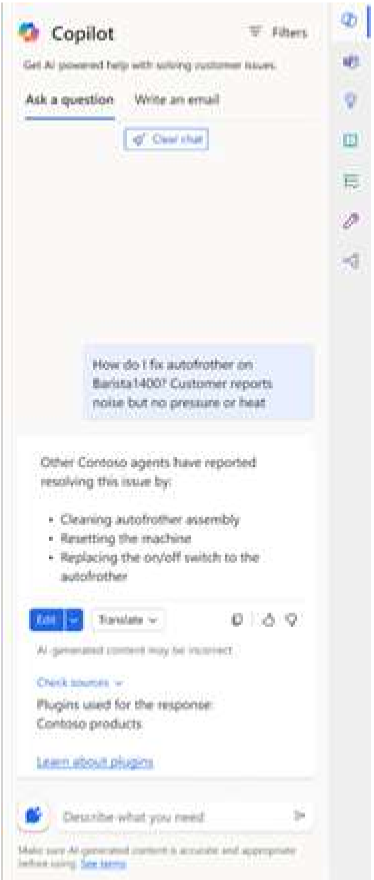
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 30, 2024	Oct 2024

Business value

Your customer service representatives rely on data and information from a wide variety of systems. Now, you can connect Microsoft Dataverse to Copilot through plugins and let your agents securely access data from these systems using Copilot.

Feature details

With plugins for Copilot in Customer Service, you can reduce the need for customer service representatives to switch to other tabs and tools to do their work and improve resolution time and customer satisfaction.



Geographic areas

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

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

See also

Enable plugins for generative AI (preview) (docs)

Feedback

Was this page helpful? Yes No

IVR capabilities

Article • 07/16/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Configure IVR to switch languages based on dialed number

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

You can use a single IVR bot for multiple languages. The bot distinguishes between languages based on the phone number the customer dials, eliminating the need for creating multiple bots.

Feature details

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

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

Feedback

Was this page helpful? Yes No

Customers can opt out of recording when they talk to IVR

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

This feature helps businesses make sure that they're legally compliant by avoiding the storage of sensitive and personal user information in call recordings based on customer choice. It is particularly useful in regions where obtaining consent from the caller before recording the call is a legal requirement.

Feature details

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

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

Feedback

Was this page helpful? Yes No

Manage calls when bot handling fails

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

You can ensure a seamless customer experience by maintaining call continuity during system failures. Administrators can customize responses and transfer strategies, minimizing disruption, and enhancing customer satisfaction.

Feature details

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

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

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

Some of the options include:

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

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

Feedback

Was this page helpful? Yes No

Mask sensitive data and prevent unauthorized access

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

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

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

Feature details

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

- **Administrative control**: Administrators can define rules for handling sensitive data items and establish masking rules. These rules can be applied for data storage, during IVR sessions, and agent sessions.
- **Service-wide application**: The established masking rules will be applied to transcription and call recording services.
- **Audit trails**: Auditing features to track changes to sensitive data rules and access to Dataverse entities that host sensitive data.

Feedback

Was this page helpful? Yes No

Use multilingual IVR bots

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

A multilingual Copilot Studio bot can help reduce the total cost of ownership through easier maintenance and faster deployment. It can enhance CSAT by allowing seamless language switching, eliminating the need for multiple bots or language-specific phone numbers.

Feature details

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

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

Feedback

Was this page helpful? Yes No

Omnichannel customer experiences

Article • 07/16/2024

ⓘ Important

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

Feedback

Was this page helpful? Yes No

Hide transcripts for voice calls

Article • 07/16/2024

ⓘ Important

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Expand table

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

Business value

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

Feature details

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

Feedback

Was this page helpful? Yes No

Monitor work item lifecycle in Application Insights

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Customers require real-time monitoring of system health to investigate issues proactively and ensure operational continuity. By integrating Dynamics 365 Contact Center with Application Insights, organizations can access self-serve information to monitor operational telemetry, troubleshoot issues, and understand the root cause to guide their mitigation plan.

Feature details

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

Feedback

Was this page helpful? Yes No

Play prerecorded audio during bot processing delays

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

You can play prerecorded audio messages to avoid customer call drop-offs when a bot is taking time to process customer requests.

Feature details

When a bot is processing customer requests, play prerecorded audio messages to the customer to avoid call disconnection. For example, the account balance topic requires the bot to obtain the account number and then use Power Automate and an appropriate system connector to make an authenticated inquiry for the account balance. This operation can take several seconds and during this time the customer hears a "percolation prompt" (that is, keyboard typing), which is a prerecorded audio file.

Feedback

Was this page helpful? Yes No

Use SLA-based automated actions on conversations

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

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

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

Feedback

Was this page helpful? Yes No

Unified routing

Article • 07/16/2024

ⓘ Important

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

Feedback

Was this page helpful? Yes No

Update queue memberships for agents in real time

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

When a contact center experiences a surge in conversations, admins and supervisors are suddenly faced with a staffing shortage. To handle these surges, they need to quickly add or redistribute the workforce between channels and lines of business represented by queues. With this enhancement, the queue membership updates made by admins will happen faster. This ensures that new agents can take work in their new queues as soon as they are added, and when you remove agents from queues, they won't receive work from the old queue while the membership changes. These benefits help maintain low customer wait times even during peak traffic periods and avoid unintended work assignments.

Feature details

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

Feedback

Was this page helpful? Yes No

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

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Messaging channels like persistent chat, Facebook, and WhatsApp provide the flexibility of a single conversation thread that can be asynchronously accessed by users and agents. Supervisors managing these channels can reduce the time to reply to a new interaction in these long-running conversations. With this enhancement to first-in, first-out prioritization, when customers resume interaction on an existing conversation, they will be prioritized based on the time the conversation was resumed instead of the time the conversation started. This ensures that customers who have resumed their conversations now have a shorter wait time irrespective of the age of the conversations.

Feature details

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

Feedback

Was this page helpful? Yes No

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

Article • 07/16/2024

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

Overview

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

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

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

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

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

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

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

Investment areas

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

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

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

Optimize resource scheduling
Resource management and scheduling optimization are at the heart of field service management. Resource scheduling enables service organizations to triage unscheduled work orders and cases efficiently and schedule the nearest matching technicians to deliver service to their customers. The schedule board offers scheduling capabilities for

dispatchers, project managers, and resource managers in different views and extensibility capabilities for partners to tailor functionality to their needs.

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

Check out the release plan

For application administrators

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

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

Get the most out of Field Service

Expand table

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

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Field Service

Article • 07/16/2024

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

- For a list of the previous wave's release plans, go to 2024 release wave 1 plan.

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

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

Boost technician productivity

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Use Remote Assist mixed reality annotations in Teams	Users by admins, makers, or analysts	✔ Apr 17, 2024	-	Oct 2024
Initiate a Remote Assist in Teams call from the Field Service mobile app	Users, automatically	-	Jul 2024	Oct 2024
Select table columns to include in mobile offline sync	Admins, makers, marketers, or analysts, automatically	✔ Jun 18, 2024	-	Oct 2024

Copilot and AI innovation

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Enhance Copilot experiences in the web app	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2024
Summarize work orders with Copilot in Outlook	Users by admins, makers, or analysts	-	-	Nov 2024

Optimize resource scheduling

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Transition all users to the new schedule board	Users, automatically	-	Jul 2024	Oct 2024

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
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For a list of the countries or regions where Dynamics 365 business applications are available, go to the International availability guide. For more information about geographic areas and datacenters (regions), go to the Dynamics 365 and Microsoft Power Platform availability page.

Feedback

Was this page helpful? Yes No

Boost technician productivity

Article • 07/16/2024

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

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

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

Feedback

Was this page helpful? Yes No

Select table columns to include in mobile offline sync

Article • 07/16/2024

ⓘ Important

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

Expand table

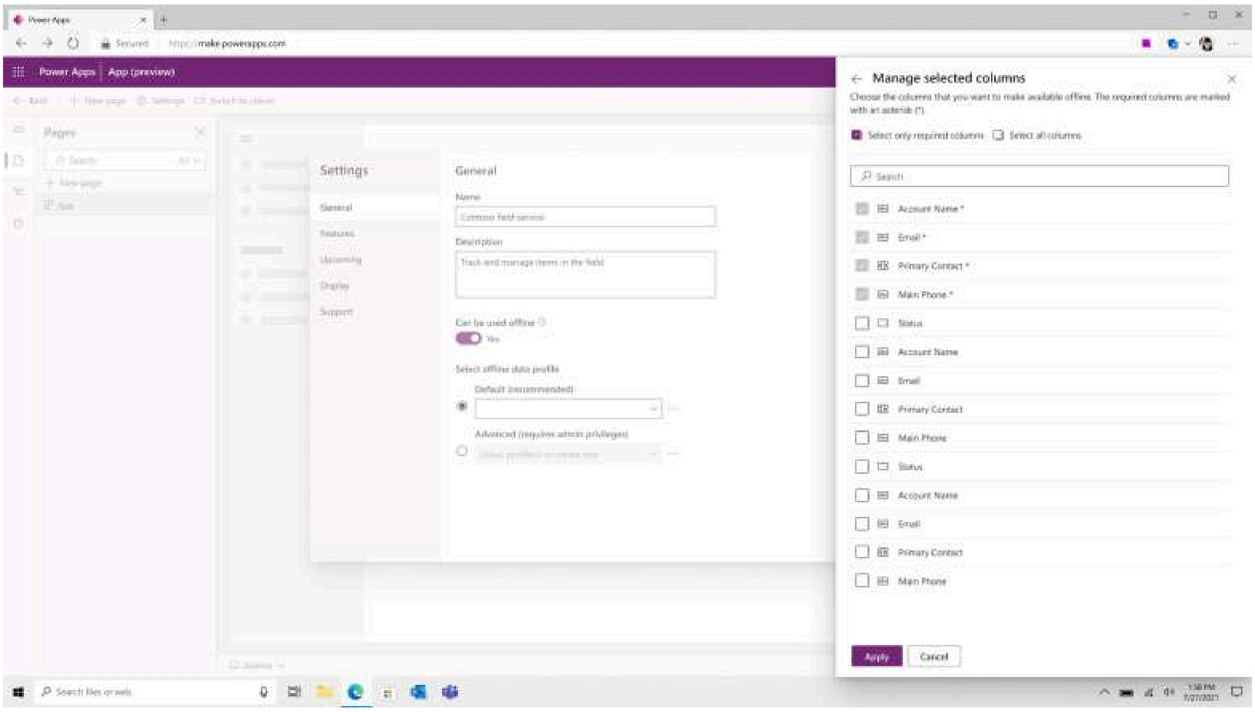
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jun 18, 2024	-	Oct 2024

Business value

Makers can now select the columns of tables that are downloaded on mobile devices for offline use. The fewer columns you select, the faster the app downloads the data on the device for usage without connectivity.

Feature details

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



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

See also

Optimize columns included within the offline profile (docs)

Feedback

Was this page helpful? Yes No

Use Remote Assist mixed reality annotations in Teams

Article • 07/16/2024

ⓘ Important

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Expand table

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

Business value

First-time fix rates are a key business and operational metric for service organizations. When a service technician is stuck on a work order because they may not have the required knowledge or experience with that issue, they can quickly initiate a call with another technician or support specialist in the back office to guide them through the issue and its resolution.

Feature details

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

This feature is currently available on iOS devices, and we're planning a fast follow for Android devices.

See also

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

Feedback

Was this page helpful? Yes No

View your mobile offline sync data with Application Insights

Article • 08/16/2024

ⓘ Important

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Expand table

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

Business value

Ensuring a seamless experience both with and without device connectivity is crucial for an effective frontline workforce. Field Service offers mobile offline capabilities to address this need. To create optimized offline profiles, you need insights into the offline performance and device data. Using Application Insights, you get the necessary data to answer essential questions about offline mobile usage, which helps with enhanced troubleshooting and user experience optimization.

Feature details

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

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

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

See also

Telemetry events for mobile app synchronization and actions (docs)

Feedback

Was this page helpful? Yes No

Copilot and AI innovation

Article • 07/16/2024

ⓘ Important

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

Feedback

Enhance Copilot experiences in the web app

Article • 07/16/2024

ⓘ Important

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Expand table

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

Business value

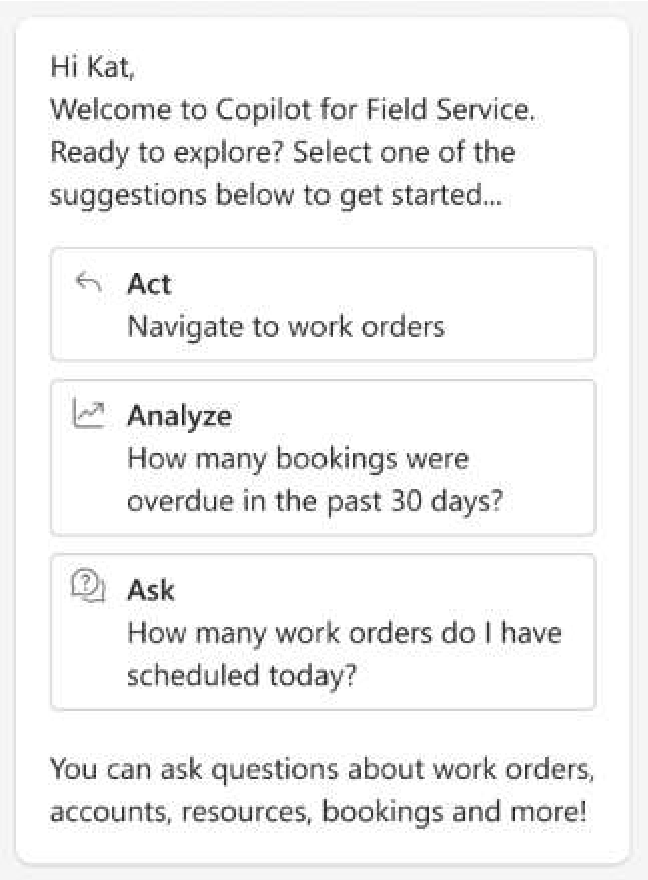
Expedite work by using enhanced Copilot experiences. Every member of the back office and frontline workforce can tap into enhanced Copilot side pane experiences to quickly get the information they need to be more efficient on the job.

Feature details

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

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

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



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

Geographic areas

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

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

- Canada
- India
- Japan
- France
- Korea

Feedback

Was this page helpful? Yes No

Summarize work orders with Copilot in Outlook

Article • 07/16/2024

ⓘ Important

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Expand table

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

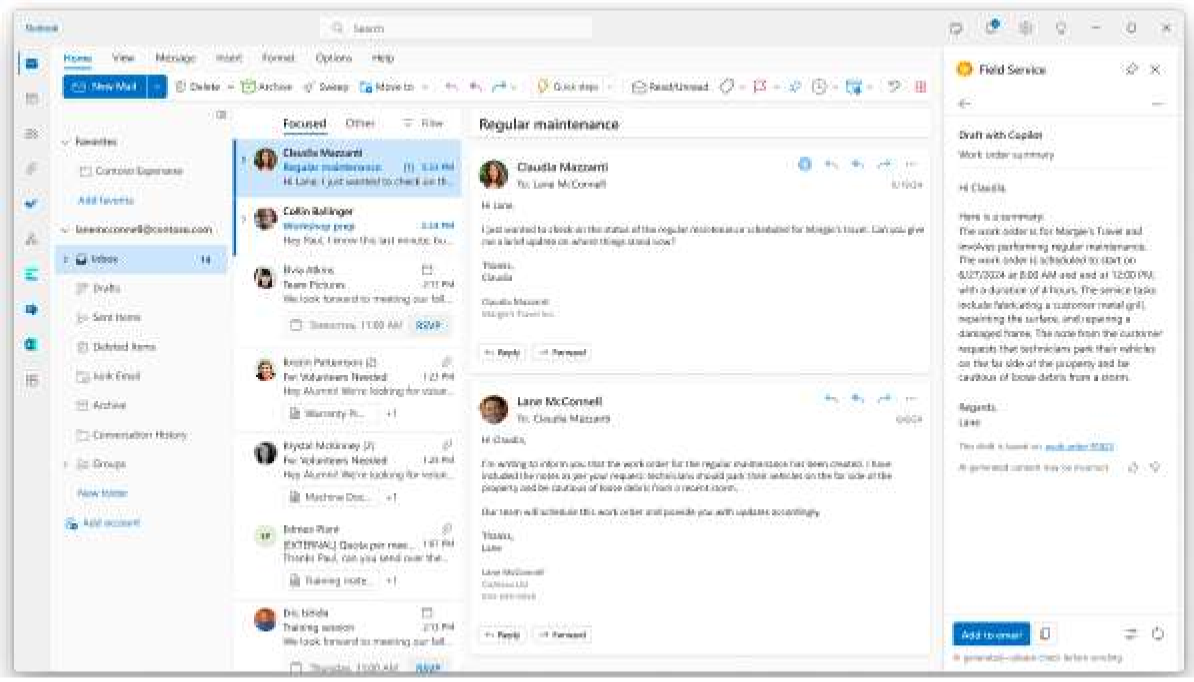
Business value

With the Outlook add-in for Dynamics 365 Field Service, service managers and frontline workers don't have to leave Outlook and open the Field Service web app or mobile app to get summary of a work order. Stay in your flow of work and boost your productivity and efficiency with contextual information right in your preferred communication app.

Feature details

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

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



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

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

Geographic areas

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

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

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

Feedback

Was this page helpful? Yes No

Optimize resource scheduling

Article • 07/16/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Improve usability and performance of the schedule board

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

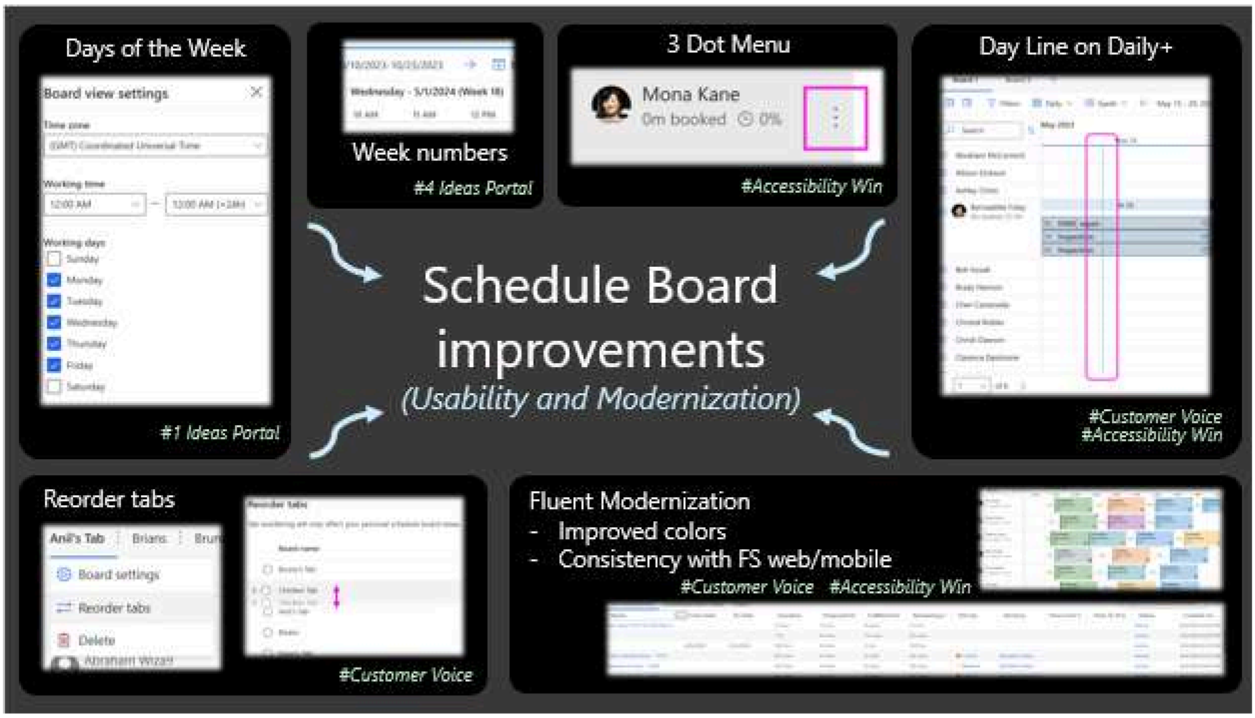
With improved usability and performance, technicians and dispatchers can manage schedules more efficiently, leading to increased productivity and employee satisfaction.

Feature details

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

ⓘ Note

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



Feedback

Was this page helpful? Yes No

Transition all users to the new schedule board

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

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

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

See also

Feature deprecations for Universal Resource Scheduling (docs)

Feedback

Was this page helpful? Yes No

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

Article • 07/16/2024

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

Overview

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

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

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

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.

Copilot

Copilot provides users with AI-powered assistance and helps resolve tasks more efficiently with less steps by guiding users through these tasks, empowering users with data, ensuring best decisions, and taking actions. These time savings enable faster execution of financial tasks and for users to spend time on more value-added activities.

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.

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Get the most out of Finance

Expand table

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

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Finance

Article • 07/16/2024

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

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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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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
Analyze data using the Record to Report data model	Users by admins, makers, or analysts	✔ Apr 28, 2023	Oct 2024
Automate actions with Copilot to put planning into action	Users, automatically	Feb 2025	-
Manage assets using the Acquire to Dispose data models	Users, automatically	Feb 2025	Mar 2025
Start planning quickly with templates in Dynamics 365 Finance	Users, automatically	-	Feb 2025
Create drivers and formulas in Business performance planning	Users by admins, makers, or analysts	Oct 2024	-

Feature	Enabled for	Public preview	General availability
Empower users with generative help and guidance	Users, automatically	Jul 2024	Oct 2024
Provide actionable insights that drive strategic decisions and operational efficiency	Users by admins, makers, or analysts	✔ Apr 28, 2023	Oct 2024
Try the reporting, analytics, and insights hub	Users by admins, makers, or analysts	✔ Apr 28, 2023	Oct 2024
Set dimensional row level security in Business performance analytics	Users by admins, makers, or analysts	✔ Apr 28, 2023	Oct 2024
Create dimensions and cubes using Copilot in Business performance planning	Users, automatically	Feb 2025	-
Use Procure to Pay data models to report and gain insights	Users by admins, makers, or analysts	✔ Apr 28, 2023	Oct 2024
Use the Order to Cash data model to gain insights and analyze sales transactions	Users by admins, makers, or analysts	✔ Apr 28, 2023	Oct 2024
Extend data models in Microsoft Fabric	Users by admins, makers, or analysts	Jul 2024	Oct 2024
Analyze business data in Excel	Users by admins, makers, or analysts	Jul 2024	Oct 2024
Refresh data frequently in Business performance analytics	Users by admins, makers, or analysts	Feb 2025	Apr 2025
Use managed extensibility of data models	Users by admins, makers, or analysts	Feb 2025	Apr 2025
Get support for multiple languages in Business performance analytics	Users by admins, makers, or analysts	Feb 2025	Apr 2025

Copilot

AI-powered assistance to resolve financial tasks more efficiently in the location where the user works.

Expand table

Feature	Enabled for	Public preview	General availability
Try immersive homepage and redesigned workspace for financial period close	Users by admins, makers, or analysts	Nov 2024	-
Experience the immersive homepage and Copilot for accounts payable clerk	Users by admins, makers, or analysts	Feb 2025	-

Core financials

Automation, AI, and enhancements to core financials.

Expand table

Feature	Enabled for	Public preview	General availability
Use Copilot to default financial tags	Users by admins, makers, or analysts	Oct 2024	-
Add efficiency with enhanced bank reconciliation report	Admins, makers, marketers, or analysts, automatically	Jul 2024	Oct 2024
Increase the length of invoice numbers	Users by admins, makers, or analysts	Jul 2024	Oct 2024
Correct receipt matching error in vendor invoices with Copilot	Users by admins, makers, or analysts	Oct 2024	-
Improve bank account lifecycle management	Users by admins, makers, or analysts	Jul 2024	Feb 2025
Get batch log summarization of sales invoice copilot	Users by admins, makers, or analysts	-	Feb 2025
Automatically clear bridged transactions	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2024	Oct 2024
Use Copilot to handle vendor invoice exceptions	Users by admins, makers, or analysts	Oct 2024	-
Make payments in advance with prepayment sales invoices	Users by admins, makers, or analysts	Feb 2025	-
Experience matching rule enhancements in advanced bank reconciliation	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2024	Oct 2024

Feature	Enabled for	Public preview	General availability
Save time with automated cash application	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2024	Oct 2024
Enable financial tags for purchase order invoicing	Users by admins, makers, or analysts	-	Oct 2024
Use document types for financial journals	Users by admins, makers, or analysts	Feb 2025	-

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
Expand localization for LATAM countries - Ecuador	Users by admins, makers, or analysts	-	Oct 2024
Expand localization for LATAM countries - Bolivia	Users by admins, makers, or analysts	-	Oct 2024
Expand localization for LATAM countries - Dominican Republic	Users by admins, makers, or analysts	-	Feb 2025
Expand localization for LATAM countries - Peru	Users by admins, makers, or analysts	-	Feb 2025
Expand localization for LATAM countries - Venezuela	Users by admins, makers, or analysts	-	Feb 2025
Use the regulatory compliance immersive homepage	Users by admins, makers, or analysts	Feb 2025	-
Import vendor electronic invoices in Germany	Users by admins, makers, or analysts	-	Oct 2024
Use Electronic invoicing Denmark OIOUBL format version 3.0	Users by admins, makers, or analysts	-	Mar 2025

Feature	Enabled for	Public preview	General availability
Convert Excel business documents to PDF	Users by admins, makers, or analysts	-	Dec 2024
Get support for new legislation for e-invoicing in Spain	Users by admins, makers, or analysts	-	Mar 2025
Experience updates to the Interfactura API for e-invoicing in Mexico	Users by admins, makers, or analysts	-	Mar 2025

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Description of **Enabled for** column values:

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Feedback

Was this page helpful? Yes No

Business performance

Article • 07/16/2024

ⓘ Important

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Feedback

Was this page helpful? Yes No

Analyze business data in Excel

Article • 07/16/2024

ⓘ Important

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Expand table

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

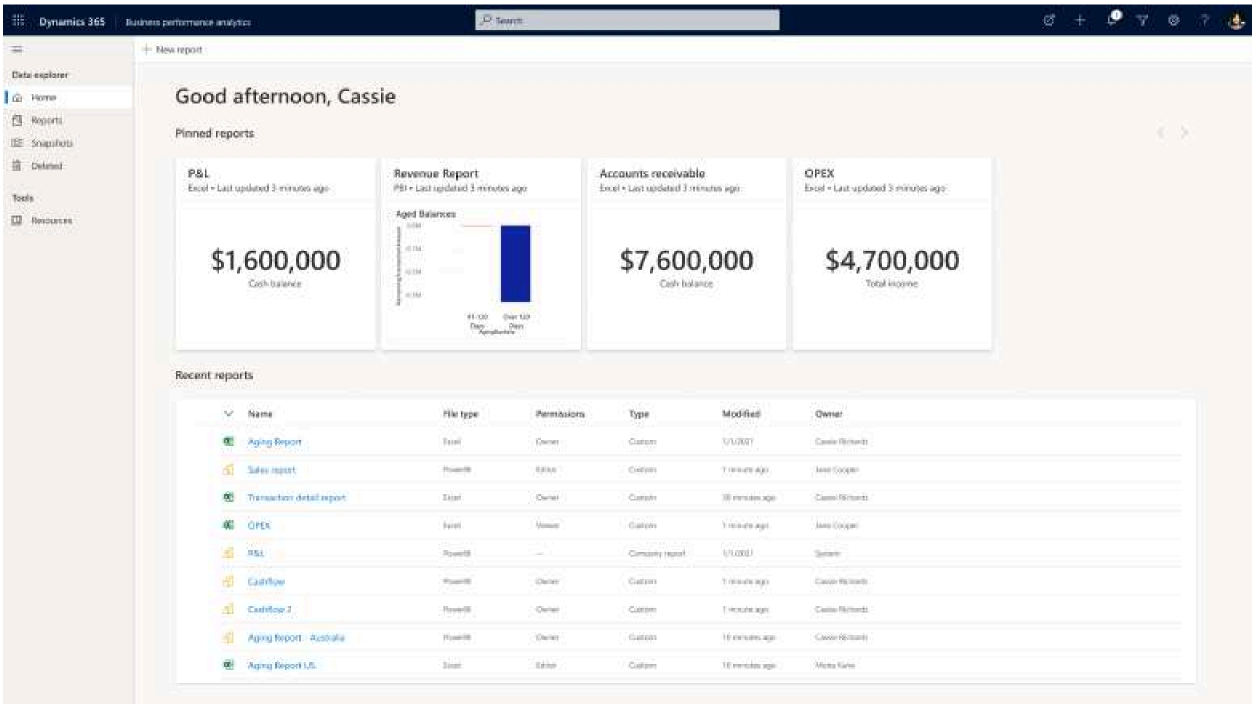
Business value

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

Feature details

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

Analyze in Excel enhances user productivity by combining the robust data capabilities of business performance analytics with the versatile analytical tools of Excel. This integration simplifies the data analysis process, reduces the learning curve for users already familiar with Excel, and fosters a data-driven culture within the organization. Ultimately, it empowers users to make informed decisions, driving operational excellence and business growth. With the complete business performance analytics data model available in Excel, users can unlock deeper insights and tailored reports, ensuring comprehensive and accurate business performance analysis.



Feedback

Was this page helpful? Yes No

Analyze data using the Record to Report data model

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

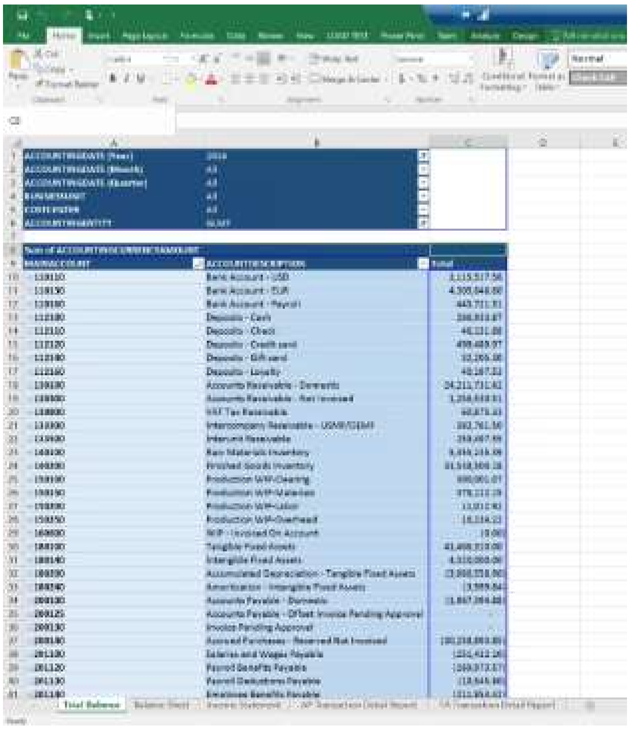
The Record to Report data model in Business performance analytics delivers fine-grained financial data, empowering users to create custom reports and perform dimension-based analysis with ease. By enhancing the accuracy and timeliness of financial statements and supporting key processes like General Ledger, Budgeting, and Financial Dimensions, the Record to Report model drives strategic decision-making, optimizes financial operations, and ensures effective period-end reporting, ultimately contributing to sustainable business growth and competitive advantage.

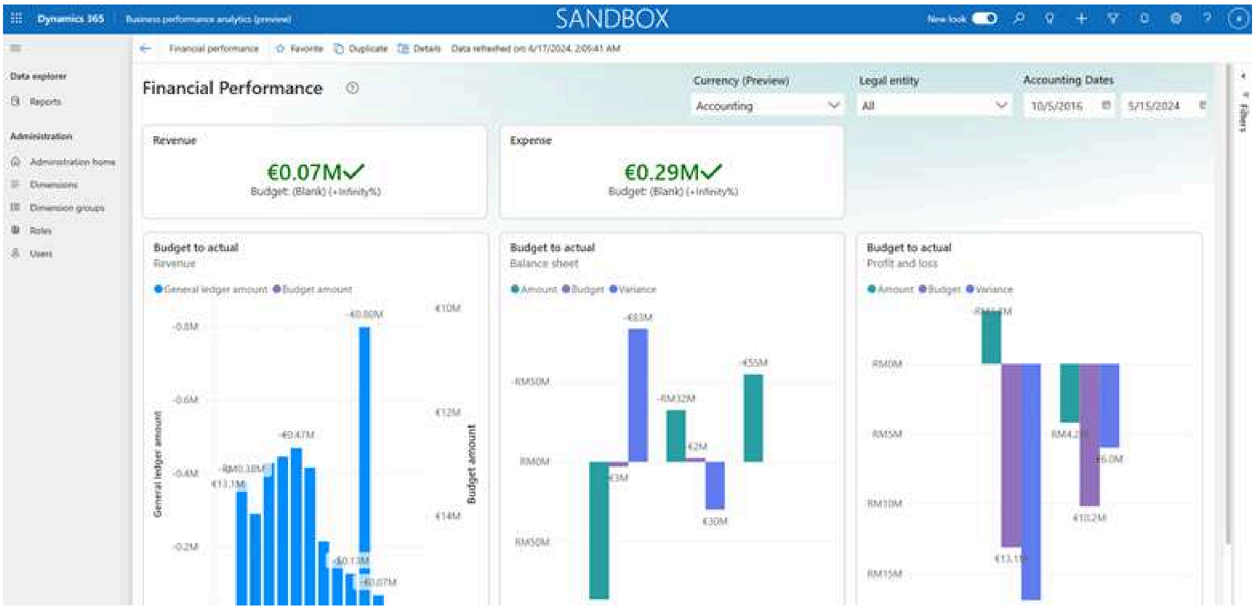
Feature details

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

The data is brought at the most fine-grain level possible, allowing for detailed and precise analysis. Users can leverage the data model to build custom reports and analytics, making it highly accessible and user-friendly. Dimension-based analysis can be easily performed on the financial data, enabling deep insights into various financial aspects. This makes the Record to Report data model particularly effective for period-end reporting, providing businesses with timely and accurate financial insights.

Additionally, it improves transparency and accountability, fostering stakeholder confidence. With the ability to quickly identify financial anomalies and trends, businesses can optimize their financial operations, reduce costs, and drive profitability. This robust financial insight ultimately contributes to sustainable business growth and improved competitive positioning.





See also

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

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

Feedback

Was this page helpful? Yes No

Automate actions with Copilot to put planning into action

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Organizations can automate their plan-act-analyze process, increasing their business agility and reducing time to take action in the planning cycle.

Feature details

Planning is a critical part of an organization's process that helps it model out potential growth or business changes and get insight into the details and impact of new or divested investments. Organizations strive to do more continuous planning to get a competitive advantage by moving faster, getting insights earlier to be more agile and dynamic than their competition.

However, the mechanics, processes, and disparate systems often slow this down, or people get too busy to act on what they decided as a company. By having actions from an approved plan, and then automating those steps back into the operational system, organizations move quicker and save users days of work. Examples include:

- Commit budget to financial system for budgetary control
- Automate the requisition of new salary or hourly headcount
- Create a new product or region
- Reorganize around efficiencies with sales or shared services

- Purchase new assets

Automating the full plan to act to analyze process is possible with the business performance capabilities, Power Automate, and Dynamics 365 Finance.

Feedback

Was this page helpful? Yes No

Create dimensions and cubes using Copilot in Business performance planning

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

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

Feedback

Was this page helpful? Yes No

Create drivers and formulas in Business performance planning

Article • 07/16/2024

ⓘ Important

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Expand table

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

Business value

With driver-based planning capabilities, decision-makers have access to financial forecasts that are directly tied to operational drivers. This connection between financial outcomes and business activities enables more informed and strategic decision-making. This feature enables the user to create powerful calculation logic and method with identified key driver to easily generate financial outcomes scenarios, eliminating the need for manual setup in Power BI, streamlining the process while keeping track of the change made to those drivers across multiples scenarios.

Feature details

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

Feedback

Empower users with generative help and guidance

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

With the help of Copilot, users can get assistance without leaving business performance analytics. Users can ask Copilot questions about the application and receive responses without needing to manually find an answer themselves, saving time for our end-users and potentially their company's IT support division as well.

Feature details

New and veteran users of business performance analytics can ask Copilot about the application using a conversational interface. Copilot takes the user's prompt and then scans the business performance analytics documentation on Microsoft Learn and summarizes the relevant pieces in its response. This way, new users can first learn about business performance analytics or veteran users can learn about new features to business performance analytics within the application itself. This saves time for the end user and their company's IT support because the user doesn't need to leave the application and manually find an answer themselves or submit a support ticket for their issue.

Feedback

Extend data models in Microsoft Fabric

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

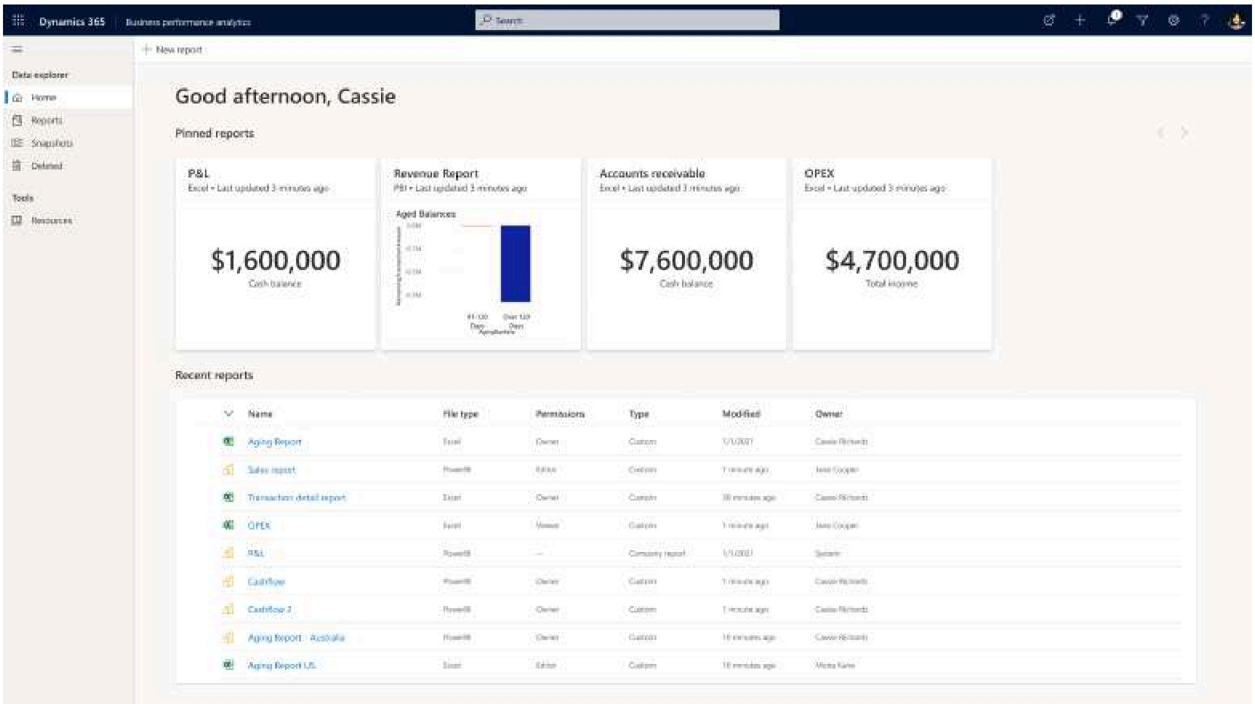
The **Extend to Fabric** feature in business performance analytics enhances the platform's flexibility by integrating BPA data with proprietary datasets, enabling customized analytical experiences tailored to specific business needs. This integration facilitates a holistic view of operations, breaking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

Feature details

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

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

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



Feedback

Was this page helpful? Yes No

Get support for multiple languages in Business performance analytics

Article • 07/16/2024

ⓘ Important

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Expand table

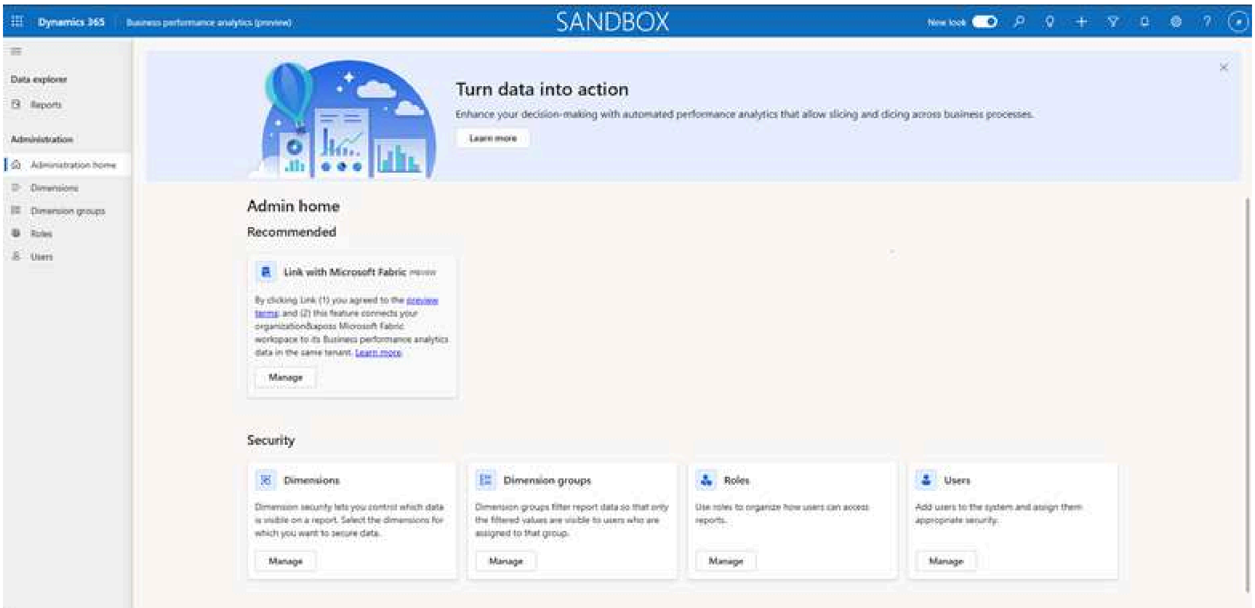
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2025	Apr 2025

Business value

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

Feature details

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



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

Feedback

Was this page helpful? Yes No

Manage assets using the Acquire to Dispose data models

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

The Acquire to Dispose data model delivers granular data that enables users to create custom reports and perform detailed analysis, incorporating various dimensions across the asset lifecycle. This capability allows businesses to gain deeper insights into asset performance, utilization, and cost trends. With dimension-based analysis, organizations can easily identify patterns in asset use, optimize maintenance schedules, and enhance investment strategies, leading to improved asset efficiency and cost savings.

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

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

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

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Feedback

Provide actionable insights that drive strategic decisions and operational efficiency

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

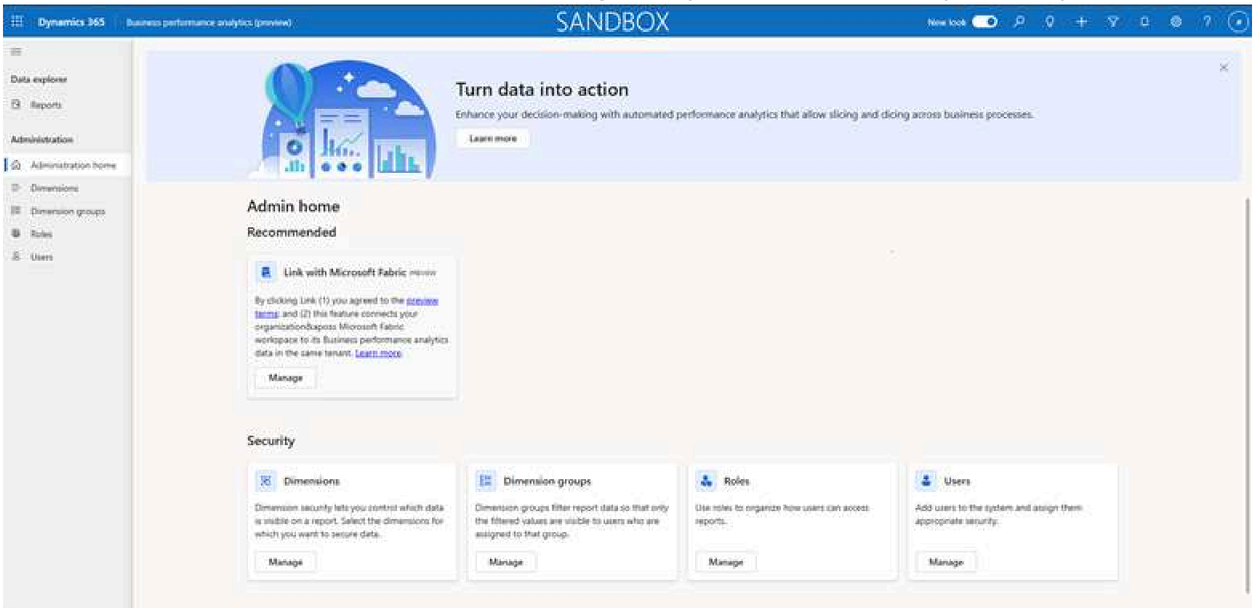
Business performance analytics is the key to unlocking your organization's full potential. By systematically collecting, analyzing, and interpreting data from various business functions, Business performance analytics provides actionable insights that drive strategic decision-making and operational efficiency. With advanced reporting and visualization tools, Business performance analytics transforms raw data into clear, impactful metrics, enabling you to track performance, identify trends, and capitalize on opportunities for continuous improvement.

Feature details

Business performance analytics is the key to unlocking your organization's full potential. By systematically collecting, analyzing, and interpreting data from various business functions, Business performance analytics provides actionable insights that drive strategic decision-making and operational efficiency. With advanced reporting, analytics and insights tools, Business performance analytics transforms raw data into clear, impactful metrics, enabling you to track performance, identify trends, and capitalize on opportunities for continuous improvement.

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

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

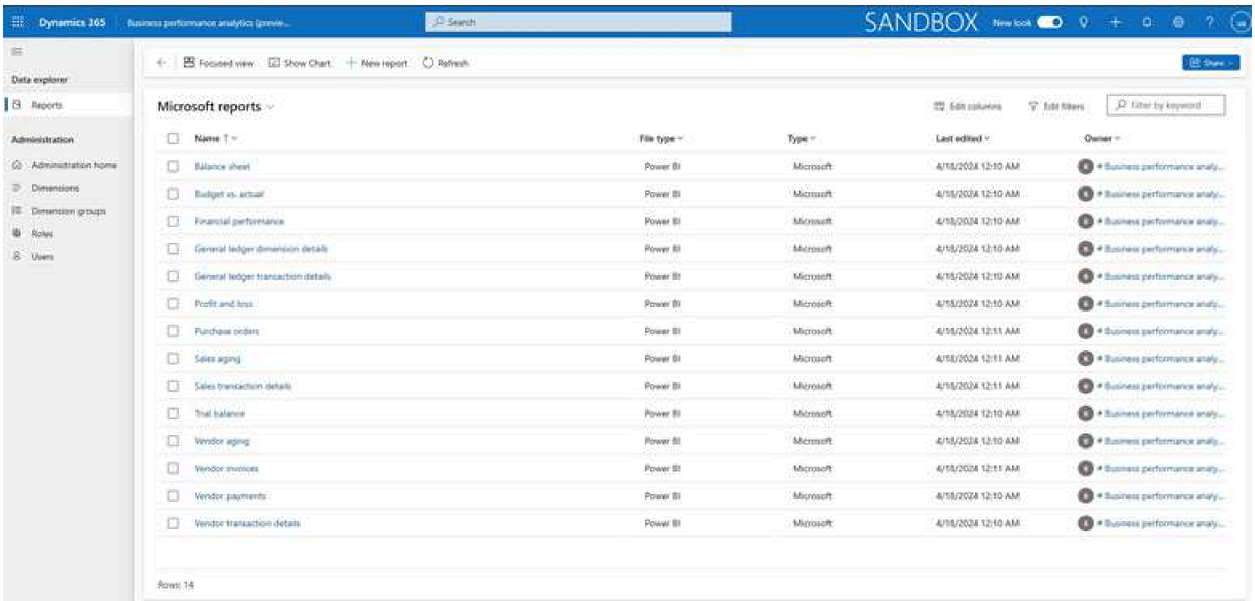


Data Models: Tailored for insight

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

Curated prebuilt reports at launch

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



Dimensional Security: Precision control

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

Extensibility with Fabric

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

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

See also

Business performance analytics (docs)

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

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Feedback

Was this page helpful? Yes No

Refresh data frequently in Business performance analytics

Article • 07/16/2024

ⓘ Important

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Expand table

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

Business value

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

Feature details

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

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

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Feedback

Was this page helpful? Yes No

Set dimensional row level security in Business performance analytics

Article • 07/16/2024

ⓘ Important

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Expand table

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

Business value

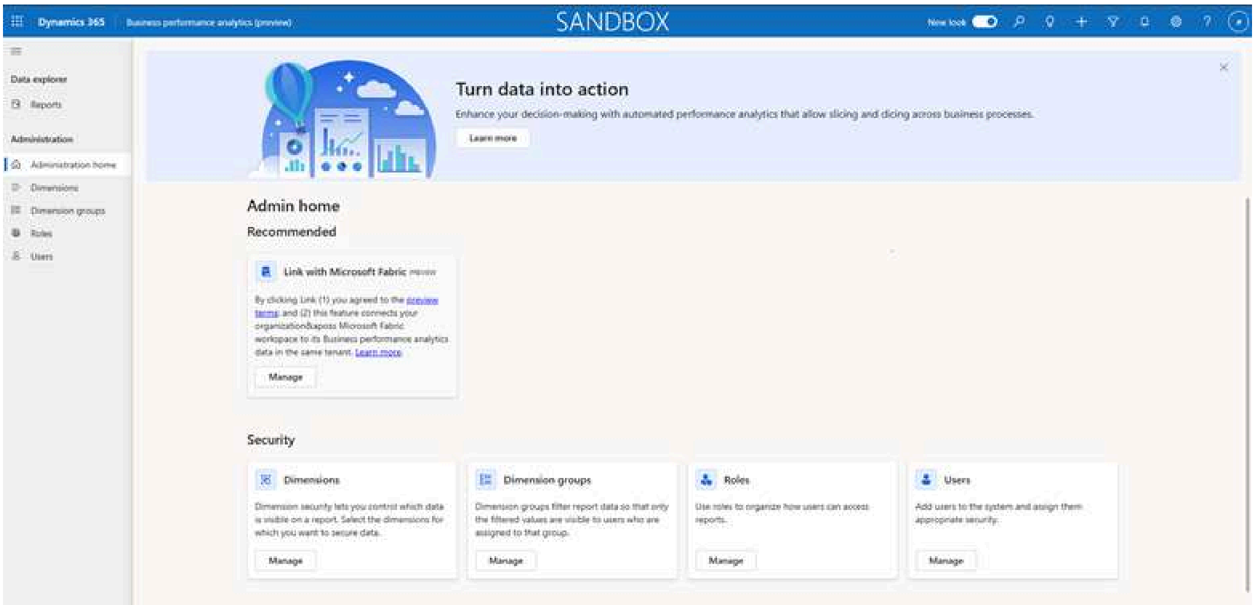
Dimensional row-level security in Business performance analytics provides significant business value by offering precise control over data access and enhancing compliance. By ensuring that users can only view data relevant to their roles, this security model minimizes the risk of unauthorized access, protecting sensitive information. It simplifies report management by eliminating the need for multiple report versions tailored to different access levels, streamlining the reporting process.

Feature details

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

With dimensional row-level security, users can share reports with team members where the data is refreshed automatically, providing fields for additional reporting capabilities. When combined with the extensibility of the data model, users can view reports by dimension and by legal entity, creating refreshable, prewritten reports that can be distributed beyond the finance organization. For instance, a sales report can be sent to field sales staff, refreshing with the most current sales numbers while being restricted to specific products and locations.

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



See also

Set up security for business performance analytics (docs)

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

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Feedback

Was this page helpful? Yes No

Start planning quickly with templates in Dynamics 365 Finance

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Users have the opportunity to quickly try planning when connecting to Dynamics 365 Finance.

Feature details

When evaluating or demonstrating new planning software, financial planning and analysis managers or partners would like to have a trial experience with their own data. This process typically takes weeks to configure as a proof of concept. Quick start templates provide this experience in minutes versus days.

By using information about the chart of accounts and properties of posted data, when an organization connects to Dynamics 365 Finance, out-of-the-box templates provide a view of the organization's profit and loss. With editing capabilities, users can try out the entry experience immediately.

Feedback

Was this page helpful? Yes No

Try the reporting, analytics, and insights hub

Article • 07/16/2024

ⓘ Important

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Expand table

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

Business value

The Business performance analytics reporting hub provides substantial business value by centralizing access to prebuilt reports like Balance Sheet, Profit and Loss, and Sales Transaction Details, enhancing efficiency and collaboration. With seamless integration with tools like Power BI and Excel, secure sharing, automatic data refresh, and precise access control, the hub streamlines reporting processes, supports data-driven decision-making, and drives operational excellence.

Feature details

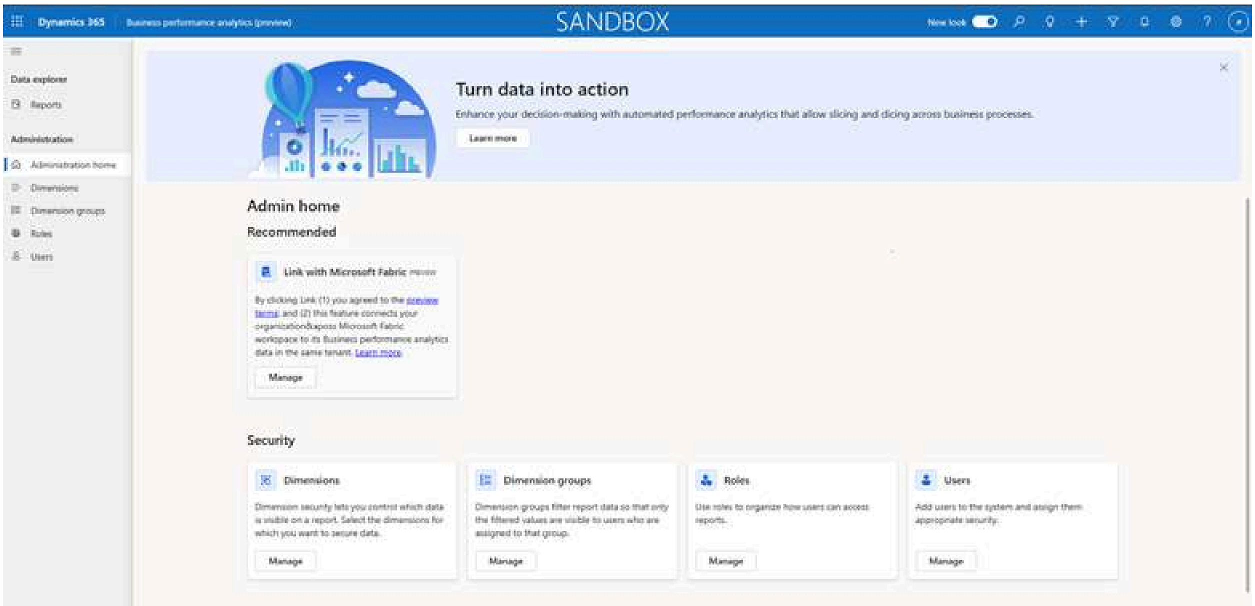
The Business performance analytics reporting hub offers substantial business value by providing a centralized platform for accessing, creating, and sharing reports. Seamlessly integrating with tools like Power BI and Excel, the hub enhances efficiency and collaboration across the organization. It features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

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

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

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

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



See also

Reports in business performance analytics (docs)

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

Feedback

Was this page helpful? Yes No

Use managed extensibility of data models

Article • 07/16/2024

ⓘ Important

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Expand table

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

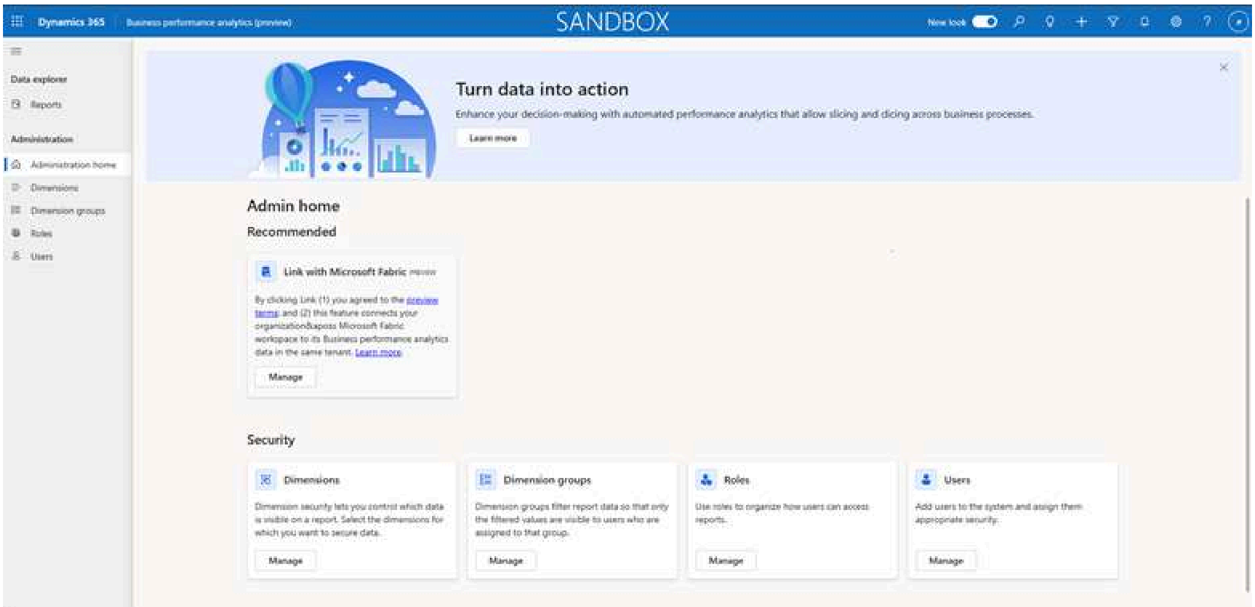
Business value

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

Feature details

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

Enabled within Business performance analytics and a customer's Fabric license, this feature addresses the issue of extending the Business performance analytics data model written off Dynamics 365 finance and operations data to conform to additional data sources in Fabric. Ultimately, managed extensibility fosters a highly adaptable analytics environment, supporting personalized decision-making and driving business growth through tailored data integration.



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Feedback

Was this page helpful? Yes No

Use Procure to Pay data models to report and gain insights

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

The Procure to Pay data model in Business performance analytics enhances your procurement processes by streamlining reporting, ensuring accurate payment processing, and providing detailed financial visibility. This feature helps reduce errors, improve efficiency, and offer valuable insights into spending and vendor performance, ultimately driving better financial management and strategic decision-making.

Feature details

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

The Procure to Pay data model delivers granular data that enables users to create custom reports and perform detailed analysis, incorporating various dimensions across the procure to pay value chain. This capability allows businesses to gain deeper insights into procurement performance, supplier behavior, and cost trends. With dimension-based analysis, organizations can easily identify procurement patterns, optimize supplier contracts, and enhance sourcing strategies, leading to cost savings and improved supplier relationships.

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

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

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

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Feedback

Was this page helpful? Yes No

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

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

The Order to Cash data model in Business performance analytics streamlines sales reporting and analytics, ensuring accurate invoicing and payment processing while providing comprehensive financial visibility. By offering detailed data on sales orders, picking lists, packing slips, invoices, payments, and the accounts receivable subledger, the Order to Cash model enhances revenue management, reduces operational costs, and improves customer relationships. Incorporating various dimensions across the order-to-cash value chain, this feature drives operational excellence and business growth.

Feature details

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

The Order to Cash data model delivers granular data that enables end users to create custom reports and perform detailed analysis, incorporating various dimensions across the order to cash value chain. This capability allows businesses to gain deeper insights into sales performance, customer behavior, and revenue trends. With dimension-based analysis, organizations can easily identify sales patterns, optimize pricing strategies, and enhance product offerings, leading to increased sales and customer satisfaction.

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

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

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

Copilot

Article • 07/16/2024

ⓘ Important

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

Copilot provides users with AI-powered assistance and helps resolve tasks more efficiently with less steps by guiding users through these tasks, empowering users with data, ensuring best decisions, and taking actions. These time savings enable faster execution of financial tasks and for users to spend time on more value-added activities.

Feedback

Was this page helpful? Yes No

Experience the immersive homepage and Copilot for accounts payable clerk

Article • 07/16/2024

ⓘ Important

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

Expand table

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

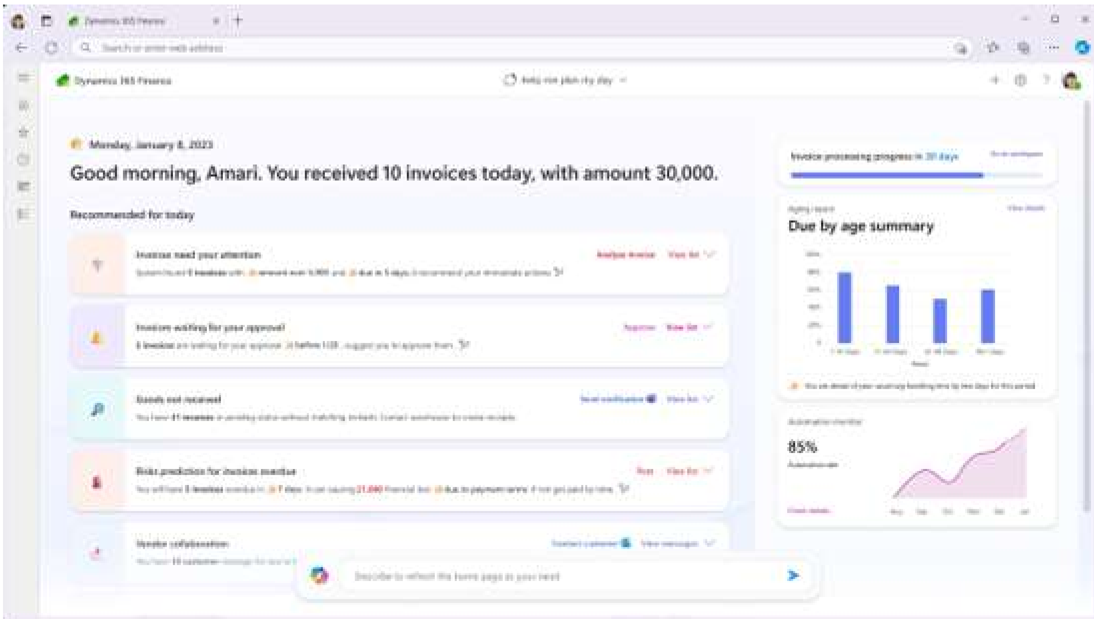
Business value

New immersive homepages and redesigned workspaces help the accounts payable clerk stay focused on their priorities and simplifies the most complex tasks. The immersive experience will provide the ability to pivot on data in the manner required by your organization or tasks across legal entities, and AI will be used to determine immersive homepage content, allowing the AP clerk to more efficiently handle AP tasks and shift effort to more value-added, strategical work.

Feature details

Central immersive homepage for AP clerk, which contains:

- Overall status of autonomous invoice processing
- Daily work summary for the AP clerk
- AI guided worklist for AP clerk: list of invoices with exceptions, list of invoices for approval
- Various insight reports



Feedback

Was this page helpful? Yes No

Try immersive homepage and redesigned workspace for financial period close

Article • 07/16/2024

ⓘ Important

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

Expand table

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

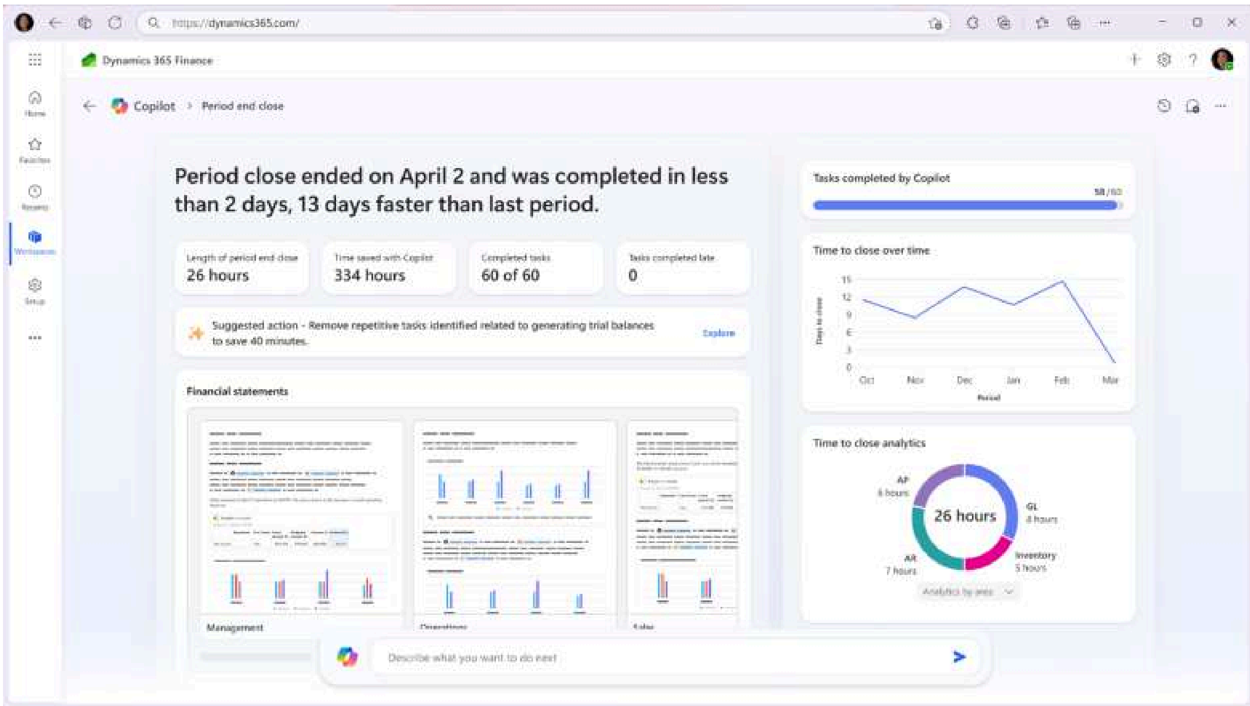
Business value

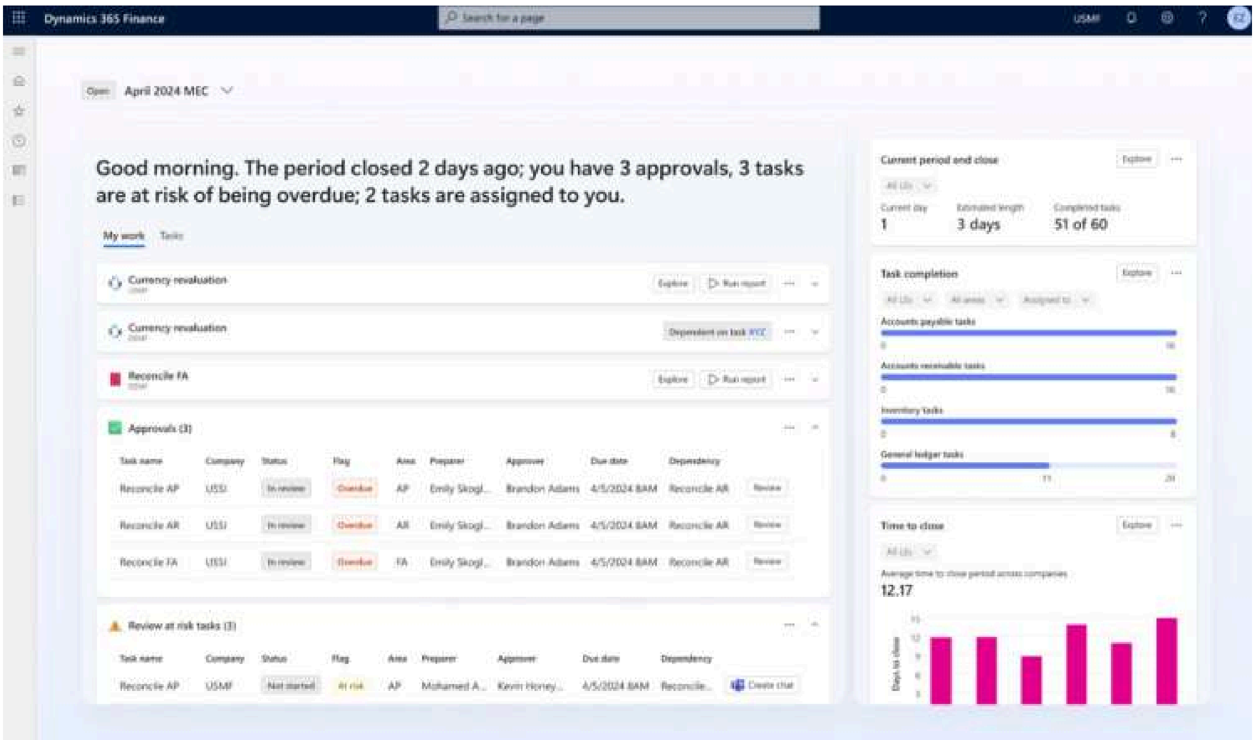
New immersive homepages and redesigned workspaces for period-end close gives visibility into the end-to-end workflows that occur around period end. Each immersive experience will provide the ability to pivot on data in the manner required by your organization or task across legal entities. AI will be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

Feature details

A new immersive homepage for the Accounting manager provides a true starting page for their daily tasks. They will have flexibility to toggle between comprehensive overviews around all tasks and their statuses within a closing schedule, or focused views highlighting only the tasks assigned to them for approval. By offering this perspective, the platform optimizes workflow efficiency and fosters collaboration, ultimately delivering enhanced business value through streamlined operations and informed decision-making.

A new workspace will focus on the definition of the period end tasks, allowing for pivots across users, modules, legal entities, or even business units across multiple legal entities. With Copilot, the recommendations made to the Accounting manager can be leveraged in this workspace for the period end definition. During period end, Copilot can be used for mass updating tasks for organizational changes, and having Copilot complete the tasks rather than relying on manual intervention (if the task supports Copilot completion). Copilot can actively assess the completion of tasks, automatically begin the next tasks, and even validate the completion of tasks based on rules defined by an organization. In addition, the period end tasks can be assigned a workflow (who completed, who approves) along with maintaining a strong audit trail of each action against each task. Improved notifications will also be included in the new enhancements.





Feedback

Was this page helpful? Yes No

Core financials

Article • 07/16/2024

ⓘ Important

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

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.

Feedback

Was this page helpful? Yes No

Add efficiency with enhanced bank reconciliation report

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

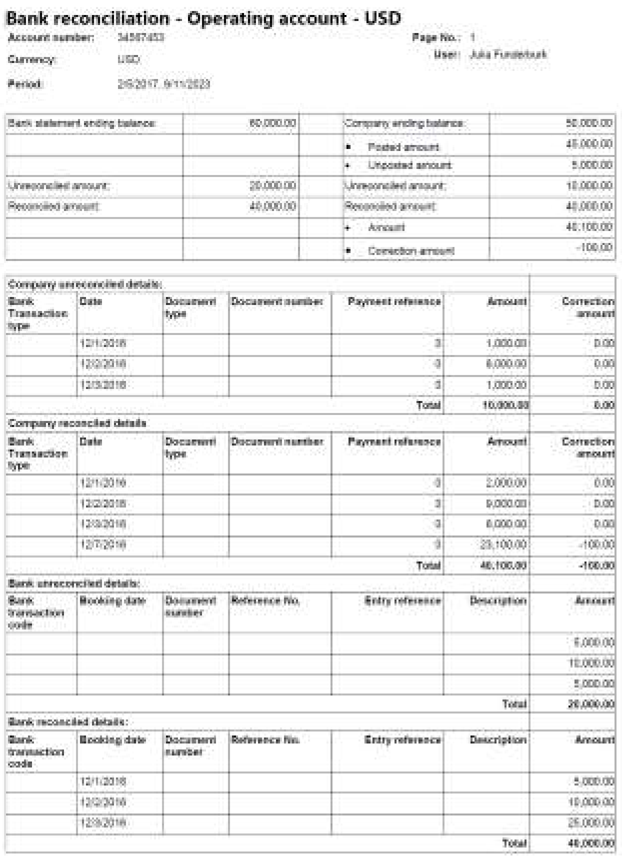
Dynamics 365 Finance offers an advanced bank reconciliation feature that helps businesses manage the bank reconciliation process more efficiently. Businesses benefit from increased automation and more functional capabilities, reducing the need for manual work and saving time for cash management clerks. By streamlining the bank reconciliation process, Dynamics 365 Finance helps businesses improve their financial management and ensure accurate reporting.

Feature details

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

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

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



Bank reconciliation - Operating account - USD

Account number: 34567453

Currency: USD

Period: 2/6/2017 9/11/2023

Page No.: 1

User: Julia Funderburk

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

Company unreconciled details:

Bank Transaction type	Date	Document type	Document number	Payment reference	Amount	Correction amount
	12/1/2018			3	1,000.00	0.00
	12/2/2018			3	8,000.00	0.00
	12/3/2018			3	1,000.00	0.00
				Total	10,000.00	0.00

Company reconciled details

Bank Transaction type	Date	Document type	Document number	Payment reference	Amount	Correction amount
	12/1/2018			3	2,000.00	0.00
	12/2/2018			3	9,000.00	0.00
	12/3/2018			3	6,000.00	0.00
	12/7/2018			3	23,100.00	-100.00
				Total	40,100.00	-100.00

Bank unreconciled details:

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

Bank reconciled details:

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

Feedback

Was this page helpful? Yes No

Automatically clear bridged transactions

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

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

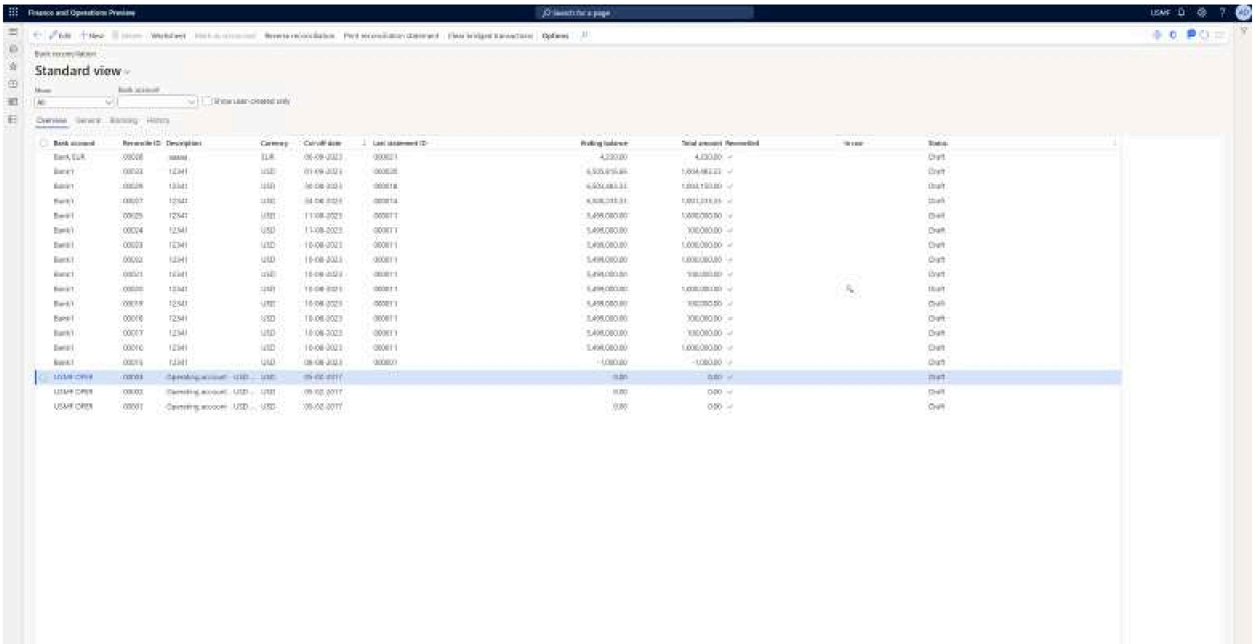
Feature details

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

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

This feature provides the following capabilities to automate the process:

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



See also

Clear bridging payments using advanced bank reconciliation (docs)

Feedback

Was this page helpful? Yes No

Correct receipt matching error in vendor invoices with Copilot

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

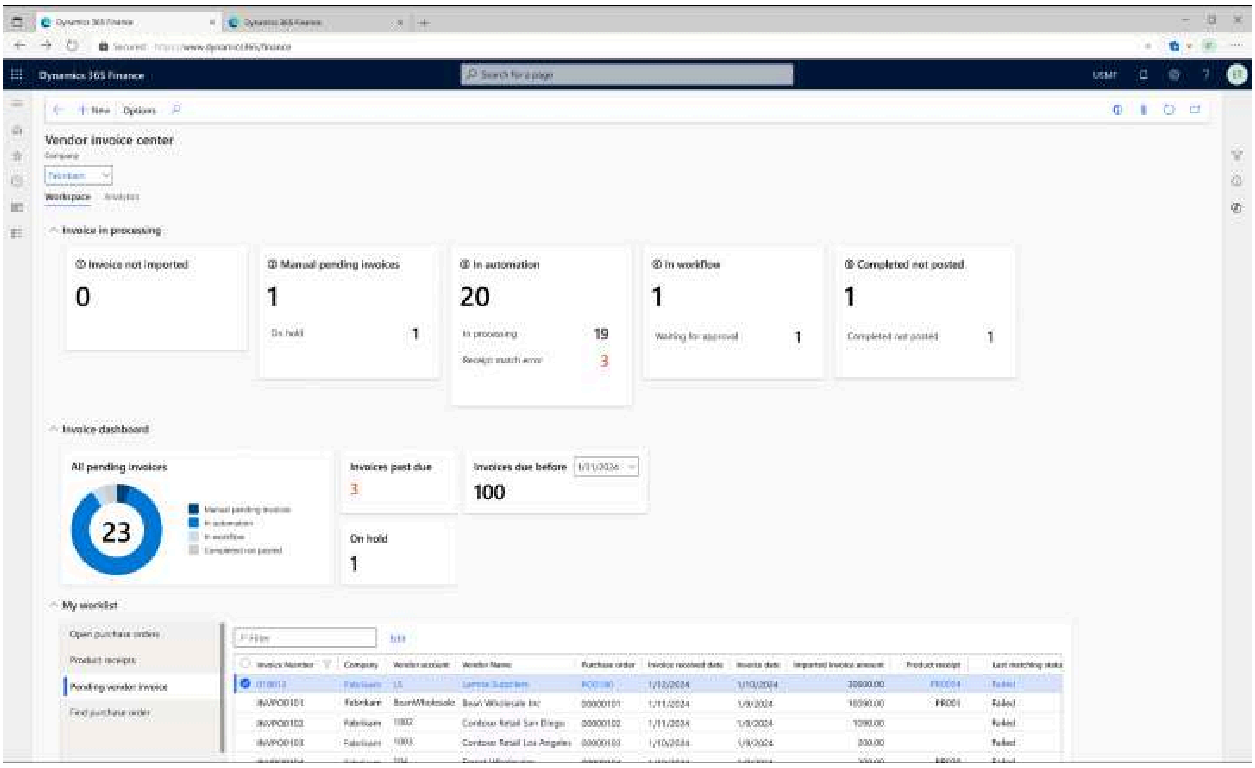
During the vendor invoice automation process within Dynamics 365 Finance, exceptions may arise at various stages of the process. The AP clerk may have to take many actions and search for data to make a correction. Copilot in the pending vendor invoice list and vendor invoice center eliminates the need for repeated and time-consuming navigation between the vendor invoice list and the detailed pending invoice page.

Feature details

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

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

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



Feedback

Was this page helpful? Yes No

Enable financial tags for purchase order invoicing

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

When the **Enable financial tags for purchase order invoicing** feature is enabled, customers can use the financial tag to track the subledger data with purchase order numbers, vendor names instead of using financial dimensions. This helps reduce the performance issue during the analysis phase.

Feature details

Financial tags supports user-defined fields across various transactions and financial documents in procurement-to-pay processing. Organizations can create and enter up to 20 customizable fields on transactions, stored on accounting entries. When the feature enabled, it applies to the following transactions and documents:

- Purchase order and accounting distributions on purchase orders
- Product receipt journal
- Pending vendor invoice and accounting distribution in pending vendor invoices

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

Feedback

Get batch log summarization of sales invoice copilot

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Users have an enhanced experience in reading batch logs. They'll get an AI-driven summary so they can answer questions about what is outstanding, what has failed, and why it failed. This will prevent users from contacting customer service and support for assistance.

Feature details

Batch logs contain critical information about the processing of transactions that finance users need to answer questions such as what is outstanding, what has failed and why. Today, the logs are hard to read as they are printed in a log type format, there is no filtering or summarization, and they are difficult to export to Excel. This feature will provide an easy-to-read view of the sales invoices in a batch, which allows the users to see what has failed and why. This lets the user debut and answer questions faster during critical business operations.

Feedback

Was this page helpful? Yes No

Improve bank account lifecycle management

Article • 07/16/2024

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2024	Feb 2025

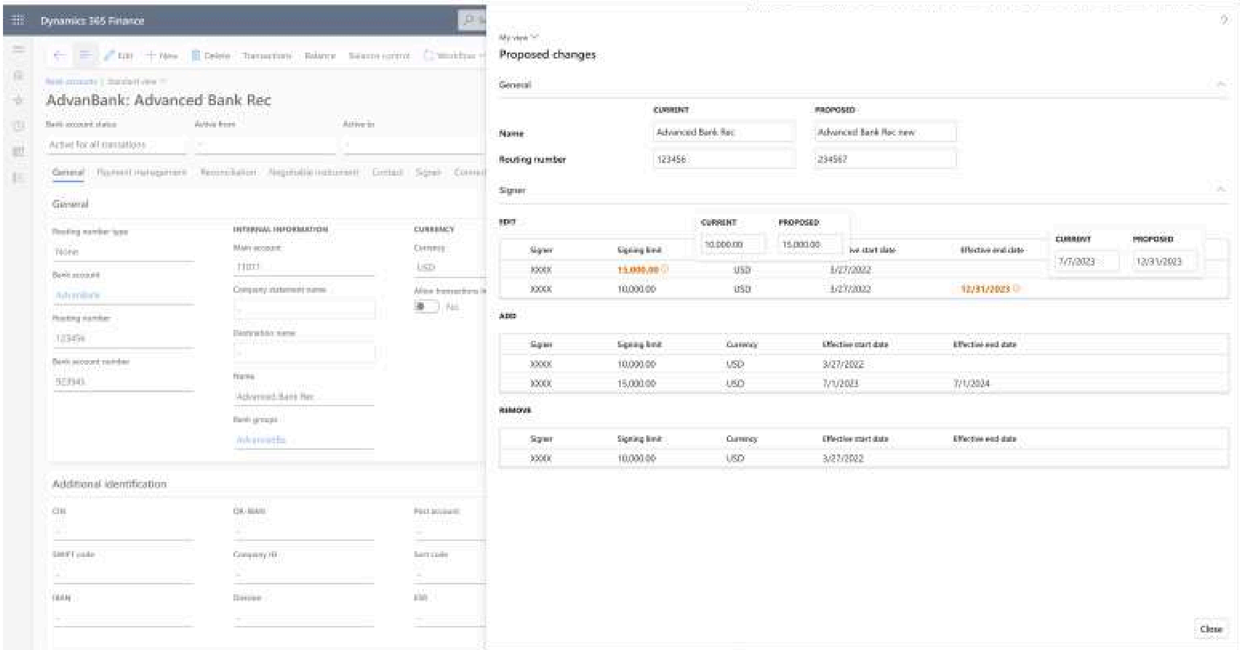
Business value

Bank accounts are the key master data of all banks' relevant transactions. They need to be well managed, including bank account openings, closings, changes, signature management, and periodical auditing. With this feature, there's a sophisticated bank account lifecycle management.

Feature details

This feature provides additional legal entity bank account lifecycle management capabilities in Dynamics 365 Finance:

- Approval workflow for bank account activation, modification, and deactivation.
- Configurable protected fields to determine whether bank account modification needs approval.
- Approver can review proposed changes on bank account.
- Bank account change history for auditing purposes.
- Additional signer master data on bank account.



Feedback

Was this page helpful? Yes No

Increase the length of invoice numbers

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

This feature increases the length of invoice numbers in Accounts payable, which gives you more flexibility to adapt invoice numbers in ways that better serve your organization's needs.

Feature details

Increasing the length of invoice numbers for vendors lets you extend specific extended data types based on unique business processes. Extending the data types that determine the length of vendor invoice numbers won't adversely affect other extended data types.

Feedback

Was this page helpful? Yes No

Make payments in advance with prepayment sales invoices

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

The prepayment sales invoice feature streamlines the invoicing process for customers who make prepayments (advance payments). It helps businesses manage their cash flow more effectively by accurately recording and tracking prepayments. Overall, the prepayment sales invoice optimizes financial operations, increases efficiency, reduces risk, and contributes to the overall success of the business.

Feature details

The prepayment invoice feature provides an option to issue an invoice against prepayment sales order lines. Payment is collected against a prepayment invoice before delivery of goods or services. Ultimately, the prepayment invoice is reconciled and settled with the final invoice. This makes sure that all payments are posted against an invoice.

Feedback

Was this page helpful? Yes No

Experience matching rule enhancements in advanced bank reconciliation

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Dynamics 365 Finance offers an advanced bank reconciliation feature that helps businesses manage the bank reconciliation process more efficiently. Businesses benefit from increased automation and more functional capabilities, reducing the need for manual work and saving time for cash management clerks. By streamlining the bank reconciliation process, Dynamics 365 Finance helps businesses improve their financial management and ensure accurate reporting.

Feature details

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

Advanced bank reconciliation in Dynamics 365 Finance helps businesses manage this process more efficiently. Within this feature, the existing matching rule in advanced bank reconciliation is enhanced with the following functions:

- Automatic post voucher

- Automatic post customer payment journal
- Automatic post vendor payment journal
- Automatic settle open customer invoices with bank statement lines

See also

Set up bank reconciliation matching rules (docs)

Feedback

Was this page helpful? Yes No

Reverse posted purchase order invoice

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

This feature is designed for accounts payable clerks who need to correct an incorrectly posted purchase order invoice. Previously, fixing this was a lengthy process, but now it automatically reverses the incorrect invoice and resets the purchase order status. This saves time and effort, streamlining the correction process and allowing you to post the correct invoice more efficiently.

Feature details

Currently, if a purchase order is posted incorrectly, the accounts payable clerks must go through several steps to correct it, which is time-consuming. They need to add a negative quantity line, post the product receipt, create and post a credit note invoice, then add a third line on the purchase order, post the receipt again, and finally create and post the correct invoice.

To address this, the new feature automatically reverses the posted purchase order invoice and resets the status of the purchase order. The status is reverted to either **Ordered** or **Received** depending on the parameter.

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/categories/?forum=16691718-61e2-e611-8101-5065f38b21f1&forumName=Dynamics%20365%20Finance .

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

Feedback

Was this page helpful? Yes No

Save time with automated cash application

Article • 07/16/2024

ⓘ Important

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Expand table

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

Business value

Dynamics 365 Finance offers an advanced bank reconciliation feature that helps businesses manage the bank reconciliation process more efficiently. Businesses can benefit from increased automation and more functional capabilities, reducing the need for manual work and saving time for cash management clerks. By streamlining the bank reconciliation process, Dynamics 365 Finance helps businesses improve their financial management and ensure accurate reporting.

Feature details

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

Advanced bank reconciliation in Dynamics 365 Finance can help businesses manage this process more efficiently. The following functions will be available in advanced bank reconciliation to automate the cash application:

- Generate customer payment journal from bank reconciliation worksheet.

- Generate vendor payment journal from bank reconciliation worksheet.
- Post voucher from bank reconciliation worksheet with redesigned user experience.
- Settle open customer invoices with bank statement lines.

See also

Cash application in advanced bank reconciliation (docs)

Feedback

Was this page helpful? Yes No

Use copilot to default financial tags

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

The default engine for tags allows an organization to define its own rules to default financial tags. Rules can be defined per transaction entry point (general journal, free text invoice, PO, vendor invoice journal, and so on), per financial tag and per transaction level (header, lines, account, offset account, distributions). The rules can also be written using three different options. First, natural language can be entered into Copilot, which will convert them into the technical rule. The rule can be defined with an expression builder or the technical rule itself can be entered.

Before activating a rule, they can be simulated against posted transactions to preview the results of the rule. The posted transaction isn't updated, but simply used for validation of the rule.

For the first release, defaulting rules can be created for a subset of transaction entry points, such as the general journal. Support for additional journals and documents will continue to be added with each release.

Feedback

Was this page helpful? Yes No

Use Copilot to handle vendor invoice exceptions

Article • 07/16/2024

ⓘ Important

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

Expand table

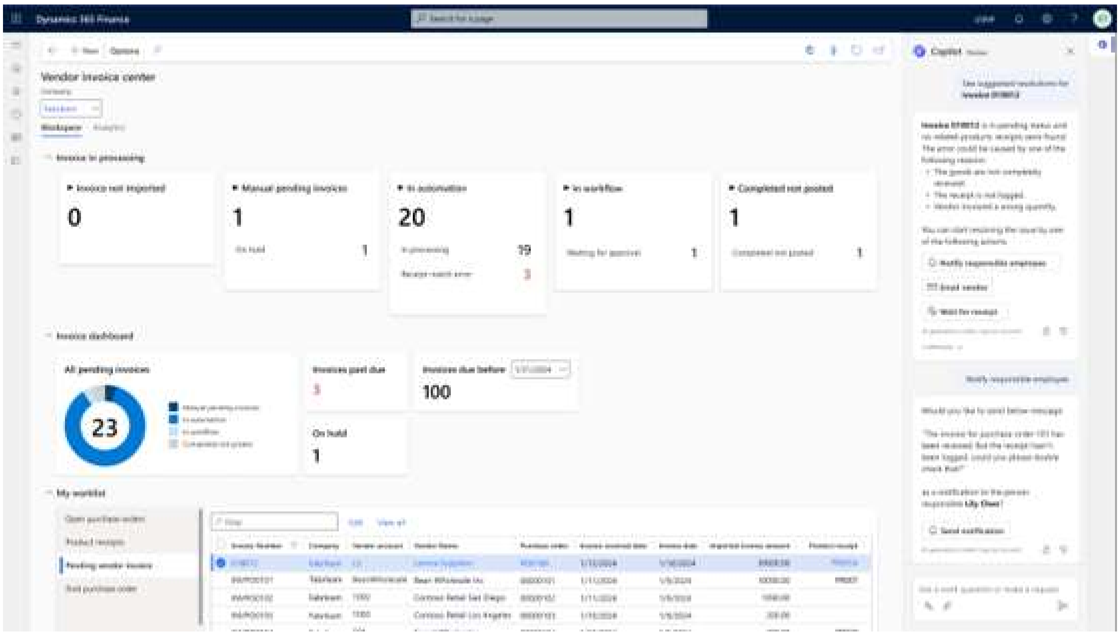
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Oct 2024	-

Business value

In invoice automation, exceptions may occur at different stages. Copilot for vendor invoice exception handling can greatly reduce AP clerk's manual effort on analyzing root cause for different invoice exceptions, thus reduce operation cost in Finance team. So, finance teams will be able to work on more strategical relevant tasks.

Feature details

Copilot can assist AP clerks in identifying and rectifying various invoice errors, including receipt matching errors, prepayment application error, workflow submission error, accounting distributions, duplicate invoice number, invalid bank account errors, and more.



Feedback

Was this page helpful? Yes No

Use document types for financial journals

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Today, the financial journals are extremely flexible, which can present challenges when trying to interpret the intention of a voucher entered within a journal. For example, when a Vendor/Ledger transaction is entered in the General journal, what type of transaction is that? For most journals, the document type is known and can default, but the user can also use this field in the General journal to identify the type of transaction. This will be used for improved transaction entry (rules defined around what is allowed/not allowed), and improved reporting.

Feature details

The Document type will be introduced in all financial journals to allow an organization to better identify the type of transaction. This feature adds key metadata for journal transaction entry, providing additional structure and rules-based processing to be applied to the transactions. For example, the document type will eventually be used to define rules for what account types can exist within the document.

In the future, rules can be defined to prevent users from entering incorrect data that cause issues due to **One voucher**.

Feedback

Was this page helpful? Yes No

Globalization Studio

Article • 07/16/2024

ⓘ Important

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

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

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

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

For more information on Globalization Studio, go to Globalization Studio documentation.

Feedback

Was this page helpful? Yes No

Convert Excel business documents to PDF

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

This feature enables local PDF conversion for Excel business documents. It allows Local Business Data conversion along with more reliability of the conversion overall.

Feature details

When you configure ER destinations for business documents in Microsoft Excel format, the conversion performs outside the current Finance instance by default. You can enable the **"Utilize application resources to perform CBD documents conversion from Excel to PDF format feature"** to convert generated Word documents to PDF format locally by using application server resources in the current Finance instance.

Feedback

Was this page helpful? Yes No

Expand localization for LATAM countries - Bolivia

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.

Feature details

We continue to extend the scope of the supported countries in LATAM to address the needs of multiple global and local customers. Out-of-the box localization for Bolivia is available. While the country localization will provide the following capabilities, not all of them might be available for preview.

Country-specific features for Bolivia

- Invoicing
  - Electronic Invoicing
    - Electronic Invoice format
  - Other invoicing

        - Invoice layout for sales order invoice, free text invoice, and project invoice

- Reporting
    - General ledger and tax reports
        - Declaration reports general ledger
        - Declaration reports trial balance
        - Declaration reports standard VAT purchases book
        - Declaration reports standard VAT sales book
        - Declaration reports VAT purchases book - Credit and Debit Memo
        - File export Archivo DaVinci IVAT Purchases - Credit and Debit Memo
        - Declaration Reports VAT Sales Book - Credit and Debit Memo
        - File export Archivo DaVinci IVAT Sales – Credit and Debit Memo
        - File export Archivo DaVinci - VAT Purchases
        - File export Archivo DaVinci - VAT Sales
        - File export Bank Book - Purchase
        - File export Bank Book - Sales

- Tax
    - Fiscal document
        - State identification
        - CA Number

Feedback

Expand localization for LATAM countries - Dominican Republic

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.

Feature details

We continue to extend the scope of the supported countries in LATAM to address the needs of multiple global and local customers. Out-of-the box localization for Dominican Republic is available. While the country localization will provide the following capabilities, not all of them might be available for preview.

Country-specific features for Dominican Republic

- Invoicing
  - Electronic Invoicing
    - Electronic Invoice format
  - Other invoicing

    - Invoice layout for sales order invoice, free text invoice, and project invoice

- Reporting
  - General ledger and tax reports
    - Declaration reports general ledger
    - Declaration reports trial balance
    - File export Report with Purchases of Goods and Services to issue Report 606
    - File export Report with the Sales of Goods and Services to issue Report 607
    - File export Report with voided receipts to issue report 608

Feedback

Expand localization for LATAM countries - Ecuador

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.

Feature details

We continue to extend the scope of the supported countries in LATAM to address the needs of multiple global and local customers. Out-of-the box localization for Ecuador is available. While the country localization will provide the following capabilities, not all of them might be available for preview.

Country-specific features for Ecuador

- Invoicing
  - Electronic Invoicing
    - Electronic Invoice format
  - Other invoicing

    - Invoice layout for sales order invoice, free text invoice, and project invoice

- Reporting
  - General ledger and tax reports
    - Declaration reports general ledger
    - Declaration reports trial balance
    - Declaration reports sales
    - Declaration reports purchases: Detailed
    - Declaration reports purchases: Payment Methods
    - Declaration reports purchases: Refunds
    - Declaration reports purchases: Withholdings
    - File export ATS

Feedback

Was this page helpful? Yes No

Expand localization for LATAM countries - Peru

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.

Feature details

We continue to extend the scope of the supported countries in LATAM to address the needs of multiple global and local customers. Out-of-the box localization for Peru is available. While the country localization will provide the following capabilities, not all of them might be available for preview.

Country-specific features for Peru

- Invoicing
  - Electronic Invoicing
    - Electronic Invoice format
  - Other invoicing

        - Invoice layout for sales order invoice, free text invoice, and project invoice

- Reporting
    - General ledger and tax reports
        - Declaration Reports Cash and Bank Ledger
        - Declaration Reports General Ledger
        - Declaration Reports Trial Balance
        - Declaration Reports Purchases Register Report
        - Declaration Reports Sales Register Report
        - File export Annual declaration of operations with third parties (DAOT): Purchases and Sales
        - File export Electronic Journal Book
        - File export Electronic Ledger
        - File export Electronic Purchase Book
        - File export Electronic Sales Book
        - File export Withholdings File - SUNAT

Feedback

Expand localization for LATAM countries - Venezuela

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Tax compliance requirements are complex and change frequently. Companies are looking for more out-of-the-box geographic coverage and tax compliance automation from Microsoft. Shipping localizations for additional LATAM countries significantly extends our country support in LATAM beyond our current support and provides customers with more consistent out-of-the-box regulatory compliance coverage in multiple areas including tax reporting and electronic invoicing.

Feature details

We continue to extend the scope of the supported countries in LATAM to address the needs of multiple global and local customers. Out-of-the box localization for Venezuela is available. While the country localization will provide the following capabilities, not all of them might be available for preview.

Country-specific features for Venezuela

- Invoicing
  - Electronic Invoicing
    - Electronic Invoice format
  - Other invoicing

- Invoice layout for sales order invoice, free text invoice, and project invoice

- Reporting
  - General ledger and tax reports
    - Declaration Reports General Ledger Book (Libro Diario)
    - Declaration Reports ISLR Withholdings Book
    - Declaration Reports Purchases VAT Book
    - Declaration Reports Relationship purchases Book
    - Declaration Reports Relationship Sales Book
    - Declaration Reports Sales VAT Book
    - File export ISLR Withholdings
    - File export VAT withholdings

Feedback

Experience updates to the Interfactura API for e-invoicing in Mexico

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Interfactura provides the 'last mile' connection to the government e-invoicing platform in Mexico and is transitioning its integration from a web service to a new API platform. This integration is essential for the certification of the CFDI electronic invoice document, a system that is integral to Mexico's commercial transactions. This partnership with Interfactura PAC web services underscores Microsoft Dynamics 365 Finance's commitment to supporting businesses in Mexico, facilitating seamless electronic invoicing in line with the country's fiscal regulations. It's a testament to our dedication to providing robust, compliant solutions for our users.

Feature details

Electronic invoicing is the primary billing model in Mexico, where it is used in 100% of commercial transactions. This system has become a tool to improve fiscal control and mitigate high evasion rates. Countries such as Mexico have dedicated laws to ensure the authenticity of these documents via authorized trust service providers, who act like electronic notaries, stamping documents and applying electronic time seals to guarantee their long-term integrity and legal weight.

The e-invoice in Mexico, known as the CFDI (Comprobante Fiscal Digital por Internet), is well established throughout Mexican society. Created in 2004, it has been subject to updates and changes over the years to ensure a better user experience for taxpayers and to correct issues detected over time. Issuers must digitally sign all invoices using a unique system that involves the encryption of the "original string" data made up of a series of characters extracted from defined fields. An additional electronic signature, called a "Stamp" must be generated by an SAT-accredited (Servicio de Administración Tributaria, the Tax administration Service) third-party trust service provider called a PAC (Proveedores autorizados de certificación, an authorized digital signature service provider), after the invoice content and structure has been validated. The PAC stamp makes the document valid for tax purposes. All tax receipts must be stamped by a PAC, which then reports the document to the SAT online. The SAT will subsequently make it available to the issuer and recipient in their respective tax mailbox.

Microsoft Dynamics 365 Finance supports out-of-the-box integration with Interfactura PAC web services, a key player in Mexico’s electronic invoicing system. This integration is essential for the certification of the CFDI electronic invoice document, a system that is integral to Mexico’s commercial transactions.

Feedback

Get support for new legislation for e-invoicing in Spain

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

The extension of compulsory electronic invoicing to all relationships between companies and professionals in Spain have a clear impact on the digitalization. With this feature, all businesses can comply with the current invoicing tax compliance obligations.

Feature details

In the absence of the publication of the technical regulation governing the new electronic invoicing system in Spain, the law provides for the following obligations in the private sector that will be satisfied with this feature:

- Ability to issue, send, and receive electronic invoices.
- Inform the status of invoices.
- Guarantee possibility to exchange electronic invoices between technological solutions or platforms.
- Ability to access, view, import, and visualize the electronic invoice for the recipients.

Feedback

Was this page helpful? Yes No

Import vendor electronic invoices in Germany

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Importing vendor electronic invoices enables global and local customers who deploy Dynamics 365 Finance in Germany to automate receiving of incoming invoices in electronic format and to meet federal requirements in this area being mandated starting from 01 January 2025.

Feature details

With the new feature of importing vendor invoices, customers can automate handling of incoming electronic invoices received from their vendors in German-specific "**XRechnung**" format and import it into pending vendor invoices in Dynamics 365 Finance.

The feature complements issuing invoices in electronic "**XRechnung**" format. For more information, go to Customer electronic invoices in Germany.

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

Feedback

Was this page helpful? Yes No

Use Electronic invoicing Denmark OIOUBL format version 3.0

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Global and local customers who deploy Dynamics 365 Finance and Dynamics 365 Supply Chain Management in Denmark can access a configurable electronic invoice in an updated OIOUBL format that meets local Danish requirements.

Feature details

This feature satisfies the Denmark-specific requirements for implementing OIOUBL format version 3.0. You can export invoices and credit notes created from sales orders, free text invoices, or project invoice proposals into XML format that complies with the updated Danish electronic invoicing standards. Version 3.0 of the OIOUBL format must be implemented by May 2025. There will be a transition period up to November 2025 when this new format version will coexist with the previous OIOUBL format version.

Feedback

Was this page helpful? Yes No

Use the regulatory compliance immersive homepage

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

The regulatory compliance immersive homepage provides users with visibility into regulatory compliance powered by Copilot. It prioritizes and suggests actions that users need to take to maintain system compliance, especially in instances where Copilot requires user confirmation. Depending on the user's role, the regulatory compliance immersive homepage presents necessary actions to manage existing or upcoming regulatory alerts and updates, address exceptions in tax automation, and keep up with the regulatory calendar for tax report submissions, among other tasks.

Feature details

The regulatory compliance immersive homepage provides users with visibility into regulatory compliance powered by Copilot. It outlines necessary actions for managing regulatory alerts, updates, tax automation exceptions, and other tasks.

The initial release of Regulatory compliance immersive homepage offers users the following capabilities:

- Visibility of compliance with legislation in the countries and regions where the customer operates.
- Regulatory alerts for upcoming legislative changes and the required actions.

- Updates on forthcoming legislative changes and the associated actions needed.
- Suggested actions to handle exceptions during agent-led tax automation, as requested by Copilot.
- A regulatory calendar for tax reporting in the countries and regions where the customer operates.

Feedback

Plan and prepare for Microsoft Copilot for Finance in 2024 release wave 2

Article • 07/16/2024

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

Overview

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

Microsoft Copilot for Finance accelerates time-to-impact for finance professionals by surfacing insights that support strategic decision-making and reduce the time spent on manual, repetitive work. Copilot empowers finance professionals to stay in the flow of work by seamlessly connecting productivity tools, such as Microsoft Excel, with existing financial systems, such as ERP, to support critical business processes and generate insights and actions in real-time.

With the assistance of Microsoft Copilot for Finance, common financial tasks can now be completed in Excel, Outlook, and Teams to reduce the need to sign in to ERP systems, while still maintaining financial data integrity and compliance. Copilot for Finance is integrated natively within Dynamics 365 Finance ERP, Business Central, and SAP. It is independently adaptable to provide the flexibility to integrate with existing investments in third-party ERP and finance solutions like Oracle.

Microsoft Copilot for Finance will be released for global availability as a part of 2024 release wave 2. With this release, Copilot for Finance will support the collections process, variance analysis, and enable more streamlined data reconciliation.

Users can connect to Dynamics 365 Finance, Business Central, and SAP directly from Outlook for easy access to valuable insights from customer data in ERP. Users can get help when crafting email responses and save communication summaries and action items for scaled impact. Partners and customers can create connectors to other ERP systems and use them with Copilot for Finance in Outlook.

Copilot for Finance offers experiences in Teams, supporting collections calls using Teams telephony capabilities, with suggested conversation scripts based on company-defined procedures and customer financial information. Action items and follow-ups can be automatically recorded in the financial system.

In Excel, users get Copilot support to reconcile their financial data and analyze variances in financial reports. Reconciliation experiences include intelligent prompts when comparing financial data structures, the ability to match the records with similar data, assisted data sanitization and preparation routines, reconciliation report creation, auto-generated insights, and suggestions on possible ways to address discrepancies. The reconciliation report summary and documented action items are automatically prepared and available to save for future reference and audit.

Variance analysis is available in pivot tables with time-series data and offers capabilities both to identify variances using criteria the user can input using natural language, and detailed analysis of underlying data explaining key drivers for these variances. Users can fine-tune variance analysis results using multi-turn prompts, add additional insights, collaborate and share analysis results with stakeholders using custom report formats.

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 empowers 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.

Microsoft Teams experiences
Microsoft Copilot for Finance experiences in Microsoft Teams enables finance professionals to collaborate and communicate on financial data using Teams. Finance professionals will be able to access and interact with customer data in ERP system directly from the Teams call conversation. They will get help when organizing and planning collection activities and will be able to save communication summaries and action items back into their ERP system. Finance professionals will also be able to collaborate on macro-economic topics using Teams. Copilot for Finance will provide the user with summaries of external macroeconomic signals as well as automated monitoring, including preparing and sharing stakeholder reports on macroeconomy trends.

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

Check out the release plan

For application administrators

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

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

Get the most out of Microsoft Copilot for Finance

Expand table

Helpful links	Description
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.

Feedback

Was this page helpful? Yes No

What's new and planned for Microsoft Copilot for Finance

Article • 07/16/2024

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

- For a list of the previous wave's release plans, go to 2024 release wave 1 plan.

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

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

Microsoft Excel experiences

Microsoft Copilot for Finance enables finance professionals to perform their tasks in Microsoft Excel.

Expand table

Feature	Enabled for	Public preview	General availability
Use Copilot assisted reconciliation data prep and selection	Users by admins, makers, or analysts	-	Oct 2024
Use Copilot extended reconciliation parametrization	Users by admins, makers, or analysts	-	Oct 2024
Use supplementary data sources to analyze variances in Excel	Users by admins, makers, or analysts	-	Oct 2024
Collaborate and share out of variance analyses in Excel	Users by admins, makers, or analysts	-	Oct 2024
Get financial data into Excel	Users by admins, makers, or analysts	-	Oct 2024

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
Use Copilot for Finance Extensibility	Users by admins, makers, or analysts	Dec 2024	Mar 2025

Microsoft Teams experiences

Microsoft Copilot for Finance enables finance professionals to collaborate and communicate on financial data using Microsoft Teams.

Expand table

Feature	Enabled for	Public preview	General availability
Manage accounts receivable in Teams	Users by admins, makers, or analysts	Jan 2025	Mar 2025
Use Copilot for Finance macroeconomic analysis	Users by admins, makers, or analysts	Jan 2025	Mar 2025

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ .

Description of **Enabled for** column values:

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

their users.

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

Feedback

Was this page helpful? Yes No

Microsoft Excel experiences

Article • 07/16/2024

ⓘ Important

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

Microsoft Copilot for Finance helps finance professionals work with financial data in Microsoft Excel without jeopardizing financial data integrity in ERP systems. Finance professionals will be able to reconcile their financial data with next-generation AI support from Copilot for Finance to compare financial data structures, create reconciliation reports, and troubleshoot and correct discrepancies.

Feedback

Was this page helpful? Yes No

Collaborate and share out of variance analyses in Excel

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Microsoft Copilot for Finance enables the next level of productivity in analyzing variances with in-process collaboration and easy sharing of results in presentation-ready form.

Feature details

Microsoft Copilot for Finance will add the following capabilities for variance analysis:

- Collaboration and sharing of variance reports

Geographic areas

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

- United States

Feedback

Get financial data into Excel

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Microsoft Copilot for Finance enables you to automate data-gathering routines to simplify your ETL processes.

Feature details

Microsoft Copilot for Finance will add the following capabilities for obtaining financial data:

- Advanced connectors to financial systems
- Adding data from financial systems using natural language

Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Use Copilot assisted reconciliation data prep and selection

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

With Microsoft Copilot for Finance, your pre-reconciliation stage is set to transform, delivering unparalleled value with the following features:

Data Preparation Excellence: Empower your reconciliation process with Copilot's guided data sanitization capabilities. Seamlessly prepare your data for reconciliation with precision and efficiency, ensuring the integrity and accuracy of your source data. By leveraging Copilot's assistance, eliminate data issues in the ETL process, allowing you to embark on reconciliation with confidence.

Streamlined Data Selection: Say goodbye to manual data hunting and selection. Copilot revolutionizes the process with its automated detection and utilization of newly appearing reconciliation data. Experience a streamlined selection process that optimizes efficiency and effectiveness, saving valuable time and resources.

Feature details

Microsoft Copilot for Finance introduces enhanced capabilities for assistance in pre-reconciliation staff, offering the following features:

- Data Preparation: Utilize Copilot's assisted data sanitization process for efficient and error-free reconciliation preparation, ensuring source data integrity and

accuracy.
- Data Selection: Benefit from streamlined auto-detection and utilization of newly appearing reconciliation data, optimizing the selection process for enhanced efficiency and effectiveness.

Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Use Copilot extended reconciliation parametrization

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Your reconciliation process with Microsoft Copilot for Finance now benefits from your tailored transaction categorization, adjusting for comparison accuracy to match your exact requirements and state of data you reconcile, maintaining clarity in reconciliation reporting with your defined data presentation.

Feature details

Microsoft Copilot for Finance introduces enhanced capabilities for reconciliation process parametrization, offering the following features:

- Customizable Tolerance Definition: Tailor your reconciliation to your business process specifics by defining allowed tolerance levels. This feature empowers you to categorize transactions accurately, ensuring alignment with your unique operational requirements.
- Numeric and Monetary Value Parameterization: Take full control of numeric and monetary values with Copilot's parametrization options. Whether it's adjusting values to absolute for comparison or modifying signs, you can customize your settings to match your exact needs and the state of the raw data.
- Precision and Presentation Settings: Fine-tune your reconciliation with configurable floating precision, rounding rules, and data presentation options. This level of

parametrization allows you to maintain consistency and clarity in your financial reporting.

Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Use supplementary data sources to analyze variances in Excel

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Microsoft Copilot for Finance unlocks harnessing additional data sources for super-targeted and insightful analysis results.

Feature details

Microsoft Copilot for Finance will add the following capabilities for variance analysis:

- Supplementary data sources

Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Microsoft Outlook experiences

Article • 07/16/2024

ⓘ Important

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

Microsoft Copilot for Finance experiences in Microsoft Outlook empowers accounts receivable employees to communicate effectively with their customers. Finance professionals will be able to connect to their ERP system directly from Outlook while communicating with their customers, get valuable insights into customer data that's in ERP, get help when crafting email responses, and save communication summaries and action items back into their ERP system.

Feedback

Was this page helpful? Yes No

Use Copilot for Finance Extensibility

Article • 07/16/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Dec 2024	Mar 2025

Business value

ERP systems typically require customization to meet unique business needs. These customizations can involve changes to the user interface, reporting, and business logic. However, this flexibility complicates integration with other systems, requiring product and specific implementation knowledge.

Simplifying the support of extensibility allows for a high degree of customization, enabling businesses to adapt the application to their unique needs and thereby enhancing their overall performance. This flexibility improves business outcomes and results in more complete end-to-end scenario completion, and improved workflows, which leads to streamlined business operations.

Feature details

Through Copilot Studio, this feature will enable makers the ability to:

- Define the entities and fields that can be interacted with in Copilot for Finance. This will include out-of-box entities and custom entities retrieved from custom connectors.
- Define custom plugin interactions with each entity.
- Specify connected data sources to be used in data reconciliation.

Feedback

Was this page helpful? Yes No

Microsoft Teams experiences

Article • 07/16/2024

ⓘ Important

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

Microsoft Copilot for Finance experiences in Microsoft Teams enables finance professionals to collaborate and communicate on financial data using Teams. Finance professionals will be able to access and interact with customer data in the ERP system directly from the Teams call conversation. They will get help when organizing and planning collection activities and will be able to save communication summaries and action items back into their ERP system. Finance professionals will also be able to collaborate on macro-economic topics using Teams. Copilot for Finance will provide the user with summaries of external macroeconomic signals as well as automated monitoring, including preparing and sharing stakeholder reports on macroeconomy trends.

Feedback

Was this page helpful? Yes No

Manage accounts receivable in Teams

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Collections software plays a vital role in modern business operations, streamlining the process of recovering outstanding debts. Some of the major advantages include:

- **Streamlined workflows**: Effective collections software brings all key data elements needed into a single pane of glass and empowers the user to execute the key end-to-end processes without bouncing between multiple applications.
- **Enhanced communication**: By providing a centralized platform for managing emails and phone calls, customers can ensure all interactions are tracked and accessible by authorized personnel, promoting increased transparency.
- **Increased compliance**: Copilot for Finance will be built on compliant, secure platform technology that allows customers to better comply with industry regulations and legal requirements.
- **Reporting and analytics**: Copilot for Finance provides accounts receivable managers the means to better measure the effectiveness of their copilot initiatives by offering insights into team performance, collection trends, and customer behavior. This data-driven approach enables teams to identify areas for improvement, optimize strategies, and make better business decisions.

Collections teams can specifically benefit from the adoption of these tools in the following ways:

- **Reduced Days Sales Outstanding (DSOs)**: By being prompt in responding to customer inquiries, collections teams can reduce days sales outstanding by avoiding delays when customers reach out for key documents.

- **Reduced delinquency rates**: By automating reminders and follow-up tasks, collections software can significantly reduce the time it takes to collect debts, leading to faster cash flow and improved financial performance.
- **Enhanced resource productivity**: By automating routine tasks and improving communication, collections software allows agents to handle more cases and resolve them faster, boosting overall team productivity.
- **Improved customer service**: Collections software fosters a more positive customer experience by facilitating personalized communication and ensuring timely resolution of inquiries.

Feature details

Copilot for Finance is a game-changer for collections coordinators, offering a suite of capabilities that streamline and enhance the collections process. Copilot for Finance provides an immersive experience in Microsoft Teams that offers the following capabilities needed to decrease days of outstanding sales and improve cash flow.

- **Worklist Items**: This feature will display the list of cases that the collections coordinator needs to work on, sorted by priority, urgency, and status. Each item will include details of the associated customer, the invoice, and the relevant correspondence details.
- **Pre-Call Preparation**: Enriched with generative AI, collections coordinators will be provided with call scripts to prepare for calls and to support the customers during the calls.
- **Copilot Dialing Support**: During customer calls, collections coordinators will be able to interact with Copilot for Finance to gain specific customer insight and take action on key scenarios which would typically require context switching to the ERP.
- **Post-Call Support**: This feature will provide the ability to store call summaries, transcripts, and calls in Microsoft Dataverse. It will also recommend the next best actions.

Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Use Copilot for Finance macroeconomic analysis

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Through Microsoft Copilot for Finance, corporate financial leaders can leverage generative AI to provide meaningful, timely summarizations of macroeconomic conditions from multiple, yet selective, market data and sources to optimize their investment and business decisions. Ever-changing conditions require consistent and constant monitoring of a variety of market-driving areas and themes that impact capital investments.

Producing impactful analyses involves analyzing and delivering clear insights from a volume and matrix of content (geos, themes, industries, government, market indices, etc.). The necessary collaboration and effort are often challenging to deliver a result that is effective in content within the window of decision-making opportunity.

The effort required can result in limiting sources, less-than-optimal reactions to sudden macroeconomic events, an inability to monitor trends and themes, and keeping stakeholders informed in real-time or near-real time.

Microsoft Copilot for Finance can help customers broaden sources, deliver more fine-tuned insights, and stay informed in real time. Copilot for Finance would optimize the monitoring of macroeconomic signals. Through the collaborative nature of Teams, Copilot for Finance can create macro-economic, topic-driven libraries easily contributed to, and accessible, by teams such as Treasury and other senior financial leadership. A team's experience also provides a centralized space for stakeholder reports, general updates on macroeconomic conditions, and late-breaking news that impacts capital markets.

Feature details

Microsoft Copilot for Finance will support the following capabilities for macroeconomic analysis:

- Finance team collaboration on macroeconomic topics.
- Customizable macroeconomic topics library.
- AI monitoring and summarizing external macroeconomic signals.
- Preparing and sharing stakeholder reports on macroeconomic trends.

Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Supply Chain Management in 2024 release wave 2

Article • 07/16/2024

ⓘ **Important**

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

Overview

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

Dynamics 365 Supply Chain Management provides capabilities for end-to-end processes that manufacturers, distributors, consumer product groups, and retailers require to meet their supply chain needs. Functionality ranges from product information management, forecasting, planning, inventory, sales, and procurement to complex manufacturing, asset maintenance, warehousing, transportation management, and costing.

This release wave focuses on copilots in three areas of plan-to-deliver e2e processes: planning, procurement, and manufacturing-traceability. We will improve Planning Optimization to calculate capable-to-promise (CTP) for sales orders faster and without waiting for the next master planning run. Demand planners can use forecast models with external signals to increase accuracy. We will also continue working to improve and expand business processes to help companies deal with complex business environments.

Investment areas

Copilot and AI innovation
Dynamics 365 Supply Chain Management provides a rich set of capabilities for supporting organizations' business processes with innovative, in-product, AI-based features that empower users to rapidly unlock the full potential of Supply Chain Management.

Inventory and logistics
The inventory and logistics capabilities of Dynamics 365 Supply Chain Management enable businesses to manage their sales and fulfillment processes efficiently while ensuring inventory availability that matches the desired service levels. These capabilities help businesses gain more visibility, efficiency, and resiliency in their supply chain operations.

Planning
Demand planning is powered by best-in-class, out-of-the-box forecast models, immersive user experiences, intelligent reports, and analytics. It empowers organizations to build an agile, resilient, and sustainable demand planning practice that's fueled by intelligence and collaboration. In-memory supply planning offers performance and scalability to get near real-time insights into requirements changes with material requirements planning and production scheduling.

Procurement
Procurement and sourcing cover all steps from identifying a need for products and services, through procurement, receipt, invoicing, and processing payments with vendors. Procurement processes can be configured toward specific business needs by defining purchasing policies and workflows.

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

Check out the release plan

For application administrators

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

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

Get the most out of Supply Chain Management

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Supply Chain Management.
Product documentation	Find documentation for Supply Chain Management.

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

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

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Supply Chain Management

Article • 07/16/2024

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

- For a list of the previous wave's release plans, go to 2024 release wave 1 plan.

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

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

Copilot and AI innovation

Reimagine the Dynamics 365 Supply Chain Management experience by leveraging generative AI.

Expand table

Feature	Enabled for	Public preview	General availability
Customize the conversational help provided by Copilot	Users, automatically	Oct 2024	-
Keep conversations going with AI-generated follow-ups	Users, automatically	Oct 2024	-

Inventory and logistics

Inventory and logistics features help organizations gain visibility and resiliency in their supply chain.

Expand table

Feature	Enabled for	Public preview	General availability
Add transactions when recalculating weighted average	Users by admins, makers, or analysts	Jul 2024	Mar 2025
Trace and solve quality issues with Copilot	Users by admins, makers, or analysts	Mar 2025	-

Planning

Demand and supply planning include forecasting future customer demand for your products or services and managing supply to fulfill it.

Expand table

Feature	Enabled for	Public preview	General availability
Calculate capable-to-promise quantities in real time	Users by admins, makers, or analysts	Oct 2024	Oct 2024
Enhance your demand forecasting and planning	Users by admins, makers, or analysts	-	Jan 2025

Procurement

Procurement and sourcing capabilities help organizations increase resiliency in their supply chain.

Expand table

Feature	Enabled for	Public preview	General availability
Manage supplier relationships and improve collaboration	Users by admins, makers, or analysts	Feb 2025	-

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Feedback

Copilot and AI innovation

Article • 07/16/2024

ⓘ Important

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

Dynamics 365 Supply Chain Management provides a rich set of capabilities for supporting organizations' business processes with innovative, in-product, AI-based features that empower users to rapidly unlock the full potential of Supply Chain Management.

Feedback

Was this page helpful? Yes No

Customize the conversational help provided by Copilot

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Copilot empowers users by providing tailored, precise help and guidance on how to use the product and accomplish daily tasks. Admins can now customize the source information indexed by Copilot to ensure that the guidance provided is targeted and relevant for your business. This allows for a more personalized and accurate support experience because the guidance is based on information specific to your company's context and needs.

Feature details

Admins can now add custom help content that Copilot will index together with the standard help content for finance and operations apps, thereby enabling Copilot to provide conversational help that's specific for your company's business processes and system customizations.

Supplementary help documents uploaded to generative answers in Copilot Studio expand on the knowledge that Copilot uses to answer questions submitted through the Copilot side car for finance and operations apps. Supported document formats include PDF and Microsoft Word.

Geographic areas

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

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

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

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Feedback

Keep conversations going with AI-generated follow-ups

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Finance and operations apps already offer innovative in-product, AI-based, contextual help with Copilot. Now, you can easily keep the conversation going with a single click, by selecting among a short list of likely follow-up questions that are automatically generated by Copilot based on your previous queries. Just select a question to receive related information without needing to formulate a new query, which makes the process of learning how to use the application more efficient and intuitive.

Feature details

The conversational help and guidance experience in Microsoft finance and operations apps uses Copilot to make it fast and easy for you to learn how to work with your app. Copilot accepts natural-language queries and returns conversational results. Now, Copilot can also provide a list of likely follow-up questions to help you keep the conversation going. All you need to do is select a question to instantly see more results.

This feature runs in the Copilot sidecar user interface and is expected to support many types of searches that are available in the sidecar. It uses AI to generate the suggested questions, which it displays as a list of clickable items. When you ask a question, Copilot analyzes it and presents its natural-language response, and then adds a list of related questions that other users typically ask after a similar search.

By integrating this feature into the generative help and guidance experience, all users benefit from a more intuitive and efficient way to find information. The feature is automatically enabled and seamlessly incorporated into the Copilot sidecar, requiring no additional setup.

Geographic areas

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

- United States

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

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Feedback

Was this page helpful? Yes No

Make efficient demand planning decisions with Copilot

Article • 08/16/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	Dec 2024

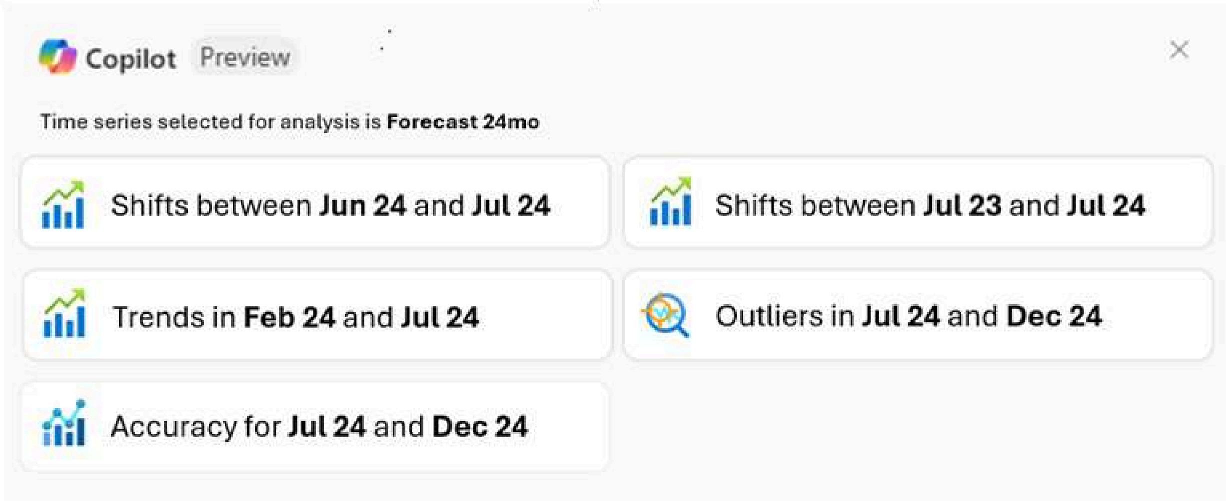
Business value

Demand planning in Microsoft Dynamics 365 Supply Chain Management now includes a copilot that lets you explore shifts and trends, identify anomalies, measure accuracy, and discover other factors that affect demand, with results presented in natural language. This helps you make informed decisions, improve forecast accuracy, optimize supply chain operations, and improve financial results.

Feature details

Copilot cursor prompts in demand planning help you explore a specific data point or data range in a forecast or time series. They provide a set of predefined questions that you can ask Copilot, which then returns insights into notable shifts (both positive and negative), trends, and anomalies across multiple dimensions. Copilot replies using natural-language summaries and visuals, which make it easy for you to digest the information and use it to make informed decisions.

The following illustration shows an example of Copilot cursor prompts.



Geographic areas

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

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

Feedback

Was this page helpful? Yes No

Inventory and logistics

Article • 07/16/2024

ⓘ Important

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

The inventory and logistics capabilities of Dynamics 365 Supply Chain Management enable businesses to manage their sales and fulfillment processes efficiently while ensuring inventory availability that matches the desired service levels. These capabilities help businesses gain more visibility, efficiency, and resiliency in their supply chain operations.

Feedback

Was this page helpful? Yes No

Add transactions when recalculating weighted average

Article • 07/16/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2024	Mar 2025

Business value

Gain greater control over the recalculation process by choosing whether to exclude or include specific types of transactions as needed. This can help ensure report accuracy and regulation compliance for some regions. Additionally, this feature can help save time and increase efficiency by streamlining the recalculation process and reducing the need for manual intervention.

Feature details

When recalculating for weighted average, you can now choose whether to include transactions that haven't yet been financially updated. This feature:

- Adds an option for item model groups.
- Includes transactions without financial closing.
- Only applies during recalculations and doesn't affect inventory closing.

Feedback

Was this page helpful? Yes No

Trace and solve quality issues with Copilot

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Effective quality assurance and issue mitigation help businesses gain customer trust. When quality assurance professionals find an issue, it can take time for them to identify the cause. They need to trace the history of manufacturing activities that went into producing the faulty items, identify specific batch/serial numbers of the relevant components and finished products, and combine this information with related data such as manufacturing time, unexpected consumption patterns, and more. Dynamics 365 Supply Chain Management now includes a copilot that applies artificial intelligence to collect and summarize all the relevant information in just a few seconds.

Feature details

The Traceability add-in for Dynamics 365 Supply Chain Management tracks manufacturing activities against the serial/batch numbers of specific components and the related finished goods. When quality issues occur, Copilot can quickly collect all the relevant details from both the Traceability add-in and Supply Chain Management itself to summarize product status, track custody, and analyze deviations related to the impacted products. Not only can this help companies to solve quality issues quickly, but it can also find correlations between specific component batches and manufacturing delays to help improve overall manufacturing performance efficiency.

With Copilot activity summaries:

- QA managers can quickly identify abnormal activity related to any item so that they can take appropriate steps to mitigate issues.
- Production managers can easily identify delays or bottlenecks in the manufacturing process.
- Field service workers can quickly understand the lifecycle of any item to verify it and make sure it qualifies for repair or replacement.

The activities page in Supply Chain Management includes a Copilot-generated summary of recent activities and a full list of activity details. Copilot provides an activity summary that highlights the related item's status, plus any other information. From there, users can drill down into the activity to find related details. The summary for each activity provides instant access to key information such as location, time, items, workers, vendors, and more.

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

Feedback

Was this page helpful? Yes No

Planning

Article • 07/16/2024

ⓘ Important

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

Demand planning is powered by best-in-class, out-of-the-box forecast models, immersive user experiences, intelligent reports, and analytics. It empowers organizations to build an agile, resilient, and sustainable demand planning practice that's fueled by intelligence and collaboration. In-memory supply planning offers performance and scalability to get near real-time insights into requirements changes with material requirements planning and production scheduling.

Feedback

Was this page helpful? Yes No

Calculate capable-to-promise quantities in real time

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Give customers realistic dates for when you can promise specific goods. For each sales line, you can provide a date that takes account of existing on-hand inventory, production capacity, and transportation times.

Feature details

Capable-to-promise (CTP) calculations in Dynamics 365 Supply Chain Management now consider both materials and resources when calculating delivery dates. This information is essential for assemble-to-order or make-to-order businesses. CTP calculations explode all the components, purchases, transfers, and capacities needed to manufacture any specific item and can be run for any selected sales order line.

Accurate confirmed ship and receipt dates allow you to:

- Tell customers the exact dates on which they will receive their orders in real time, while they are on the phone.
- Check how any change to a product (such as color, design, or other options) would affect the promised delivery date.
- Check how any change in quantity would affect the promised delivery date.

- Group or separate line quantities to meet delivery deadlines on make-to-order products.

Feedback

Collaborate on supply plans within and across teams

Article • 08/16/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2024	Dec 2024

Business value

Master planning is a complex process that considers a wide variety of factors when deciding which goods and materials need to be ordered to keep the business running smoothly. Multiple supply planners, production planners, material managers, and other stakeholders are involved in and affected by the process. As a result, users working within and across teams often need to collaborate while entering relevant data and preparing and reviewing each plan.

To collaborate effectively, all contributors need access to the same, up-to-date information. Dynamics 365 Supply Chain Management now provides greatly improved support for master planning collaboration because it continuously recalculates your master plans, refreshing them after each edit. All planners and other stakeholders will nearly always see the latest, fully optimized planning results as they evaluate and update each plan.

Feature details

Master planning calculations consume significant computer resources, so companies typically schedule these processes to run overnight when spare computing capacity is available. As a result, a fresh set of optimized plans is available for review at the start of the next business day. Then, throughout the day, supply planners, production planners, and material managers can review and update each master plan as needed to accommodate new issues such as material delays, machine breakdowns, or changing priorities. As the day goes on, each modified plan can become progressively less optimized and harder to work with until the system has time to recalculate them overnight.

Because the planning engine in Supply Chain Management operates in parallel with the rest of the system, it's able to recalculate master plans throughout the day without affecting overall system performance. That means that freshly optimized supply plans are continuously available to all collaborators, thereby ensuring the best use of materials and capacity and minimizing delays in providing products to customers.

Feedback

Enhance your demand forecasting and planning

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

The latest enhancements for Demand planning in Microsoft Dynamics 365 Supply Chain Management provide new insights into your supply chain planning. Take advantage of them to optimize your supply chain and boost your financial outcomes.

Feature details

Demand planning in Microsoft Dynamics 365 Supply Chain Management helps you plan and forecast demand based on various data sources and signals. This release enhances the app by adding the following capabilities:

- Filter the data that you need from different legal entities.
- View and select the best fit model for each planning unit based on accuracy and performance metrics.
- Allocate demand across different dimensions, such as products, customers, or channels, based on an allocation basis that you define.
- Incorporate external signals, such as inflation rates or weather conditions, into your forecast calculation and understand how they impact your demand.
- Export your data to other systems or platforms, such as Dynamics 365 Supply Chain Management or Azure Data Lake. You can also customize and map your export fields as needed.

- Aggregate your data by different time periods, such as year, quarter, or week, in the grid view. You can also perform calculations in the grid view that update in real time.
- Manage orchestration templates for running your forecast jobs. You can delete or update your templates as needed.
- View all your forecast jobs in one page and focus on the ones that failed or need attention.
- Apply time fence rules to prevent edits in specific periods that are locked or closed.
- See the dependencies between your profiles and time series and how they affect your forecast results.
- Use weighted average as an aggregation method for your data.
- Support bidirectional calculations between quantity and amount for your demand scenarios.
- Extend the analyze feature with copilot to more metrics and dimensions that are relevant to your business.
- Extend the calculations and transformations that you can apply to your data with custom logic or expressions.

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

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Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Project Operations in 2024 release wave 2

Article • 07/16/2024

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

Overview

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

In one application, Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams so they can win more deals, accelerate delivery, empower employees, and maximize profitability. The application provides the necessary visibility, collaboration, and agility across the project lifecycle to drive success for project-centric businesses. Powered by Microsoft Power Platform, customers are provided with an unmatched set of capabilities that enable everyone to analyze, act, and automate across their organization to transform their services business from the ground up. It's everything you need to run your project operations, from deal management to financials, all in one application.

For 2024 release wave 2, we're delivering functionally rich experiences in the following areas:

- Support for larger projects with increased tasks and dependencies in the work breakdown structure.
- Usability and performance improvements to project invoicing.
- Improvements to Time, Expense, and Material usage entry, submission, and approval process using Copilot.
- Enable stocked and resource/non-stocked deployments in the same Legal entity.
- Mobile experiences for time entry.
- Investments in generative AI to help with core operational workflows in project proposal generation.

Investment areas

Optimize Project Operations
In one application, Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams so they can win more deals, accelerate delivery, empower employees, and maximize profitability. Project Operations is continuing to invest in capabilities to improve usability, performance, and scale across key areas of the product like project planning, invoicing, time entry, and core transaction processing flows. Project Operations continues to invest in capabilities to improve usability, performance, and scale across critical areas of the product like project sales, planning, resourcing, budgeting and tracking, invoicing, and core transaction process flows.

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

Check out the release plan

For application administrators

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

Features that must be enabled by application administrators
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Get the most out of Project Operations

Expand table

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

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Project Operations

Article • 07/16/2024

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

- For a list of the previous wave's release plans, go to 2024 release wave 1 plan.

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

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

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
Enable processing billed sales for resource-nonstock deployments	Users by admins, makers, or analysts	-	Mar 2025
Enable flexibility when determining financial dimension defaults	Users by admins, makers, or analysts	✔ Jun 7, 2024	Mar 2025
Copy quotes and contracts across legal entities	Users by admins, makers, or analysts	✔ Feb 29, 2024	Oct 2024
Support cost plus pricing for resource time	Users by admins, makers, or analysts	✔ Feb 16, 2024	Oct 2024
Use one grid for material and expense estimates	Users by admins, makers, or analysts	✔ Mar 8, 2024	Oct 2024

Feature	Enabled for	Public preview	General availability
Enable milestone date to be time zone independent	Users by admins, makers, or analysts	-	Mar 2025
Enable progress-based billing in Billing hub	Users by admins, makers, or analysts	-	Mar 2025

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

Was this page helpful? Yes No

Copilot in Project Operations

Article • 08/16/2024

ⓘ Important

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

With every new release wave, AI and automation investments through Copilot empower consultants, sales personnel, project and resource managers, as well as project accountants in Dynamics 365 Project Operations, providing them with intelligent, natural-language interactions. These enhancements extend beyond business applications to productivity tools like Microsoft Teams, Microsoft Outlook, and Microsoft Excel, meeting employees where they are most productive. Copilot features in Project Operations streamline and expedite workflows from the frontline to the back office, optimizing operational efficiency for service delivery organizations.

Feedback

Was this page helpful? Yes No

Use the enhanced Quote experience and AI Quote summary

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

By enabling users to add or edit quote line details directly from a unified grid interface, this feature reduces manual effort and minimizes errors. The inclusion of customer schedules, margins, and budgets within the quote line details offers deeper insights and better financial oversight.

The advanced quote summary generated using language learning models (LLM) ensures comprehensive overviews, aiding in informed decision-making and strategic planning.

Feature details

In 2024 release wave 2, we plan to complete the Modern Quote user interface improvement work. This feature introduces several enhancements to improve the management of quotes. Users can add or edit quote line details directly from a unified grid interface, with cost details accessible. The feature provides various insightful details such as customer schedules, margins, and budgets in the quote line detail, and allows seamless addition of new lines.

An advanced quote summary, generated using LLM, provides comprehensive overviews and indicates upcoming actions and various other actionable insights.

These improvements streamline quote management, enhancing functionality, accuracy, and efficiency.

Geographic areas

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

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

Feedback

Was this page helpful? Yes No

Optimize Project Operations

Article • 07/16/2024

ⓘ Important

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

In one application, Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams so they can win more deals, accelerate delivery, empower employees, and maximize profitability. Project Operations is continuing to invest in capabilities to improve usability, performance, and scale across key areas of the product like project planning, invoicing, time entry, and core transaction processing flows. Project Operations continues to invest in capabilities to improve usability, performance, and scale across critical areas of the product like project sales, planning, resourcing, budgeting and tracking, invoicing, and core transaction process flows.

Feedback

Was this page helpful? Yes No

Add time-zone agnostic fields for project and project tasks

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

This feature gives you the option to use a field that stores start and end dates on projects and project tasks in a time-zone agnostic manner. Currently, times are converted to GMT before being saved, and issues can arise when the conversion moves this to a different day. These issues will be solved by using the time-zone agnostic fields that are not converted to GMT when stored.

Feature details

Project and project task start and end are saved in a date-time format that is converted to GMT prior to saving. They will then be converted back to the user's time zone when being displayed in the product. However, some integrations and customizations pull only the date from this field. Problems with this arise when the conversion to GMT changes the date, then an integration pulls only that date from the field without converting it back to GMT.

To prevent this, new fields on the entity are being created to store the start and end date time without first converting to GMT. This will allow you to confidently pull only the date without concern that the time-zone conversion has caused the date to change.

Feedback

Was this page helpful? Yes No

Copy quotes and contracts across legal entities

Article • 07/16/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 29, 2024	Oct 2024

Business value

When quotes and contracts are created, a legal entity is associated with these records for customers who deploy the resource and non-stocked scenarios. When a copy is required, it may need to be recreated in a new legal entity to reflect an alternate delivery model.

Feature details

This feature empowers you with the capability to explicitly indicate and define the desired target legal entity, customer, and business unit during the process of duplicating or replicating a quote or contract. With this functionality, our platform ensures you have complete control and flexibility in specifying the precise entities and units involved in the replication process, thereby enhancing efficiency and accuracy in managing quotes and contracts within their respective contexts.

See also

Copy project-based quotes (docs)

Feedback

Was this page helpful? Yes No

Enable estimate grid to display cost and sales on one row

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

This feature enhancement lets you view and edit both cost and sales on one line of the estimate grid so you can easily edit these within the One Grid view.

Feature details

This feature consolidates cost and sales visibility into a single, easily accessible One Grid view while maintaining control over editable fields, thus improving efficiency, accuracy, and user satisfaction in managing estimates.

Geographic areas

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

- Norway
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific

- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France

Feedback

Was this page helpful? Yes No

Enable flexibility when determining financial dimension defaults

Article • 07/16/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jun 7, 2024	Mar 2025

Business value

This feature adds additional flexibility for resource-based/non-stocked scenarios by adding financial dimensions for both cost and revenue to better analyze financial performance. It eliminates the need to reclassify costs or revenue manually.

Feature details

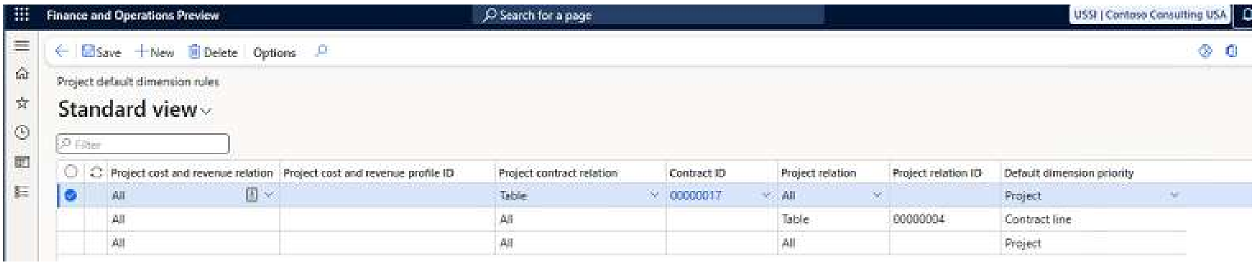
Previously there were limited options to determine how financial dimensions default. This feature adds functionality and more flexibility in defaulting financial dimension values. With this feature, you can:

- Create a configuration to determine how financial dimensions default based on criteria like contract, project, or cost and revenue profile.
- Set criteria to determine if dimensions should default from contract lines or projects.
- Improve reliability when saving financial dimensions and value defaults on the project.
- Add the ability to set dimensions on time and material contract lines.
- Add the ability to use contract lines for revenue recognition.

In the example in the image below, the system uses the following logic:

- The line at the bottom of the grid defaults all projects and contracts to use the project dimension unless an individual record overrides that behavior.
- The table line at the top of the grid is the next most specific record and causes all projects associated with contract 00000017 to use the dimensions from the project.
- The middle line is the most specific record because it is project specific, it overrides previously defined behavior, and has all transactions specific to Project 000000004 use the contract line for the basis of default dimensions.

The **Enable contract line based revenue recognition with Project Operations for non-stocked/resource based scenarios** feature modifies the **Project default dimension rules** form by adding another column to add rules based on specific contract line groups as the first filter.



See also

Financial dimension defaults (docs)

Feedback

Was this page helpful? Yes No

Enable milestone date to be time zone independent

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

The milestone date field in the project contract line milestone entity is using user local time while the same field in the invoice entity is time zone independent. This causes a discrepancy in the milestone date when viewed from the invoice schedule in the project contract line in the UI. This feature helps drive parity between the milestone date in both the entities, so that invoicing of milestones is more accurate.

Feature details

Ensuring that the milestone date (invoice date) is consistently displayed across both the project contract line milestone entity and the invoice entity will help by improving:

- **Accuracy of Invoicing** of fixed price contract lines, thereby ensuring consistency of milestone date between both project contract line and invoice, ensuring less corrections downstream.
- **Efficiency** of the invoicing process thereby reducing the administrative burden and allowing finance teams to operate more efficiently. This can lead to faster cash flow and improved financial management.

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

Feedback

Was this page helpful? Yes No

Enable multiple deployment types in a single legal entity

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

This feature enables users to take advantage of our modern architecture with our resource/non-stocked scenarios using the Dataverse platform. Users benefit from the great user experiences, the deep functionality in project planning using Microsoft Project for the Web, and resource management using Unified Resource Management.

Feature details

The enhancements introduced with this feature will work toward parallel use of projects from both deployment types. This is a large effort that won't have all functionality delivered at once.

This feature is for customers who are using our stocked/production order deployment type, but using scenarios that don't involve inventory. The changes made allow customers who have used Microsoft Project in the past to enable the resource/non-stocked deployment type without having to reimplement their existing legal entity.

Changes include:

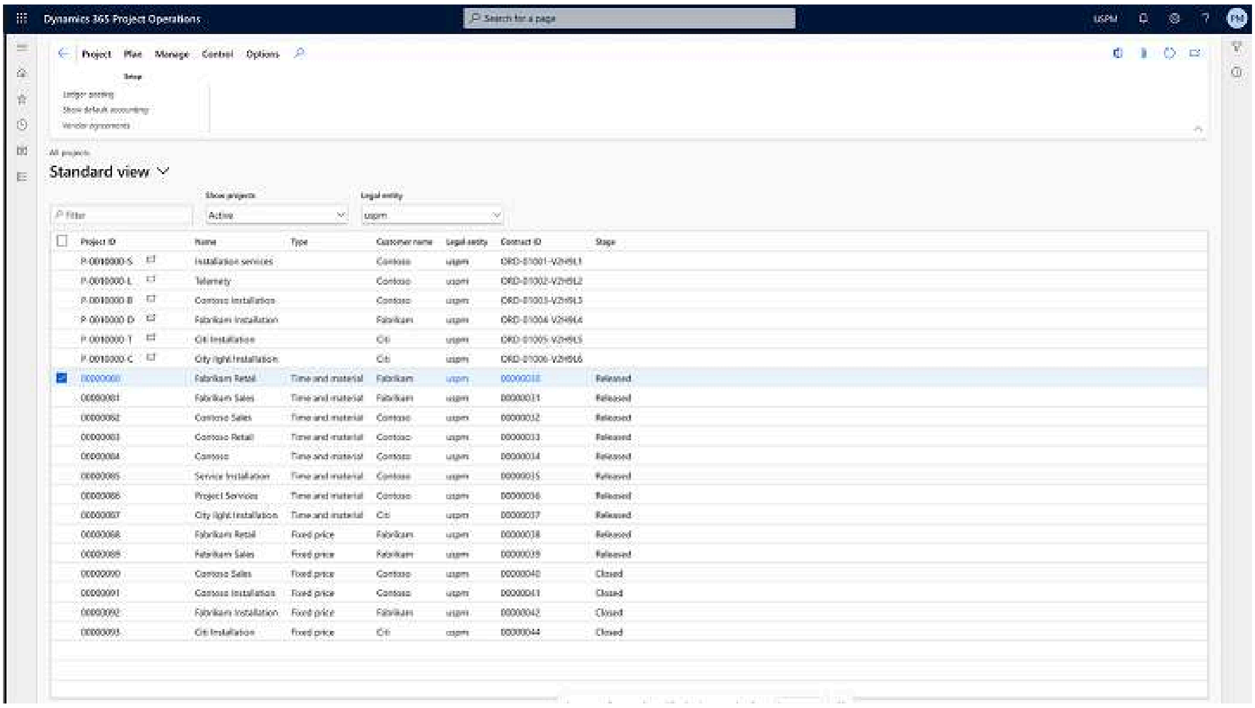
- The existing validation in the **Global project management and accounting parameters** form will be relaxed to allow legal entities with existing project data to be enabled for resource/non-stock deployment types.

- Business processes will be evaluated to ensure proper restrictions are in place for the appropriate deployment types. For example, invoices for Dataverse-based projects can only be created from Dataverse.

- We will remove access or make read-only the legacy functions that exist in both deployment types. For example, resource management and project work breakdown structures will no longer be editable in the finance and operations user interface for both stocked and resource/non-stocked deployment mode with this feature enabled. For projects created in resource/non-stocked deployment mode, users are able to use **Unified Resource Scheduling** experiences for resource scheduling, and **Project for the Web** experiences for project planning.

- Some experiences may change. For example, we may introduce independent forms to manage projects for each deployment type or show both types of projects in the same list page.

Example experience: Managing existing stocked projects along with non-stocked projects in the same form.



Feedback

Was this page helpful? Yes No

Enable processing billed sales for resource-nonstock deployments

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

The ability to create transactions for time, expense, and material usage directly on a draft invoice streamlines the invoicing process to help ensure timely and accurate billing. This enhances operational efficiency and accelerates cash flow, providing significant financial and administrative benefits to project-oriented companies.

Feature details

Implementing the flexibility to create transactions for time, expense, and material usage directly on a draft invoice is indeed a significant enhancement for project-oriented companies. This approach offers several key benefits:

Timeliness: Invoices can be prepared and sent out more quickly, reducing delays often caused by waiting for consultants to submit their time and expenses or by manually creating journal entries.

Accuracy: By entering transactions directly on the draft invoice, the risk of errors is minimized. This ensures that all billable items are captured correctly and reflects the true cost of the project.

Convenience: Consultants and Project Managers can focus on their core activities without being bogged down by administrative tasks. This is particularly beneficial for consultants who are frequently on the move.

Efficiency: Streamlining the invoicing process reduces the administrative burden and allows finance teams to operate more efficiently. This can lead to faster cash flow and improved financial management.

Transparency: It provides a clear and comprehensive view of all billable items on the draft invoice, making it easier to review and approve before finalizing and sending it to the client.

Overall, this flexibility can greatly enhance the invoicing process, making it more efficient and accurate, ultimately benefiting both the company and its clients.

Feedback

Enable progress-based billing in Billing hub

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

The progress-based billing feature enables billing based on progress or % complete of a milestone. By integrating this capability with Billing hub, users will be able to take advantage of this feature from Billing hub without navigating to any other form, reducing clicks and navigation and improving user efficiency at the time of invoice creation when working on fixed price agreements.

Feature details

With this feature, you'll experience:

- **Reduced clicks and navigation**: By enabling billing users to review all transactions in invoiceable state with a single click while staying in the context of the project contract, project operations billing users save time and are more efficient.
- **Faster invoicing cycle**: Faster invoice creation helps speed up the invoicing process and enables faster processing of payments from the customer.
- **Reduced invoice correction**: Proactive invoice insights help billing administrators make more accurate decisions at the time of invoice creation, helping improve their productivity while also reducing the need for invoice corrections later.

Feedback

Was this page helpful? Yes No

Enable time phasing of quote and contract lines

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

This feature addresses the challenge of managing the time-phased price changes in labor, expenses, and materials within quotes and contracts. This enhancement ensures that any changes in prices are automatically reflected from their effective date, providing accurate and up-to-date pricing without the need for manual intervention.

Feature details

With this feature, the correct sales and cost prices will be automatically updated in quotes and contracts based on date effectivity. Prices will be computed using weighted average prices for both quote line details and contract line details, ensuring precise and reliable pricing calculations. This automation significantly reduces the manual effort previously required to track and update prices, minimizing the risk of errors and discrepancies in pricing.

Additionally, the new feature includes the ability to maintain a comprehensive audit trail of all changes made to quotes and contracts. This allows for full transparency and traceability, giving users confidence in the accuracy and integrity of their pricing information.

Users will now have the ability to see exact totals at any point in time, reflecting all current and historical pricing data. This real-time visibility into totals enhances contract management and helps ensure that all financial aspects are accurately accounted for.

Geographic areas

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

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

Feedback

Was this page helpful? Yes No

Implement access restrictions in Project for the Web iFrame

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

Currently, when a user has access to a project record, they have unlimited access to the Microsoft Project for the Web iFrame. There they can modify, create, or delete any project tasks, dependencies, goals, and more. This feature adds the ability to manage what users can do in this iFrame.

Feature details

This feature implements a security system that allows administrators to set restrictions on what a user can access inside the Project for the Web iFrame on projects for which they have access to but are not team members. Additionally, we will implement the same system for project managers to set these restrictions for team members on their projects.

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

Feedback

Was this page helpful? Yes No

Mark a task as complete from the grid view

Article • 08/16/2024

Important

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

Expand table

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

Business value

This feature provides an additional method of completing a task: marking it as complete directly from the grid view.

Feature details

Some Project Operations customers don't use time entries to track their progress on tasks. For these customers there are challenges in completing tasks, as that requires time entries to increase effort completed. With this update, we are adding functionality to mark a task as complete from the grid view, like the way it's done in default Project for the Web.

Feedback

Was this page helpful? Yes No

Support cost plus pricing for resource time

Article • 07/16/2024

ⓘ Important

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

Expand table

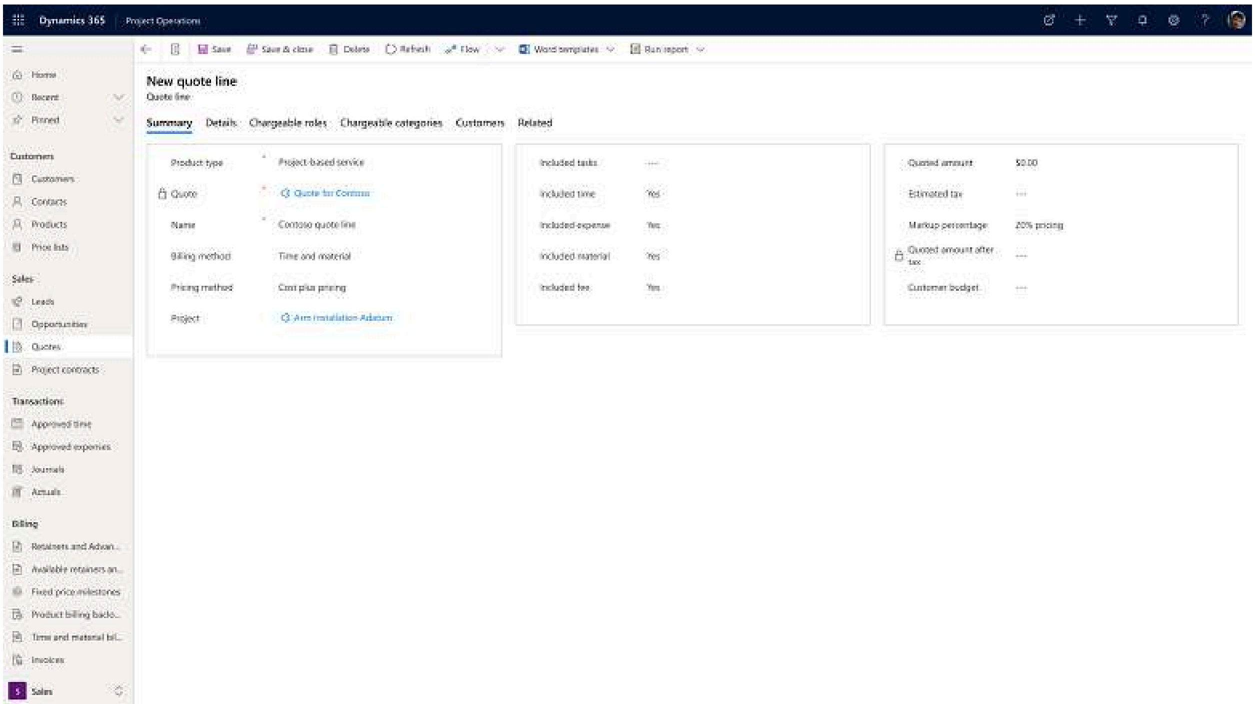
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Feb 16, 2024	Oct 2024

Business value

Many professional services organizations derive their bill rates as a function of the associated cost rate of a resource. Empowering organizations to derive these prices directly in Project Operations saves time, provides flexibility, and eliminates the need for external tracking sheets sometimes used to perform these calculations.

Feature details

Currently, Project Operations supports the ability to define a bill rate across multiple dimensions. However, the cost is currently not a supposed configuration. This new feature provides the ability to define line items in a sales price rate as a function of a related cost rate. Enabling these capabilities supports less risk-averse contracting models such as cost plus.



See also

[Set up labor bill rates Lite deployment](#) (docs)

Feedback

Was this page helpful? Yes No

Use one grid for material and expense estimates

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Replacing the grid within expense and material estimates provides a clean experience when creating and editing estimates. The enhanced grid experience provides easy filtering, deletion, and lookup functionality. This change ensures extensibility and improves performance.

Feature details

This feature brings together the new grid support into Project's expense and material estimate grids. Today these custom grids are not performant and lack extensibility and capabilities. This feature enables the capabilities of the new modern grid to improve the overall experience for end users.

These enhancements include:

- Improved grid with a view switcher.
- Improved grid allowing extensibility.
- Task sorting by work breakdown structure.
- Quick create experience to easily add expense and material estimates.

See also

Set up price lists (docs)

Feedback

Was this page helpful? Yes No

Use progress billing for resource and nonstock scenarios

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

Progress billing allows users to maintain progress billing rules in Project Operations non-stock/resource-based scenarios.

Feature details

- Progress billing rules are available for project operations non-stock/resource-based scenarios.
- User can maintain the progress % for the contracts.
- Users can create invoices based on the progress completed.

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

Feedback

Was this page helpful? Yes No

Use time-zone agnostic fields in project planning

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

When a project is created, the time zone is based on the time zone defined in the applied work hour template. When a task is created, the start time, end time, and hours/day are controlled by the working hours of the project. This time zone component can make it difficult to enforce extensibility scenarios related to contracts where the definition of the time boundaries may not cross due to differences created by time zones.

Feature details

The functionality of start and end dates in projects and project tasks within Dynamics 365 Project Operations entails the inclusion of supplementary fields that aren't dependent on specific time zones. These additional fields are incorporated into both the project and project task entities, thereby facilitating integration and extensibility possibilities for scenarios where the time zone aspect of the start and end fields is not of utmost importance or for improved accounting alignment.

Feedback

Plan and prepare for finance and operations cross-app capabilities in 2024 release wave 2

Article • 07/16/2024

ⓘ **Important**

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

Overview

Finance and operations cross-app capabilities apply to all finance and operations apps, including Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, Dynamics 365 Human Resources, and Dynamics 365 Project Operations.

We continuously enhance the platform and services that support finance and operations apps with new capabilities to enable businesses everywhere to accelerate their digital transformation. As we add product enhancements, we deliver frequent updates that help customers stay current consistently, predictably, and seamlessly. The key driver for the new core capabilities is increasing productivity and return on investment.

Investment areas

Copilot for Dynamics 365 finance and operations apps
AI provides opportunities to empower enterprise users through copilot experiences.

These experiences increase productivity by leveraging business data and large language models (LLMs). Copilot experiences in finance and operations apps will complement the experiences across Microsoft offerings, including Power Platform and Microsoft 365.

One Dynamics One Platform
Virtual table users accessing finance and operations data will experience better performance, automation, and less management, making it an alternative solution for accessing finance and operations data on Power Platform with less effort. This is a huge leap in realizing a long-standing customer promise of the One Dynamics One Platform.

Customers using export to Data Lake will have an opportunity to transition to Azure Synapse Link for Dataverse, which will bring an integrated experience with the ability to choose data from all Dynamics 365 apps. For AX 2012 or AX 2009 customers planning an upgrade to cloud-based finance and operations, you can easily query finance and operations data using Azure Synapse Analytics. You can preserve your existing data integration pipelines by accessing finance and operations data in the lake in table form, as Azure Synapse Link for Dataverse supports finance and operations tables and entities.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Finance and Operations cross-app capabilities** below:

Check out the release plan

For application administrators

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

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

Feedback

Was this page helpful? Yes No

What's new and planned for finance and operations cross-app capabilities

Article • 07/16/2024

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

- For a list of the previous wave's release plans, go to 2024 release wave 1 plan.

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

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

Copilot for Dynamics 365 finance and operations apps

Increase productivity with Copilot for Dynamics 365 finance and operations apps.

Expand table

Feature	Enabled for	Public preview	General availability
Navigate and search using Copilot in finance and operations	Users, automatically	Jul 2024	Oct 2024

One Dynamics One Platform

Build finance and operations extensions in Power Platform.

Expand table

Feature	Enabled for	Public preview	General availability
Get offline support for Dynamics 365 finance and operations virtual tables	Admins, makers, marketers, or analysts, automatically	Jul 2024	Oct 2024
Enable support for asynchronous operation in dual-write functionality	Users by admins, makers, or analysts	Aug 2024	Dec 2024

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ .

Description of **Enabled for** column values:

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

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

Feedback

Was this page helpful? Yes No

Copilot for Dynamics 365 finance and operations apps

Article • 07/16/2024

ⓘ Important

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

AI provides opportunities to empower enterprise users through copilot experiences. These experiences increase productivity by leveraging business data and large language models (LLMs). Copilot experiences in finance and operations apps will complement the experiences across Microsoft offerings, including Power Platform and Microsoft 365.

Feedback

Was this page helpful? Yes No

Navigate and search using Copilot in finance and operations

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Users of finance and operations apps can face challenges finding specific pages and data they need in the application. Copilot in finance and operations apps streamlines this experience by enabling users to query data and navigate to specific pages and records in the application.

Feature details

Copilot in finance and operations apps provides the ability to navigate to pages in the application and deep link to specific entity records using the natural language chat experience of the Copilot interface.

Feedback

Was this page helpful? Yes No

One Dynamics One Platform

Article • 07/16/2024

ⓘ Important

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

Virtual table users accessing finance and operations data will experience better performance, automation, and less management, making it an alternative solution for accessing finance and operations data on Power Platform with less effort. This is a huge leap in realizing a long-standing customer promise of the One Dynamics One Platform.

Customers using export to Data Lake will have an opportunity to transition to Azure Synapse Link for Dataverse, which will bring an integrated experience with the ability to choose data from all Dynamics 365 apps. For AX 2012 or AX 2009 customers planning an upgrade to cloud-based finance and operations, you can easily query finance and operations data using Azure Synapse Analytics. You can preserve your existing data integration pipelines by accessing finance and operations data in the lake in table form, as Azure Synapse Link for Dataverse supports finance and operations tables and entities.

Feedback

Was this page helpful? Yes No

Enable support for asynchronous operation in dual-write functionality

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

This feature enables asynchronous business processes for dual-write functionality for your business.

Feature details

Dual-write functionality currently supports initial synchronization and live synchronization modes. In this release wave, dual-write functionality supports continuous, asynchronous data movement between finance and operations apps and Microsoft Dataverse for eventual data consistency. It enables asynchronous business processes to participate in dual-write functionality. By executing bulk create and update operations in asynchronous mode, you can avoid session timeout problems and delays that can occur with blocking synchronous operations.

Feedback

Was this page helpful? Yes No

Get offline support for Dynamics 365 finance and operations virtual tables

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Many enterprise mobile applications are used in the field where there may be inconsistent access to internet resources. In these cases, the mobile application must continue to function in offline mode. For mobile Power Apps built against Dataverse virtual tables for Dynamics 365 finance and operations apps, there will now be offline support to ensure work is not disrupted in areas without internet access.

Feature details

Enterprise mobile applications often require support for running in offline mode. To support these capabilities for mobile Power Platform apps built on Dynamics 365 finance and operations data, we now support offline mode for finance and operations virtual tables. Apps can work against the data locally when offline, and sync data changes with Dynamics 365 finance and operations apps when back online.

Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Human Resources in 2024 release wave 2

Article • 07/16/2024

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

Overview

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

As human resources roles shift more from administrative to strategic, we will leverage next-generation AI to transform common HR activities and responsibilities to empower HR users, reduce costs, and provide valuable insights for faster decision making. Our vision is to deliver an HR application that ensures full visibility, evidence, and autonomy as HR professionals navigate a complex and competitive world where regulations are constantly changing, and companies are looking at new ways to grow globally while retaining talent and increasing engagement.

One of the key challenges for human resources professionals is to stay ahead of the curve and adapt to the changing needs of their organizations and employees. To help them achieve this, in this release new AI-powered features are introduced that enables them to automate and optimize common HR tasks, such as benefits, talent management, and employee engagement. By using our in-app copilot capabilities, they can access personalized and contextual guidance, insights, and recommendations based on their role and preferences. We will also invest in our business performance planning and analytic capabilities, which will provide a holistic view of workforce data and trends, and help make informed decisions that align with strategic goals.

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.
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.

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Human Resources

Article • 07/16/2024

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

- For a list of the previous wave's release plans, go to 2024 release wave 1 plan.

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

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
Integrate Human Resources with Viva Connections	Users by admins, makers, or analysts	Jan 2025	Mar 2025
Use recruiting with copilot	Users by admins, makers, or analysts	Jan 2025	Mar 2025

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

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

Feedback

Was this page helpful? Yes No

Copilot in Dynamics 365 Human Resources

Article • 08/16/2024

ⓘ Important

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

With every new release wave, AI and automation investments empower employees, HR managers, administrators, and recruiting agents, providing them with intelligent, natural-language interactions. These enhancements extend beyond business applications to productivity tools like Microsoft Teams, Microsoft Outlook, and Microsoft Excel, meeting employees where they are most productive. Copilot features in Human Resources streamline and expedite workflows from the frontline of employee experiences to the human resources back office, optimizing operational efficiencies.

Feedback

Was this page helpful? Yes No

Explore recruiting copilot scenarios

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

The copilot scenario in recruiting provides a range of benefits, enhancing the efficiency and effectiveness of the entire hiring process. Human resources administrators, recruiters, and hiring managers can make use of a candidate's autocalculated fitment percentage and autojob description generation features. This allows them to focus on more strategic aspects of the hiring process. It leads to a more efficient, objective, and candidate-centric hiring process, contributing to the overall success of talent acquisition efforts.

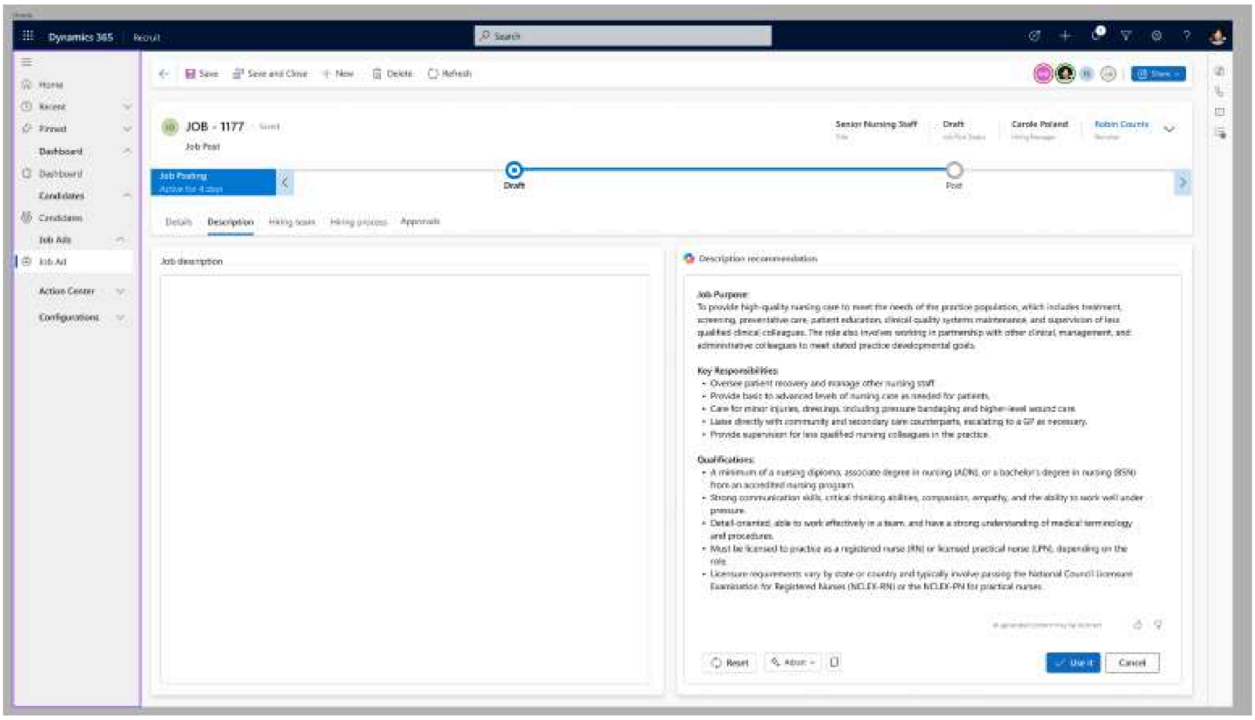
Feature details

This is an extension of the recruiting app where end-to-end flow of the hiring process aligns with the different personas in the process.

The following scenarios are planned as part of this release:

- **Job description generation**: Quickly creates comprehensive and well-structured job descriptions without the need for manual input. Automatic job description generation in recruiting can offer several advantages, streamlining the hiring process and improving overall efficiency.

- **Interview assistant**: Provides interviewers with a list of pregenerated interview questions based on the role the candidate is applying for and the candidate's experience.



Geographic areas

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

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

Feedback

Was this page helpful? Yes No

Optimize human resource operations

Article • 07/16/2024

ⓘ Important

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

Every new release wave of the Dynamics 365 Human Resource application brings new enhancements for corporations and organizations to optimize their human resource operations from personnel management, compensation, benefits, and performance management. Improvements in recruiting operations, skills and competency management, and succession management bring efficiencies in the hire-to-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.

Feedback

Was this page helpful? Yes No

Avoid duplication with Microsoft Entra ID integration

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

You can avoid duplication of data entry in Microsoft Entra and Dynamics 365 Human Resources with this integration. Data needs to be updated only at one place, which then flows into the other. This reduces duplicate entries, decreases data entry errors, and increases efficiency. This will also help you to seamlessly maintain user data in one place, thereby increasing satisfaction and convenience, which also reduces the risk of errors and duplication of work.

Feature details

You can now have a streamlined process where you enter employee profile data once and the same data then flows into the other. In the current process, you are required to enter employee data in Microsoft Entra and in Dynamics 365 Human Resources individually by relying on manual methods to create, update, and delete employees. You must have used methods such as uploading CSV files or custom scripts to sync employee data. These provisioning processes are error prone, insecure, and hard to manage.

Thank you for your idea

Thank you for submitting this idea:

- User provisioning from Dynamics 365 HR to Azure Active Directory

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

Feedback

Was this page helpful? Yes No

Integrate Human Resources with Viva Connections

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Enhancing the employee experience, integration with Microsoft Viva Connections centralizes human resources (HR) data access and delivers targeted information through adaptive cards, eliminating the need to log into separate systems and streamlining information retrieval.

Feature details

With the feature, you'll experience these capabilities:

Single Sign-On Access: Seamlessly access all HR-related data directly within Microsoft Teams, courtesy of the integration between Dynamics 365 Human Resources and Viva.

Efficient Data Management: Eliminate the need for multiple logins by centralizing HR data in one convenient location, enhancing productivity and user experience.

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

Feedback

Was this page helpful? Yes No

Use recruiting for service-centric organizations

Article • 08/16/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 17, 2024	Oct 2024

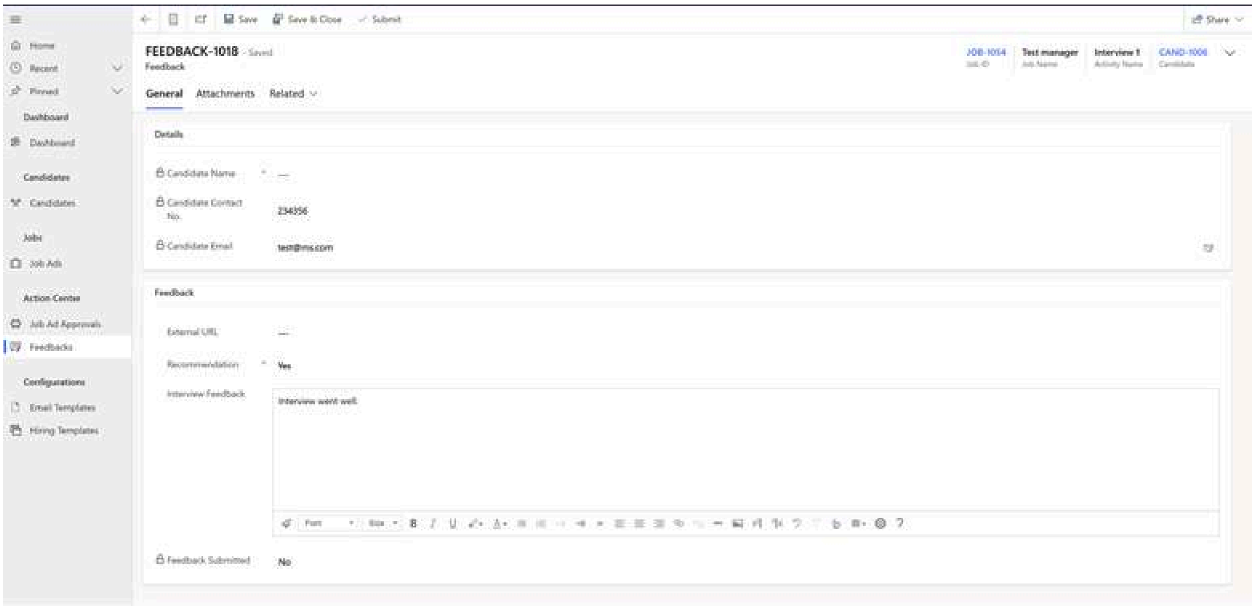
Business value

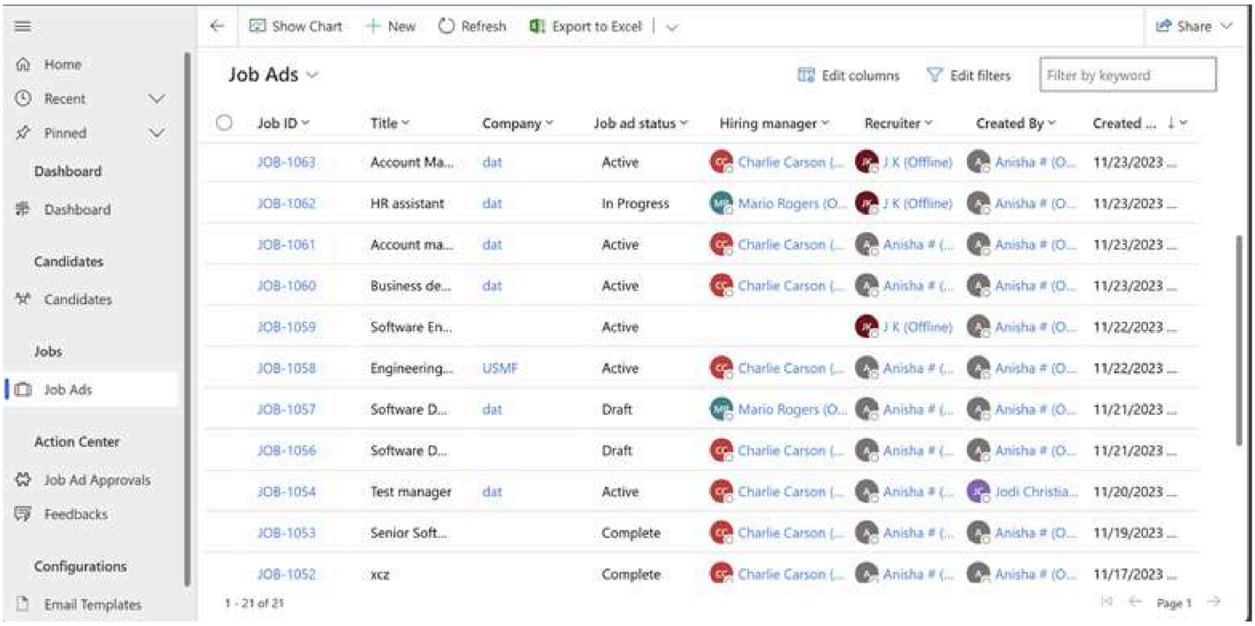
The recruiting feature provides human resources business partners, recruiters, and hiring managers the ability to create interview process templates, create talent pools, read candidate profile information from LinkedIn, collaborate, and include relevant information related to the position when creating a job posting.

Feature details

We will enable the end-to-end flow of the hiring process by leveraging both Finance and Power Platform to align with the different personas in the process. Managers will use manager self-service within Dynamics 365 to submit a recruitment request that signals the beginning of the recruiting activities for the hiring team. Recruiters will use a model-driven Power Apps app to manage jobs and internal job postings, interviews, feedback, and candidate pipelines. Candidates will use a job portal built on Power Pages to apply and track progress.

The experiences are tailored to best align with how each person works and enable companies to extend and customize to meet their business needs.





See also

[Set up the Human Resources recruiting app](docs) (docs)

Feedback

Was this page helpful? Yes No

Use recruiting with copilot

Article • 07/16/2024

ⓘ Important

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

Expand table

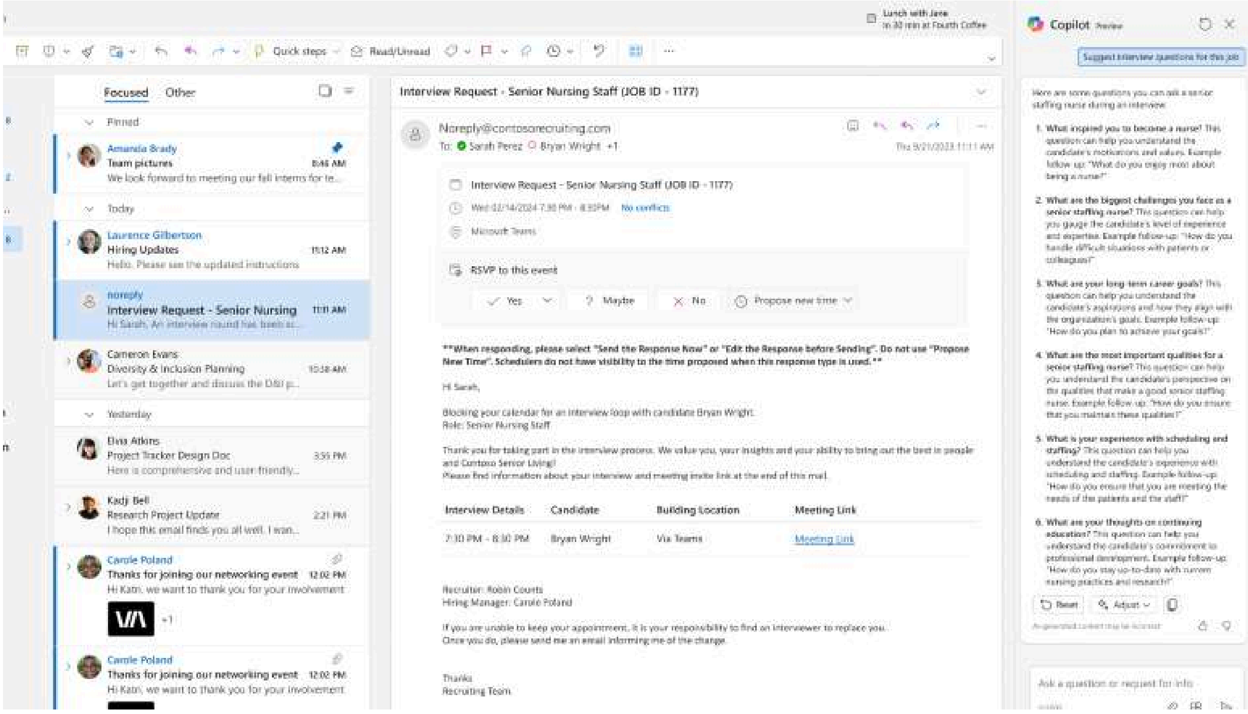
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2025	Mar 2025

Business value

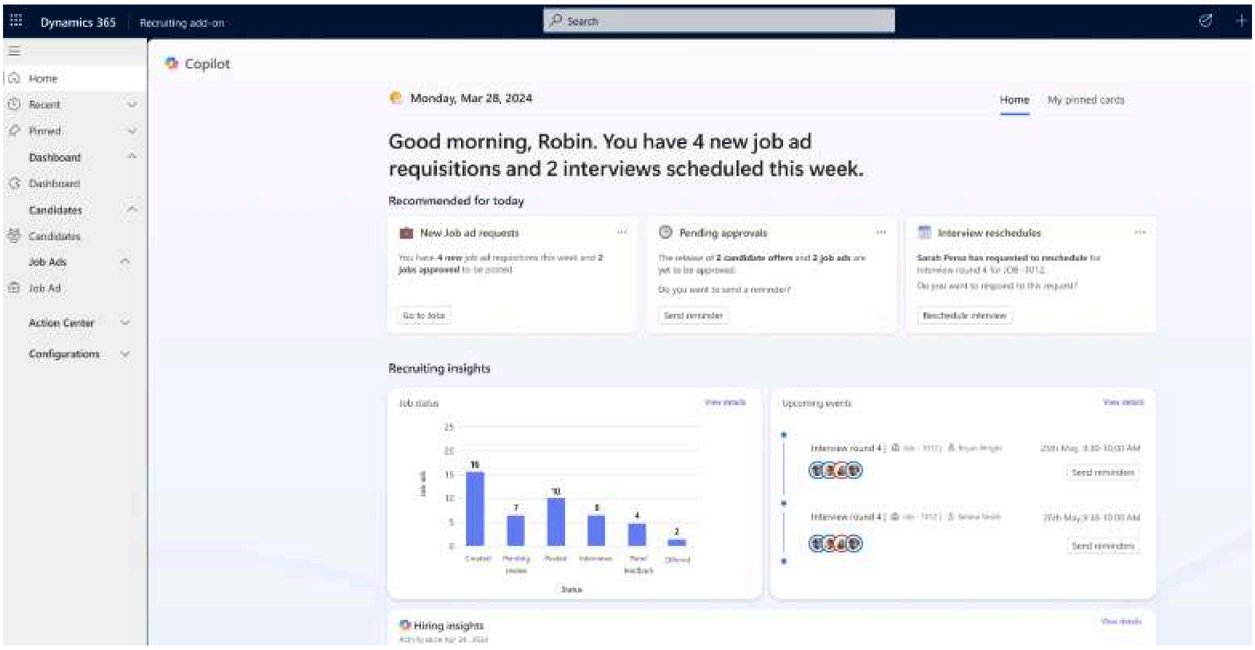
With copilot in the recruiting add-on for Dynamics 365 Human Resources, recruiters have a personal assistant to guide them through every step of the hiring journey. Copilot helps recruiters create effective and engaging job descriptions by using the information already associated with jobs.

Feature details

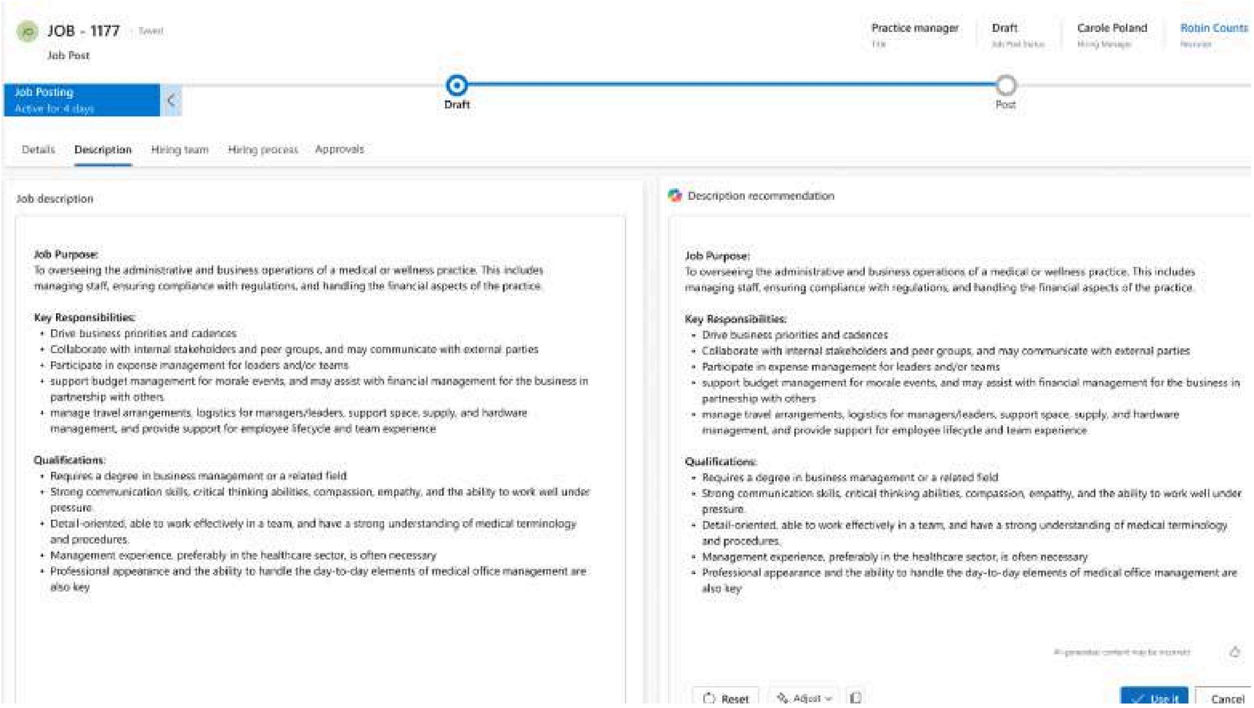
A suggested job description is provided, and recruiters can adjust as needed before posting to job boards. Copilot also helps recruiters and the hiring team conduct interviews by suggesting a set of interview questions based on the job description plus the candidate's application and resume information. Candidate assessments will also be streamlined with copilot, and recruiters will be provided with a list of candidates who are the best fit for the role.



Focused
Other
Interview Request - Senior Nursing Staff (JOB ID - 1177)
Noreply@contosorecruiting.com
RSVP to this event
Yes
Maybe
No
Propose new time
Interview Details
Candidate
Building Location
Meeting Link
7:30 PM - 8:30 PM
Bryan Wright
Via Teams
Meeting Link
Copilot



Dynamics 365
Recruiting add-on
Copilot
Monday, Mar 28, 2024
Good morning, Robin. You have 4 new job ad requisitions and 2 interviews scheduled this week.
Recommended for today
New Job ad requests
Pending approvals
Interview reschedules
Recruiting insights
Hiring insights



Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Commerce in 2024 release wave 2

Article • 07/16/2024

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

Overview

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

Microsoft Dynamics 365 Commerce is a headless omnichannel retail solution that delivers seamless end-to-end retail scenarios across physical, digital, and call center channels. By combining sales, intelligence, and productivity into a single platform, retailers have an all-encompassing view of their customers, which enables them to provide personalized shopping experiences that can lead to loyal customers and higher conversions. The Dynamics 365 Commerce solution enables comprehensive support for fixed point of sale (POS), mobile point of sale (MPOS), call center, digital commerce (direct-to-consumer [DTC], business-to-business [B2B], and B2B for wholesalers), clienteling, merchandising, channel management, cross channel inventory visibility, and order orchestration for efficient, on-time fulfillment.

Through its headless omnichannel retail solution, Dynamics 365 Commerce can help your organization drive better business outcomes and increase conversion rates in the following ways:

- **Seamlessly engage with customers across retail channels**: Give your customers the option to purchase whenever, however, and wherever they want—on any device—by delivering a frictionless and consistent engagement across physical, digital, and call center channels.
- **Modernize and streamline retail store operations**: Create personalized and friction-free commerce experiences in-store and in pop-up shops using our modern mobile POS that supports fixed, roaming, endless aisle, and self-checkout modes of operation.
- **Gain agility and scalability through a fully integrated, headless omnichannel retail solution**: Support traditional and emerging channels by using a natively

integrated, agile, API-driven, headless commerce engine that enables seamless cross-channel operations.
- **Build your digital commerce presence**: Grow your business with an integrated, end-to-end, unified digital commerce solution that enables support for DTC, B2B, and B2B for wholesaler operations.

Key features for this release include:

- **Use Copilot to streamline back-office merchandising activities**: Use Copilot to automatically validate assortments, categories, products, and more with proactive alerts that guide you to easy resolutions.
- **Use Copilot to efficiently run your retail stores**: Use Copilot to augment how you run your retail stores with insightful real-time reporting that tracks and summarizes store performance so you can proactively address issues and take advantage of local trending patterns.
- **Use Copilot to boost conversions with assisted selling and clienteling**: Use Copilot to provide personalized shopping experiences by providing sales associates with product and customer insights that can be used to increase customer loyalty and boost customer conversions.
- **Enable self-serve checkout and kiosk experiences**: Delight your customers with a POS experience that's optimized for quick and intuitive self-serve operations.
- **Enable Modern POS experiences**: Provide sales associates with improved Store Commerce components and workflows that are optimized for usability and efficiency.

Investment areas

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

Retailers operate on razor thin margins and need to maximize the value of every sale. Minimizing the time required to access product and customer information and providing AI-powered sales insights are crucial for improving per-sales margins and increasing customer loyalty. Copilot in Dynamics 365 Commerce's Store Commerce point of sale (POS) focuses on enhancing sales associate productivity and effectiveness in the checkout flow, enabling associates to access summarized product and customer information with AI-powered insights, actions, and recommendations that are contextually available throughout the interface. Copilot features save sales associates time, increase sales conversions, and improve customer satisfaction and loyalty.

Omnichannel commerce
Developed as a modern, cloud-based, software as a service (SAAS) solution, the Dynamics 365 Commerce omnichannel headless retail engine enables scalable retail operations across in-store, call center, and online (business-to-consumer, business-to-business, and indirect business-to-business) sales channels. Each channel can support products, pricing, and promotions and capture customer and order data that can be accessed by any other sales channel.

Merchandisers tasked with defining complex pricing structures can use the unified pricing management module to simplify their workflow by using attribute-based pricing models to configure, simulate, and approve rules-based pricing across products, attributes, channels, and customers.

Store Commerce
Built on a modern, headless, omnichannel retail platform, Dynamics 365 Commerce's Store Commerce POS enables retailers to provide fast, efficient, and modern checkout experiences on fixed and mobile devices that operate on or offline. The Store Commerce POS application provides comprehensive retail workflows, from in-store, online, and curbside pickup transactions, to inventory management, order fulfillment, assisted selling, and store operations.

Sales associates spend most of their time engaging with customers and processing orders through the Store Commerce POS. Streaming the checkout workflow to optimize for efficiency, standardizing payment flows, and providing contextual in-line controls results in time saved on every transaction, leading to happier, more efficient sales associates. Customers who want to skip the queue can instead use Store Commerce's fast and frictionless self-checkout functionality to quickly complete their payment.

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

Check out the release plan

For application administrators

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

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

Get the most out of Commerce

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Commerce.
Product documentation	Find documentation for Commerce.
User community	Engage with Commerce experts and peers in the community.

Helpful links	Description
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Commerce.

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Commerce

Article • 07/16/2024

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

- For a list of the previous wave's release plans, go to 2024 release wave 1 plan.

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

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

AI innovation with Copilot

Reimagine customer engagement and retail operations with Store Commerce POS using GPT technology.

Expand table

Feature	Enabled for	Public preview	General availability
Improve merchandiser efficiency with Copilot	Users, automatically	-	Oct 2024
Enhance clienteling with Copilot customer insights	Users, automatically	-	Oct 2024
Discover store trends and patterns with Copilot	Users, automatically	-	Oct 2024
Improve sales with Store Commerce Copilot insights	Users, automatically	-	Oct 2024
Discover retail insights using Copilot summaries	Users, automatically	-	Oct 2024

Omnichannel commerce

Reimagine cross-channel retail operations with Dynamics 365 Commerce's headless omnichannel retail engine.

Expand table

Feature	Enabled for	Public preview	General availability
Roll out multifaceted pricing strategies	Users by admins, makers, or analysts	Oct 2024	-

Store Commerce

Store Commerce POS on Dynamics 365 Commerce enables retailers to provide efficient and frictionless sales experiences on any device, anywhere in the world.

Expand table

Feature	Enabled for	Public preview	General availability
Boost efficiency with modern Store Commerce workflows	Users by admins, makers, or analysts	Oct 2024	Dec 2024
Enable kiosk self-checkout with intuitive workflows	Users by admins, makers, or analysts	Oct 2024	Dec 2024
Check out faster with optimized payment flows	Users by admins, makers, or analysts	Oct 2024	Dec 2024
Reduce checkout time with streamlined receipt workflows	Users by admins, makers, or analysts	Dec 2024	Dec 2024

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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Feedback

Was this page helpful? Yes No

AI innovation with Copilot

Article • 07/16/2024

ⓘ Important

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

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

Retailers operate on razor thin margins and need to maximize the value of every sale. Minimizing the time required to access product and customer information and providing AI-powered sales insights are crucial for improving per-sales margins and increasing customer loyalty. Copilot in Dynamics 365 Commerce’s Store Commerce point of sale (POS) focuses on enhancing sales associate productivity and effectiveness in the checkout flow, enabling associates to access summarized product and customer information with AI-powered insights, actions, and recommendations that are contextually available throughout the interface. Copilot features save sales associates time, increase sales conversions, and improve customer satisfaction and loyalty.

Discover retail insights using Copilot summaries

Article • 07/16/2024

ⓘ Important

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

Expand table

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

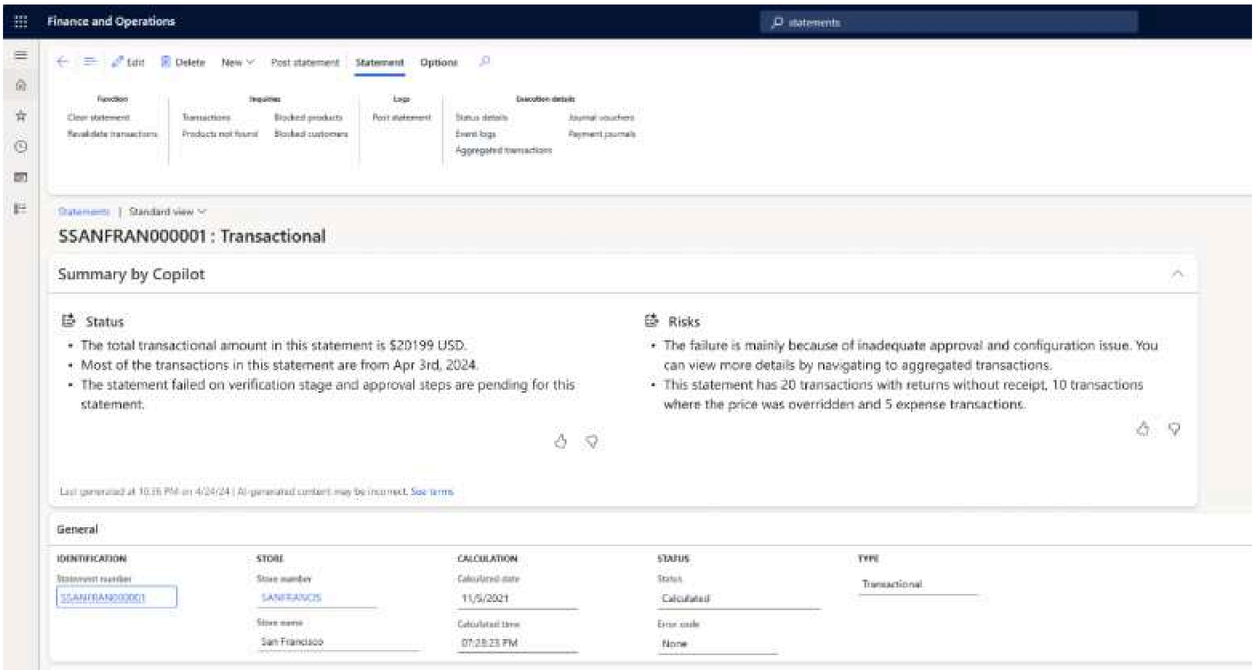
Business value

Physical stores regularly send cash and carry transactions to Dynamics 365 Commerce headquarters for processing, which updates inventory and financial records. However, frequent processing failures can lead to significant time and effort spent troubleshooting by the operations team. Delayed identification of these issues complicates resolution, especially when compounded by time-sensitive constraints like financial year closure or discontinuation of items. The statement posting summary and insights by Copilot feature aims to deliver actionable insights on failed transactions, enabling you to prioritize and address issues effectively.

Feature details

The statement posting summary and insights by Copilot feature uses Copilot to offer a comprehensive summary of insights derived from posted and unposted statements. The summary includes insights like the count of transactions affected, total sales amount of these statements and risks such as transactions with returns without receipts, expense transactions, price overrides, and more. Additionally, for each failed statement, the system presents a synopsis of the error to help users easily understand the issue.

The statement posting summary and insights feature is enabled automatically, but administrators can enable or disable it using the Commerce headquarters feature management workspace. This feature is available in the Dynamics 365 Commerce 10.0.41 release, and is also included in the Commerce 10.0.38, 10.0.39, and 10.0.40 releases through proactive quality updates (PQUs) to facilitate adoption.



Geographic areas

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

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

Feedback

Was this page helpful? Yes No

Discover store trends and patterns with Copilot

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Store insights using Copilot deliver streamlined smart summaries, offering an immediate overview of a store's performance. Key metrics, such as sales, returns, discounts, and payment types that are summarized for the channel and store, are prominently featured. This equips store associates and managers with the data necessary for strategic decision making.

Feature details

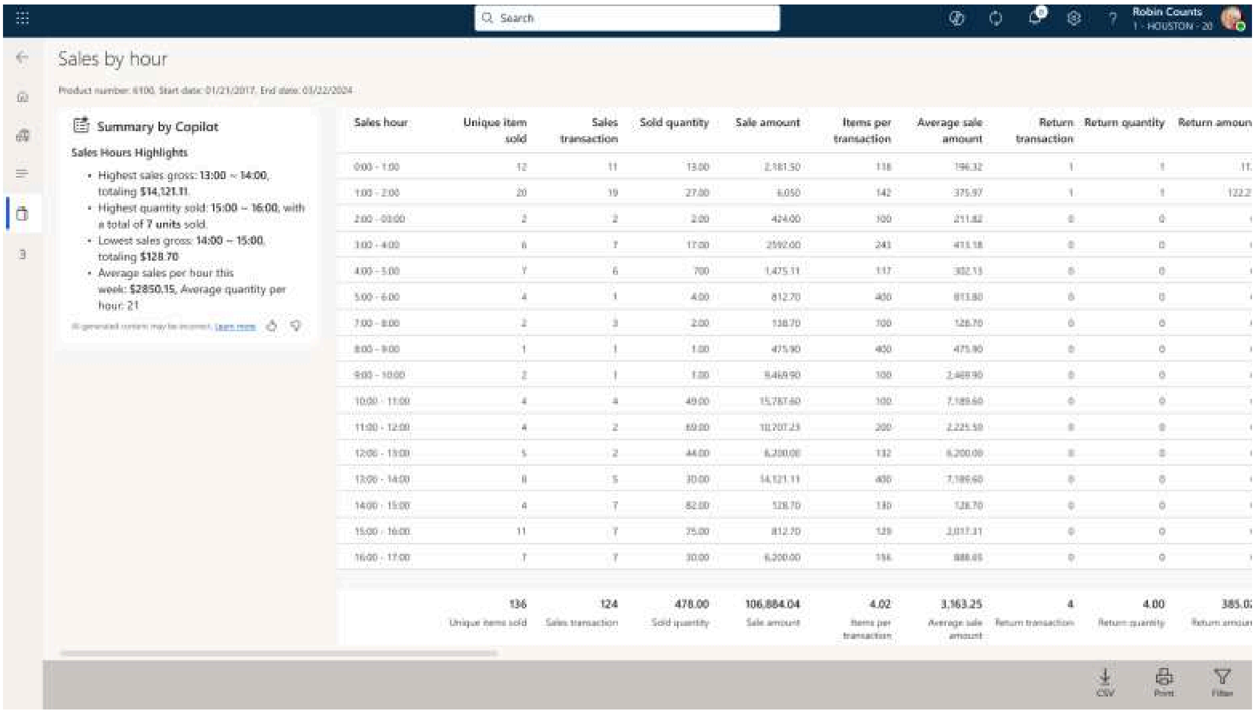
This feature enables Dynamics 365 Commerce's point-of-sale (POS) solution for Store Commerce to provide narrative summaries of channel sales and store performance reports. Using the capabilities of narrative visuals, the POS system delivers concise, human-readable summaries that highlight key metrics and trends from transactional data.

- **Efficiency**: Quick and easy access to summarized reports saves time for store associates.
- **Accuracy**: Automated summaries reduce the risk of human error in interpreting data.
- **Real-time Analysis**: Immediate availability of summarized data after transactions allows for timely decision-making.

This feature includes the following capabilities:

- **Default availability**: Summaries are accessible every time a channel report is loaded.
- **Compatibility with Highcharts reports**: Summaries seamlessly integrate with existing Highcharts-based reports.
- **Localization**: Summaries automatically adapt to the locale configuration of the POS app.
- **Data Access Control**: Summaries are governed by data access control settings. For example, a store cashier can analyze or view reports related to their own POS activity, while a store manager has broader permissions to access reports for the entire store's POS activity depending on the definition of underlying query powering reports.

Store insights can be disabled and reenabled using the functionality profile mapped to your store channels. This feature is available in the Dynamics 365 Commerce 10.0.41 release and is also included in the Commerce 10.0.38, 10.0.39, and 10.0.40 releases through proactive quality updates (PQUs) to facilitate adoption.



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

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

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Feedback

Was this page helpful? Yes No

Enhance clienteling with Copilot customer insights

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Copilot can help store associates easily and more effectively personalize shopping experiences for customers with real-time insights into their preferences and behaviors as they happen, right there in the store. Copilot does the heavy lifting by analyzing purchase history, clienteling notes, product recommendations, and more to bring you precise, actionable insights. With rich contextual information directly available inline, you can now connect with your customers on a deeper level without having to switch focus. You'll see the impact where it matters most: in satisfied customers who keep coming back for that personalized touch only you can provide. With Copilot, you're not just selling products; you're crafting experiences that resonate with each individual shopper.

Feature details

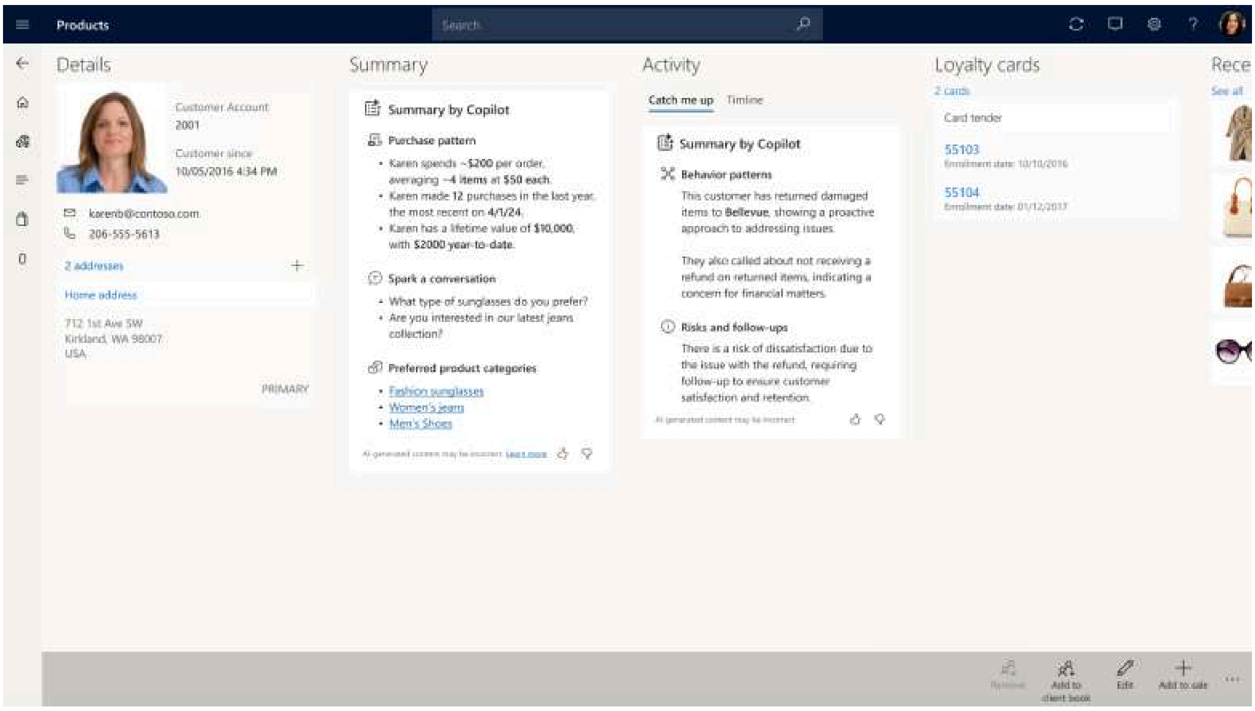
With Copilot, you gain access to a wealth of insights about your customers' preferences, including their favored categories and price points, as well as the store locations they frequent.

- **Preferred categories and basket analysis**: Copilot analyzes your customers' purchase history to identify the types of products they love. Whether they gravitate towards high-end electronics or are frequent buyers of eco-friendly products, you'll know exactly what to recommend next. Plus, Copilot understands price sensitivity, helping you to suggest items that not only match their interests but also their budget.

- **Preferred store location preferences**: Understanding where your customers prefer to shop is crucial. Copilot tracks this data, allowing you to tailor your approach based on whether they're local regulars or out-of-town visitors looking for something special.
- **RFM analysis**: Recency, frequency, and monetary value (RFM) analysis is a cornerstone of customer segmentation. Copilot performs this analysis on your customers' transaction history, segmenting them into groups based on their shopping behavior. This enables you to prioritize your attention and offers to those who are most engaged with your store.
- **Summarized timeline of customer activity**: Keeping up with every interaction can be overwhelming. That's why Copilot summarizes the timeline of each customer's activity. At a glance, you can catch up on their past interactions, making it easy to continue the conversation where it left off or to provide a personalized follow-up.

By leveraging these insights, you're not just selling products; you're building relationships. Copilot doesn't replace your expertise—it enhances it, giving you the tools to create memorable experiences that keep customers coming back.

The customer insights feature can be disabled and reenabled using the functionality profile mapped to your store channels. This feature is available in the Dynamics 365 Commerce 10.0.41 release, and is also included in the Commerce 10.0.38, 10.0.39, and 10.0.40 releases through proactive quality updates (PQUs) to facilitate adoption.



Geographic areas

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- United Kingdom
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- Brazil
- Canada
- India
- Japan
- France
- Korea

Feedback

Was this page helpful? Yes No

Improve merchandiser efficiency with Copilot

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

In Dynamics 365 Commerce, the Copilot-based summary and insights for merchandising data offer an interactive summary panel, automated data validations, and risk previews. By proactively identifying errors and inconsistencies in merchandising configurations, Copilot ensures data accuracy and empowers users to take corrective actions promptly. Properly configured products are essential for retail success, as inaccuracies can lead to missed sales opportunities.

Feature details

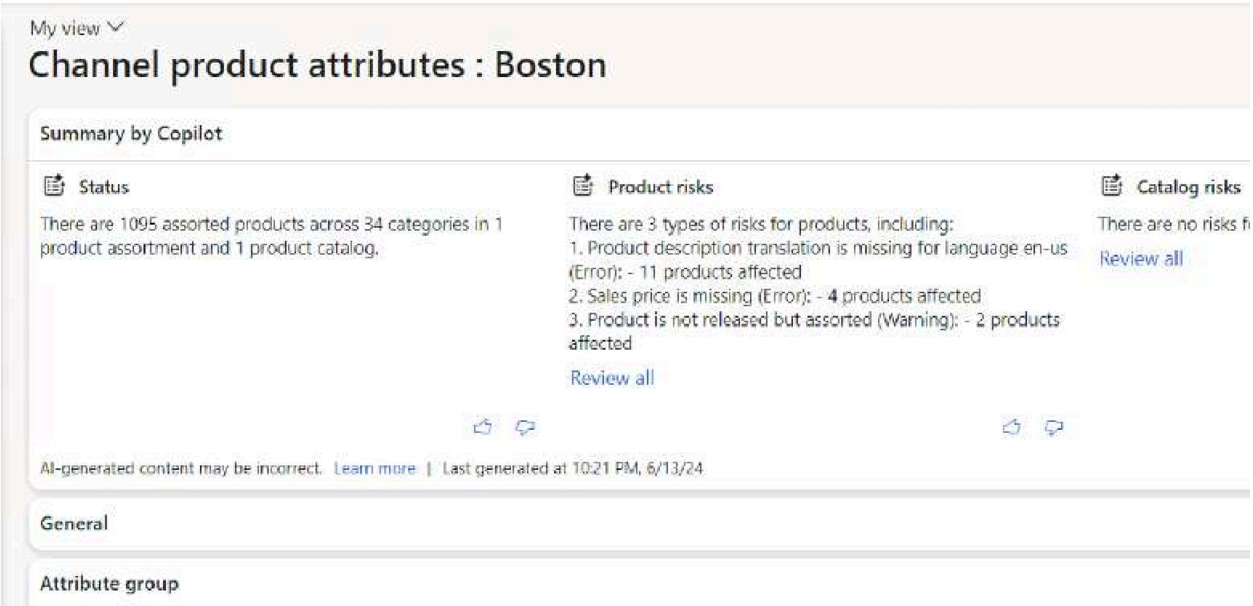
The Copilot-based summary and insights for merchandising data in Dynamics 365 Commerce offers valuable capabilities:

- **Interactive Summary Panel**: When users navigate to a channel in the Channel Categories and Product Attributes forms within Commerce headquarters, Copilot displays a summary panel. This panel provides insights and highlights potential issues related to merchandising configurations, such as product, category, and catalog-related settings.
- **Automated Data Validations**: Copilot enables automatic runs of various merchandising data validations. By using artificial intelligence (AI), it identifies

errors and inconsistencies in your configurations. This proactive approach helps maintain data accuracy and consistency.

- **Risk Preview**: Merchandisers can preview risks identified by Copilot. This feature allows you to assess potential issues before they impact your operations, empowering you to take corrective actions promptly.

The Copilot-based summary and insights feature can be disabled and reenabled using the **Enable Copilot based summary and insights for merchandising data** feature management switch in Dynamics 365 Commerce headquarters. This feature is available in the Dynamics 365 Commerce 10.0.41 release, and has also been included in the Commerce 10.0.38, 10.0.39, and 10.0.40 releases through proactive quality updates (PQUs) to facilitate adoption.



Geographic areas

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

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

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

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

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Feedback

Was this page helpful? Yes No

Improve sales with Store Commerce Copilot insights

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Sales associates in retail stores are better able to sell products with Copilot-generated product insights in Store Commerce. They have access to summarized key product information to help customers quickly find the right products. Copilot also helps sales associates suggest other products that complement a selected product to increase store sales.

Feature details

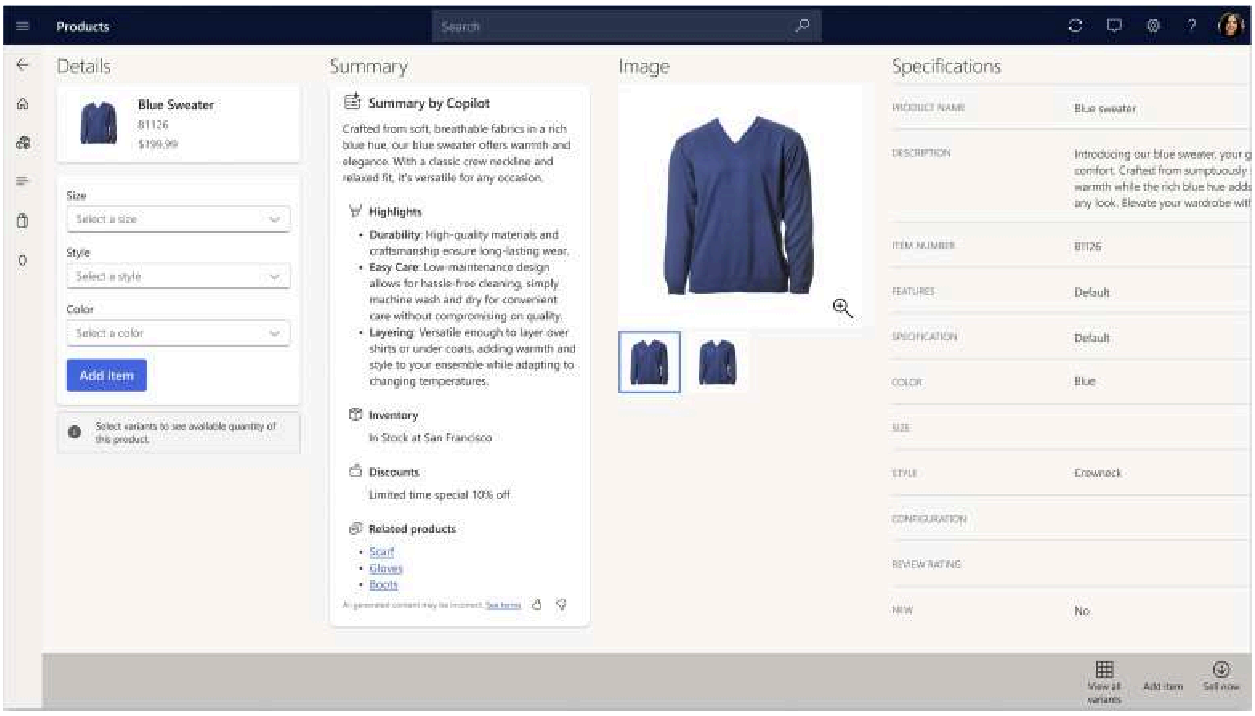
Copilot for Store Commerce generates product insights to help sales associates in retail stores improve their sales effectiveness and efficiency. Using generated insights, store associates can quickly learn and convey the most relevant information about products to customers.

Copilot-generated product insights are available on the product details page in Store Commerce and include the following information.

- **Summary**: A brief description of the product that emphasizes its main features.
- **Highlights**: The top three benefits of the product.
- **Inventory**: Product availability in the current or nearby stores.
- **Discount**: The best discounts and offers available for the product.

- **Related products**: Other products or product categories that customers generally buy with the current product.

The Copilot product insights feature can be disabled and reenabled using the functionality profile mapped to your store channels. This feature is available in the Dynamics 365 Commerce 10.0.41 release, and it has also been included in the 10.0.38, 10.0.39, and 10.0.40 Commerce releases through proactive quality updates (PQUs) to facilitate adoption.



Geographic areas

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

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

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

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

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Feedback

Was this page helpful? Yes No

Omnichannel commerce

Article • 07/16/2024

ⓘ Important

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

Developed as a modern, cloud-based, software as a service (SAAS) solution, the Dynamics 365 Commerce omnichannel headless retail engine enables scalable retail operations across in-store, call center, and online (business-to-consumer, business-to-business, and indirect business-to-business) sales channels. Each channel can support products, pricing, and promotions and capture customer and order data that can be accessed by any other sales channel.

Merchandisers tasked with defining complex pricing structures can use the unified pricing management module to simplify their workflow by using attribute-based pricing models to configure, simulate, and approve rules-based pricing across products, attributes, channels, and customers.

Feedback

Was this page helpful? Yes No

Roll out multifaceted pricing strategies

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Organizations are increasingly adopting multifaceted pricing strategies and seeking to gain better control over pricing in their omnichannel transformations. They want to eliminate pricing silos and use a centralized platform to plan, manage, review, and roll out pricing across all customer engagement touchpoints. Organizations also need an efficient way to define and maintain price breakdown and margin components that incorporate all relevant factors to offer contextual pricing that resonates with customers. The omnichannel experience also requires a real-time and performant pricing execution that enables businesses to quickly adapt to market changes and customer demands. This feature allows you to implement a unified pricing management module that works consistently and comprehensively across supply chain, retail, and e-commerce business processes.

Feature details

The pricing management module provides the following capabilities to help your organization drive omnichannel pricing that covers the presale, sale, and postsale stages of business processes:

- Uses an attribute-based pricing model to set up pricing rules based on product, customer, channel, or order attributes.
- Enables sophisticated price segmentation to efficiently drive differentiated and tailored pricing experiences per market or customer segment.

- Defines and manages complex pricing structures with comprehensive price component breakdowns.
- Drives flexible pricing strategies by using a rich set of pricing techniques that include long-term trade agreements, short-term price adjustments, promotional discounts, auto charges, and retrospective rebates.
- Runs pricing simulation to validate pricing setup and generate pricing reports to analyze pricing execution.
- Integrates with headless pricing application programming interfaces (APIs) for pricing lookup and calculation in business-to-consumer (B2C) and business-to-business (B2B) scenarios.
- Configures and customizes pricing engine behavior to fit business specific needs.

Feedback

Was this page helpful? Yes No

Store Commerce

Article • 07/16/2024

ⓘ Important

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

Built on a modern, headless, omnichannel retail platform, Dynamics 365 Commerce's Store Commerce POS enables retailers to provide fast, efficient, and modern checkout experiences on fixed and mobile devices that operate on or offline. The Store Commerce POS application provides comprehensive retail workflows, from in-store, online, and curbside pickup transactions, to inventory management, order fulfillment, assisted selling, and store operations.

Sales associates spend most of their time engaging with customers and processing orders through the Store Commerce POS. Streaming the checkout workflow to optimize for efficiency, standardizing payment flows, and providing contextual in-line controls results in time saved on every transaction, leading to happier, more efficient sales associates. Customers who want to skip the queue can instead use Store Commerce's fast and frictionless self-checkout functionality to quickly complete their payment.

Feedback

Boost efficiency with modern Store Commerce workflows

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

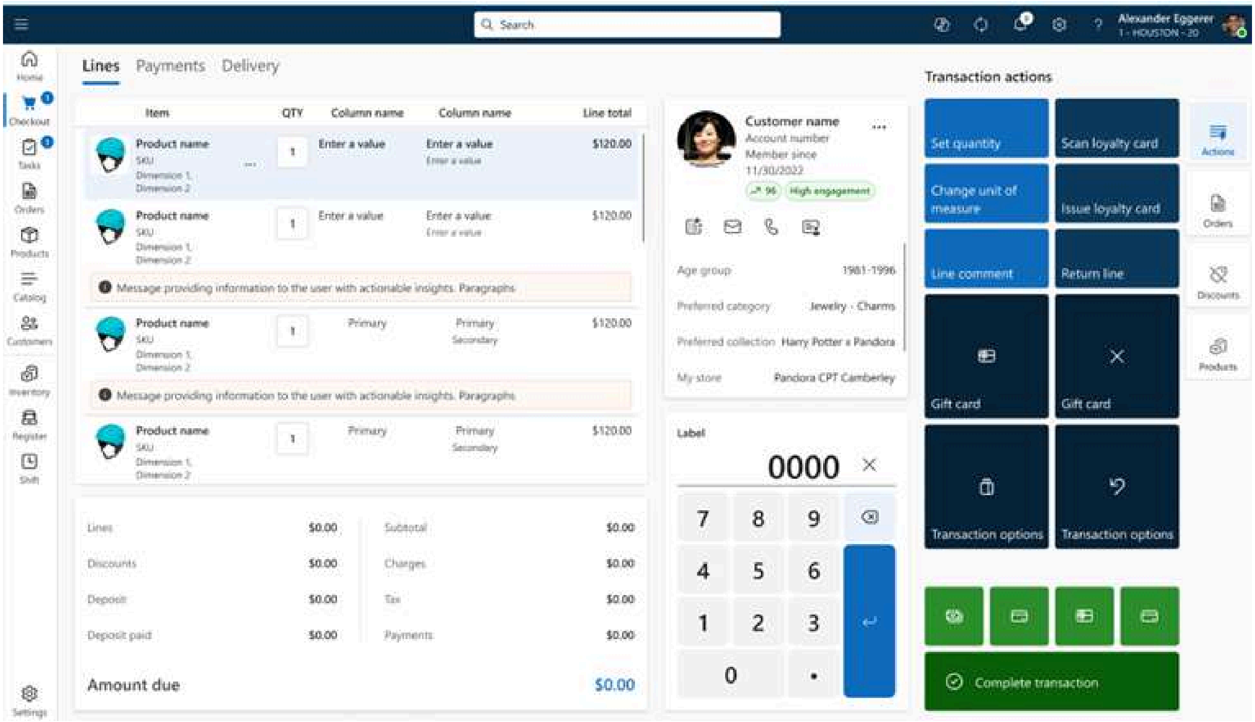
In a busy retail setting, a point of sale (POS) system that puts usability first and surfaces the most common user actions with minimal clicks helps cashiers and sales associates be more efficient, keeping customers satisfied with their experience. This feature improves transaction workflows in Store Commerce POS with modern styles and interactions that bring additional efficiencies and the ability to perform inline actions with minimal clicks.

Feature details

Improvements in Store Commerce simplify and streamline the POS checkout experience by adopting the React framework for the Store Commerce app transaction page, which allows you to activate the following capabilities:

- **Inline editing**: Change quantity and unit of measure directly by interacting with the transaction grid.
- **Better inline messaging**: Enable modernization of the transaction grid with improved handling of inline messaging and actionable insights.
- **Inline shortcuts**: Provide shortcuts from the list rows for primary actions coupled with overflow menus such as voids and price overrides.

- **Improved user experience**: Apply modern styling and improve appearance of button grids, total panels, and customer cards.



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

Feedback

Was this page helpful? Yes No

Check out faster with optimized payment flows

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Efficiency and predictability are key to the smooth operation of a point of sale (POS) system, especially when it comes to payment processing. When store associates process customer payments across a variety of payment types with fewer steps, customers spend less time waiting. Optimize the Dynamics 365 Commerce POS payment processing user experience to create more consistent workflows across loyalty, gift card, voucher, and customer account payment types that make the checkout process more efficient.

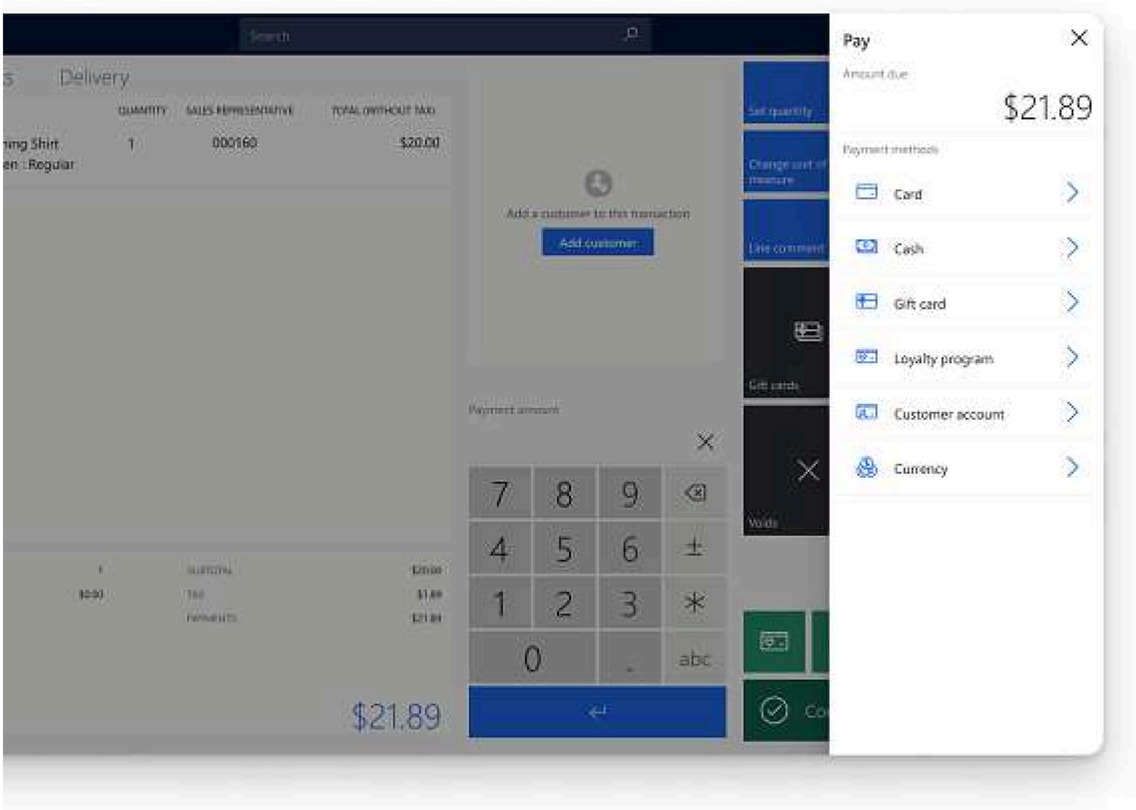
Feature details

The payment processing workflows for Dynamics 365 Commerce POS apps are benefiting from several updates and improvements. The updates apply across all POS experiences, including Store Commerce for Windows, Android, and iOS, as well as Store Commerce for web.

Improvements include:

- **New payment methods**: New, consistent payment user interface (UI) patterns across payment types for loyalty, gift card, voucher, and customer account workflows.

- **Enhanced workflows**: New, simpler UI for payment methods that are currently unintuitive or overly complex.
- **Payment terminal integration**: Ability to send payments directly to the payment terminal during checkout.



Feedback

Was this page helpful? Yes No

Enable kiosk self-checkout with intuitive workflows

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

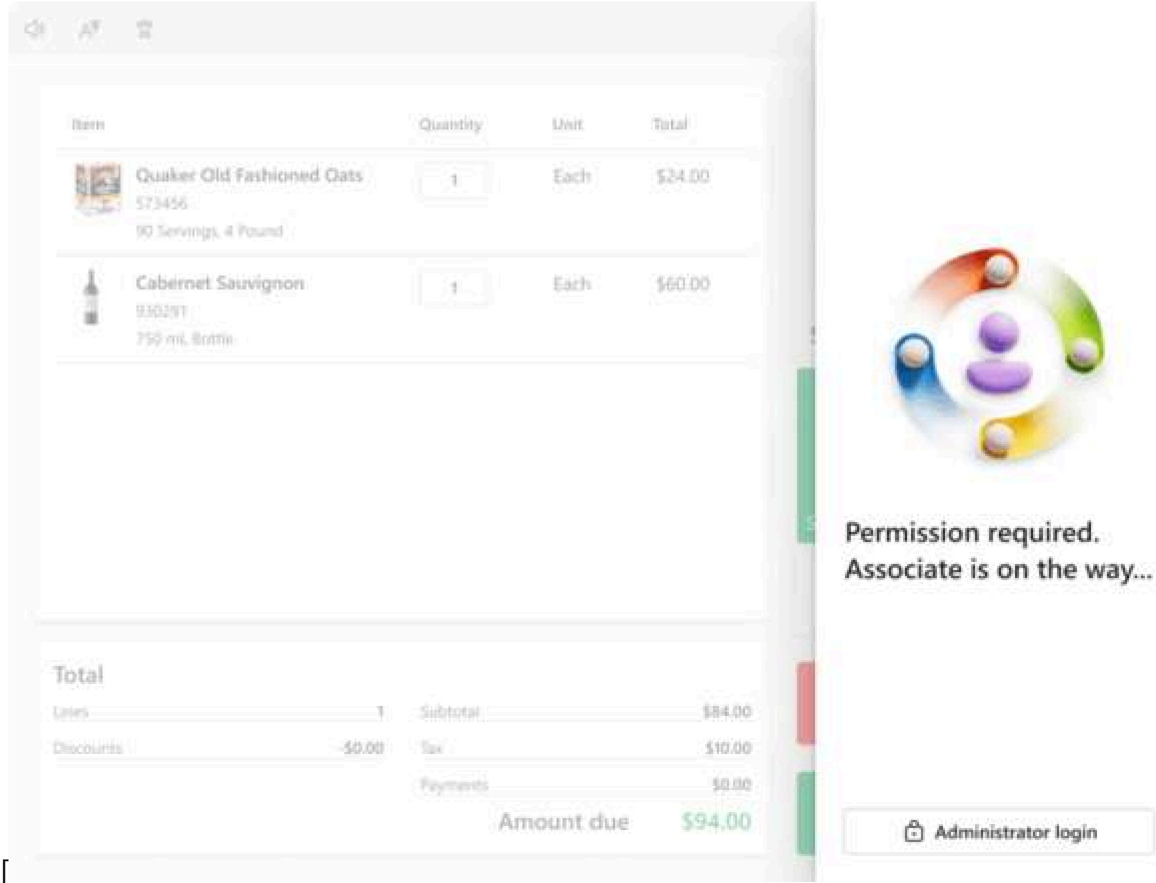
Provide faster checkout and reduced wait times to your shoppers by enabling Store Commerce kiosk-based self-checkout with automated cashier intervention workflows for restricted operations.

This release empowers Dynamics 365 Commerce point of sale customers to roll out kiosk-based self-checkout at scale for their shoppers by integration with call for assistance functionality, lights to notify associates when shoppers need assistance, and support for a variety of payment methods including gift cards and loyalty cards.

Feature details

Store Commerce kiosk-based self-checkout functionality provides the following capabilities:

- **Age-restricted products**: Enables automated call for assistance workflows for age-restricted products and restricted operations with light peripherals integration.
- **Payment types**: Accepts payment through existing tender types such as credit, debit, and loyalty programs.

![

See also

Enable self-checkout in the Store Commerce app (docs)

Feedback

Was this page helpful? Yes No

Reduce checkout time with streamlined receipt workflows

Article • 07/16/2024

ⓘ Important

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

Expand table

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

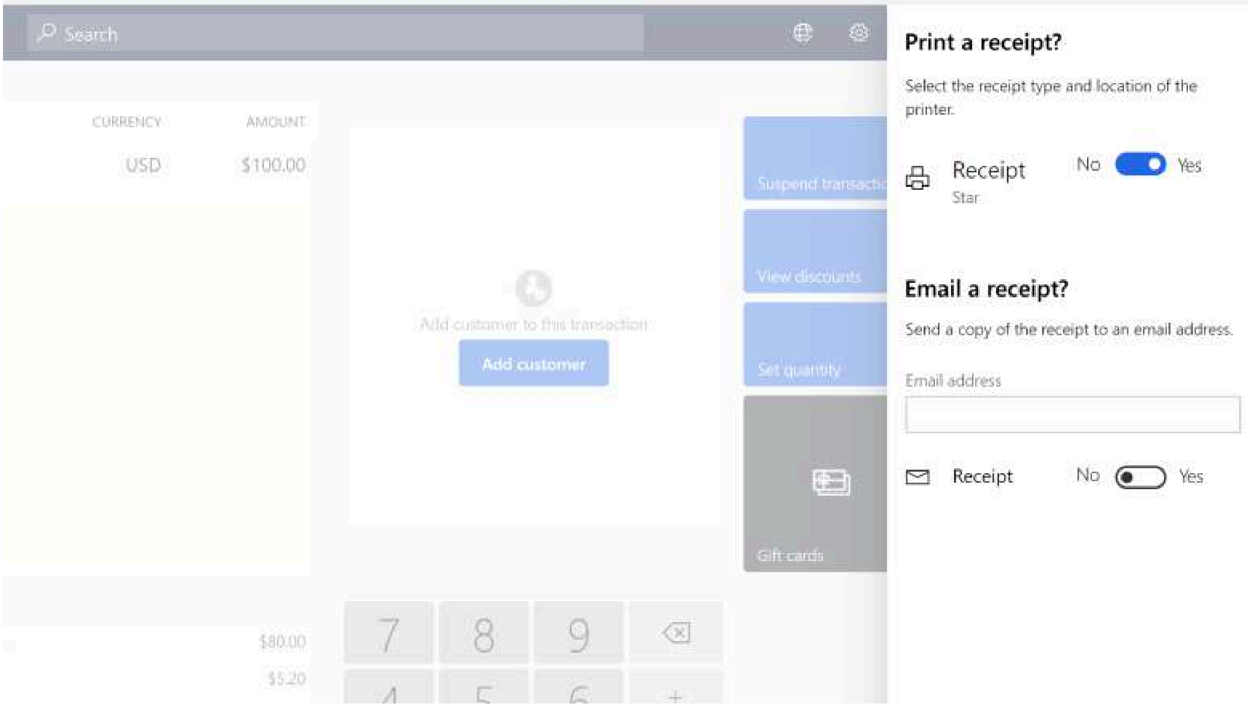
Business value

Every action that a cashier performs to complete a transaction requires time and effort, so any reduction in the number of steps it takes to check out a customer has a meaningful impact. We are optimizing the Store Commerce app to reduce clicks and automate actions that don't require user input so that cashiers can complete transactions and print receipts faster and more efficiently.

Feature details

To streamline the checkout process, Dynamics 365 Commerce has introduced the following optimizations to the checkout flow:

- **Immediately open the cash drawer**: Open the cash drawer when the denomination is selected, and the prompt for an emailed receipt is enabled.
- **Automatically print receipts**: Print the receipt when the cash drawer opens if printed receipts are configured to print automatically.
- **Reduce prompting**: Combine print and email dialogs into a single slide-out menu when configured to prompt the user.
- **Eliminate clicks**: Automatically dismiss the change due dialog when the cash drawer is closed.



Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Business Central in 2024 release wave 2

Article • 07/16/2024

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

Overview

Business Central is a business management application for small and mid-sized organizations that automates and streamlines business processes. Highly scalable and adaptable with a rich set of capabilities, Business Central enables companies to manage their finances, supply chain, manufacturing, projects, services, and more. Companies can easily add functionality that's relevant to their specific industry or region of operation by picking apps from industry-leading ISVs and customizing the app to fit their business needs. Business Central is fast to implement and easy to configure. Simplicity guides innovations in product design, development, implementation, and usability.

This release will again demonstrate our commitment to Copilot. We continue to look at how Copilot can help optimize business processes so you can complete tasks faster. We'll enable Copilot to help with creating sales orders directly from Chat. Additionally, we will also make it faster to create product information faster with Business Central using Copilot to create information like Variant, Unit of Measure, and other information. We are also investing in piloting Chat extensibility to help users learn from 3rd party content.

Developers are already improving their productivity with GitHub Copilot in Visual Studio Code, and there's more innovation to come from these world-leading development tools for AL developers. We've also enabled developers to enrich the application metadata with more details to use for a better Copilot experience.

We'll help organizations focus on their primary business while staying compliant with various government regulations by automating regulatory tasks. Expanding core functionality is always a focus, and this release will enable customers to use installments on sales documents. To support customers with international business, we'll enable support for multiple VAT numbers.

Additional updates in 2024 release wave 2 include:

- **Application**: Our e-document feature provides more capabilities for sending documents. The last release offered integration between projects in Business Central and Dynamics 365 Field Service, and in this release, we're expanding this integration to cover service orders in Business Central. We'll also deliver more reporting capabilities for sustainability to help companies track their greenhouse gas emissions for reporting.
- **Country and regional**: We've expanded Business Central's global availability. Business Central is now available in more than 170 countries and regions.
- **Development**: We'll continue to invest in areas that enhance productivity for developers who work with GitHub, Visual Studio Code, and AppSource marketplace. We're adding new code refactoring capabilities, an easy path to functional and performance testing, and ISV and custom code with AL GO for GitHub.
- **Governance and administration**: Business Central delivers a set of additional self-service features to help administrators manage access to environments at a more granular level, and audit critical admin operations using Microsoft 365 Audit Log. Audit Log provides strong options for reinforcing data privacy with customer-managed encryption keys and Azure Lockbox.
- **Legislation**: We'll continue to ensure that Business Central is compliant with local accounting laws, which means we'll make several improvements to Microsoft's localized versions.
- **Reporting and data analysis**: We'll add over 70 Power BI reports and continue to invest in our overall reporting capabilities.
- **Service and platform**: We're continuing to invest in the fundamentals of our service, focusing on high availability, performance, stability, resource governance, security, and compliance.

Investment areas

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 170 countries and regions worldwide. Additionally, in the countries where Microsoft is responsible for the localization, we provide updates for all regulatory features.

Development
To empower AL developers and increase their productivity, we've laid the foundation for introducing namespace support in the platform and application. Namespace support makes it easier to structure apps, create better object names, and avoid identifier clashes. As apps mature, the need to refactor is inevitable, so we've added the ability to move ownership of a table and its data between extensions. Additionally, developers can hide specific variable data so that other parties can't access it during debugging, which protects internal data.

When it comes to data analysis and reporting, developers have more control. For example, you can turn off Analysis Mode on pages and specify how to embed content from Power BI.

Consultants and developers can easily open Visual Studio Code for a production or sandbox environment to investigate and understand objects across installed extensions, view code for owned extensions, and perform troubleshooting—all without having to set up Visual Studio Code manually. Similarly, we've improved profiling from the client and Visual Studio Code so it's easier to find database-related performance issues.

AppSource publishers can sell through CSPs, and better handling for AppSource runtime packages gives seamless development and troubleshooting across app dependencies for publishers and resellers.

Governance and administration
We're giving Business Central administrators more tools for managing environments, apps, and data migrations. The goal is for administrators to be self-sufficient, able to solve their customer needs, and handle a wide variety of administrative scenarios.

- More granular administrator roles to give more control over the access granted to (delegated) administrators.
- Improved processes for minor update releases.
- The ability to link Business Central and Power Platform environments to set up integrations consistently and to apply Power Platform environment settings to Business Central.
- The ability to cancel Cloud Migration replication runs.

Legislation
Business Central offers updates to regulatory features based on popular requests for improvements and ever-changing requirements from local authorities. To give our customers peace of mind and enable them to focus on their core business, we automate many processes and ensure that features comply with the regulations set by government agencies. For example, if local regulations require that you create vouchers that serve as proof of transactions and a detailed audit trail, you can automate the

process. Business Central can automatically generate and attach vouchers to general ledger entries, so that accountants can rest assured that they're compliant, without extra steps. The retention policy features let you specify how long you need to store vouchers before you clean them up, giving you more control over the amount of data you store.

We're working to make regulatory features a standard part of Business Central, so that we can deliver improvements out of the box across the countries and regions where they're relevant. For example, the E-documents module is a foundation that supports processes for sales and purchase invoicing, and it's easy for partners to extend by building country-specific apps for e-invoicing.

Reporting and data analysis

In the modern world, data is an invaluable resource, forming the foundation of decision-making and progress across all sectors. Recent advances in AI technology and data analytics tools bring radically new ways for businesses to distill complex information into actionable intelligence, reveal hidden patterns and trends, and find correlations that were previously concealed. The critical insights gained from data analysis empower organizations to optimize their strategies, enhance customer experiences, identify potential risks, gain unprecedented insights into the details of their operations and environments, and innovate in ways that were once inconceivable.

As data continues to fuel innovation and drive transformative advancements, harnessing its potential has become essential for staying competitive and shaping a more efficient and sustainable future for SMBs.

Our reporting strategy revolves around building universal BI and analytics within the Business Central experience. We aim to seamlessly integrate in-context, rich, and immersive BI and analytics content from first and third parties into Business Central. Alongside flexible self-service capabilities, you can effortlessly access and leverage your data for maximum value.

User experiences

Business Central offers a broad portfolio of user interfaces that enable our customers to work with their data from anywhere, and on any device. User interfaces include an installable desktop app, a browser-based web app, and mobile apps. Whether you need to enter data at high speed, casually update entries, or analyze relational data, Business Central offers numerous features that are easy to get started with and powerful when needed.

Every release includes enhancements to usability, accessibility, performance, and reliability. In this release wave, we're boosting efficiency when you're working with actions across selections in lists of records and viewing summarized data to help you easily fix data entry mistakes.

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

Check out the release plan

For application administrators

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

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

Get the most out of Business Central

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
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.

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Business Central

Article • 07/16/2024

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

- For a list of the previous wave's release plans, go to 2024 release wave 1 plan.

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

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

Application

Core application functionality is a key investment area for us. We listen to our partners and customers to make sure we deliver what they need to be even more productive with every release.

Expand table

Feature	Enabled for	Public preview	General availability
Use new reports and demo data for financial reporting	Users, automatically	-	Oct 2024
Manage subscription billing and revenue and expense recognition	Users, automatically	Sep 2024	Oct 2024
Integrate Field Service with Service Management	Users, automatically	-	Oct 2024
Archive service management documents	Users by admins, makers, or analysts	-	Oct 2024
View item availability in Field Service work orders	Users by admins, makers, or analysts	-	Oct 2024

Feature	Enabled for	Public preview	General availability
Export posted sales invoices to Shopify	Users, automatically	-	Oct 2024
Replenish items for projects	Users, automatically	-	Oct 2024
Reconcile payment transactions in Shopify with invoices	Users, automatically	-	Oct 2024
Use directed put-away and pick warehouses with projects	Users, automatically	-	Oct 2024
Capture data from e-docs with Azure AI Document Intelligence	Users, automatically	-	Oct 2024
Add invoice and receipt documents to e-documents in bulk	Users, automatically	-	Oct 2024
Import, export product info using Shopify Metafields	Users by admins, makers, or analysts	-	Oct 2024

Copilot and AI innovation

This wave expands on our first Copilot capability, marketing text suggestions, boosting productivity for a broader set of SMB roles.

Expand table

Feature	Enabled for	Public preview	General availability
Suggest number series with Copilot	Users, automatically	Oct 2024	-
Chat with Copilot and learn to use installed add-on apps	Users, automatically	Oct 2024	-
Complete bank account reconciliation faster with Copilot	Users, automatically	✔ Nov 9, 2023	Oct 2024
Create product information faster with Copilot	Users, automatically	Oct 2024	-
Summarize any record with Copilot	Users by admins, makers, or analysts	Jan 2025	-
Experience enhancements to Analysis Assist with Copilot	Users, automatically	Oct 2024	-

Feature	Enabled for	Public preview	General availability
Start using Copilot without having to set things up	Users, automatically	-	Oct 2024
Create sales lines easily with Copilot	Users, automatically	Oct 2024	-
Automate tests for your Copilot extensions with the Business Central Test Toolkit	Users by admins, makers, or analysts	Dec 2024	Dec 2024

Country and regional

We've made Business Central available in more countries and regions around the world in this release wave.

Expand table

Feature	Enabled for	Public preview	General availability
Start using integration with IRS for 1099 submissions	Users, automatically	Oct 2024	Nov 2024
Start using E-Documents framework localized for Germany	Users, automatically	Oct 2024	Nov 2024
Enable additional countries and regions	Users, automatically	-	Feb 2025

Development

Our focus is on making Business Central AL developers more productive, and empowering consultants, citizen developers, and users to do more while lowering the cost of changes.

Expand table

Feature	Enabled for	Public preview	General availability
Set up easier in-client performance profiling with rules	Users, automatically	Oct 2024	Oct 2024

Feature	Enabled for	Public preview	General availability
Use the ternary operator when coding in the AL language	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024
Pull extension source from GitHub when opening Visual Studio Code from the web client	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024
Use the 'this' keyword for codeunit self reference	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024
Restore extensions if publishing from Visual Studio Code fails	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024
Use improved features for report documents	Users by admins, makers, or analysts	-	Oct 2024
Package resources in extensions and access from AL	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024
Run code action for 'with' for file, project, or workspace	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024
Type testing and casting operators for interfaces	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024
Extend AL interfaces	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024
Extend and customize profiles from other extensions	Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

Governance and administration

We're adding new tools and improving existing tools for administrators to manage environments, apps, and data migrations.

Expand table

Feature	Enabled for	Public preview	General availability
Manage environment updates more flexibly	Admins, makers, marketers, or analysts, automatically	Oct 2024	Mar 2025
Migrate record links and notes with cloud migration tooling	Users, automatically	Sep 2024	Oct 2024
Manage per-tenant extensions in admin center	Admins, makers, marketers, or analysts, automatically	-	Dec 2024
View app compatibility with future versions in admin center	Users, automatically	-	Dec 2024
Get notified about issues with job queue background processing	Users by admins, makers, or analysts	-	Oct 2024
Get list of manageable environments for Microsoft Entra apps	Admins, makers, marketers, or analysts, automatically	-	Dec 2024
Support IPv6 for enhanced security and scalability	Users, automatically	-	Feb 2025

Legislation

This Business Central release wave delivers a set of legislative capabilities that can act as a foundation for more specific requirements in local versions.

Expand table

Feature	Enabled for	Public preview	General availability
Use e-documents with Power Automate	Users, automatically	Oct 2024	Nov 2024
Use multiple VAT numbers for a customer	Users, automatically	-	Oct 2024
Achieve sustainability scorecards and goals	Users, automatically	-	Oct 2024
Navigate the sustainability manager role center with ease	Users, automatically	-	Oct 2024
Add attachments when you send electronic documents	Users, automatically	Oct 2024	Nov 2024

Feature	Enabled for	Public preview	General availability
Record greenhouse gas emissions using purchase invoices	Users, automatically	-	Oct 2024
Report sustainability entries with financial reports	Users, automatically	Oct 2024	Nov 2024
Use new service providers in the e-documents framework	Users, automatically	Oct 2024	Nov 2024
Purchase carbon credits	Users, automatically	-	Oct 2024
Enable Internal Carbon Fee calculation in Sustainability	Users, automatically	-	Oct 2024

Reporting and data analysis

Access to the right reports and data analysis capabilities is essential for companies wanting to be in control of the business and identify new growth opportunities.

Expand table

Feature	Enabled for	Public preview	General availability
Use embedded Power BI reports out of the box	Users by admins, makers, or analysts	-	Oct 2024

User experiences

Great user experiences help users enter, update, and fix mistakes in their data in an intuitive way.

Expand table

Feature	Enabled for	Public preview	General availability
Access keys with Key Tips in more languages	Users, automatically	-	Oct 2024
Use drag and drop on file upload dialog to	Users,	-	Oct 2024

Feature	Enabled for	Public preview	General availability
attach multiple files	automatically		
Resize columns even when personalization isn't enabled	Users, automatically	-	Oct 2024

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Feedback

Was this page helpful? Yes No

Adapt faster with Power Platform

Article • 08/16/2024

ⓘ Important

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

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.

Feedback

Was this page helpful? Yes No

Auto-apply templates when you synchronize data with Dataverse

Article • 08/16/2024

ⓘ Important

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

Expand table

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

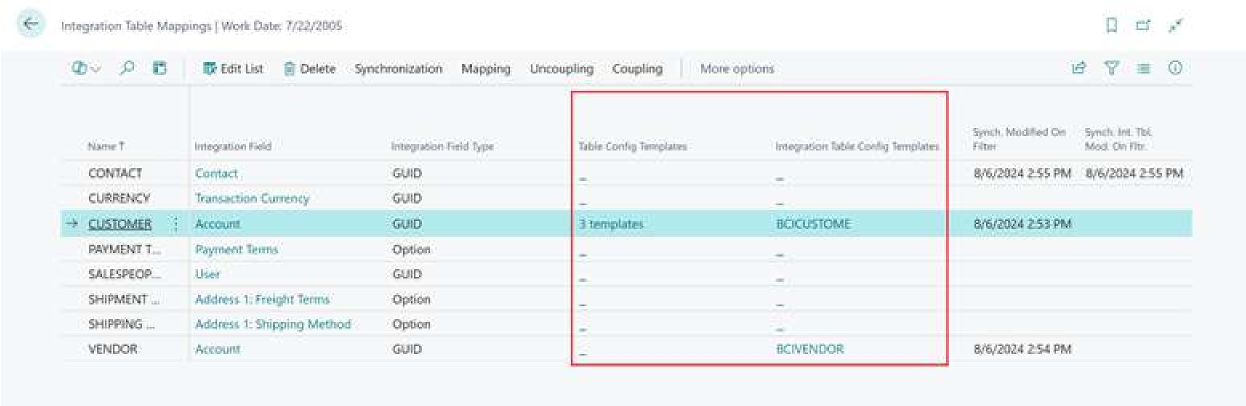
Business value

Businesses often enrich data that's synchronized between Business Central and Dataverse by using templates that make the data ready to use in either application. Having a configurable, rule-based, and automated way to select the templates to apply when they synchronize data in either direction means you don't have to extend your integration solutions with such rules, so integration between Business Central, Dataverse, and Dynamics 365 apps is faster and more cost effective.

Feature details

For example, when you synchronize account data from Dataverse to the customer table in Business Central, you might want to apply different configuration templates for domestic or foreign customers. Configuration templates can contain different posting groups and other settings for the customer records that synchronization creates. The synchronization engine chooses a configuration template based on the country specified for the account record in Dataverse.

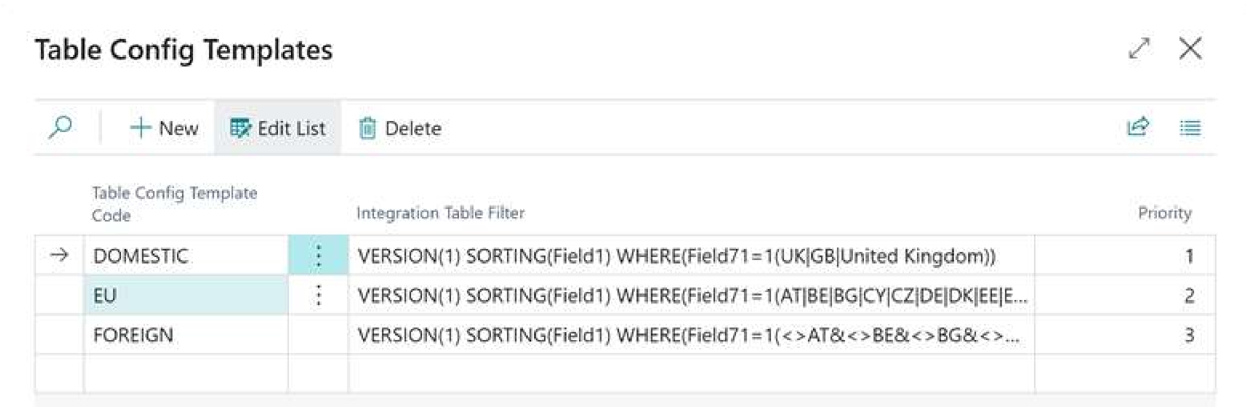
On the **Integration Table Mapping** page, you can specify multiple configuration templates and define filters for when to apply them by choosing the link in the **Table Config Template Code** and **Int. Tbl. Config Template Code** fields.



The **Table Config Template Code** and **Int. Tbl. Config Template Code** fields show different values depending on the number of templates that you configure for a specific integration table mapping:

- If you configure a single configuration template, the name of the configuration template shows in order to stay compatible with current capabilities.
- If you configure multiple configuration templates, the number of configured configuration templates shows.

To set up the configuration template to apply when you synchronize data to Business Central, choose the link in the **Table Config Template Code** field on an integration table mapping to open the **Table Config Templates** page. On the **Table Config Templates** page, you can insert multiple configuration templates, and for each you can specify a **Filter** that determines which template to apply. The **Priority** column determines the order in which the filters for each configuration template are evaluated.



The same applies when you choose a link in the **Int. Tbl. Config Template Code** field.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Application

Article • 07/16/2024

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

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.

Feedback

Was this page helpful? Yes No

Add invoice and receipt documents to e-documents in bulk

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

The e-documents framework in Business Central is the cornerstone for exchanging electronic documents and the import and export of data that supports operations and finances. In this release wave, it's easier for people in accounts payable to import invoices and receipt documents so they can work with them. This speeds up total processing time and ensures a single point of entry for overhead invoices or other documents that use the e-documents framework.

Feature details

Today, you can import e-documents manually, and only one at a time. In this release, we've extended the e-documents framework to handle the import of multiple files, and importing them from a SharePoint folder. These capabilities drastically decrease the time it takes to import e-documents.

This feature is part of an enrichment of accounts payable scenarios for core bookkeeping. We're streamlining the processes for bookkeepers and accountants end-to-end, so they can be faster and more precise.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Archive service management documents

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

Service documents often change and evolve during their lifecycle. The archiving capability gives you control over your service data through audit trails and version control.

Feature details

Archiving capabilities for service management are similar to the functionality you might already be familiar with from the sales and purchase areas. You can set up documents to archive automatically, so that you don't need to think about it. With automatic archiving, Business Central creates a new version of the archived document when people do the following:

1. Change the status of a document or delete it.
2. Print, download, or send a document by email.
3. Post service order.
4. Convert a service quote to an order or service contract quote to contract.

You're in full control of archiving. The following list shows the documents and options you can choose when you set up automatic archiving on the **Service Management Setup** page:

- Archive service quotes: Never (default), Questions, Always.
- Archive service contract quotes: Never (default), Question, Always
- Archive orders: Yes/No

You can also use the **Archive** action to manually archive versions of service documents, such as service quotes, contract quotes, and orders.

To keep the size of your database under control, archived service documents are added to a list of Retention policy tables.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

Thank you for submitting this idea:

- Archive Service Orders

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

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

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Feedback

Was this page helpful? Yes No

Capture data from e-docs with Azure AI Document Intelligence

Article • 07/16/2024

ⓘ Important

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

Expand table

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

Business value

The e-documents framework in Business Central is the cornerstone for the exchange of electronic documents, and the import and export of data that supports operations and finances. When working with vendor invoices and receipts through e-documents, accounts payable departments can streamline their OCR and document capture with native Azure AI Document Intelligence support in Business Central. They can capture data at the invoice line level, so received invoices and receipts are ready for further processing.

Feature details

In this release, we're extending the e-documents framework to seamlessly handle and process imported e-documents. For some types of documents, such as PDFs and images, an OCR service must capture the data. In this release, there's a new modern OCR service in Business Central that uses state-of-the-art technology to process invoices and receipts. This service is powered by a native integration into Azure AI Document Intelligence, which specializes in recognizing invoices and receipts (among other things).

E-documents is the key framework for working with incoming and outgoing documents and data exchange in Business Central. Going forward, we'll enrich e-documents with features to help streamline document transport, processing, and sending/receipt, so document exchange can work smoothly. With the new Azure AI Document Intelligence processing in e-documents, the accounts payable department is empowered to process documents for the channel through which they prefer to receive e-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.

Feedback

Was this page helpful? Yes No

Define shipping information for Shopify shipping fees

Article • 08/16/2024

ⓘ Important

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

Expand table

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

Business value

Map shipping fee information from Shopify to Business Central more accurately and with more flexibility. You can choose different types of shipping charges, such as G/L account, item, or item charge, and specify the shipping agent and shipping agent service.

Feature details

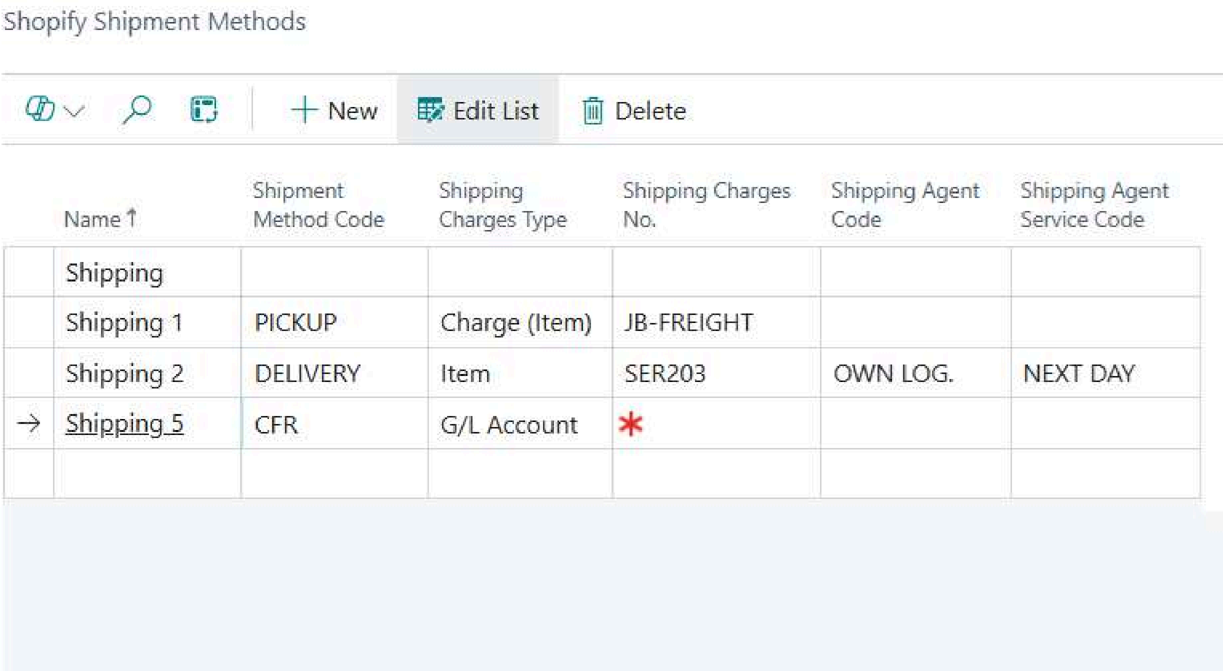
In addition to the **Shipping Charges Account** field available on the Shopify Shop Card page, we're adding **Shipping Charges Type** and **Shipping Charges No** fields to the **Shopify Shipment Method** page. Adding these fields allows you to more precisely map shipping fee information from Shopify to the sales document in Business Central.

You can continue to use the G/L account defined on the Shopify Shop Card page, but if you define a **Shipping Charges Type** and **Shipping Charges No**, those values are used instead.

The Shopify Connector now supports the following types:

• G/L Account • Item • Item Charge

Item Charge is automatically assigned to all items on the sales document.

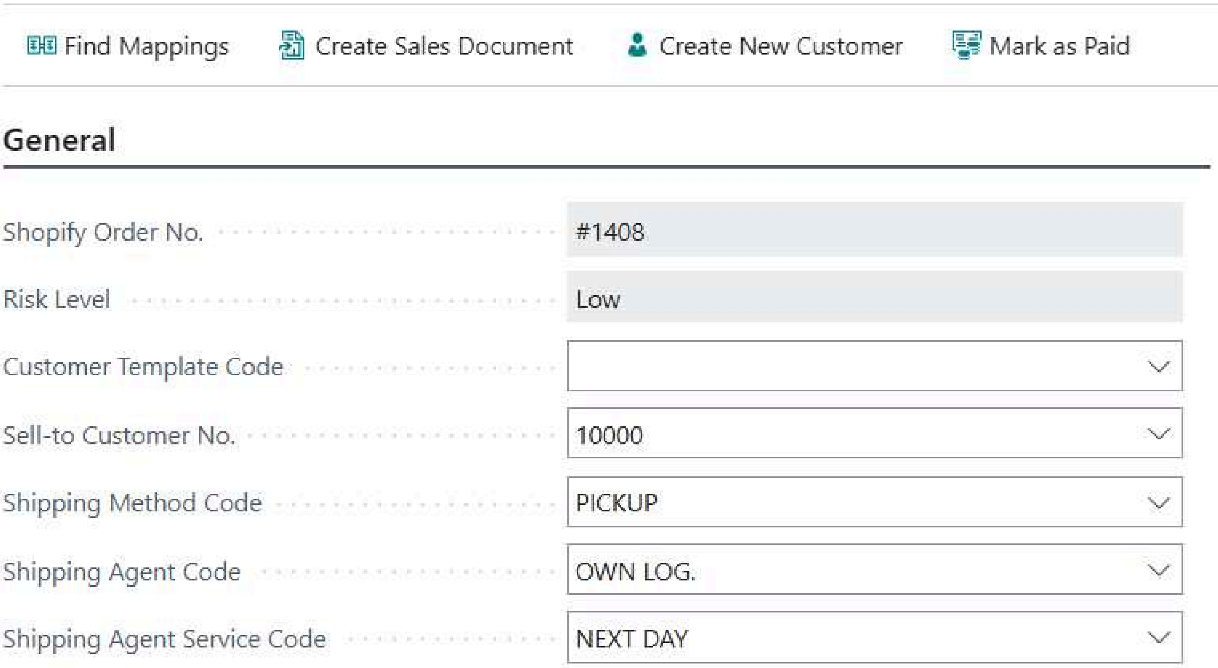


Shopify Shipment Methods

New | Edit List | Delete

Name ↑	Shipment Method Code	Shipping Charges Type	Shipping Charges No.	Shipping Agent Code	Shipping Agent Service Code
Shipping					
Shipping 1	PICKUP	Charge (Item)	JB-FREIGHT		
Shipping 2	DELIVERY	Item	SER203	OWN LOG.	NEXT DAY
→ Shipping 5	CFR	G/L Account	*		

You can also find the **Shipping Agent Code** and **Shipping Agent Service Code** fields in the **Shopify Shipment Methods** page. If you fill them in, they populate the corresponding fields on the sales document in Business Central.



Multiple shipping fees

Shopify lets you add multiple shipment fees to an order—for example, by editing the order in the Shopify Admin. When you receive several shipping fees with a Shopify order, the Shopify Connector uses the first one to initialize the Shipment Method Code, Shopping Agent Code and Shipping Agent Service Code fields in the header of the document.

Be aware that in other cases, Shopify merges multiple shipping rates into one value called **Shipping** and doesn't transfer individual rates.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Enable locations in Shopify refunds

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see [Microsoft policy](#)). Learn more: [What's new and planned](#)

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

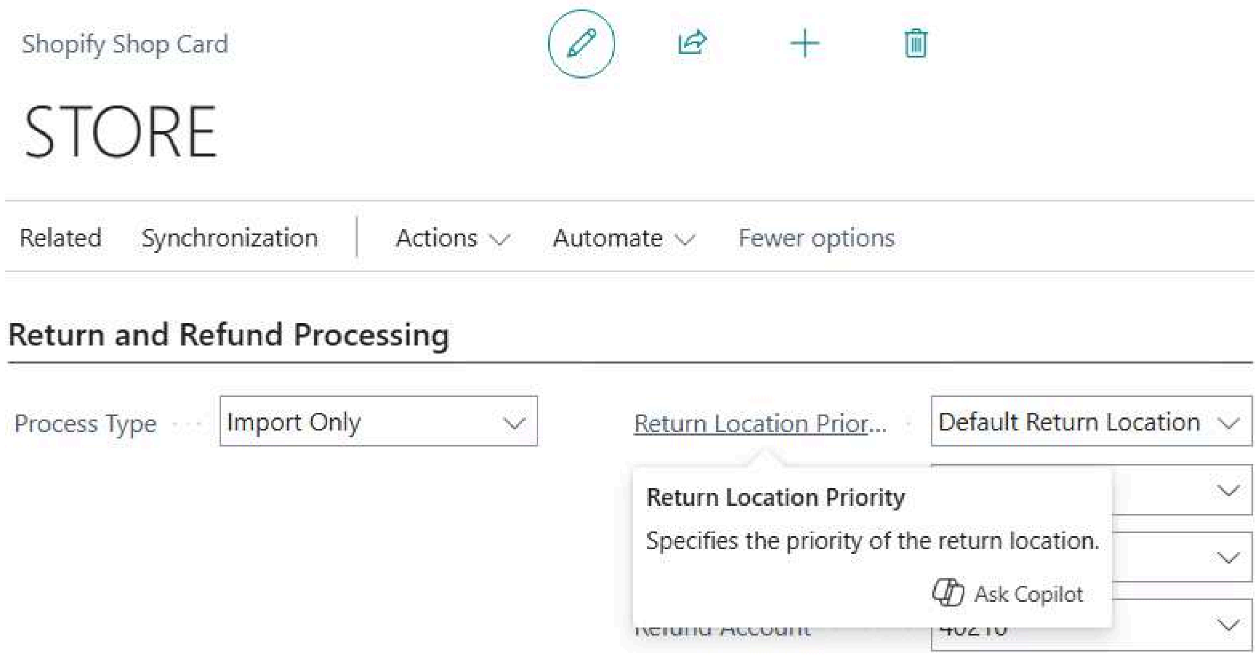
Business value

This update significantly reduces manual intervention and the risk of errors by fully using the original return location from Shopify when synchronizing refunds and returns. It streamlines the credit memo creation process, ensuring that the location code is accurate without additional reviews.

Feature details

This update enhances the integration between Shopify and Business Central by using the original return location from Shopify for refunds and returns. This improvement ensures accurate location data in credit memos, which reduces manual adjustments and streamlines the returns process.

To turn on the feature, on the **Shopify Shop Card** page, choose **Original** > **Default Location** in the new **Return Location Priority** field.



The **Return Location Priority** field offers the following options:

- **Default Return Location**: This is the default option. It uses the value from the **Default Return Location** field when creating sales credit memos.
- **Original** > **Default Location**: Select this option if you want the connector to find the original location on the Shopify refund or, if applicable, the Shopify return document. If the connector can't find the original location, for example, when an item is restocked in several locations, it uses the **Default Return Location** defined on the **Shopify Shop Card**.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Feedback

Was this page helpful? Yes No

Export posted sales invoices to Shopify

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

Buyers can sign in to Shopify and access all their invoices, regardless of whether the invoices were created in Shopify or in Business Central.

Feature details

You can export posted sales invoices to Shopify as orders by using a new report (batch job). The report is available on the **Shopify Shop Card** page, or you can use Tell Me search to find it. You can also run the report by using the job queue.

To enable the capability for specific shop, go to the **Shopify Shop Card** page and turn on the ** Posted Invoice Sync** toggle.

The sync includes invoices under the following conditions:

- The **Shopify Order ID** field contains 0.
- The bill-to customer has a mapping in the **Shopify Customers** or **Shopify Companies** tables.
- The bill-to customer isn't used as the **Default Customer** on the **Shopify Shop Card** or **Shopify Customer Template**.
- The posted invoice has at least one non-comment line where the **No.** field has a value.

When you run the report, the following happens in Business Central and Shopify.

Business Central

Update the **Shopify Order ID** field based on results of sync:

- Successful export – update Shopify Order Id field with ID of order in Shopify.
- Export failed – set "-1"
- Invoice is excluded from sync for a reason listed in the conditions mentioned earlier – set "-2"

The same pattern is used in the **Posted Sales Shipment**, where the **Update Document** page lets you replace "-1" and "-2" or "0" to retry the export.

Shopify

The connector uses GraphQL to first create a draft order with header and item lines, and then complete the draft order and convert it to an order.

Headers and lines

The following fields are exported on the order header:

- The mapped bill-to customer/company is used.
- The **Fulfilment Status** field shows **Fulfilled**. Tracking Details don't synchronize.
- The **Paid Status** field shows **Paid** or **Partially Paid**, based on the customer ledger entry linked to the sales invoice. For partially paid, it shows the **Remaining Amount** field.

The following fields are exported on the order lines:

- Items (item variants) that are mapped export as products.
- Items that aren't mapped and lines of other types, such as G/L Account or Item Charge lines, export as custom products in Shopify.
- Shipping charges in Shopify aren't created. The shipping cost is registered as a custom product in Shopify.
- The new setting on the **Shopify Shop Card** page lets you avoid exporting invoices with non-mapped items. Turn on the **Items must be mapped to Products** toggle to exclude posted invoices from sync if there's at least one line of type **Item** where the selected item isn't mapped to a product or variant in Shopify.
- Tax amounts. Because the Graph API doesn't currently support the TaxLine object, the calculated tax is added as a custom product. Tax information from Business Central won’t be available in the tax report in Shopify Admin. To avoid Shopify recalculating taxes, orders are marked as **Tax Exempt**.
- Quantity, in whole numbers. Shopify doesn’t support fractions.

Impact on the process of synchronizing orders

Synchronization imports the order and checks whether it was exported earlier. If it was exported earlier:

- It marks the order as processed.
- It adds a link to the posted sales invoice (related documents, should happen automatically because the Shopify Order ID is already populated). Shopify might automatically archive Fully Paid and Fulfilled orders, and the synchronization won't process them.

Deal with updates

In Shopify, because the order is already fulfilled, the only meaningful changes are Notes, Payment Status, and payment transactions. If payments are processed in Shopify, refunds and returns are as well.

In Business Central, changes aren't tracked. Currently, if you want to mark order as paid, use the **Mark as Paid** action on the **Shopify Order Card** page.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Import, export product info using Shopify Metafields

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

Business value

Metafields are a flexible way to add and store additional information about a Shopify resource, such as a product or variant. You can synchronize and manage metafield data from Business Central either using the UI or using the extensibility model to map fields, attributes, or related entries in Business Central to metafields in Shopify.

Feature details

Shopify's platform includes data models for fundamental commerce concepts out of the box. However, commerce is diverse and often requires more complex or specific data models. The custom data platform enables you to extend Shopify's data models and create your own by using metafields. Metafields are a flexible way to add and store additional information about a Shopify resource, such as a product or variant. The additional information stored in metafields can be almost anything related to a resource. Some examples are specifications, size charts, downloadable documents, release dates, images, or part numbers.

We're are adding the ability to import and export data stored in metafields into Business Central. Also, we're providing an extensibility model that allows developers to map standard or custom fields, attributes, or other related entries in Business Central to metafields in Shopify.

You can see and edit metafields using the **Shopify Metafields** page, which you open from the **Shopify Products** and **Shopify Vairants** pages.

> **Note**
>
> The page is editable if the **Product Sync** field is set to **Products to Shopify** and the **Can update Shopify products** toggle is turned on. When you insert a new record, the connector immediately sends a request to Shopify and stores the entry only when gets a response with the Shopify ID for the metafield. You can't edit types that have AssistEdit functionality defined directly on the line.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Integrate Field Service with service management

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

This integration is particularly valuable for organizations that provide regular maintenance and proactive repair. It offers a seamlessly integrated solution for managing service tasks, consumption, and financial transactions to benefit service technicians, service managers, and finance teams. It's a powerful solution for managing work orders and consumption in Field Service and efficiently invoicing and fulfilling them in Business Central.

Feature details

To enable integration with Service Management module, you can turn on the **Service Management Integration** toggle in **Set up integration to Dynamics 365 Field Service** assisted setup guide, or on the **Dynamics 365 Field Service Integration Setup** page. This setting adds additional integration table mappings for service documents and work orders.

To specify where to integrate work order data from Field Service in service orders, you can choose a **Work Order Type** that's mapped to a **Service Order Type**. You can also use the **External Project** field to link it to a project in Business Central.

To exchange the following data between work orders and service orders in both directions, turn on the **Service Order Archiving** toggle on the **Service Management Setup** page:

- Fields in the headers on service orders and work orders, such as **Service Account**, **Billing Account**, and **Work Order Type**.
- **Service Item Lines** and **Work Order Incidents** in Field Service to transfer information about the customer assets being repaired.
- **Service Line** fields and **Work Order Products** and **Work Order Services** fields, such as **Qty. to Ship**, **Qty. to Invoice**, and **Qty. to Consume**.

When a technician marks a work order product or service as **Used** on a work order with a specific work order type, the lines synchronize to a service order. Consumption is also posted, based on settings on the **Dynamics 365 Field Service Integration Setup** page.

During consumption and invoice posting in Business Central, the consumed and invoiced quantities are updated in the original work order product and work order service lines in Field Service.

You can send a **Posted Service Invoice** back to Field Service.

> ⓘ **Note**
>
> Dynamics 365 Field Service integration with Dynamics 365 Business Central's service management module requires use of Premium license.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Manage subscription billing and revenue and expense recognition

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	Sep 2024	Oct 2024

Business value

Businesses are finding ways to create recurring revenue streams by selling goods and services on a subscription basis. This release lets you manage subscription contracts in Business Central. The new subscription module lets you spend more time selling and less time organizing and invoicing contracts.

Feature details

Companies across sectors have increased their adoption of digitalization and are revamping their products and services to accommodate subscription-based business models.

You can now support many different types of subscription scenarios in Business Central. There's a simple set of processes that let you manage portfolios of the items and services that you bill on a recurring schedule. For example, hardware maintenance, IT support, cleaning services, and so on. You combine the sale of services and items in mixed subscription contracts that hold information about the items, services, and billing schedule.

Templates simplify the process of creating subscription contracts by standardizing the parameters and schedules for recurring billing. You can manage current pricing and plan for future price updates. On the accounting side, posting accruals to balance sheet accounts is automated, and revenue or expense are assigned to the correct periods in the income statement.

The new module comes with:

- Contracts for which you do recurring billing for items and services.
- Billing schedules with flexible parameters that cater to typical use cases for recurring billing.
- Usage-based billing.
- Automated billing.
- Deferral integration.
- Revenue recognition based on billing schedules.
- Contract updates (parameters and prices).
- Standard reports for contracts, customers, billing schedules, recognized revenue, future billing dates and amounts, and so on. Most reports are available as Power BI reports.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Reconcile payment transactions in Shopify with invoices

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

Integrating Business Central and Shopify lets you easily manage your online sales and payments in one place. You can track the different payment methods, such as gift cards, credit cards, and more, that buyers used during checkout, and create customer ledger and general ledger entries to ensure accurate accounting and reporting.

Feature details

When a customer completes their checkout in the online store, the information about their payment is saved as a **Transaction**. There might be multiple transactions linked to the order, such as when a customer uses a gift card to pay some of the cost and then uses a credit card or PayPal for the remaining amount. The payment transactions in Shopify synchronize with the orders and you can view them on the **Shopify Orders** page.

There are several options for processing imported payment transactions in Business Central. This release offers an extra option that's helpful in cases where several payments methods are involved. The gift card scenario is probably the most common.

Example scenario

The scenario involves the following parties:

- The buyer, who is the person who buys goods from your Shopify online store.
- The merchant, which is your company.
- The payment provider, which is the company that facilitates payment processing for you. The provider can be Shopify Payments or a third party.

How the money flows

The Buyer buys goods from an online store. The last stage is to process their payment.

> **Note**
>
> This example doesn't cover cases where payment is completed outside Shopify checkout, which is valid for B2B scenarios.

The Buyer pays part of the amount with a gift card, and the remaining amount with a credit card, PayPal, or a local payment method such as MobilePay in Denmark.

The Merchant can see the issued gift card and information about its use in Business Central.

Depending on the payment provider, the Merchant might see the money in their account with the payment provider, including both the amount received and the amount deducted for the provider's commissions. Payment providers often take a commission from each transaction, and in some cases they also have a fixed fee.

Depending on the payment provider, the Merchant either transfers the money to their bank account (payout) manually or automatically within a defined period. For example, one timer per day, per month, and so on.

Depending on the bank, the Merchant can see the incoming transaction at their bank account via online banking or their bank statement.

Reconcile Shopify transaction against original invoices, reconcile bank statement against interim account representing money at the payment provider

The Merchant imports a sales order to Business Cental and posts the shipment and invoice. Business Central creates a customer ledger entry of the type **Invoice** with the full amount, apd sets **Open** to **Yes**. The remaining amount equals the invoiced amount.

The Merchant processes the imported Shopify transactions in the **Transactions** list. They apply filters, and then use the **Suggest Shopify Payments** action to transfer the transactions to the general journal. Alternativley, the merchant can use the **Suggest Shopify Payments** action on the **Cash Receipt Journal** page. The Merchant reviews the lines, and notices that the applied documents are selected automatically. They post the journal, and Business Central creates a customer ledger entry of the type **Payment** and applies it to the corresponding entry of the type **Invoice**.

> ⓘ Note
>
> If you configured a payment method mapping, make sure the corresponding payment method doesn't have the **Bal. Account Type** and **Bal. Account No.** filled in. If they are, when you post the invoice Business Central creates a balancing entry of the **Payment** type and applies it to the **Invoice** type in the customer ledger entry. You won't be able to create a journal line and apply it to the sales invoice. Instead, create **Journal Batch** for each payment method, and fill in the **Bal. Account Type** and **Bal. Account No.** fields there.

The merchant imports bank statement using payment reconciliation journal or bank reconciliation journal with one or more transactions that represent the transfer from the payment provider to bank account.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Replenish items for projects

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

Business Central makes it fast and easy to ensure that you have the items you need to kick off a new project or keep one running smoothly. On the **Project Card** page, you can create purchase orders for the items by choosing the **Create Purchase Order** action. Afterward, you can review and edit the orders before you send them to your vendors.

Feature details

The process of creating purchase orders from projects is similar to the functionality you might already be familiar with from the sales area. The process lets you create purchase orders right from a project. It shares the same algorithm as **Order Planning** worksheet, which means it doesn't require elaborated setup to produce recommendations, but it's intelligent enough to analyze demand and supply for required items.

To create one or more purchase orders from a project

To create a purchase order for the quantity of each item the project is missing, use the **Create Purchase Orders** action.

1. Choose the **Lightbulb** that opens the **Tell Me** feature. icon, enter **Projects**, and then choose the related link.

2. Open a project that you want to purchase items for.
3. Choose the **Create Purchase Orders** action.
4. The **Create Purchase Orders** page opens and shows a line for each item on the project. Lines for both fully available quantities and unavailable quantities show by default. Unavailable quantities aren't available. To show only unavailable quantities, choose the **Show Unavailable** action.
5. The **Quantity to Purchase** field contains the unavailable quantity. To purchase a different quantity, edit the value in the field. You can also turn on the **Reserve** toggle if you want to reserve the quantity on the purchase line against demand.

> ⓘ Note
>
> You can also change the Quantity to Purchase field on unavailable lines, even though they represent fully available quantities.

6. Choose **OK**.

This process creates a purchase order for each vendor from which you purchase the items on the project, including any quantity changes that you made on the **Create Purchase Orders** page. You can continue to process the purchase order or orders, for example, by editing or adding purchase order lines.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

See improved usability for service and projects

Article • 08/16/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

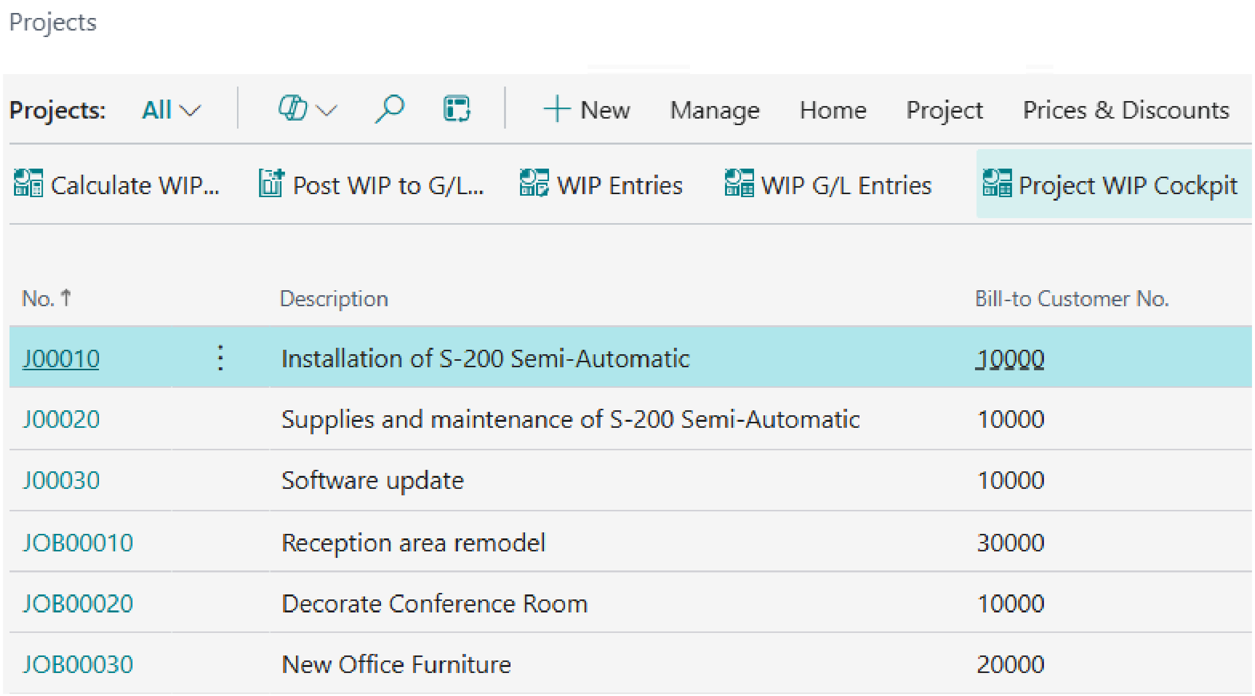
Productivity increases when processes are easy, so we've improved the usability of several areas within project and service management. For both projects and services, to make it a bit faster to get to information, we've added fields and actions on several pages.

Feature details

Based on feedback from our customers, we've made it easier to complete several business processes in projects and service management.

To speed up the process of creating invoices for projects, we've added the **Create Project Sales Invoice** action to the **Project Card** page. Now you can create invoices without having to leave the project information. Additionally, we've made it faster to access and work with details about projects by adding the following actions to the **Project List** page:

- Assembly Orders
- Put-away, Pick, and Movement Lines
- Registered Pick Lines
- Project WIP Cockpit

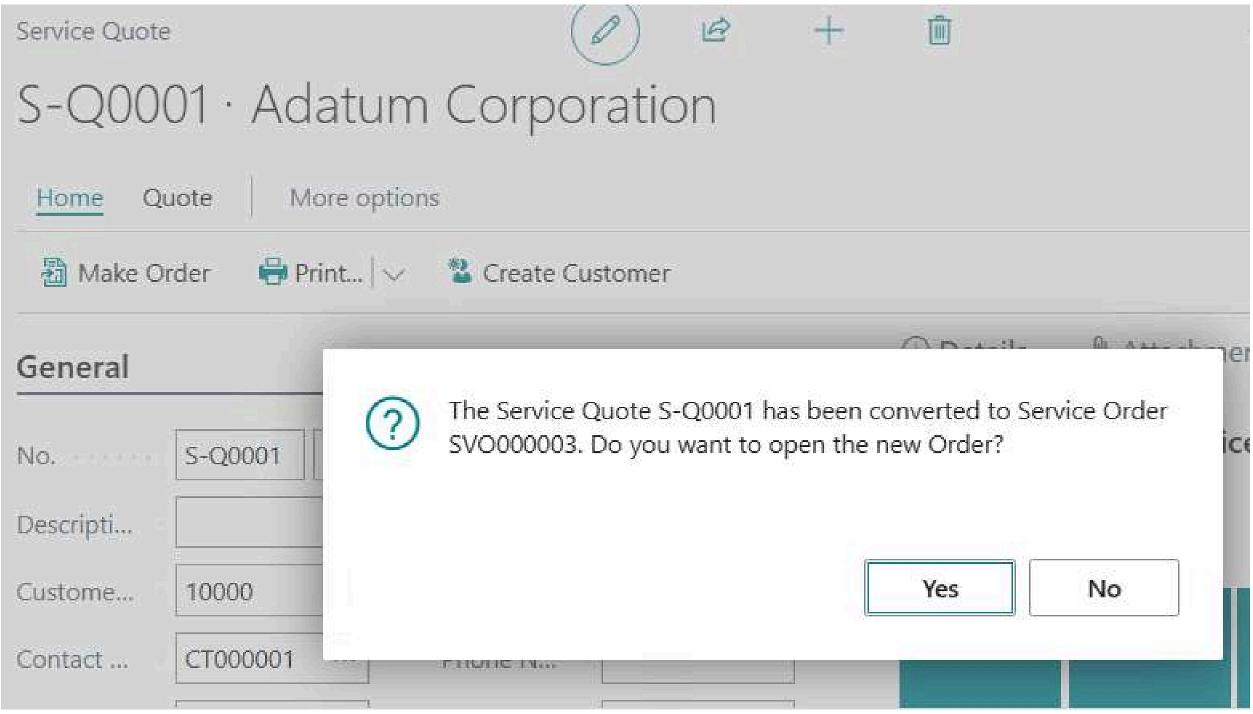


We’ve also done some renaming in projects. The **Project WIP** page is now named **Project WIP Cockpit**, which makes it easier to distinguish it from other Project WIP pages and actions.

To improve service management features, we’ve added some useful fields to several pages. The addition of the **Customer Name** field on the **Service Items** page lets you identify the customers that use the items. Also, to make it easier to find records by searching for your reference numbers, we’ve added the **Your Reference** field to the following pages:

- Service Invoice
- Service Orders
- Service Quotes
- Posted Service Invoice
- Posted Service Invoices

We've streamlined the **Make order** process for both service and sales. When you convert a **service quote** into an order, you're prompted to open the newly created service order and process it.



Feedback

Was this page helpful? Yes No

Use directed put-away and pick warehouses with projects

Article • 07/16/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

Businesses can use warehouse activities with projects to help drive an effective flow through the warehouse, and to organize and maintain inventory.

Feature details

As a continuation to our multi-release effort to ensure that project management features benefit from the rich warehouse capabilities in Business Central, you can now use locations configured for directed flows with projects.

Business picking items before they're consumed in different ways. The process depends on how their warehouse is configured. When you want to specify either a default **Location Code** on the **Project** and **Project Task Lines Subform** pages, or enter a **Location Code** on **Project Planning Lines**, you can now also use locations where the **Directed Put-Away and Pick** toggle is turned on.

Now, to create or register a pick document, you can use the **Create warehouse pick** action under the following conditions:

- The **Status** of the project is **Open**.
- The **Line Type** of the project planning line is **Budget** or **Both Budget and Billable**.
- The **Type** of the project planning line is **Item**.

- The **Project Consump. Whse. Handling** is **Warehouse Pick (mandatory)** , which is now available when Directed Pick and Put-away is selected.

You can also create warehouse picks using a pick worksheet. The pick worksheet lets you organize pick information before you create warehouse pick instructions. You'll need to fill in the a **To-Project Bin Code** field on the **Location Card** page.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas .

Feedback

Was this page helpful? Yes No

Use new reports and demo data for financial reporting

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

New reports are provided as demo data for Business Central. The reports can serve as ready to use reports, or as template you can use to create your own financial reports. In addition, you can generate more demo data to get a better idea of what data the reports display.

Feature details

The list of standard reports for financial reporting is expanded to include five new reports. In addtion, a set of five new row definitions and 12 column definitions are provided. You can combine them to create more than 25 new reports.

The following table lists the new reports:

Expand table

Name	Description
TB	Trial Balance
BS DET	Balance Sheet Detailed
BS SUM	Balance sheet Summary

Name	Description
IS DET	Income Statement Detailed
IS SUM	Income Statement Summary

The new row definitions have the same names and descriptions as the reports.

The following table lists the new column definitions:

Expand table

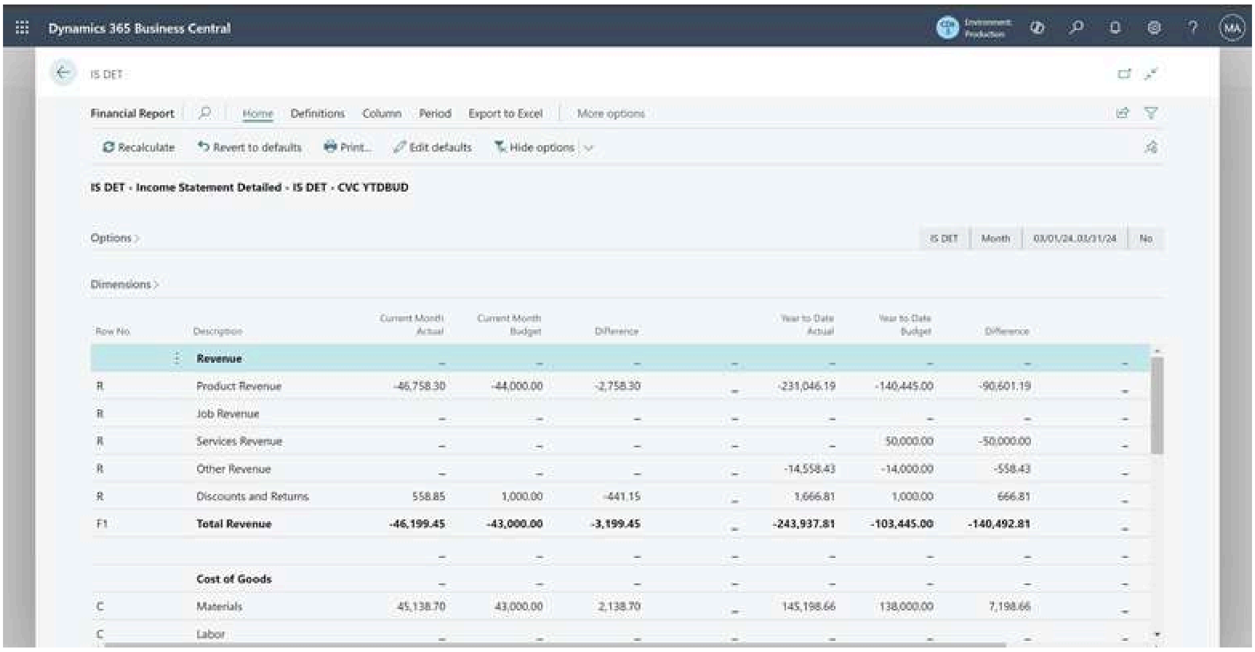
Name	Description
BBDRCREB	TB Beginning Balance Debits Credits Ending Balance
BSTREND	BS 12 Months Balance Trending Current Fiscal Year
CB	BS Current Month Balance
CB V PB	BS Current Month Balance v Prior Month Balance
CB V SPYB	BS Current Month Balance v Same Month Prior Year Balance
CNC	IS Current Month Net Change
CNC BUD	IS 12 Months Net Change Budget Only
CNC V PNC	IS Current Month Net Change v Prior Month Net Change
CNC VSPYNC	IS Current Month Net Change v Same Month Prior Year Net Change
CNCVPNCYOY	IS Current Month v Prior Month for CY and Current Month v Prior Month for PY
CVC YTDBUD	IS Current Month v Budget Year to Date v Budget and Bud Total and Bud Remaining
ISTREND	IS 12 Months Net Change Trending Current Fiscal Year

ⓘ Note

The five reports are ready to use for the US version. For other country version, you must map the row defintions to your chart of accounts in order for the reports to display any data. Microsoft will work on providing the ready-to-use experience for more country version in future releases.

Financial reporting demo data

Financial reporting is at the core of every business, and when evaluating business management applications it's often desirable to view the reporting capabilities as they would look like for a running company. The new demo data can be generated by running the Contoso Financial demo data from the Contoso Demo Data tool page. The data will contain three years of G/L entries, broken down to dimensions with a Budget for the current year for variance analysis reporting.



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Feedback

Was this page helpful? Yes No

View item availability in Field Service work orders

Article • 07/16/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

Business value

When integrated with Business Central, technicians and dispatchers can get insight into item availability for a specific warehouse or technician's truck on a work order in Field Service. Having this information readily available helps businesses optimize work order scheduling, avoid unnecessary (travel) costs, and at the same time, optimize their service and purchasing operations.

Feature details

You can integrate, configure, and customize Field Service warehouses with Business Central's locations. The integration can give you information about the availability of a product or item at a specific location. To manage the synchronization of data, we've added a unidirectional (from Business Central) integration table mapping between Business Central locations and warehouses in Field Service. To use the new integration table mapping, in Business Central you must turn on the **Location Mandatory** toggle on the **Inventory Setup** page.

Business Central synchronizes locations with the following settings on the **Location Card** page:

- The **Use as In-Transit** toggle is turned off.

- **Project Consump. Whse. Handling** is different from Warehouse Pick (mandatory)
- **Assm. Consump. Whse. Handling** is different from Warehouse Pick (mandatory)

On the **Locations** and **Location Card** pages, you can use the **Dynamics 365 Field Service** action to open a coupled location in Field Service, synchronize it, set up and delete couplings, and view synchronization logs.

You can use **Open in Business Central** in Field Service to open a location in Business Central that's coupled to a warehouse in Field Service.

You can now view the allocated product quantity from work orders in Field Service as part of the gross requirements in Business Central's inventory availability calculation. Demand generated by orders in Field Service automatically become an input for planning.

On the Field Service side, on a work order, technicians can check how much of particular product is available at a warehouse they specify.

Tell us what you think

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Copilot and AI innovation

Article • 07/16/2024

ⓘ Important

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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.

Feedback

Was this page helpful? Yes No

Automate tests for your Copilot extensions with the Business Central Test Toolkit

Article • 07/16/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Dec 2024	Dec 2024

Business value

As our partner community brings generative AI capabilities to market and matures their offerings, partners need new engineering tools and practices to help them succeed in the AI era. Data-driven test automation is vital to ensure AI systems are accurate against diverse inputs, preserve the trust and safety of our customers and their data, and are resilient to changes in AI model versions. The developer tools for Copilot in Business Central are an end-to-end toolkit covering development, deployment, administration, feedback loops, and now test automation.

Feature details

With this feature, you can:

- Author tests for your prompt dialogs using a familiar framework in AL and Visual Studio Code.
- Organize your test datasets based on purpose and prompt variations.
- Implement automated verification depending on your feature use case.
- Run tests as fully automated or semi-automated.

Tell us what you think

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Feedback

Was this page helpful? Yes No

Chat with Copilot and learn to use installed add-on apps

Article • 07/16/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	-

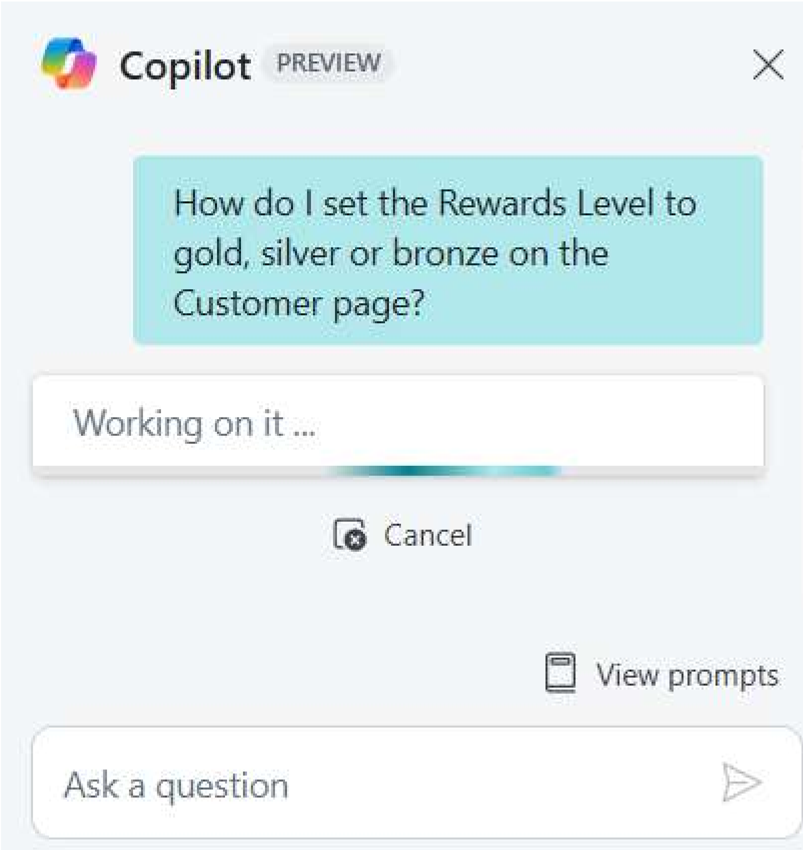
Business value

2024 release wave 2 introduced chat: a conversational experience where people can get assistance from Microsoft Copilot to find data, get unblocked, or learn new skills. Most of our customers install one or more ISV add-on apps from Microsoft AppSource to enhance Business Central with industry-specific solutions, localized functionality, or other critical capabilities that meet their needs. Now, Copilot in Business Central is able to explain and guide workers through using functionality of these add-ons, transforming Copilot from a simple "librarian" to an in-house expert that understands your unique Business Central.

Feature details

Copilot's chat capabilities have been enhanced with the following:

- Users can ask questions about content from installed add-ons, such as new pages, fields, and business processes.
- Copilot explains and guides based on documentation provided by the apps installed to your Business Central environment.



ⓘ **Note**

- Copilot responses are subject to availability and quality of the documentation provided by each app publisher. Microsoft isn't responsible for third party content provided by app publishers.
- This feature is part of Copilot chat and is available as a production-ready preview for production and sandbox environments in any country localization. Production-ready previews are subject to supplemental terms of use. For more information, go to [Supplemental terms of use for Dynamics 365 preview](#).
- This feature is supported in English only. While it can be used in other languages, it might not function as intended. Language quality might vary based on the user’s interaction or system settings, which may impact accuracy and the user experience.
- AI-generated content might be incorrect.

About security, privacy and AI

Copilot is built on Microsoft's comprehensive approach to enterprise security, privacy, compliance, and responsible AI. Our philosophy is that your data is your data: customer data in Business Central is not used to train AI models. For more information, go to FAQ for Copilot data security and privacy for Dynamics 365 and Power Platform

Looking for more details?

- Read the preview announcement for Chat with Copilot
- Learn about Chat with Copilot
- AI FAQ for Chat with Copilot

Tell us what you think

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at aka.ms/bcIdeas, or join the discussion on the Dynamics 365 Business Central Partner Community Network on Viva Engage (formerly Yammer) to help us shape the future of AI in Business Central.

Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea

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Feedback

Was this page helpful? Yes No

Complete bank account reconciliation faster with Copilot

Article • 07/16/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Nov 9, 2023	Oct 2024

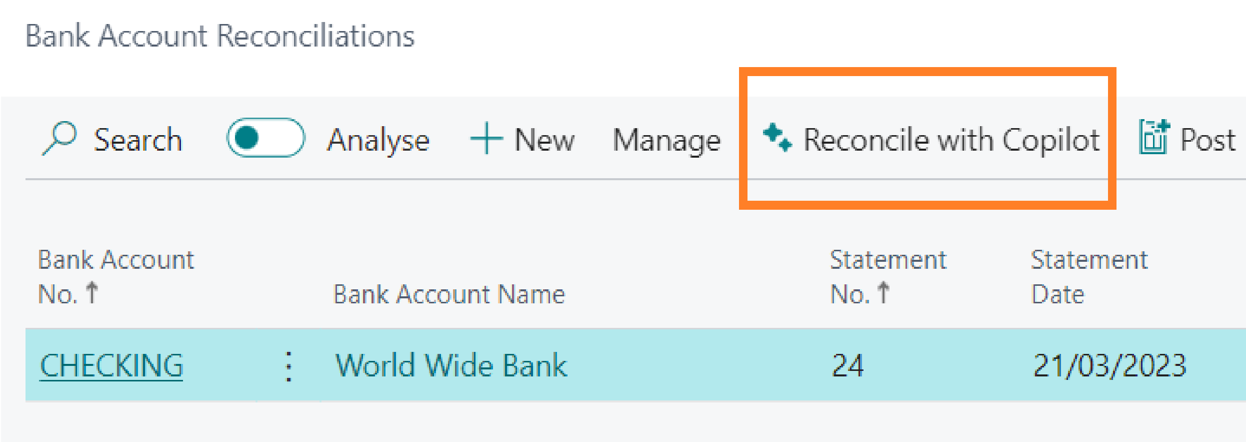
Business value

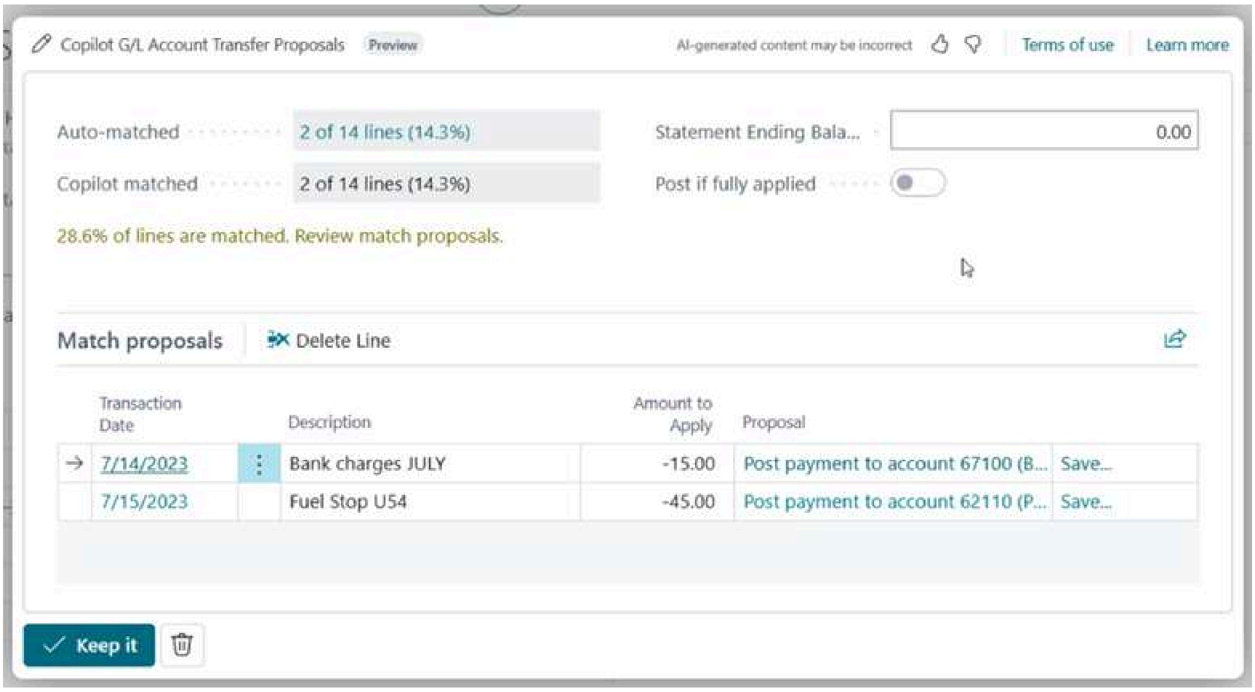
Bookkeepers in SMB organizations need to import bank statements and reconcile transactions with their bank ledger entries, making sure all transactions are accounted for. While Business Central already reduces effort through rule-based transaction matching, the residual work to process the unmatched transactions every week remains cumbersome and quickly accrues to lost workdays. Copilot reduces bookkeeping effort by matching more transactions and suggesting G/L accounts to post the remaining transactions.

Feature details

The bank account reconciliation feature in Business Central has been enhanced with:

- **AI-powered transaction matching** that complements rule-based matching and further reduces the remaining unmatched transactions that require review.
- **AI-powered G/L account suggestions** where Copilot suggests the most likely ledger account to post any residual transactions to and offers the opportunity to remember a specific transaction description for the next reconciliation.
- **Built-in demo data** for evaluation companies that makes it easier to experience and demonstrate this Copilot capability to others. Demo data is available in English with 23.1 and other languages with 23.2.





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

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Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

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- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates

- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea

See also

Reconcile bank accounts with Copilot (docs)

Feedback

Was this page helpful? Yes No

Create product information faster with Copilot

Article • 07/16/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	-

Business value

In a business landscape that changes fast, companies often need to evolve the portfolio of products they sell. Whether it's adding new products, changing existing products, or adding entire new product lines and categories, it's often time consuming to create and manage product (item) information. Copilot can significantly reduce this effort and accelerate the time to market for new products, which means you have more time to focus on what matters most, your business.

Feature details

Because product (item) information is spread out across several pages, creating and managing this information can be a time-consuming task. The effort involves looking up information based on existing items, pasting values, and ensuring the new product is ready to transact. Creating variants, dimensions, units of measure, and other item-related information also takes time that delays market readiness for new products.

Copilot can help you add items by reusing information from similar items. Copilot can suggest the following information:

- Variants
- Units of Measure

- Substitutions
- Dimensions

When you manage product information, Copilot can assist by suggesting data from similar products (items). Copilot assistance not only reduces the time it takes to create a product, but it also ensures that your products are ready to transact faster than ever before.

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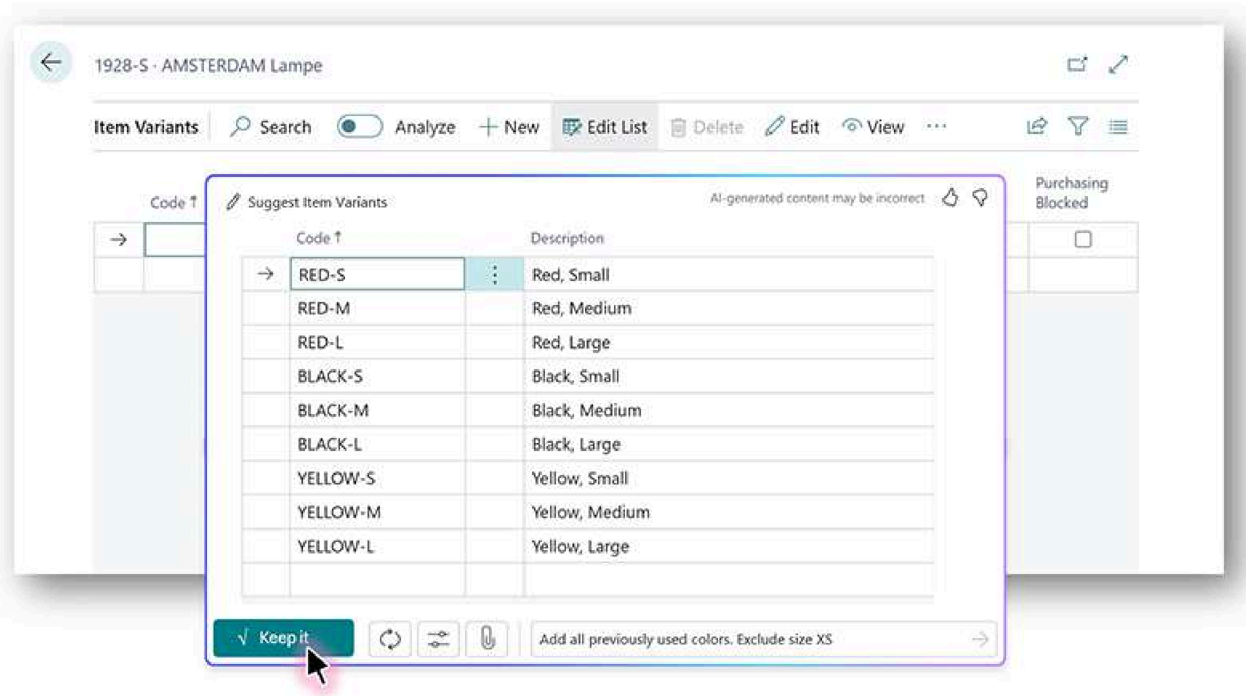

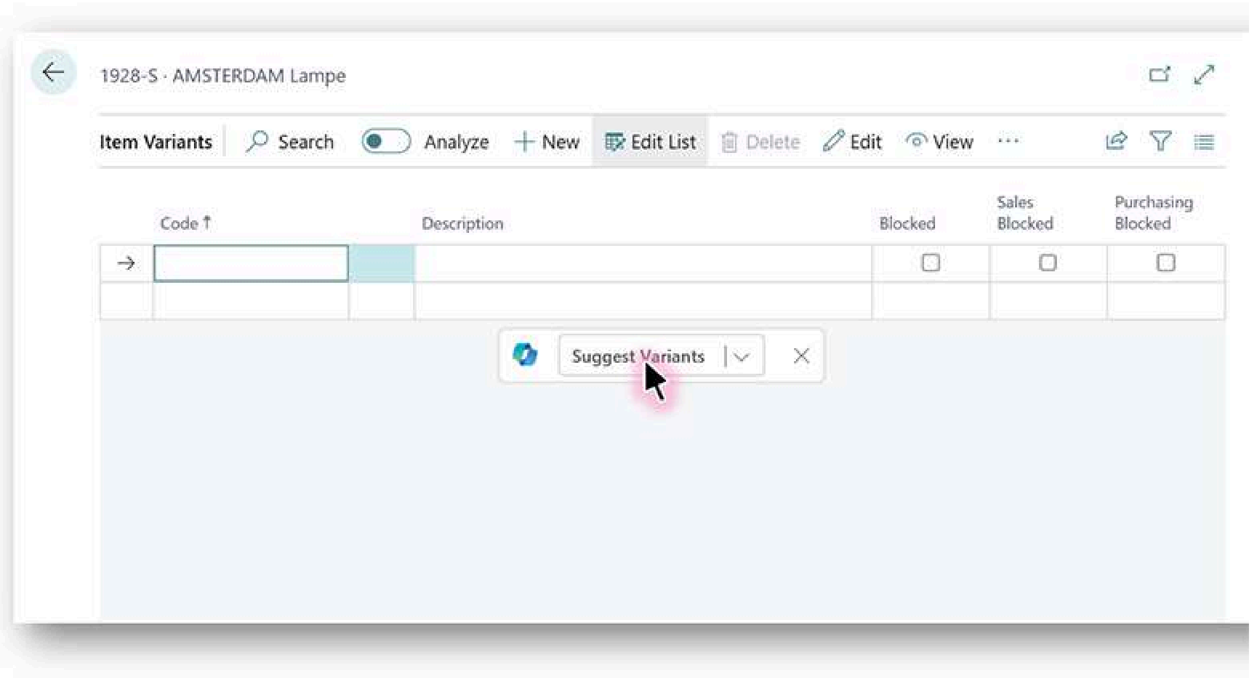

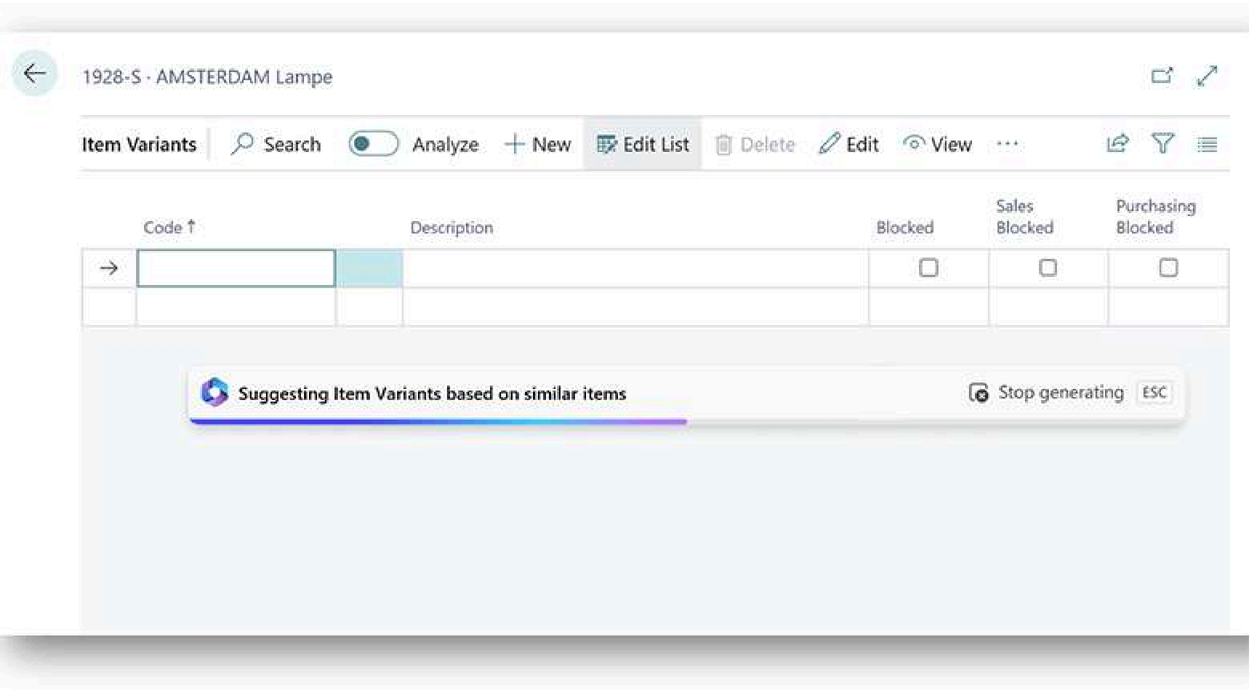

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- Japan
- France
- Korea

Tell us what you think

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ⓘ **Note:** The author created this article with assistance from AI. Learn more

Feedback

Was this page helpful? Yes No

Create sales lines easily with Copilot

Article • 07/16/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	-

Business value

The introduction of Copilot in Business Central adds a significant enhancement to the sales document processes. It expedites the creation of sales documents and minimizes time spent on repetitive tasks and lookups. Copilot assistance drives operational efficiency in creating and managing sales documents and contributes to potential revenue growth by getting sales documents into the hands of customers faster. Copilot is the AI-powered assistant for work that boosts creativity and improves productivity for Business Central users.

Feature details

We continue to improve Copilot in Business Central by adding new capabilities and polishing existing ones.

In addition to the **Find product** and **Find document by reference** skills, Copilot can combine them. It can first find documents, and then search for products on document lines. This combination can be particularly useful for companies that often work with blanket orders. The **Find document by reference** skill now includes sales blanket order as source documents.

Also, it also now supports units of measure. Copilot can try to use the unit of measure you specify in your prompt, but if that isn't found it falls back to the sales unit of measure for the item.

Attachments are a longer journey that starts with CSV file. Copilot analyzes the structure of an attached file to identify things like field and row separators, date and decimal formats, columns, and headers. It suggests field mappings to fill in product and quantity fields.

> ⓘ **Note**
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Feedback

Was this page helpful? Yes No

Experience enhancements to Analysis Assist with Copilot

Article • 07/16/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	-

Business value

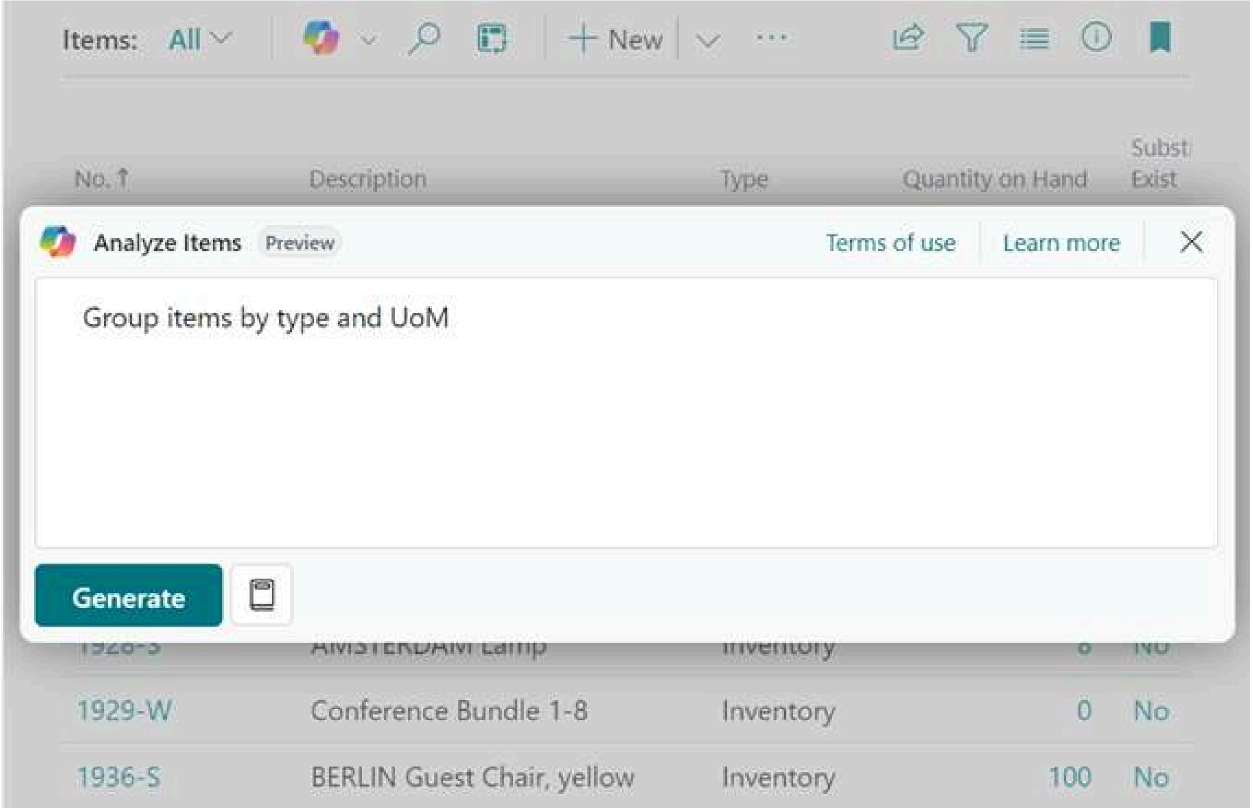
Microsoft Copilot in Business Central is the AI-powered assistant that boosts creativity, improves productivity and eliminates tedious tasks. Copilot can help reduce the time it takes to identify trends and anomalies in your business data by enabling you to express your analysis as a simple sentence, and without ever leaving Business Central. By describing how you want to structure your data analysis, such as “show me vendors by location sorted by amount of purchases,” you can quickly get to insights instead of spending time on the clicks and keystrokes to construct analysis views. For example, you can use this feature to identify which vendors supply each of your warehouses, and then take steps to optimize your supply chain or negotiate better deals with your vendors.

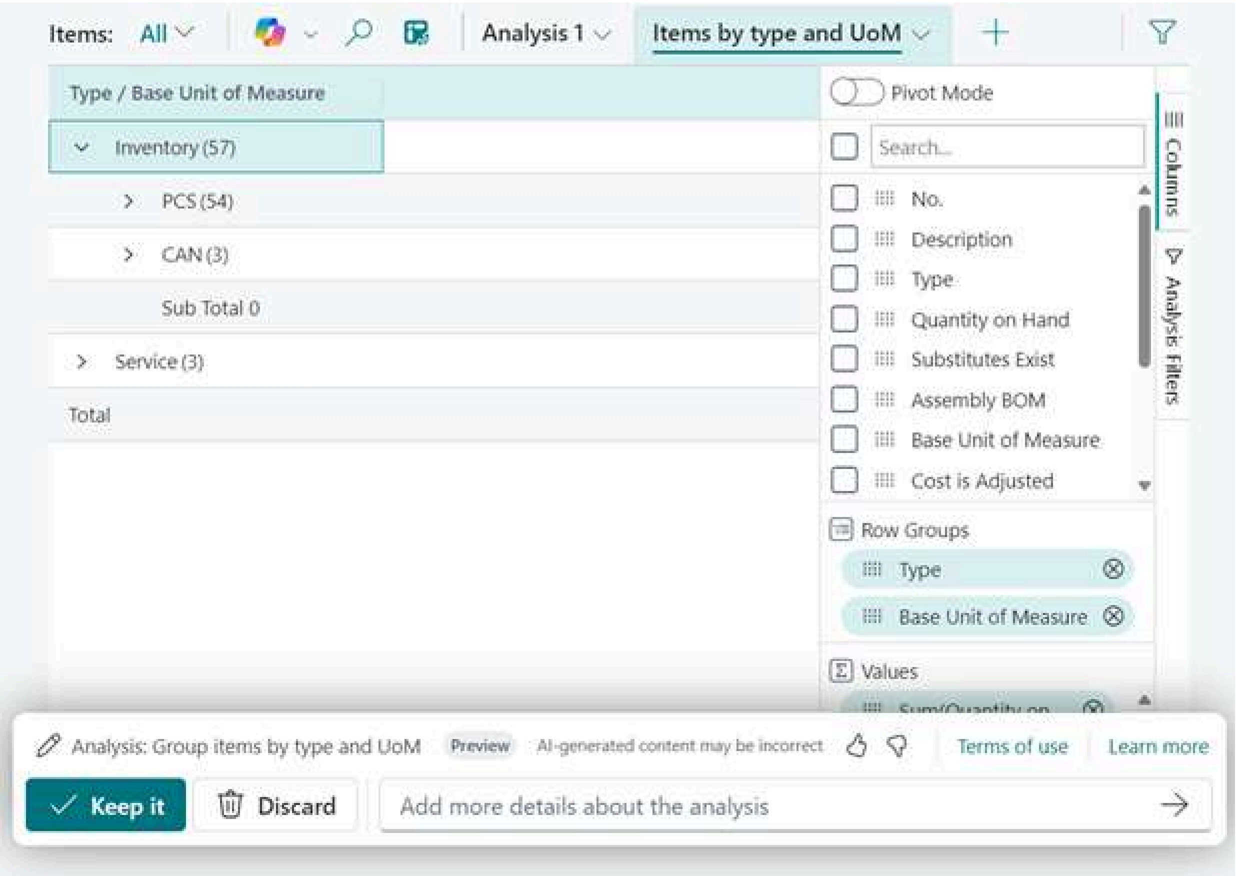
Feature details

This update to the preview includes:

- Support for 14 more languages.
- Copilot can draft analysis tabs using any fields from the list, including columns that may be hidden on the page.
- A teaching tip displays when you modify the draft analysis tab, explaining why specific user interactions signal the desire to save the draft and continue to work on it without the help of Copilot.

- Improved reliability.





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Looking for more details?

- Read the preview announcement: Get to insights fast with Copilot-created analysis tabs
- Analyze data in lists with the help from Copilot
- AI FAQs for analysis assist

Tell us what you think

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Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore

- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Start creating Power Automate flows with Copilot

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	Dec 2024	-

Business value

Copilot is the AI-powered work assistant that boosts creativity and improves productivity for small and medium-sized organizations.

Building Power Automate flows without predefined templates can be a mundane and complicated process. With Copilot in Power Automate, this process is much smoother because flows can be built based on just the natural language input from the user.

Feature details

This feature integrates Copilot in Power Automate with Business Central so that you can start creating automation flows based on natural language. When such flows are opened in Power Automate for further refinement, you can take advantage of the Copilot experience in Power Automate.

Copilot in Power Automate allows open-ended and conversational experiences while authoring flows that use your Business Central data. You can ask questions and get assistance to improve and change those flows. Copilot stays with you in your flow and helps you build, set up, and run an automation on your behalf through a comfortable chat experience. Copilot takes your input and provides either documentation, links, or answers in the Copilot chat pane. But most importantly, it makes changes to the structure of the flow based on your natural language description.

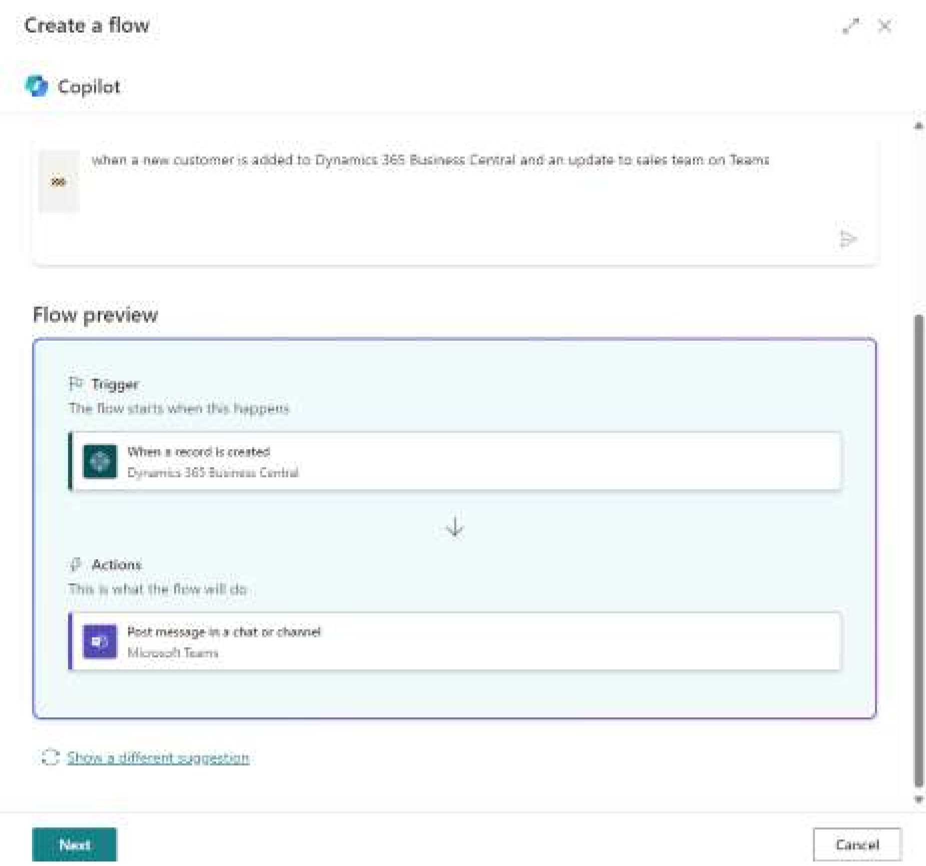
This feature helps you streamline business processes and improve productivity by shortening the path to automation.

> **Note**
>
> - This feature will be made available later in 2024 release wave 1 as a production-ready preview for production and sandbox environments based on the English language in the US region.
> - Production-ready previews are subject to supplemental terms of use. For more information, see Supplemental terms of use for Dynamics 365 preview.
> - While in preview, this feature is available in English only. When using other languages, users must change their language in the **My Settings** page to experience this feature.
> - This feature needs to be enabled in **Feature Management**.
> - AI-generated content may be incorrect.

Tell us what you think

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at aka.ms/bcIdeas, or join the discussion on the Dynamics 365 Business Central Development Viva Engage network (formerly Yammer) to help us shape the future of AI in Business Central.



Geographic areas

This feature will be released into the following Microsoft Azure geographic area:

- United States

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas .

Feedback

Was this page helpful? Yes No

Start using Copilot without having to set things up

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

Microsoft Copilot is an integral part of Business Central that helps workers boost creativity, improve productivity, and eliminate tedious tasks. No matter the country or region in which you operate Business Central, Copilot is readily available without requiring any one-time administrative setup.

Feature details

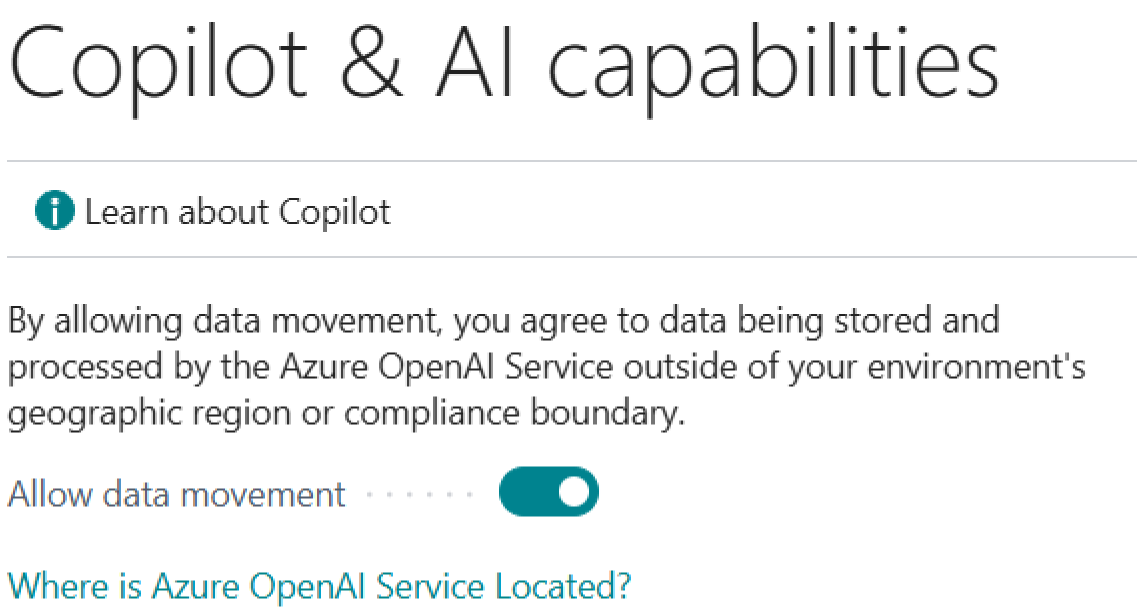
Customers with environments deployed to the United States, United Kingdom, India, and Australia Azure regions continue to benefit from Microsoft Azure OpenAI Service availability in their own geography with no administrative setup for Microsoft Copilot in Business Central.

For all other geographies, the administrative setting on the **Copilot & AI Capabilities** page is now on by default.

- New environments of version 25.0 or later no longer require administrative setup, and users are immediately able to enjoy Copilot capabilities.
- Environments upgrading to version 25.0 in 2024 release wave 2 are automatically updated. The **Allow data movement** setting in the **Copilot & AI Capabilities** page

is switched on, and users will be able to access Copilot capabilities as soon as the environment is upgraded.

- Administrators can use this switch at any time to opt out of data movement across geographies, which deactivates Copilot for all users of that environment.



Looking for more details?

FAQ for Copilot data security and privacy for Dynamics 365 and Power Platform

Copilot data movement across geographies

Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia

- Brazil
- Canada
- India
- Japan
- France
- Korea

Tell us what you think

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Feedback

Was this page helpful? Yes No

Suggest number series with Copilot

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	-

Business value

Getting started fast on new implementation and recurring maintenance of certain aspects of Business Central setup saves companies time and money. Copilot can reduce the time it takes to set up initial number series and make their maintenance quick and painless. For example, when updating year or month based numbering many draft and posted documents in Business Central.

Feature details

You can use Copilot for faster creation and updates of number series on the **No. Series** page. The **Generate** action opens the **Generate No. Series with Copilot** dialog, where you can enter a prompt to create new, or modify existing, number series.

Number series setup creation

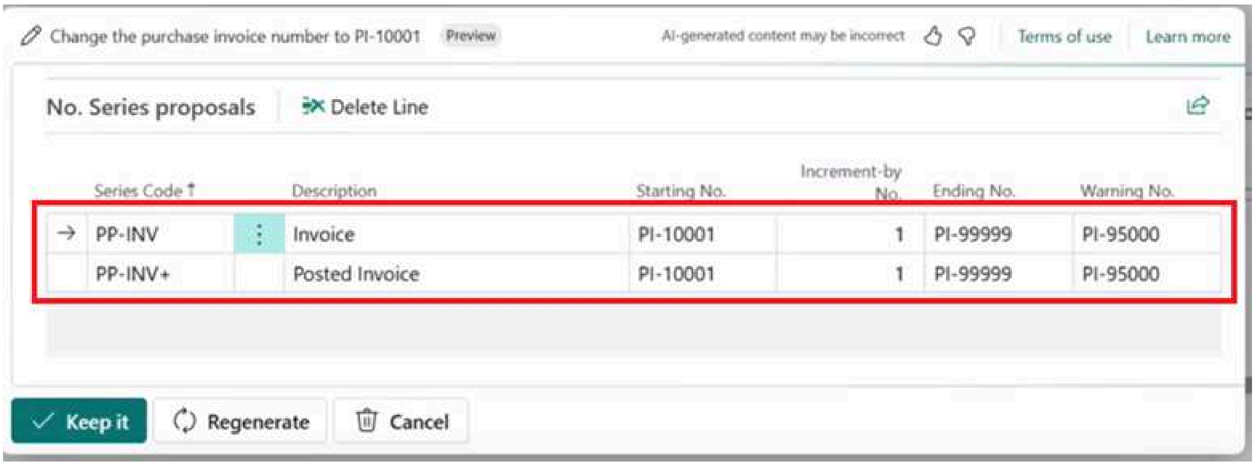
To help you write the prompt, the **Create new** action in the **Generate No. Series with Copilot** dialog provides sets of prompt guides that you can use as inspiration.

When you choose**Generate**, Copilot creates proposals for one or more number series, and you can review the proposals in **No. Series Proposals** view. You can remove the proposals that Copilot generated that you don't like, and edit the ones you do. When you're ready, you can choose **Keep it** to add or update a proposal. In addition, Copilot updates various setup pages with the number series you decided to keep.

Number series updates

In the **Generate No. Series with Copilot** dialog, **Modify existing** offers sets of prompt guides to help you write a prompt to update an existing number series.

When you choose**Generate**, Copilot updates one or more number series proposals, and you can review the proposals in the **No. Series proposals** view. You can remove the proposals Copilot generated, and edit the ones you like. When you're ready, you can choose **Keep it** to add or update a proposal.



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, go to Supplemental terms of use for Dynamics 365 preview .

While the feature is in preview, it works only in English language.

Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany

- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
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Tell us what you think

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Feedback

Was this page helpful? Yes No

Summarize any record with Copilot

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jan 2025	-

Business value

Whether you're looking at customer details, a large order, or any other record, you might spend a considerable amount of time on understanding the current state of your data and the fields that matter. Microsoft Copilot is the AI-powered assistant that helps spark creativity, boost productivity, and eliminate tedious tasks. Copilot summarizes any record into a couple of brief and understandable sentences, greatly reducing the effort needed to get an overview of your data and plan your approach.

Feature details

Ask Copilot for a concise and textual summary of any record, even for data from custom tables. You can interact with the summary to immediately go to highlighted fields or related data or get assistance with next steps by chatting with Copilot. To view the record summary alongside the thumbnail and important fields, you can peek into related records. Developers can write AL code to enhance summaries with even more insights.

ⓘ Note

- This feature is available as a production-ready preview for production and sandbox environments in any country localization. Production-ready previews are subject to supplemental terms of use. For more information, go to Supplemental terms of use for Dynamics 365 preview.

- This feature is supported in English only. While it can be used in other languages, it might not function as intended. Language quality might vary based on the user's interaction or system settings, which might impact accuracy and the user experience.
- AI-generated content might be incorrect.

About security, privacy and AI

Copilot is built on Microsoft's comprehensive approach to enterprise security, privacy, compliance, and responsible AI. Our philosophy is that your data is your data: customer data in Business Central is not used to train AI models.

For more information, go to FAQ for Copilot data security and privacy for Dynamics 365 and Power Platform

Tell us what you think

We're excited to have you with us on our Copilot journey.

Help us improve Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at aka.ms/bcIdeas, or join the discussion on the Dynamics 365 Business Central Partner Community Network on Viva Engage (formerly Yammer) to help us shape the future of AI in Business Central.

Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

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- United Kingdom

- Australia
- Brazil
- Canada
- India
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- France
- Korea

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Feedback

Was this page helpful? Yes No

Country and regional

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Business Central continues to become available to businesses in more countries and regions. This expansion happens largely through partner-led localizations. Our partners create and maintain apps for specific countries and regions, and publish their apps on AppSource. In combination with built-in language offerings, Business Central is available to serve customers in more than 170 countries and regions worldwide. Additionally, in the countries where Microsoft is responsible for the localization, we provide updates for all regulatory features.

Feedback

Was this page helpful? Yes No

Show features with demo dataset for Czechia

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

To help partners demonstrate the capabilities of Business Central, we're making a demo tool that provides setup and data for Czech localization scenarios.

Feature details

The demo dataset for the Czech localization adds country-specific content on top of the base application.

The Contoso Coffee app provides a demo tool and a related set of demo data. You can install the extension in any environment. Presales specialists can run the tool on Cronus or MyCompany and get the setup and demo data they need to demonstrate features for various scenarios in the Czech localization. For Business Central on-premises, the demo tool and data are available on the product media as source code.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Enable additional countries and regions

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Feb 2025

Business value

Business Central is available in more countries and regions, so more businesses around the world can leverage the benefits of its cloud-based business management features.

Feature details

We're expanding the availability of Business Central to include more countries and regions through partner-led localizations. Our partners create the relevant localization apps and publish them to AppSource. In combination with the built-in language offerings, we're making Business Central online available to serve customers in more than 180 countries and regions worldwide.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Start using E-Documents framework localized for Germany

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	Nov 2024

Business value

This feature introduces electronic documents for receipts and invoices, which significantly enhances business efficiency by streamlining administrative processes and reducing operational costs. This feature minimizes manual data entry errors and accelerates transaction processing, allowing quicker and more accurate financial computation and tracking. Additionally, it reduces the need for physical storage space and paper usage, contributing to environment sustainability. The real-time access to electronic documents improves transparency and facilitates better decision-making, ultimately leading to increased productivity and customer satisfaction.

Feature details

Users can use **E-Documents** framework localized for Germany, so users can work with **Peppol BIS3** or **XRechnung** electronic invoices formats.

They can choose to use one of existing Peppol service providers as communication channel via access points or exchange documents by uploading it manually or via e-mail.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Map e-documents to purchase order lines with Copilot (preview) (docs)

Feedback

Was this page helpful? Yes No

Start using integration with IRS for 1099 submissions

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	Nov 2024

Business value

This feature introduces the IRS 1099 tax forms in the latest release for taxpayers and businesses. This feature integrates with the IRS and doesn't print 1099 Tax Forms on preprinted original IRS 1099 Tax Forms. Instead, Business Central submits 1099 Tax Forms through integration with the IRS and sends Copy B to vendors as Copy Substitutions printed on plain paper. This feature can guide you on setting up and reporting to the IRS.

Feature details

User can report *IRS 1099* forms directly to the IRS using API integration with IRS using IRIS platform. This integration functionallity will be based on new 1099 feature that was delivered in 2024 release wave 1.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your ideas

Thank you for submitting these ideas:

- 1099's on blank paper
- 1099 update as an extension instead of incorporating in version upgrades
- 1099 Print to Blank paper
- 1099 Forms - print without using IRS preprinted forms
- Adjust 1099 Annual Cumulative Amounts by Vendor
- Add ability to have DBA name and legal name so IRS 1099 vendor reports are legal.
- 1099 Improvements

We listened to your ideas, along with comments and votes, to help us decide what to add to our product roadmap.

See also

Set up the IRS 1099 forms (docs)

Note: The author created this article with assistance from AI. Learn more

Feedback

Development

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

To empower AL developers and increase their productivity, we've laid the foundation for introducing namespace support in the platform and application. Namespace support makes it easier to structure apps, create better object names, and avoid identifier clashes. As apps mature, the need to refactor is inevitable, so we've added the ability to move ownership of a table and its data between extensions. Additionally, developers can hide specific variable data so that other parties can't access it during debugging, which protects internal data.

When it comes to data analysis and reporting, developers have more control. For example, you can turn off Analysis Mode on pages and specify how to embed content from Power BI.

Consultants and developers can easily open Visual Studio Code for a production or sandbox environment to investigate and understand objects across installed extensions, view code for owned extensions, and perform troubleshooting—all without having to set up Visual Studio Code manually. Similarly, we've improved profiling from the client and Visual Studio Code so it's easier to find database-related performance issues.

AppSource publishers can sell through CSPs, and better handling for AppSource runtime packages gives seamless development and troubleshooting across app dependencies for publishers and resellers.

Feedback

Extend AL interfaces

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

Business value

The support for extensible interfaces in programming languages offers significant business value by enabling creation of flexible and adaptable extensions that can evolve over time to meet changing business needs. They enable developers to add new functionalities without altering the core system, which can save time and resources while reducing the risk of introducing errors into the existing codebase. They are a key component in modern software engineering, providing the agility and flexibility needed to drive innovation and maintain a competitive edge in today's fast-paced business environment.

Feature details

You can now extend one or more existing interfaces when you declare an interface. When implementing an interface that extends other interfaces, the implementor must also implement all methods from all extended interfaces.

The feature also works with the testing and casting operators `is` and `as`, which are also new additions to the AL language in this release.

The syntax is shown in example below. Here, `TheImplementor` can be used as both `IFoo`, `IBar`, and `IFooBar`.

```
interface IFoo
{
    procedure Foo();
}

interface IBar
{
    procedure Bar();
}

interface IFooBar extends IFoo, IBar
{
    procedure FooBar();
}

codeunit 50100 TheImplementor implements IFooBar
{
    // Must implement IFoo, IBar, IFooBar
```

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Feedback

Was this page helpful? Yes No

Extend and customize profiles from other extensions

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

Business value

One of the current extensibility gaps is the lacking ability to extend profiles. This implies that partners have been forced to copy profiles defined in other extensions whenever they needed to do some changes for them. In this release, it's now possible to define profile extension objects.

Feature details

With this feature, you can now create profile extension objects in your AL code. They can be used to modify the target profile's caption, role center, or even include/remove it from the role explorer. It's also possible to add page customizations to a specified profile.

In addition to the language support, additional coverage in IntelliSense, AL Explorer, and analyzer rules have been added.

The following code example shows a profile extension:

```
profileextension MyProfileExt extends "O365 SALES"
{
    Caption = 'Profile Extension Caption';
    ProfileDescription = 'Profile Extension Description';
    Enabled = true;
    Promoted = true;
    RoleCenter = 9027;
    Customizations = SalesOrderCustomization, SalesQuoteCustomization;
}
```

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Package resources in extensions and access from AL

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

Business value

Often features require some data, for example to initialize and set up. Until now, it has only been possible to add such data and consume from AL through the use of labels or code. In this release, we're adding the ability to include resources in extensions and access these from AL.

Feature details

Developers will be able to package resources in extensions and access the content of these resources from within AL code. This can be used to ship data for setup and initialization features (for example, for RapidStart packages, demo data, templates, and more), thereby avoiding having to use labels or codeunits for this purpose.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Pull extension source from GitHub when opening Visual Studio Code from the web client

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

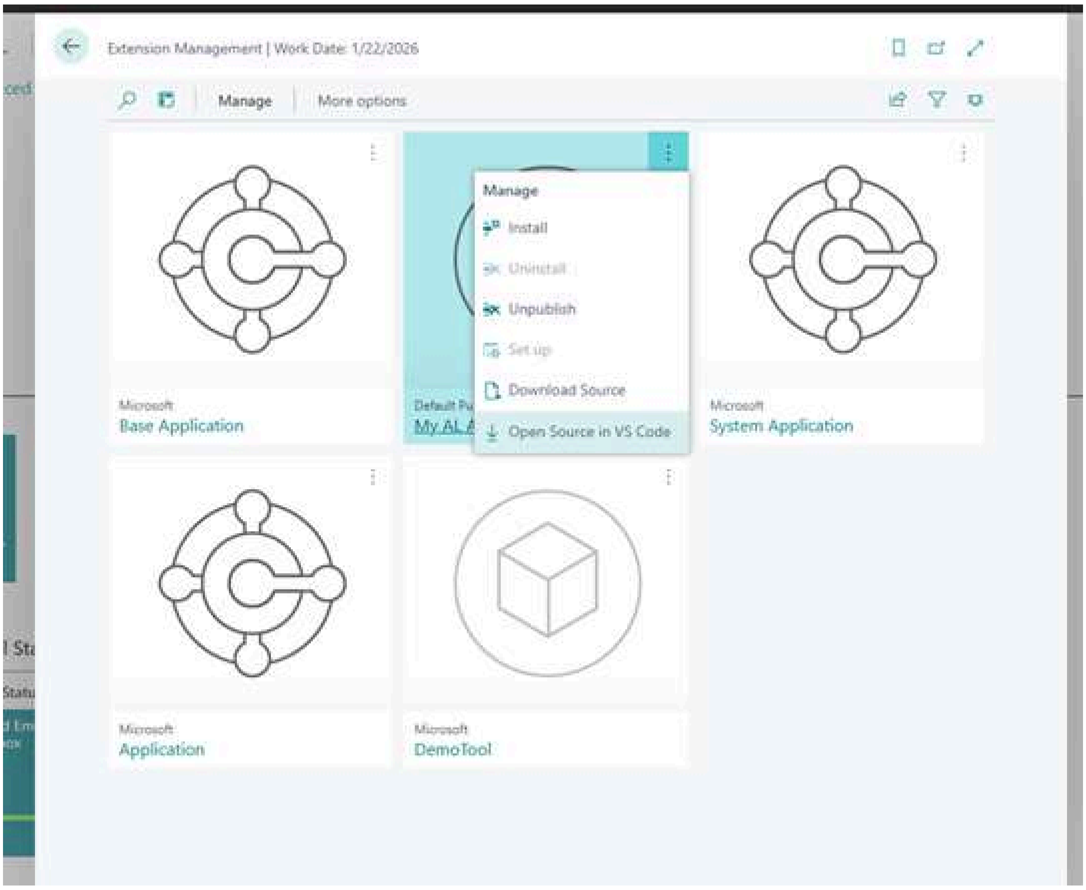
Business value

A year ago, you got the power to open a Visual Studio Code project from within the web client. This removed all the hassle of creating projects so you could launch configurations and download symbols yourself. This is a great tool for exploring functionality and troubleshooting, whether it's in sandboxes or production, and it empowers support, consultants, and developers. However, what if access to extension code is blocked by IP resource exposure protection, but the source is in your GitHub repo? Or maybe you want to proceed with authoring your own code, such as hotfixing one of your apps or pulling the latest source version for changes or development? In 2024 release wave 2, this feature will make that possible.

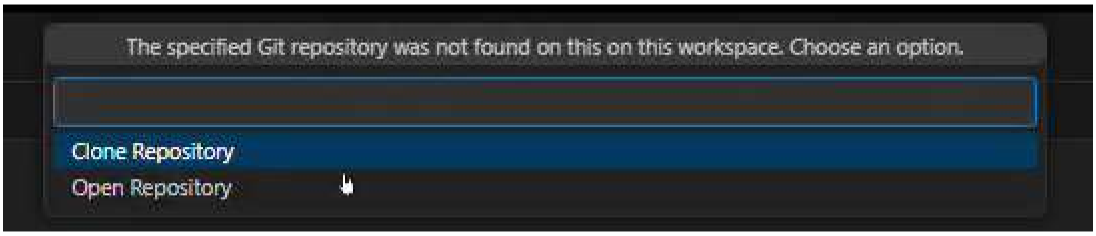
Feature details

In this release, we're building on the recent "Explore in Visual Studio Code" feature by using the source and build metadata in the manifest of an extension to offer pulling source from the related GitHub repository and from a specific build. This allows navigating code for the extensions that you have source access to and allows you to hotfix a given build or sync to get the latest changes for investigation or development.

From the **Extension Management** list page, you now have a new **Open Source in VS Code** option in the context menu for an extension.



If you invoke that, Visual Studio Code will open and ask you whether to clone or open the GitHub repo for the extension. It will use the repo metadata that was included in the extension when it was built.



You can read more about the source and build metadata in the app.json file here:

- Track source and build metadata on extensions
- JSON files

ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Feedback

Was this page helpful? Yes No

Restore extensions if publishing from Visual Studio Code fails

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

Business value

If publishing an extension from within Visual Studio Code fails, the publishing process tries to restore any previously installed extensions, that were uninstalled and unpublished as part of the failed publishing. If a full restore fails, the developer is informed about which extensions could be restored and which ones failed, providing the developer with a better overview.

Feature details

When deploying an extension from Visual Studio Code, which is part of a graph of installed extensions on the target environment, first level dependent extensions are uninstalled and unpublished in order to be recompiled once the extension has been deployed. However, if the deployment from Visual Studio Code fails (for example, due to a compilation issue on the server), the server is left with an incomplete graph of installed extensions. This results in unnecessary manual work to redeploy the previously installed extensions in the correct order. With this release, Visual Studio Code now tries to restore the previous extension state, removing the need for manual work in most cases.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Run code action for 'with' for file, project, or workspace

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

Business value

The code action to convert 'with' statements to explicit records has only been only available for individual 'with' statements. However, most apps have many, many uses spread across the codebase, leading to a lot of unnecessary manual work to convert code. With this release, the code action to convert 'with' usage can now be run on the whole Document, the active Project as well as the complete Workspace level.

Feature details

Previously, we added generic support for running code actions on the active document, active project, or the complete workspace. This has been adopted by code actions, which are used for converting uses of ApplicationArea or tooltips. In this release, the code action to convert the usage of `with` can now be run on the entire document, the active project, as well as the complete workspace level. This makes it much more productive to convert the usage of `with` statements in existing code to use explicit records.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Set up easier in-client performance profiling with rules

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	Oct 2024

Business value

Three releases ago we launched the in-client profiler, a very powerful tool for investigating performance issues across extensions. Since then, profiling has become essential to identify application performance problems for customers, partners, and support, and it's the main performance troubleshooting tool for partners.

However, due to its current nature of being an interactive capture, acquiring a performance profile requires well-defined repro steps and collaboration across stakeholders.

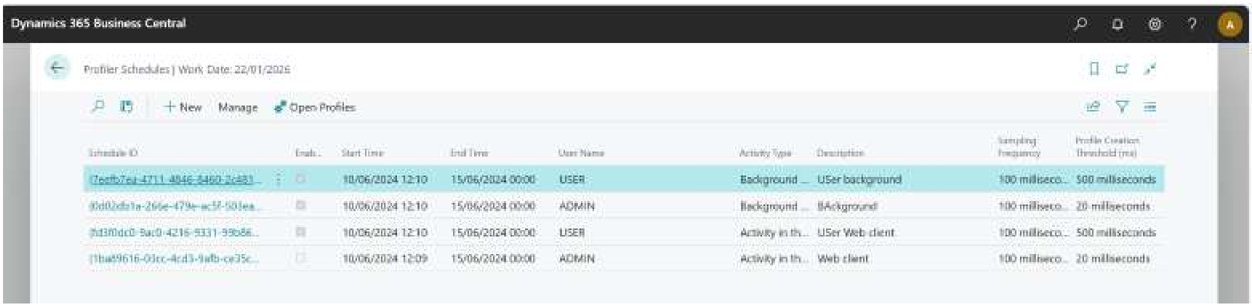
To make it easier and faster for customers, consultants, pro developers, partners and Microsoft support to capture a profile, and thereby lower manual collaboration and time-to-mitigate, this release will add the additional support for capturing performance profiles automatically and noninteractively in the background, based on well-defined rules triggering capture. Captured profile details can then be analyzed afterwards.

Feature details

In addition to the existing interactive way of capturing a performance profile - by starting the profile, performing repro steps in the client, stopping the profiler and then analyzing the results - a new rule-based scheduling mode for capturing profiles in the background is added.

With this, a customer admin, consultant, support person or developer can set up a specific scheduled rule, for example, to profile as a given user and session type for a given duration. Once the rule is defined and enabled, the server will trigger a profile each time the rule is met. At the end of the duration, profiling will stop, and the results can be inspected to see if there are any performance issues, including intermittent or long running ones.

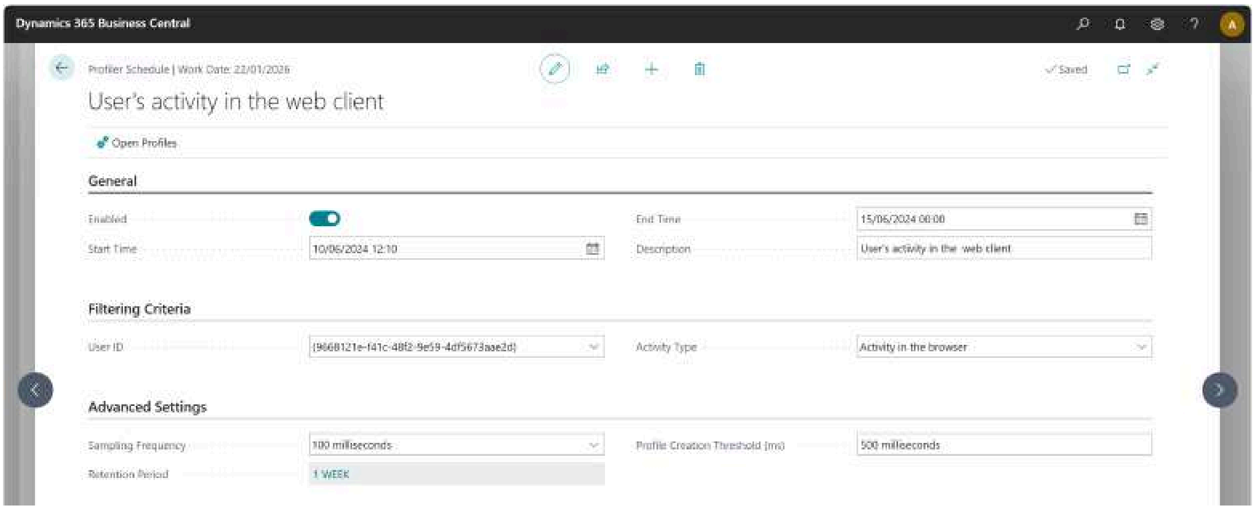
To create a new profile rule schedule, open the **Performance Profiler Schedules** page. This lists the defined schedules, and the additional schedule details. From here, you can create a new schedule.



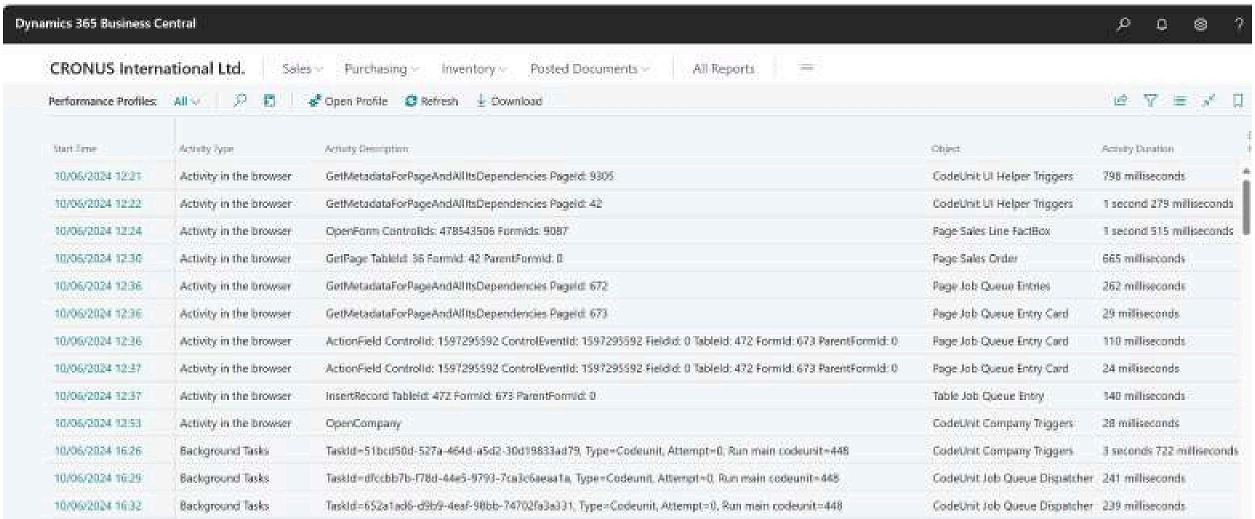
When creating a new profile capture schedule, you can define a number of rules and settings:

- Enabled: Allows you to enable or disable the defined schedule.
- Start and End Time: Sets the duration in schedule is active and can trigger profile captures.
- Description: Add your own description of the profile schedule.
- User ID: Choose whether the scheduling only captures profiles for a specific user.
- Activity Type: Select the kind of activity that will trigger capturing profiles. It can be background tasks, or activity in the browser (such as opening a page).
- Sampling frequency: Choose the sampling frequency used when capturing profiles. You can select the same options as in the existing interactive in-client performance profiler, or AL profiler in Visual Studio Code.
- Profile creation threshold: Specify the minimum duration of the profile for it to be saved.
- Retention period: Specify how long captured profiles for this schedule should be kept.

The following example shows how you can set up a schedule for capturing profiles for a specific users browser activity during 5 days.



Once profile schedules have been defined, enabled, and run, you can view all the captured profiles in the **Performance Profiles** list page, and open a selected profile for detailed analysis, similar to what's known from the in-client performance profiler.



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Feedback

Was this page helpful? Yes No

Type testing and casting operators for interfaces

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

Business value

The contractual behavior of interfaces has been a limiting factor with regards to update and future extensibility. Adding casting will greatly increase the usefulness of interfaces in AL. In this version, we introduce support for type testing and casting interfaces in the AL language. Two new operators, 'is' and 'as', have been added to facilitate these operations. The 'is' keyword checks if an interface is of a specific type, which is useful for ensuring type safety within code. The 'as' keyword, on the other hand, attempts to cast an interface to another interface. These operators improve the extensibility and usefulness of interfaces in AL and align with the broader programming practice of ensuring that systems are built with future growth and adaptability in mind, allowing for seamless updates and maintenance.

Feature details

In this version, we introduce support for casting between AL interfaces. Given an interface A, you can cast it to the interface B if the underlying object (only codeunit for now) implements B. Two new operators, 'is' and 'as', are added to facilitate these operations.

The `is` operator

The `is` operator allows you to test whether an instance of an interface, or the content of a variant supports a specific interface. Here's the syntax for using the `is` keyword:

```
procedure TestInterface(intf: Interface IFoo)
begin
    if intf is IBar then
        Message('I also support IBar');
end;
```

You can also use the `is` operator with variants:

```
procedure TestVariant(v: Variant)
begin
    if v is IBar then
        Message('I support IBar');
end;
```

The `as` operator

The `as` operator is used for casting an instance of an interface to a specific interface. If the source interface doesn't implement the target interface, it will throw an error at runtime. Here's an example:

```
procedure CastInterface(intf: Interface IFoo): Interface IBar
begin
    exit(intf as IBar); // Throws an error if 'intf' doesn't implement 'IBar'
end;
```

Similarly, the `as` keyword works with variants:

```
procedure CastInterface(v: Variant): Interface IBar
begin
    exit(v as IBar); // Throws an error if 'v' doesn't implement 'IBar'
end;
```

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ⓘ **Note:** The author created this article with assistance from AI. Learn more

Feedback

Was this page helpful? Yes No

Use improved features for report documents

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

Business value

Developers and power users can use more of the features that Word provides for document layouts. These improvements reduce time spent on designing layouts for documents and let more power users work with document layouts.

Feature details

You use report documents in Business Central when you need to send a document such as a quote, order, or invoice to your customers or suppliers.

The following improvements are available for the Word layout feature:

- You can use *sections* in Word layouts even when you use the WordMergeDataItem property. This unlocks the ability to change layout properties, such as margins, orientation (portrait or landscape), or columns inside your Word layout. Also, you can use different watermarks for different parts of the layout. For more information, go to Using sections in a Word layout.
- From the **Report Layouts** page, you can download a Word layout template for a report. The layout template makes it easier to convert an RDL layout or a customer-supplied Word file into a Word layout for a report.

- A new Word add-in lets you control conditional visibility of text, tables, or table rows/columns.

Feedback

Was this page helpful? Yes No

Use the 'this' keyword for codeunit self reference

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see [Microsoft policy](#)). Learn more: [What's new and planned](#)

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

Business value

A new 'this' keyword is introduced as known from other languages. The keyword supports passing the current object as arguments to methods, which until now has only been possible with less optimal workarounds. In addition, the use of the `this` keyword improves readability for bigger methods where it can be difficult to see if a variable is global or local scope.

Feature details

We have added support for the `this` keyword for self-reference on all objects, as known from other programming languages.

The main benefits of using the `this` keyword are that it

- Allows codeunits to pass a reference to this (which is itself) as an argument to another method.
- Improves readability by signaling that a referenced symbol is a member on the object itself.

A new CodeCop rule AA0248 is added and enabled by default with severity 'hidden'. 'Hidden' means that it shows up as three dots in the editor, but not as a diagnostics in the **Problem** view in Visual Studio Code, or in pipelines. There's also a workspace-wide CodeFixer to update existing code to use the `this` keyword.

The System Application is converted to use `this` for referencing methods and globals in the same object.

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Feedback

Was this page helpful? Yes No

Use the ternary operator when coding in the AL language

Article • 07/16/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Oct 2024

Business value

The ternary operator ? : known from other programming languages streamlines conditional operations in code, enhances readability and reduces verbosity. It's particularly useful for simple conditions, promoting code clarity and intent-focused programming. By allowing variable initialization within the same line, it ensures proper assignment and minimizes code length. With this release, AL now also supports the ternary operator.

Feature details

The ternary operator `? :` can now be used to assign one of two values to a variable, depending on the condition of an expression.

Here's an example of using if-then-else as until now and the new ternary operator.

```
codeunit 50122 TernaryOperator
{
    0 references
    procedure Example()
    var
        myExpression: Boolean;
        myVar: Text;
    begin

        // Using if-then-else
        if myExpression then
            myVar := 'True'
        else
            myVar := 'False';

        // Using the ternary operator
        myVar := myExpression ? 'True' : 'False';
    end;
}
```

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ⓘ **Note:** The author created this article with assistance from AI. Learn more

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Feedback

Was this page helpful? Yes No

Governance and administration

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

We're giving Business Central administrators more tools for managing environments, apps, and data migrations. The goal is for administrators to be self-sufficient, able to solve their customer needs, and handle a wide variety of administrative scenarios.

- More granular administrator roles to give more control over the access granted to (delegated) administrators.
- Improved processes for minor update releases.
- The ability to link Business Central and Power Platform environments to set up integrations consistently and to apply Power Platform environment settings to Business Central.
- The ability to cancel Cloud Migration replication runs.

Feedback

Was this page helpful? Yes No

Encrypt data at-rest with customer-managed encryption key

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

Business value

This capability will allow customers to meet their data and privacy policy according to the standard privacy guidelines.

Feature details

With Dynamics 365 Business Central 2024 release wave 1, customers will gain the ability to encrypt their environment database using their own encryption key. This feature, also known as a customer-managed key (CMK), provides enhanced data protection and compliance for your business data. With CMK, you can use your own Azure Key Vault key to protect and control access to the key that encrypts your environment database. This gives you more flexibility and control over your encryption keys, such as the ability to rotate, revoke, or restore them.

This feature will be administered in the Power Platform admin center, and will require the Business Central environment to be linked to a Power Platform environment. Enabling CMK on a Power Platform environment linked to a Business Central environment will apply the same CMK policy on the Power Platform and Business Central environments.

Feedback

Was this page helpful? Yes No

Get list of manageable environments for Microsoft Entra apps

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Dec 2024

Business value

Using a new admin center API endpoint, Microsoft Entra apps authorized in the admin center can get a list of environments for which the app is authorized. This capability reduces the manual overhead associated with maintaining environment lists and facilitates the automation of repetitive administrative tasks, enhancing operational efficiency for partners.

Feature details

Partners increasingly automate administrative tasks on their customer environments by authorizing their multitenant Microsoft Entra app in their customers' admin center. As the number of customers per partner and partners per customer grows, and with the environment-level access controls introduced for partners in 2024 wave 1, the overhead of manually keeping lists of manageable environments per Microsoft Entra app is increasing. So is the demand to automate repetitive tasks, like updating installed apps.

A new API endpoint for Microsoft Entra apps returns a complete list of all environments in all tenants that are manageable by the Microsoft Entra app. This will make it easier for partners to automate administrative tasks across all their customers' environments.

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Feedback

Was this page helpful? Yes No

Get notified about issues with job queue background processing

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

Business value

Sometimes tasks, reports, or batch processes can take a long time to complete. To keep people productive in the meantime, companies often use Business Central's ability to run processes in the background. If something goes wrong and an important background process stops, or isn't scheduled for some reason, being notified of the issue can help you react quickly to resolve it.

Feature details

To be notified when there are issues with job queue processing, you can subscribe to external business events that are emitted when:

- Job queue processing fails after a number of retries.
- Job queue processing fails to schedule.

The **When a business event occurs** trigger in a Power Automate flow can catch external business events when they're emitted. To give you flexibility, you can choose from a couple of built-in Power Automate templates that we're shipping with this feature.

You can also create a new Power Automate flow to set up a notification mechanism that's best for your business. For example:

- Notify the user whose credentials the job queue uses to run.
- Notify the notification recipients you set up in the Business Central admin center.

Additional job queue APIs allow such automations to react to specific job queue issues by restarting or rescheduling the job queue.

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Feedback

Was this page helpful? Yes No

Manage environment updates more flexibly

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	Mar 2025

Business value

With extended periods for major releases and optional minor updates, administrators have more flexibility to update environments in a way that suits their needs. Businesses have more time to prepare for updates and plan them for less busy periods.

Feature details

Previously, relatively rigid update policies were in place for major and minor updates. This release introduces the following changes for much more flexibility:

- **Five month update periods for major updates**: This change gives more time for thorough testing and preparation before implementing the update. Resellers can spread the workload of updating all customer environments over the entire calendar year to avoid peak periods for major updates. Developers have more time to ensure all apps are compatible with the update, and customers with specific testing and preparation requirements have more time to comply with those requirements.

- **Optional minor updates**: This change allows administrators to choose when and whether to implement minor updates based on their needs and schedule. The default behavior of environments receiving updates every month doesn't change.

Instead, a new environment-level setting makes it possible to opt-out of monthly minor updates.

As part of these changes, the grace period after the update period for the next major update shortened to one month. As before, the update will run and can't be postponed to a later date during this grace period. The update will be forced by uninstalling incompatible extensions once the grace period ends.

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Feedback

Was this page helpful? Yes No

Manage per-tenant extensions in admin center

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Dec 2024

Business value

Having a unified user interface and API for managing per-tenant extensions (PTEs), alongside AppSource apps makes it easier and faster for administrators to deploy and maintain extensions across different environments and tenants.

Feature details

In this release, we're introducing a new feature that lets Business Central administrators manage PTEs from the Business Central admin center and its API, similar to how AppSource apps can be managed today. This feature saves time and effort because admins can manage PTEs across different environments and tenants without having to go to the client of each environment.

Tell us what you think

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Feedback

Migrate record links and notes with cloud migration tooling

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

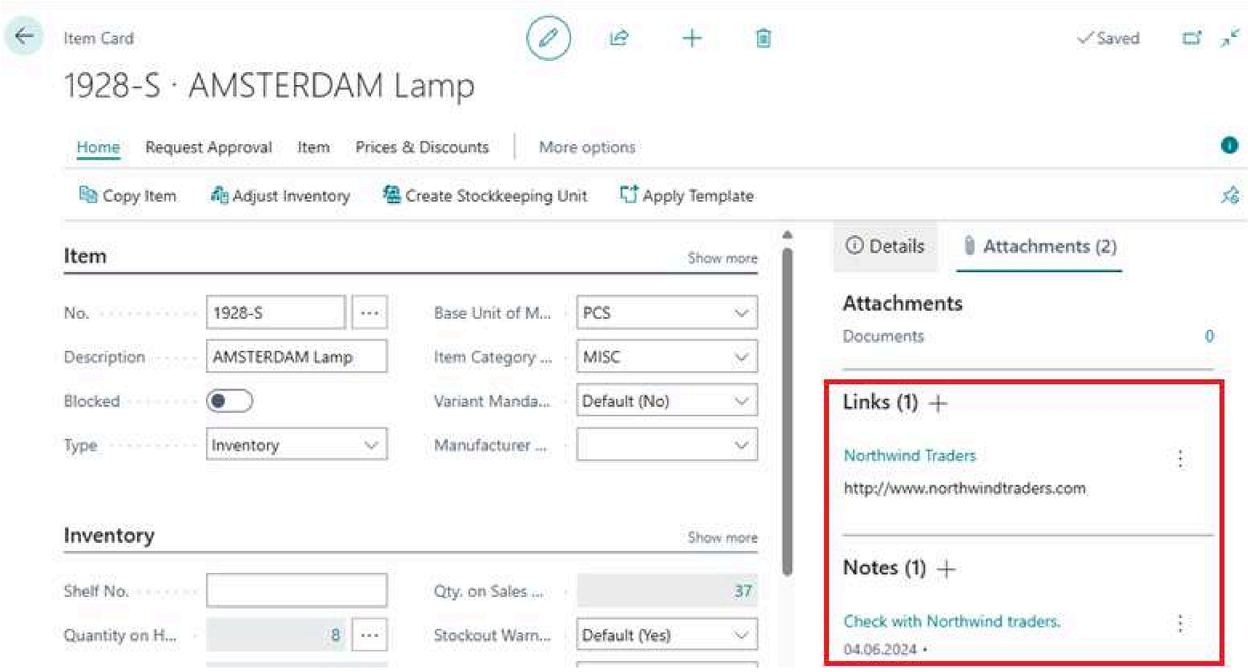
Enabled for	Public preview	General availability
Users, automatically	Sep 2024	Oct 2024

Business value

Business users often attach links and notes to records in Business Central to add context and extra information. For businesses transitioning from on-premises to cloud environments, this feature ensures that these links and notes on records are included in the cloud migration without the need for the external tooling. This feature saves valuable time and reduces the risks of error with manual data transfer.

Feature details

Previously, the record links and notes were not automatically migrated to the online tenant as part of the cloud migration process. Instead, you had to use manual means to move the data. Now, the cloud migration setup and replication tooling will automatically migrate the links and notes on records for you with minimal work on your part.



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Feedback

Was this page helpful? Yes No

Support IPv6 for enhanced security and scalability

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Feb 2025

Business value

The adoption of IPv6 in Business Central helps to ensure uninterrupted service, improved security, and scalability in the future as the number of internet-connected devices continues to grow and IPv4 addresses become less available.

Feature details

The supply of IPv4 addresses is limited and will eventually run out. So, starting in 2024 wave 2, Business Central supports IPv6 addresses. The transition to IPv6 not only ensures seamless connectivity for your environments but also enhances the security of your data with IPv6's built-in security protocols. More importantly, this update prepares your environments for the future as the world moves towards widespread IPv6 adoption.

Tell us what you think

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ⓘ **Note:** The author created this article with assistance from AI. Learn more

Feedback

Was this page helpful? Yes No

View app compatibility with future versions in admin center

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Dec 2024

Business value

By reporting the compatibility between the base application and other apps installed on an environment in the admin center, administrators can better prepare for changes and avoid potential problems during upgrades.

Feature details

Environment updates might include changes to functionality that installed apps depend on, which, in turn, can break those apps. Until 2024 release wave 2, only notification recipients and registered Application Insights resources received messages about incompatibilities of installed apps with a future Business Central update.

To make it easier to plan for these changes ahead of time and avoid upgrade failures, you can now view app compatibility reports directly in the admin center. You're prevented from scheduling an update to a version that installed apps are incompatible with.

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Feedback

Was this page helpful? Yes No

Legislation

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

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.

Feedback

Was this page helpful? Yes No

Achieve sustainability scorecards and goals

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

Achieving sustainability scorecards and goals enhances a company's reputation, operational efficiency, and compliance, leading to cost savings and risk mitigation. It attracts investors, customers, and talent while fostering innovation and ensuring long term viability. Sustainability efforts align with regulatory incentives and market demand, creating a competitive advantage and driving growth through responsible resource management and positive stakeholder engagement.

Feature details

Users have the ability to set up specific scorecards with owner information to track sustainability and add goals for each of them.

Goals will have starting and ending dates, baselines, current and target values for all tracked emissions, so users can easily track their progress in achieving their sustainability plans.

Tell us what you think

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See also

Using key performance indicators (KPIs) to meet your business goals (docs)

Feedback

Was this page helpful? Yes No

Add attachments when you send electronic documents

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	Nov 2024

Business value

When you send an electronic document, such as an invoice, you can attach the document as a PDF, which enhances transactional transparency and streamlines auditing processes to increase efficiency and reduce potential disputes.

Feature details

Before this release, you could create **E-Document** files (for example, in the Peppol BIS3 format) when you post sales documents. You could only send this e-document file to the electronic document service provider. The Peppol BIS3 format includes the possibility to include attachments as encoded objects within the XML file.

In this release, you can include PDF attachments with the electronic document and Business Central can encode it in the XML file (alongside invoices or credit notes) when you send documents to various end points.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Enable internal carbon fee calculation in Sustainability

Article • 07/16/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

Motivate your business, or individual business units, to reduce carbon emissions by setting up carbon fees for greenhouse gas emissions.

Feature details

Companies can set up an internal fee that they charge themselves for each unit of carbon they emits. An internal company carbon fee is a fee that a company charges itself for each unit of CO2 that it emits. The purpose of the fee is to encourage the organization to reduce its carbon footprint and be more environmentally sustainable. By putting a price on carbon emissions, the company or individual organizational units are motivated to find ways to reduce emissions and save money.

Organizations can set their carbon fee, and fees for other greenhouse gas (GHG) emissions, by scope type or use a flat fee across scopes. GHG fee calculation should include allocations by **Country/regions** and by **Responsibility Centers**.

Administrators can enable carbon fee (or other GHG fees) calculations using the **GHG Fees** field on the **Sustainability Setup** page. Afterward, Business Central automatically calculates the fees when posting sustainability journals, or you can run a manual action.

The fees are posted to the **Sustainability Ledger Entry** page, where they're available in the **Emission Fee** field.

To use this functionality, you must set up fees on the **Emission Fees** page, where you can specify the GHG emissions you want to use in calculations and the emission fee amount. You can also use a recalculation model to calculate all fees in a carbon equivalent.

Tell us what you think

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Feedback

Was this page helpful? Yes No

Navigate the sustainability manager role center with ease

Article • 07/16/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

The Sustainability manager role center enhances operational efficiency by providing quick access to key environmental metrics and compliance data. The streamlined access enables managers to monitor sustainability initiatives in real-time, ensuring timely adjustments to meet regulatory standards and corporate sustainability goals. By reducing the time spent on data retrieval and analysis, this feature allows sustainability managers to focus on strategic decision-making and continuous improvement, ultimately driving more sustainable business practices and enhancing overall organizational performance.

Feature details

In the future, sustainability experts within the company can establish a dedicated role center - **Sustainability Manager**, where they can access all crucial data concerning greenhouse gas emissions within their organizations.

Users will have specific menu, with sustainability-related information provided in the headline, as well as charts, and cues for all important information about emissions, as well as purchase document featuring emission-related lines and goals.

Tell us what you think

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See also

Sustainability management overview (docs)

Feedback

Was this page helpful? Yes No

Purchase carbon credits

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

Many regions have mandatory emission reduction targets. Purchasing carbon credits allows companies to comply with these regulations when they can't reduce emissions enough through their operations alone.

Feature details

On **Item Card** pages, you can set the **GHG Credit** field for items to treat them as carbon credits. When you set up an item as a carbon credit item type, the **Carbon Credit per UoM** field (decimal) is enabled so you can specify the carbon credit value.

Afterward, when you include the item on purchase documents it posts a negative line for emission (in the **Emission CO2** field) together with the cost of the item (in the **Emission Fee** field) in the **Sustainability Ledger Entry** table.

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Feedback

Was this page helpful? Yes No

Record greenhouse gas emissions using purchase invoices

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

Recording greenhouse gases using purchase invoices allows businesses to track and reduce their carbon footprint effectively. By integrating environmental data with financial records, companies can identify high-emission activities, make informed sustainability decisions, and enhance their corporate responsibility. The proactive approach not only meets regulatory requirements but also attracts eco-conscious customers, strengthens brand reputation, and can lead cost savings through more efficient resource management.

Feature details

When users receive emissions information on their invoices from vendors, they can promptly include these values in the *Purchase Invoice* or *Purchase Order*, eliminating the need for redundant data entry in *Sustainability Journals* later on. This streamlined process enhances user productivity. Users simply need to choose the **Sustainability Account** and input the designated emission amounts tracked for each account.

These values will also be available in the **Purchase Credit Memo**, so it can be used for reversal entries as well.

Upon posting a purchase document, emission information becomes visible in both the **Posted Purchase Invoice** or **Posted Purchase Credit Memo**, as well as in the **Sustainability Ledger Entry** with the appropriate entry type.

If users prefer not to track emissions within purchase documents, they can easily disable this feature on the **Sustainability Setup**.

Tell us what you think

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See also

Record sustainability entries (docs)

Feedback

Was this page helpful? Yes No

Report sustainability entries with financial reports

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	Nov 2024

Business value

Integrating sustainability metrics, particularly greenhouse gas emissions, into financial reports significantly enhances business value. It demonstrates a commitment to transparency and accountability, fostering trust among stakeholders.

Feature details

Users can choose new **Totaling Type** on the **Financial Reports Line - Sust. Account** referring to the **Sustainability Ledger Entries**.

With this model, users can combine values based on **General Ledger Entries** or **Statistical Accoun Ledger Entries** with the following sustainability values: **Emission Fees**, **CO2 Emission**, **CH4 Emission**, and **N2O Emission**.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

See also

Sustainability management overview (docs)

Feedback

Was this page helpful? Yes No

Track sustainability certificates for items and vendors

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

Customers are increasingly seeking products that are more friendly to people and the environment. It's good for business if you can demonstrate that the products you build or buy were produced with sustainability in mind. To encourage that, there are various sustainability certificates that recognized organizations award. To keep track of the sustainability certificates that your vendors have earned, you can add their certificates to them, or to the items they work with.

Feature details

If a vendor or an item has a sustainability certificate from an issuer, you can easily record the information on the vendor or item so that the information is readily available. If you want to find a vendor that has a certain sustainability certificate, you can filter on it.

You can create sustainability certificates with the following details:

- Name
- Area
- Standard
- Issuer
- Value

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Use e-documents with Power Automate

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	Nov 2024

Business value

Because e-documents are pretty much the standard these days, modern businesses need flexible and compliant ways to share them with the right people. To that end, you can use APIs for Power Automate to share e-documents with other applications, so that people can access them in their preferred tools.

Feature details

It's easy to share electronic documents for sales and purchases in Business Central with other applications. You can use Power Automate with the E-Documents app in Business Central to integrate the app with Power Platform tools and other systems. The integration lets you use Power Automate to send electronic documents as BLOB files to the different communication channels that people in your business use.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Use multiple VAT numbers for a customer

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

Customers that have warehouses in multiple EU countries probably have a different VAT number for each country. Business Central makes it easy to accommodate that situation. You can set up alternate ship-to addresses for the customers and specify the VAT number to use for those addresses on your sales documents.

Feature details

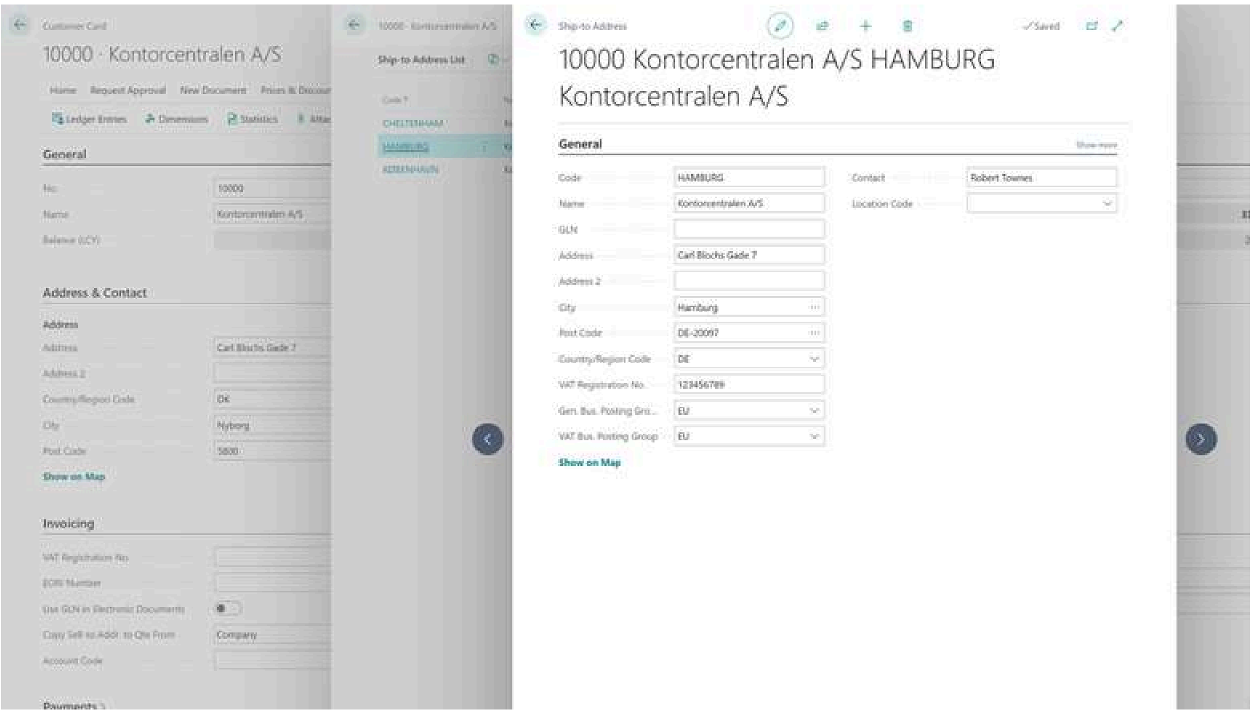
Customers that have warehouses in different EU countries must register a new VAT number in each country, which means they have more than one VAT number.

You can add the **VAT Number**, the **VAT Business Posting Group**, and the **General Business Posting Group** to the alternate address for a customer if the address has a different **Country/Region Code**. When you want to send goods to another address and you select an **Alternate Ship-to Address**, Business Central shows the appropriate VAT number. You also have the option to use different posting groups.

This feature is available on the following sales documents:

- Sales invoices
- Sales orders
- Sales credit memos

- Sales return orders



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:

- VAT-Registration No. + VAT Bus. Posting Group in Ship-to Address (Table 222)

We listened to your ideas, along with comments and votes, to help us decide what to add to our product roadmap.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Feedback

Was this page helpful? Yes No

Use new service providers in the e-documents framework

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	Oct 2024	Nov 2024

Business value

With multiple external service provider options available for electronic invoice exchanges during B2B or B2G communication, businesses can now select the provider that best aligns with their specific needs. This flexibility enhances operational efficiency, reduces costs, and mitigates risks associated with dependency on a single provider. Businesses can improve their invoice processing times, ensure compliance with diverse regulatory requirements, and streamline their financial workflows.

Feature details

You have more options to use as access points for electronic invoicing because we added more electronic document service providers to Business Central.

You can choose new options as the **Service Integration** endpoints on the **E-Document Service** page. After you choose a service provider and consent to using third party systems, you set up the connection. To set up the connection, use the **Setup Service Integration** action to configure credentials and API URLs.

By integrating new service providers, you can automate the receipt and delivery of electronic invoices. The providers serve as endpoints for e-document exchange. This automation streamlines invoice management, reduces manual processing errors, and accelerates transaction times, significantly enhancing operational efficiency and boosting overall productivity.

Although the **E-Document Services** page has several service integrations already, partners can easily add to their own to the list by publishing a connector app on AppSource.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Reporting and data analysis

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

In the modern world, data is an invaluable resource, forming the foundation of decision-making and progress across all sectors. Recent advances in AI technology and data analytics tools bring radically new ways for businesses to distill complex information into actionable intelligence, reveal hidden patterns and trends, and find correlations that were previously concealed. The critical insights gained from data analysis empower organizations to optimize their strategies, enhance customer experiences, identify potential risks, gain unprecedented insights into the details of their operations and environments, and innovate in ways that were once inconceivable.

As data continues to fuel innovation and drive transformative advancements, harnessing its potential has become essential for staying competitive and shaping a more efficient and sustainable future for SMBs.

Our reporting strategy revolves around building universal BI and analytics within the Business Central experience. We aim to seamlessly integrate in-context, rich, and immersive BI and analytics content from first and third parties into Business Central. Alongside flexible self-service capabilities, you can effortlessly access and leverage your data for maximum value.

Feedback

Was this page helpful? Yes No

Do ad hoc analysis on fixed assets, projects, and services

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

Do reporting and ad hoc data analysis on transactions from fixed assets, projects, and service management: group, summarize, and pivot data to give you the insights you need without the need to run a report.

Feature details

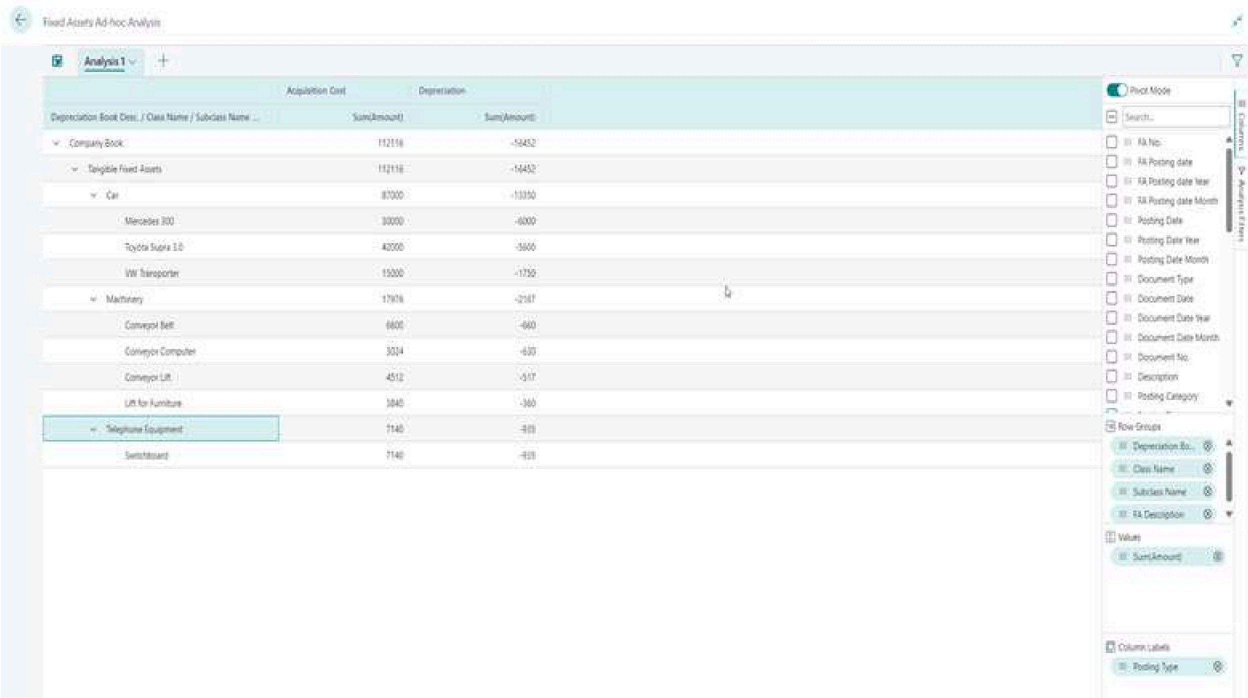
In 2023 release wave 2, we introduced the ability to do data analysis on an AL query. Now, 2024 release wave 2 has out-of-the-box queries designed to make ad hoc analysis easier for fixed assets, projects, and services.

Many of the first examples are ledger entry tables (such as fixed assets ledger entries or project ledger entries) joined to relevant tables (typically the tables where a code field on the ledger can be joined) where additional fields can enrich the analysis scenarios that people typically do on ledger entry list pages.

Example: fixed assets ad hoc analysis

The fixed assets ad hoc analysis query joins data from fixed asset ledger entries to master data tables, such as the Fixed Asset, Fixed Asset Class, Fixed Asset Subclass, Fixed Asset Location, and Depreciation Book tables.

When you open the query in the Business Central client, you can slice and dice data about fixed assets any way you like. The following image shows the options that are available.



Feedback

Was this page helpful? Yes No

Use advanced settings in the Power BI connector

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

Business value

Advanced users of Power Query can now fine-tune the use of the Power BI connector for Business Central in their semantic models. The introduction of new parameters to the Power BI connector for Business Central enhances the flexibility, performance, and user experience of data integration and analysis, while still ensuring the default values are optimal in the majority of cases. These parameters empower users with more control over their data interactions, leading to more efficient data processing, better performance, and an improved user experience.

Feature details

Starting in this release, the Power BI connector for Business Central now supports several advanced properties that you can set in your Power Query queries:

- **AcceptLanguage**: This parameter allows you to specify preferred languages for responses, ensuring users receive messages and translatable strings in their desired language. This improves user satisfaction and makes the data more accessible and relevant.
- **ODataMaxPageSize**: By limiting the number of entities per results page, this parameter allows for more flexibility when connecting to large datasets or using

complex queries. It ensures efficient and responsive data retrieval, leading to faster insights and decision-making. You can't exceed the maximum page size defined on the service.

- **Timeout**: This parameter defines the maximum duration for a request before cancellation. It helps manage system resources effectively and prevents long-running queries from impacting overall system performance. Users experience minimal delays and interruptions, ensuring a smoother workflow. You can't exceed the timeout defined on the service.

- **UseReadOnlyReplica**: This parameter determines whether requests target the primary database or a read-only replica. Offloading read operations from the primary database can significantly boost performance. This leads to faster data retrieval and improved system stability, especially during peak usage times.

Feedback

Was this page helpful? Yes No

Use embedded Power BI reports out of the box

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Oct 2024

Business value

It's easier than ever to leverage your business data to get insights into your operations. You can analyze your business data with out-of-the-box Power BI reports for finance, sales, purchasing, inventory, manufacturing, and projects.

Feature details

Business Central comes with many options for reporting, business intelligence (BI) dashboards, and data analysis. This release wave adds a lot of new reports for finance, sales, purchasing, inventory, manufacturing, and projects.

Specifically, the following Power BI reports are available:

- Finance: 14 reports
- Sales: 12 reports
- Purchasing: 13 reports
- Inventory: 7 reports
- Manufacturing: 11 reports
- Projects: 6 reports

You can also embed the Power BI Metrics scorecards you use to track your important KPIs directly inside Business Central.

ⓘ **Note:** The author created this article with assistance from AI. Learn more

Feedback

Was this page helpful? Yes No

User experiences

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Business Central offers a broad portfolio of user interfaces that enable our customers to work with their data from anywhere, and on any device. User interfaces include an installable desktop app, a browser-based web app, and mobile apps. Whether you need to enter data at high speed, casually update entries, or analyze relational data, Business Central offers numerous features that are easy to get started with and powerful when needed.

Every release includes enhancements to usability, accessibility, performance, and reliability. In this release wave, we're boosting efficiency when you're working with actions across selections in lists of records and viewing summarized data to help you easily fix data entry mistakes.

Feedback

Was this page helpful? Yes No

Access keys with Key Tips in more languages

Article • 07/16/2024

> ⓘ Important
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see [Microsoft policy](#)). Learn more: [What's new and planned](#)

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

Organizations are looking to streamline their operations through AI, automation, and empowering workers with productivity tools. When time to enter data is critical, every keystroke and mouse click counts. Business Central adopts the familiar experience from Microsoft 365 applications, such as Excel and Word, to boost efficiency for keyboard users. Access keys with key tips help users quickly explore, navigate, and activate any action in the action bar, navigation menus, and other user interface (UI) elements.

Feature details

You can use access keys with key tips, regardless of your language setting in **My Settings**. Key tips are optimized for the following languages:

- English
- Danish
- Dutch
- Italian
- French
- German
- Spanish
- Portuguese

- Swedish
- Finnish
- Norwegian
- Polish
- Czech
- Icelandic

If you're using the Business Central Web client, when you press the Alt key, the following becomes available:

- Key tips are revealed alongside UI elements to indicate the next keystroke.
- Sequences of keystrokes can be used to navigate the user interface and activate UI elements, without leaving your current focused element.
- Access keys are available for actions in the action bar and links in the navigation menu, regardless of whether they are assigned a specific shortcut key.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Resize columns even when personalization isn't enabled

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

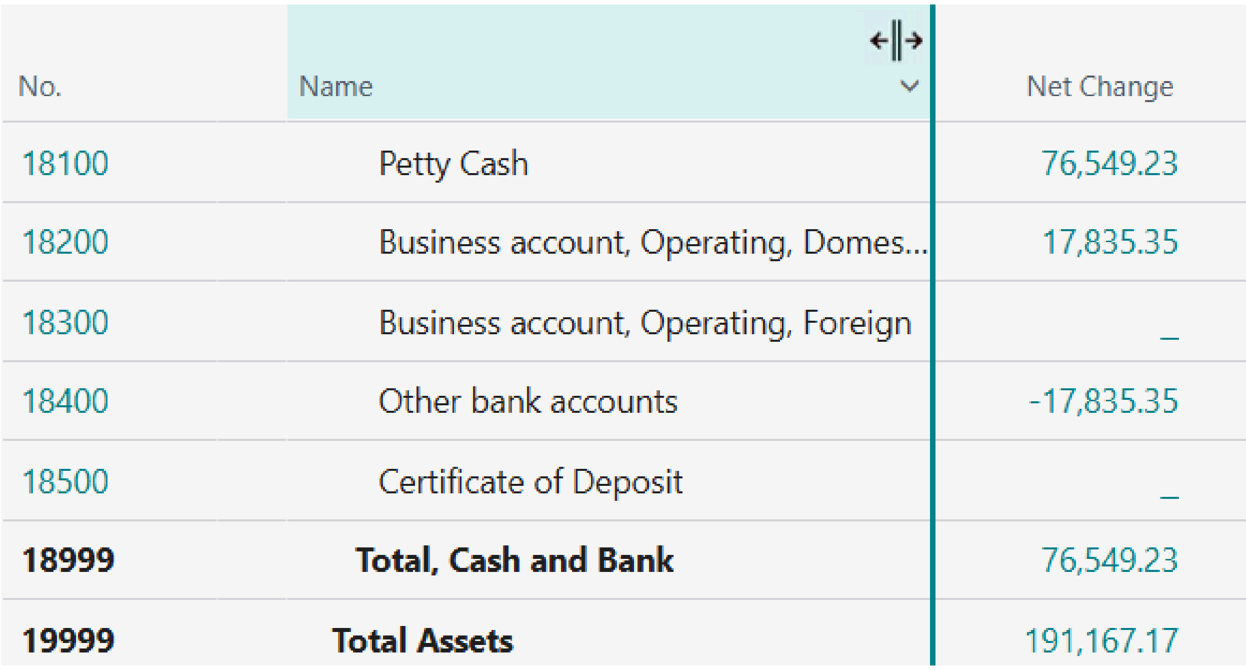
Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

People using the Business Central web client often need to adjust the widths of their data columns. Whether you're looking for a particular record or optimizing the layout of their pages for efficient reading or accelerated data entry. Now, this is disconnected from the UI customization system to let you quickly and easily resize columns on any list.

Feature details

- **Optimize for each device**: When you're working on multiple browsers or devices, such as a desktop PC at work and a laptop when you're on the go, you can adjust column widths independently on each device for an optimal view of your data.
- **Resize regardless of role**: Even when personalization is off for a given profile (role), users who are assigned that profile can still resize columns by dragging or double-clicking the sides of the column header.
- **Get it done, quicker**: Resizing a column is notably faster.
- **On any page**: Unlocks the ability to resize columns on page types where you previously couldn't, such as Copilot prompt dialogs.
- **Best of both worlds**: Resizing columns in personalization mode or role customization mode will continue to persist the column width to the UI personalization store in the database.



No.	Name	Net Change
18100	Petty Cash	76,549.23
18200	Business account, Operating, Domes...	17,835.35
18300	Business account, Operating, Foreign	_
18400	Other bank accounts	-17,835.35
18500	Certificate of Deposit	_
18999	**Total, Cash and Bank**	76,549.23
19999	**Total Assets**	191,167.17

Column size preferences now join many other simple UI adjustments that are stored in your browser. Using in-private or incognito browsing, or clearing your browser history might discard your preferences, including column sizing.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Use drag and drop on file upload dialog to attach multiple files

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

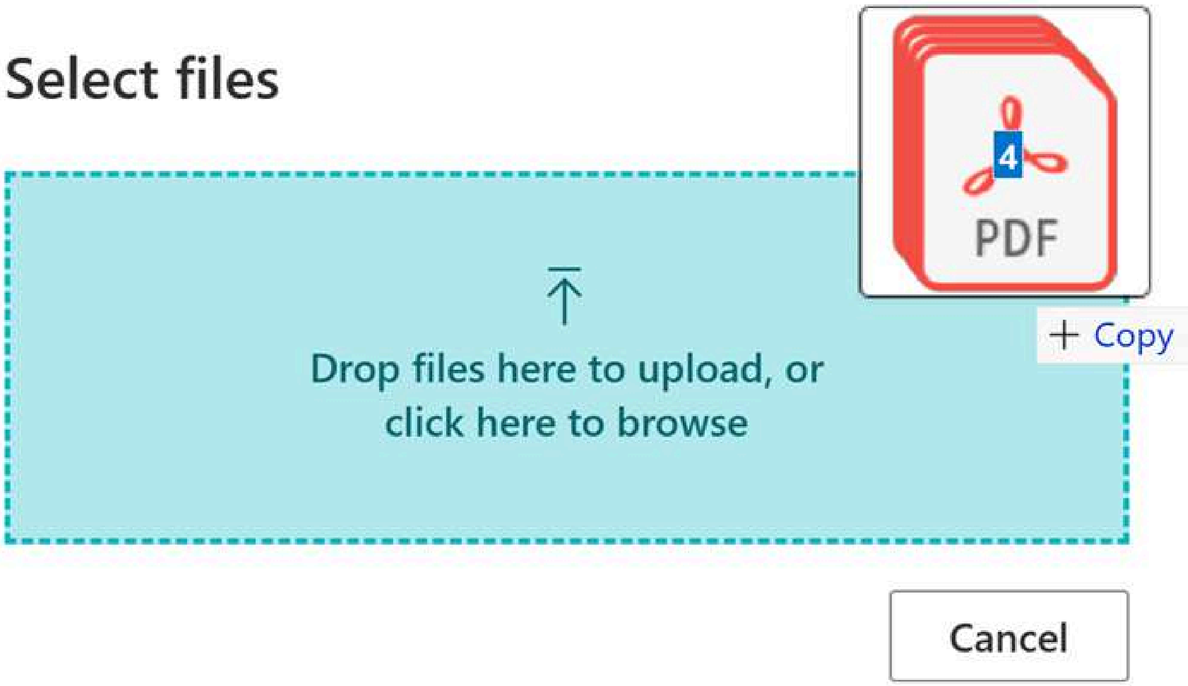
Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

Drag and drop functionality to attach multiple files to Business Central records makes it easier to manage files. This feature benefits users who work with multiple files and adds value to organizations by enhancing data organization and accessibility.

Feature details

You can drag multiple files at the same time to attach them to records in Business Central. Select multiple files, and then just drag them to the file upload dialog.

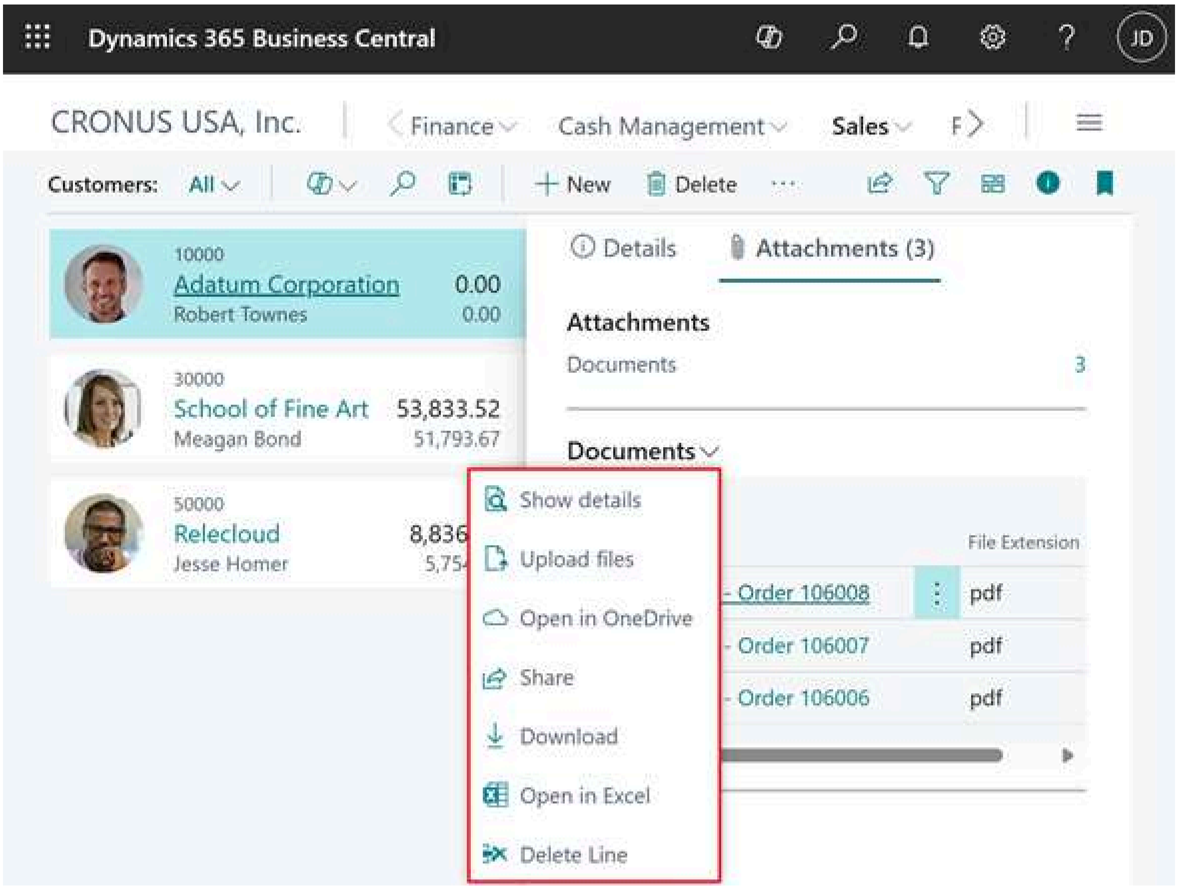


The following pages and actions open a File Upload dialog. You can upload multiple files either by choosing **Browse** to manually select them or by dragging multiple files to the dialog.

- **Document Attachments List FactBox** page, which is available on many document pages in the **Attachments** part of the FactBox pane.
- **Incoming Document Files FactBox** page, which is available on pages related to incoming documents.
- **Email Editor** page, which is used to draft and send emails from Business Central.

Document attachments

The **Doc. Attachments List** FactBox is available in the **Attachments** part of the FactBox pane. It comes with same set of actions that the existing **Document Attachments** has. However, it also features a quick overview of uploaded files, so you don't have to open the **Attached Document** page.



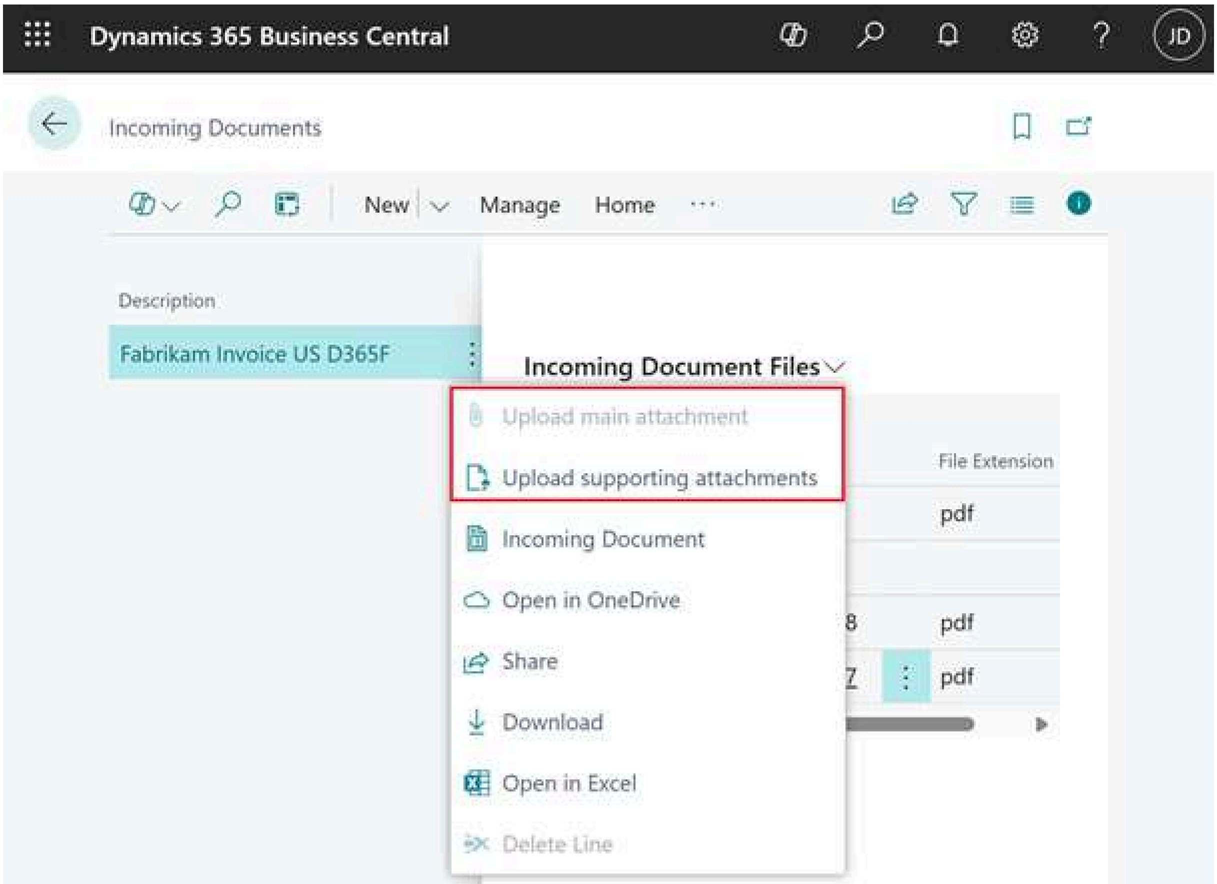
ⓘ Note

If you choose to use the new **Attachments** FactBox, you can use Business Central's personalization capabilities to hide the legacy **Document Attachments** FactBox, which will be deprecated in upcoming releases.

Incoming document files

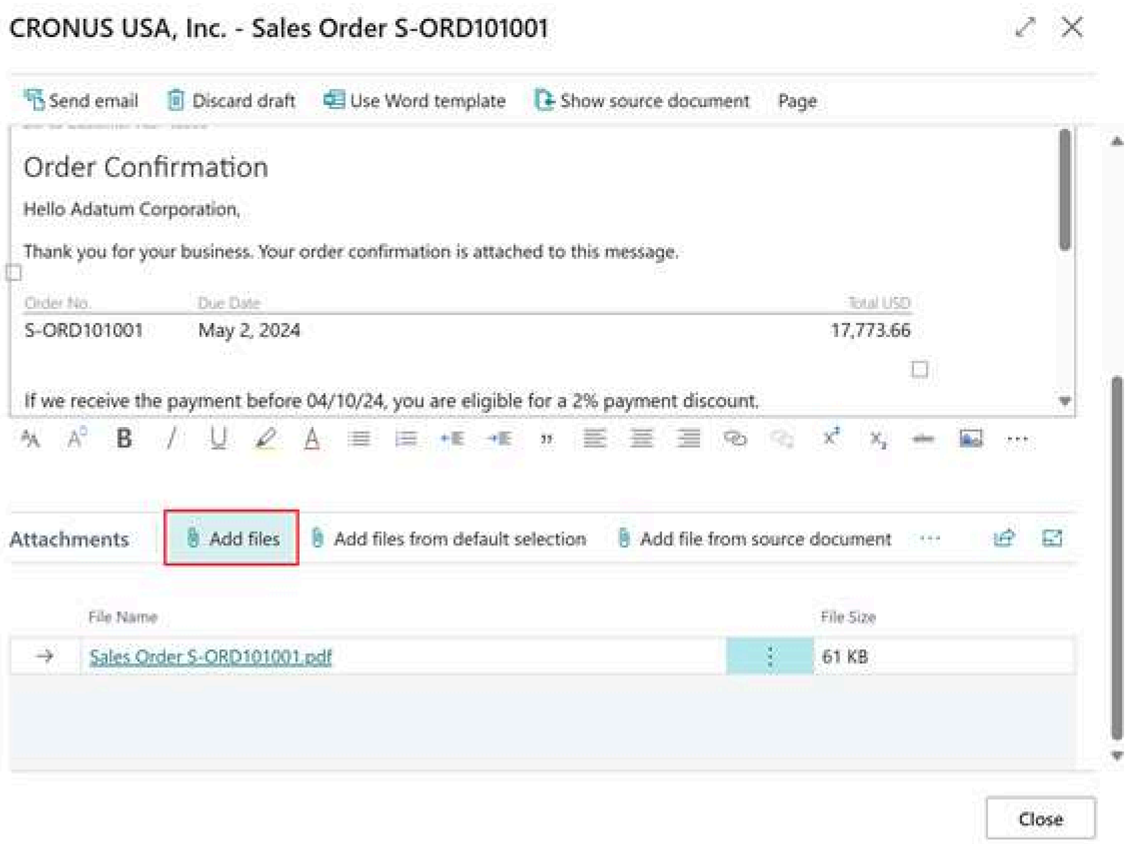
The **Incoming Document Files** FactBox has two separate actions for uploading incoming document files:

- You can choose the **Upload main attachment** action, which was previously named **Attach File**, to upload a single main incoming document attachment.
- You can choose the **Upload supporting attachments** action to upload multiple supporting document attachments for the incoming document.



Email editor

On the **Email Editor** page, you can choose the **Add files** action to attach one of more attachments to emails you are sending from Business Central.



Tell us what you think

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Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Remote Assist in 2024 release wave 2

Article • 07/16/2024

> **Important**
>
> The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Remote Assist**.

Overview

Dynamics 365 Remote Assist is a mixed reality application that empowers technicians to solve problems faster when they encounter them. Whether in a heads-up, hands-free environment on Microsoft HoloLens or using an iOS or Android device, technicians can collaborate with remote experts to troubleshoot issues directly where they get the work done. Remote Assist modernizes field service operations and helps technicians use their time efficiently.

Dynamics 365 Remote Assist focuses on three key scenarios:

- **Service and repairs**: Enable organizations to service assets faster by doing the right remote collaboration fast and capturing the fixes for further analysis.
- **Surveys and walkthroughs**: Complete tasks such as inspections, quality assurance, project reviews, and other field service and operations activities by capturing asset information with augmented reality.
- **Knowledge and service insights**: Empower technicians to capture information and make it available for the broader organization. Use repair data from your technician operations to improve your business processes.

In the coming release wave, Dynamics 365 Remote Assist will bring the spatial annotations feature curently available in preview on Teams mobile to general availability. Additionally, Teams mobile users on iOS and Android will get meaningful improvements to inking scenarios in which remote experts or technicians can reliably ink over irregular and complex surfaces.

Investment areas

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Remote Assist** below:

Check out the release plan

For application administrators

User-impacting features to the user experience enabled automatically
User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

Features that must be enabled by application administrators
This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.

Get the most out of Remote Assist

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Remote Assist.
Product documentation	Find documentation for Remote Assist.
User community	Engage with Remote Assist experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Remote Assist.

Note: The author created this article with assistance from AI. Learn more

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Remote Assist

Article • 07/16/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

- For a list of the previous wave's release plans, go to 2024 release wave 1 plan.

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✔) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Expand table

Feature	Enabled for	Public preview	General availability
Use Remote Assist mixed reality annotations in Teams	Users by admins, makers, or analysts	✔ Apr 17, 2024	Oct 2024
Get improved spatial annotations in Teams mobile	Users, automatically	-	Oct 2024

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the International availability guide. For more information about geographic areas and datacenters (regions), go to the Dynamics 365 and Microsoft Power Platform availability page.

Feedback

Was this page helpful? Yes No

Get improved spatial annotations in Teams mobile

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Oct 2024

Business value

Dynamics 365 Field Service, Remote Assist, and Guides customers get improvements to the stability and accuracy of annotations in Teams mobile. Spatial arrows and annotations will be more stable and readable as users move around.

Feature details

Teams mobile users on iOS and Android get meaningful improvements to remote expert inking scenarios. This feature further improves accuracy for remote experts with spatial annotation that better align with the physical geometry of the world. The ink strokes are more reliably shown on irregular and complex surfaces. Furthermore, there's increased stability for existing annotations both for remote experts and the frontline technician using holographic annotations on mobile.

Feedback

Was this page helpful? Yes No

Use Remote Assist mixed reality annotations in Teams

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Apr 17, 2024	Oct 2024

Business value

Frontline workers can now get remote assistance via video call with spatial annotations, right within Teams mobile. Users no longer need to switch apps to use Remote Assist when they are collaborating within Teams on their mobile devices. Remote assistance improves first-time fix rates, which are a key business and operational metric for service organizations.

Feature details

With this feature, users can initiate a Remote Assist call right within Teams mobile and will no longer need to switch apps to get support from a remote expert using spatial annotations. When a service technician is stuck on a job because they may not have the required knowledge or experience with that issue, they can quickly initiate a call with another technician or support specialist in the back office to guide them through the issue and its resolution. Technicians can share their mobile camera view with a remote expert and have them annotate on their screen, which can be seen by a service technician in real time.

See also

Use Teams mobile to annotate in a user's environment (docs)

Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Customer Insights - Data in 2024 release wave 2

Article • 07/16/2024

ⓘ **Important**

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Insights - Data**.

Overview

https://aka.ms/ReleaseHighlight/2024W2/CustomerExperience

Dynamics 365 Customer Insights - Data unifies customer profiles from various data sources, enriches them with Microsoft's unique data assets and creates powerful AI-driven predictions, segments, and measures. It enables a deep understanding of every customer by providing a holistic, up-to-date view with unmatched time to insights. You can activate this data across channels, departments, and devices to deliver personalized customer experiences at every touchpoint.

In this release wave, our focus is on three key areas:

- **Generative AI and Copilot**: Data from Customer Insights now augments the efficacy of other Copilots in Dynamics 365, enabling you to optimize every interaction and drive business growth.
- **Moments that matter**: Keep your customer profiles up to date with the latest interactions so that you can deliver the most relevant experience in the moments that matter.
- **Unify sales and marketing**: Streamline data ingestion and transform data from disparate data sources into actionable insights swiftly, creating an enriched, comprehensive view of every customer to empower sellers and marketers to be more successful.

Our goal is to allow your teams to focus less on data integration, but more on creating value and predicting what your customers will need next. Bring customer experiences to life in extraordinary ways by fostering loyalty and driving business growth.

For official product documentation and training for Dynamics 365 Customer Insights - Data, go to Dynamics 365 Customer Insights documentation.

Investment areas

Moments that matter
Get a unified customer profile that contains the latest customer interactions so you can personalize each experience. Responding to customer needs in the moments that matter raise the likelihood of conversion with better understanding and real-time capabilities.

Unify sales and marketing
Tear down data silos and gain a ubiquitous understanding of your customers through a unified view of data across the organization and improve your business outcomes across marketing, sales, and service.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 Customer Insights - Data** below:

Check out the release plan

For application administrators

User-impacting features to the user experience enabled automatically
User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

Features that must be enabled by application administrators
This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the

complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.

Get the most out of Customer Insights - Data

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Customer Insights - Data.
Product documentation	Find documentation for Customer Insights - Data.
User community	Engage with Customer Insights - Data experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Customer Insights - Data.

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Customer Insights - Data

Article • 07/16/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

- For a list of the previous wave's release plans, go to 2024 release wave 1 plan.

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✔) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

Moments that matter

Respond to customers' expectations in real time to engage them in moments that matter.

Expand table

Feature	Enabled for	Public preview	General availability
Use automation to manage segments and measures	Admins, makers, marketers, or analysts, automatically	Aug 2024	Oct 2024
Accelerate time to insights with data in Delta Lake format	Admins, makers, marketers, or analysts, automatically	Aug 2024	Oct 2024

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
Simplify and centralize data sources using Dataverse	Admins, makers, marketers, or analysts, automatically	Feb 2025	-
Generate insights from marketing interactions	Admins, makers, marketers, or analysts, automatically	Oct 2024	Dec 2024
Use Microsoft OneLake as a data source	Admins, makers, marketers, or analysts, automatically	Oct 2024	-

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

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Feedback

Was this page helpful? Yes No

Moments that matter

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Get a unified customer profile that contains the latest customer interactions so you can personalize each experience. Responding to customer needs in the moments that matter raise the likelihood of conversion with better understanding and real-time capabilities.

Feedback

Was this page helpful? Yes No

Accelerate time to insights with data in Delta Lake format

Article • 07/16/2024

> ⓘ Important
>
> **Some of the functionality described in this release plan has not been released.** Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2024	Oct 2024

Business value

Your customer data updates constantly, with rapidly changing signals like online activities and mobile interactions. When a traditional data warehouse is used to generate customer insights, this leads to increased time to insight with each update while the volume of unprocessed signals keeps growing. Longer queues result in slow or stale insights. With native support for Delta Lake storage format in Customer Insights, you can now accelerate processing times even with a higher volume of fast-changing data updates. Get customer profiles and associated insights updated more frequently and react to customer engagements based on the most current information available. This empowers you to create the most relevant and personalized experiences for your customers and the most up-to-date and timely insights for your business users.

Feature details

One of the key values of the Delta Lake format is the ability to track changes over time to the data. With native support for the Delta Lake table format in Customer Insights, you can now take advantage of Delta Lake incremental data updates to accelerate processing in Customer Insights - Data.

It is typical for customer profile data to only change by a few percent each day. Instead of reprocessing the entire data set every day, Customer Insights - Data can process just the changed source data for unification in the Delta format, saving time and getting you results faster. This improvement happens automatically when all the tables are in Delta format. No configuration or change is required.

Incremental processing is also implemented for unification, segments, measures, activities, and predictions.

> **Note**
>
> In this initial release, incremental unification requires that all source tables involved in the unification process use the Delta format. Any tables ingested to Customer Insights - Data using the Delta Lake connector will be in the Delta format. Starting in February, tables imported using the Dataverse connector will also be in the Delta format.

Feedback

Use automation to manage segments and measures

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2024	Oct 2024

Business value

As your Dynamics 365 Customer Insights usage increases, so does the number of segments and measures. Large numbers of segments and measures can result in longer system refresh times, which delay time-sensitive insights.

Customer Insights now automatically deactivates segments and measures based on their usage to ensure your active segments and measures refresh faster. As an admin you get to control the retention period that applies and can support your organization to scale confidently.

Feature details

When you have large numbers of segments and measures, as an admin, you can't determine which are needed and which are not. Campaigns could be one-time campaigns where the segments or measures are not needed after a period of time.

When the segment or measure isn't used anywhere else after the retention period, it is automatically deactivated by the system. This moves computes resources to the segments and measures that are active, which results in faster system refresh and thus faster time to insights.

You can reactivate such segments or measures if needed or opt out of automatic management entirely.

Feedback

Was this page helpful? Yes No

Unify sales and marketing

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Tear down data silos and gain a ubiquitous understanding of your customers through a unified view of data across the organization and improve your business outcomes across marketing, sales, and service.

Feedback

Was this page helpful? Yes No

Use Microsoft OneLake as a data source

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	-

Business value

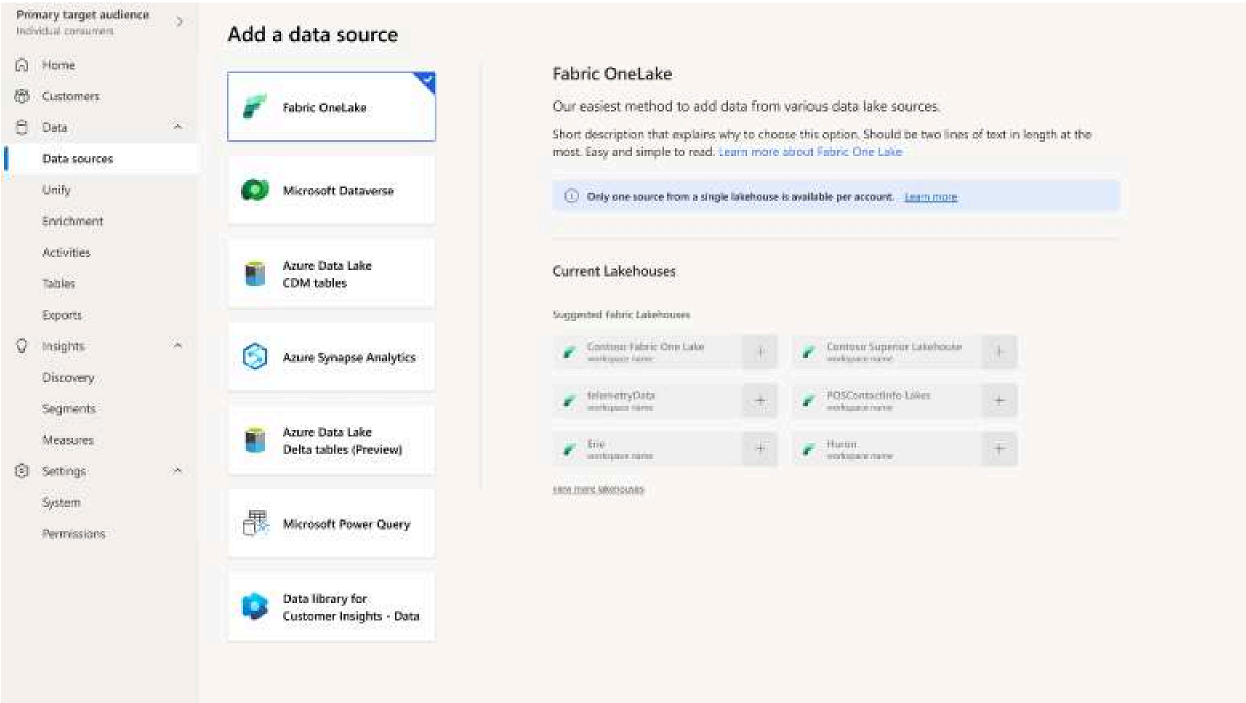
Dynamics 365 Customer Insights helps generate insights from all your customer data stored in your data lake, whether it's built using Azure Delta Lake or the new OneLake. When you use Customer Insights together with Microsoft Fabric, you can focus on generating the insights you need while cutting costs, reducing the effort and time needed to move, integrate, and transform customer data from any source.

Increase agility in decision-making with up-to-date insights that you can use in various Dynamics 365 applications and for data warehousing, data sharing, and advanced analytics/machine learning scenarios directly through Fabric—all without the need for expensive data movement or ETL.

Feature details

- Build your customer data platform by adding Customer Insights on top of Fabric. If you already use Customer Insights as your customer data platform, attach your data in OneLake to Customer Insights.
- Explore and select data stored in OneLake to be included in Customer Insights workflows.
- Save time with OneLake Delta format. No need for separate data formatting in full or upserts folders. Customer Insights seamlessly harnesses Delta Lake capabilities for OneLake interactions.

Example scenario: Contoso Coffee has recently centralized their data estate using Microsoft Fabric and are able to leverage the Fabric OneLake as a shared source for all kinds of analytical workloads. In the past, they would copy data from OneLake to an Azure storage container, using the Delta format, or the Common Data Model format. Now, they can simply connect Customer Insights to their Fabric OneLake directly, allowing them to unify customer data and create deep insights without copying data, or perform any ETL. With this approach, they can get insights faster than ever as data pipelines no longer create delays and Fabric's use of Delta format allows Customer Insights - Data to process just the incremental daily changes.



Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Customer Insights - Journeys in 2024 release wave 2

Article • 07/16/2024

ⓘ **Important**

The 2024 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2024 to March 2025. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Insights - Journeys**.

Overview

https://aka.ms/ReleaseHighlight/2024W2/CustomerExperience

Dynamics 365 Customer Insights - Journeys brings together the worlds of customer experience, generative AI, and marketing automation, empowering businesses to orchestrate end-to-end, personalized journeys across all touchpoints to strengthen relationships and earn loyalty.

Customers demand digital and in-person experiences throughout the purchase journey. They expect seamless, exceptional, and personalized experiences at every touchpoint. This necessitates analyzing a large amount of data to gain a deep understanding of customers, robust alignment between sales and marketing, and the ability to orchestrate personalized journeys across the customer lifecycle.

In this release, our focus is on three key areas:

- **Generative AI and Copilot**: We're not just enhancing your workflow, we're reinventing it. By combining productivity and creativity with an AI-first interface that truly grasps the nuances of your business, we're setting the stage for a new era of efficiency. With just a simple project brief, Copilot generates a campaign that mirrors your vision and can be further refined and launched. Copilot now works the way you do, as it understands your custom tables, fields, and email templates, and can generate suggestions based on them. Copilot generates email suggestions, based on your brand identity and layout preferences.

- **Engaging customers in moments that matter**: We're rolling out new features to enhance customer interaction and operational workflows, facilitate efficient event management, ensure timely communication, enable seamless journey deployment, and improve email engagement with insightful analytics and customizable content so you can boost efficiency and engagement with your customers in the moments that matter

- **Unifying sales and marketing**: We continue to break down data silos between your departments, to streamline customer data collection and enhance lead scoring to increase win rates, by addressing leads when they're the most likely to buy.

Our goal is to equip you with an unparalleled suite of tools to enhance your productivity in delivering great customer experiences. We want to empower you to understand your customers deeply, reach out to them in innovative ways, and consistently refine your journeys for optimal results, boosting your performance to new heights.

For official product documentation and training for Dynamics 365 Customer Insights, go to: Customer Insights - Journeys overview

Investment areas

Journeys - Copilot and AI innovation
Empower marketers to redefine their approach and unlock new possibilities with Copilot in Customer Insights and AI innovation. By tapping into the potential of generative AI, marketers can elevate their productivity to unprecedented levels. Copilot serves as a reliable daily assistant, streamlining manual tasks and fueling creativity. The result? Enhanced business outcomes that drive success.

Journeys - Moments that matter
In today’s dynamic business landscape, anticipating customer expectations in real time is paramount. To meet these expectations, Customer Insights - Journeys can strategically identify optimal communication channels and touchpoints. These interactions, carefully

orchestrated, create meaningful moments that resonate with customers, fostering engagement and loyalty.

Journeys - 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 Customer Insights - Journeys** below:

Check out the release plan

For application administrators

User-impacting features to the user experience enabled automatically
User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

Features that must be enabled by application administrators
This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.

Get the most out of Customer Insights - Journeys

Expand table

Helpful links	Description
Release plan	View all capabilities included in the release.
Licensing	Improve your understanding of how to license Customer Insights - Journeys.
Product documentation	Find documentation for Customer Insights - Journeys.
User community	Engage with Customer Insights - Journeys experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Customer Insights - Journeys.

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Customer Insights - Journeys

Article • 07/16/2024

This topic lists features that are planned to release from October 2024 through March 2025. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

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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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Journeys - Copilot and AI innovation

Revolutionize how marketers work and what they can achieve with Copilot in Customer Insights and AI innovation.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Create brand-consistent emails with templates and Copilot	Admins, makers, marketers, or analysts, automatically	Oct 2024	-	Mar 2025
Take campaigns from concept to launch using Copilot	Admins, makers, marketers, or analysts, automatically	✔ Apr 1, 2024	-	Dec 2024
Create journeys by using Copilot to describe them	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2024
Tailor Copilot to your business with custom tables, fields	Admins, makers, marketers, or analysts, automatically	Oct 2024	-	-

Journeys - 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
Collect extra customer data without custom attributes	Admins, makers, marketers, or analysts, automatically	Oct 2024	-	-
Enable customers to find and sign up for events easily	Admins, makers, marketers, or analysts, automatically	Oct 2024	-	-
Form prefill simplifies form filling and event sign-up	Admins, makers, marketers, or analysts, automatically	Oct 2024	-	-
Boost customer confidence with branded content links	Admins, makers, marketers, or analysts, automatically	Oct 2024	-	-
Use segments to decide which path a customer should take	Admins, makers, marketers, or analysts, automatically	Aug 2024	-	Nov 2024
Build and test journeys before deploying to production	Admins, makers, marketers, or analysts, automatically	-	-	Oct 2024
Personalize customer messages based on web interactions	Admins, makers, marketers, or analysts, automatically	Oct 2024	-	Feb 2025
Get insights on email engagement with heatmap analytics	Admins, makers, marketers, or analysts, automatically	Oct 2024	-	-

Journeys - 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
Boost wins with better lead scoring and qualifying criteria	Admins, makers, marketers, or analysts, automatically	-	-	Feb 2025

- You are able to opt into some features as part of early access on July 29, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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Feedback

Was this page helpful? Yes No

Journeys - Copilot and AI innovation

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Empower marketers to redefine their approach and unlock new possibilities with Copilot in Customer Insights and AI innovation. By tapping into the potential of generative AI, marketers can elevate their productivity to unprecedented levels. Copilot serves as a reliable daily assistant, streamlining manual tasks and fueling creativity. The result? Enhanced business outcomes that drive success.

Feedback

Was this page helpful? Yes No

Create journeys by using Copilot to describe them

Article • 07/16/2024

ⓘ Important

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Expand table

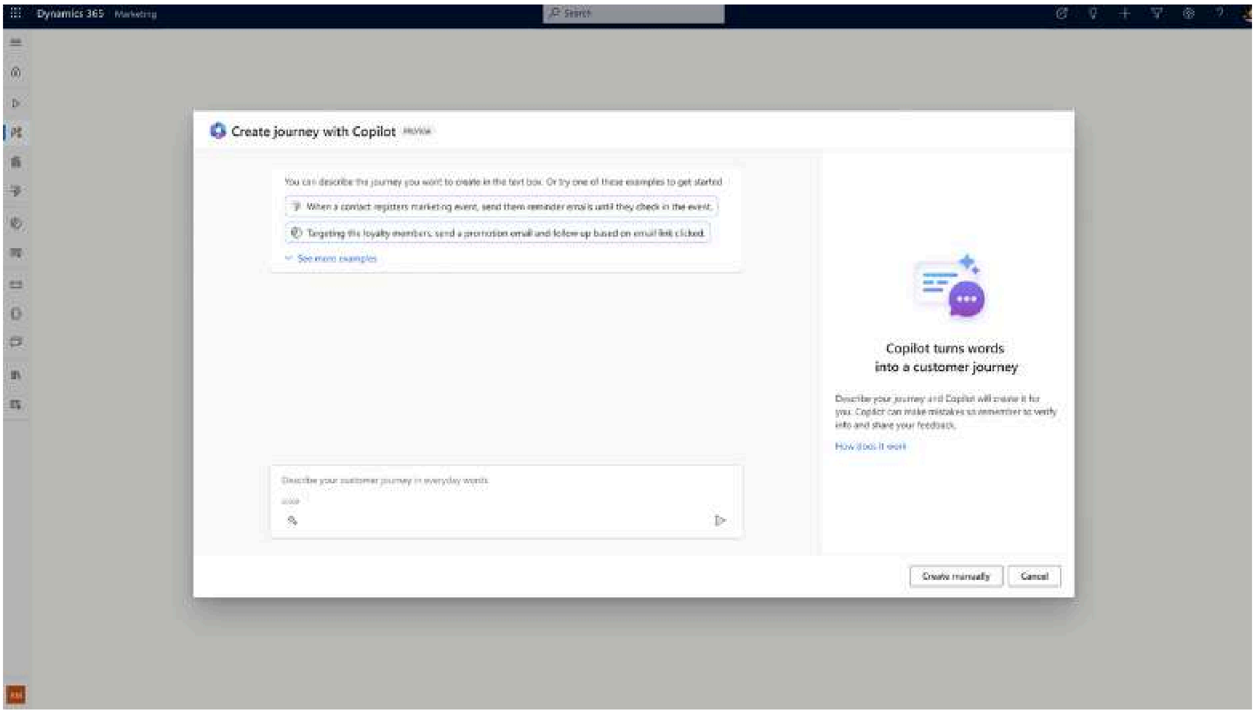
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Oct 2024

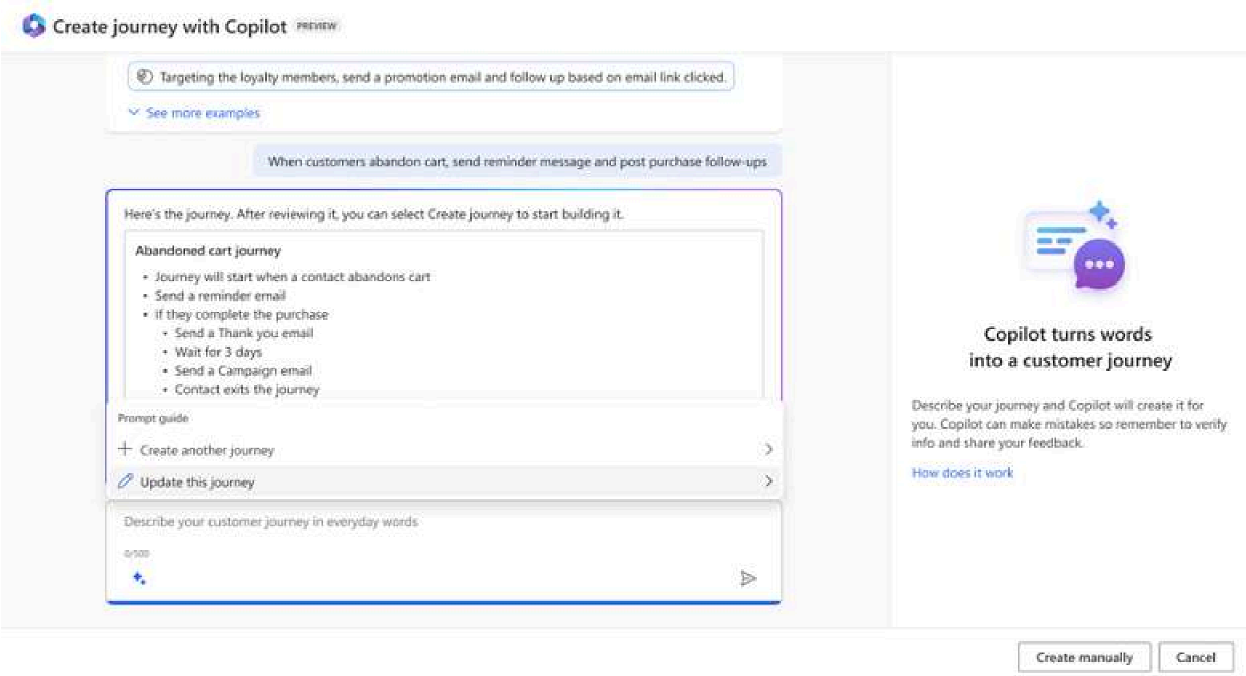
Business value

With Dynamics 365 Customer Insights - Journeys, anybody can create journeys in minutes, even if they've never done it before. Simply describe in everyday words what you want to create and rely on generative AI to build the journey for you. This empowers you to do more with less. Instead of spending time getting the mechanics of the journey right, you can now ensure that you're delivering the most personalized experience for your customers by collaborating with your entire team and quickly driving stakeholder alignment. Using the journey creator functionality together with content ideas for email creation, you can now get your customer experience ideas to market in no time.

Feature details

- Use natural language to describe the journey you want to create.
- Get inspiration about how to get started with a list of suggested journeys.
- See a preview of the journey Copilot created.
- Get a detailed summary of the Copilot-created journey before you start adding your content.





Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia

- Brazil
- Canada
- India
- Japan
- France

Feedback

Journeys - Moments that matter

Article • 07/16/2024

ⓘ Important

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In today's dynamic business landscape, anticipating customer expectations in real time is paramount. To meet these expectations, journeys in Customer Insights can strategically identify optimal communication channels and touchpoints. These interactions, carefully orchestrated, create meaningful moments that resonate with customers, fostering engagement and loyalty.

Feedback

Was this page helpful? Yes No

Collect extra customer data without custom attributes

Article • 07/16/2024

ⓘ Important

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Expand table

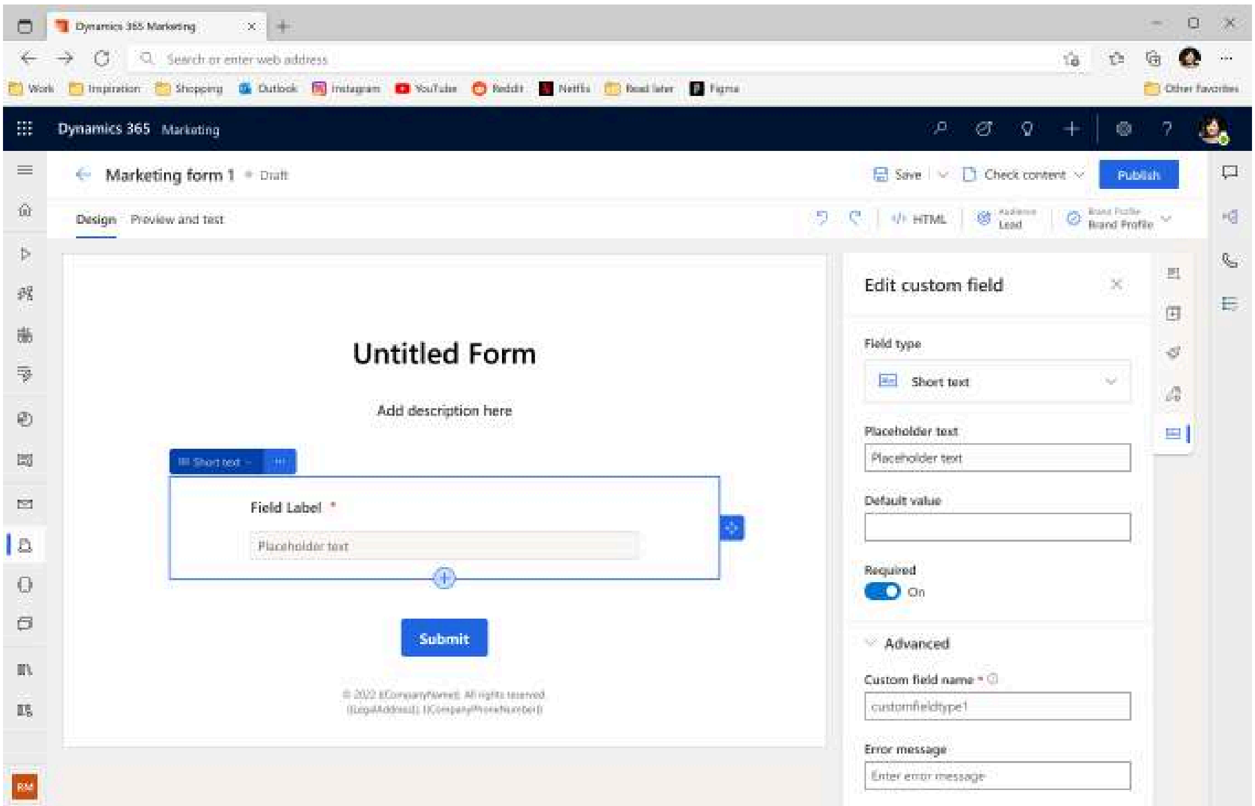
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	-	-

Business value

Easily gather additional information about your customers by creating any kind of question directly in the form editor without having to create new custom attributes for your lead or contact entity. For example, you can create fields to ask, “What is your meal preference?” or create contest questions to increase your customer satisfaction and retention.

Feature details

- Use custom fields to capture additional or temporary information like meal preference or an answer to a contest question.
- To use custom form fields, simply drag and drop them from the toolbox to the form canvas and edit the label and properties as you wish.
- The answer is stored only as part of the form submission, so you can access the value any time without polluting your data.



Feedback

Was this page helpful? Yes No

Control how fast customers can enter a journey

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2024	-	Dec 2024

Business value

There are times when you want to reach a large audience, but sending a message to the entire audience at the same time would cause problems for your business.

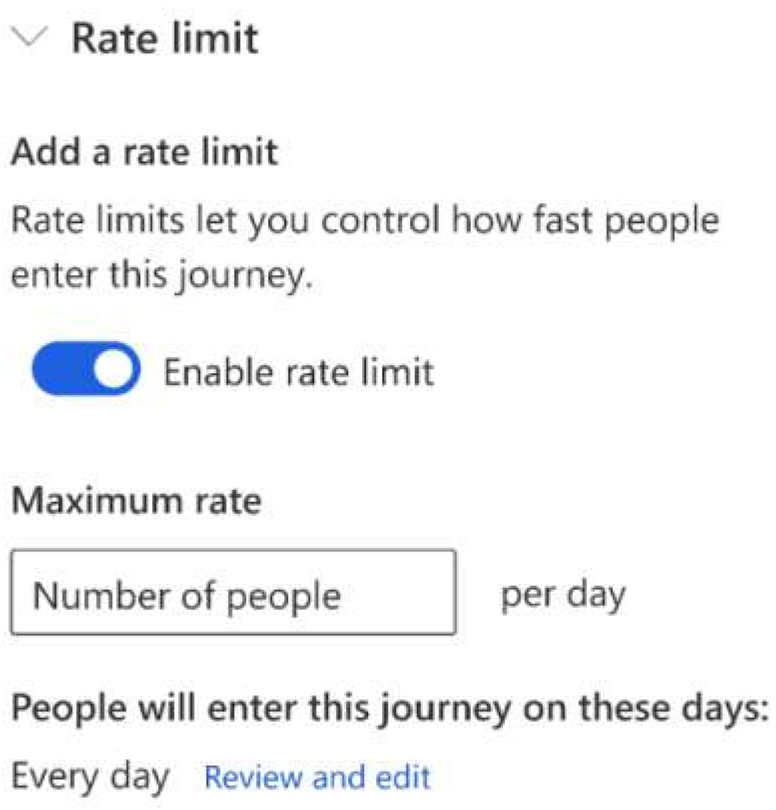
With journey rate limiting, you'll be able to space out message sending over time by setting how quickly you want customers to enter your journey. This feature helps prevent overwhelming downstream operations with a large influx of requests from customers who receive messages from your journey.

For example, let's say you have a journey that sends messages to your entire customer base with a call to action to contact your call center. You may want to avoid creating a poor customer experience due to long wait times from an overwhelmed help desk if you send messages at the same time to everyone. Instead, you can now slow down how fast customers enter the journey, avoiding thousands of phone calls at the same time.

Feature details

Control how fast customers enter your journey with journey rate limiting. By setting a rate limit, you'll be able to spread out the number of customers who begin your journey over time.

- Set rate limits per day or per hour.
- Choose which days of the week customers can enter the journey.
- Rate limits only apply to segment-based journeys. Trigger-based journeys don't support rate limiting at this time.



Feedback

Was this page helpful? Yes No

Enable customers to find and sign up for events easily

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	-	-

Business value

Events are a pivotal element of your business strategy, aiding in customer acquisition and engagement. A centralized location is essential for your clients to discover and learn about events you are organizing.

The new event portal allows for the swift creation of a comprehensive hub where customers can access event details, session specifics, and speaker schedules and conveniently register using the event registration form. The portal can be seamlessly integrated into your existing CMS or deployed through Power Pages, where it can be tailored to align with your brand identity.

Feature details

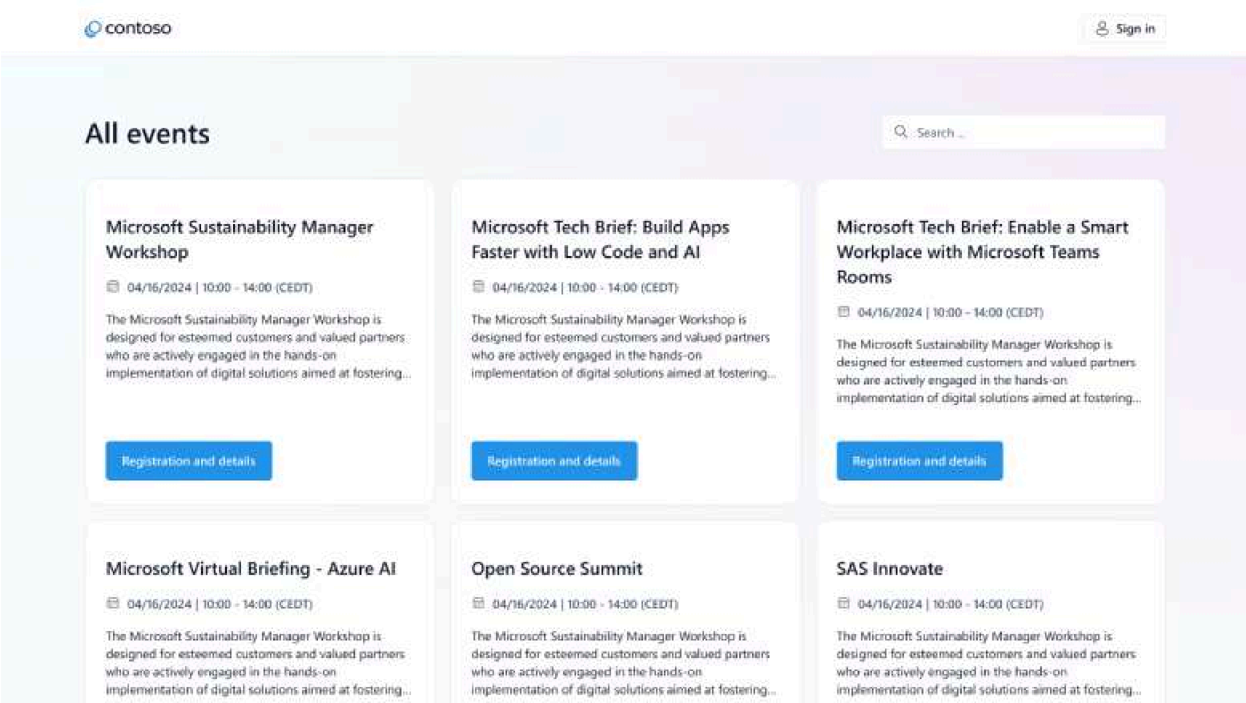
Create a comprehensive event portal where customers can access event details and registration.

Portal hosting options:

- Embed in an existing website.
- Leverage an out-of-the-box Power Pages template for quick deployment.

Portal includes:

- A list of your upcoming events.
- A detailed summary for each event, including session information and speakers.



Feedback

Was this page helpful? Yes No

Easily set up and execute pre- and post-event communications

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Jan 2025	-	-

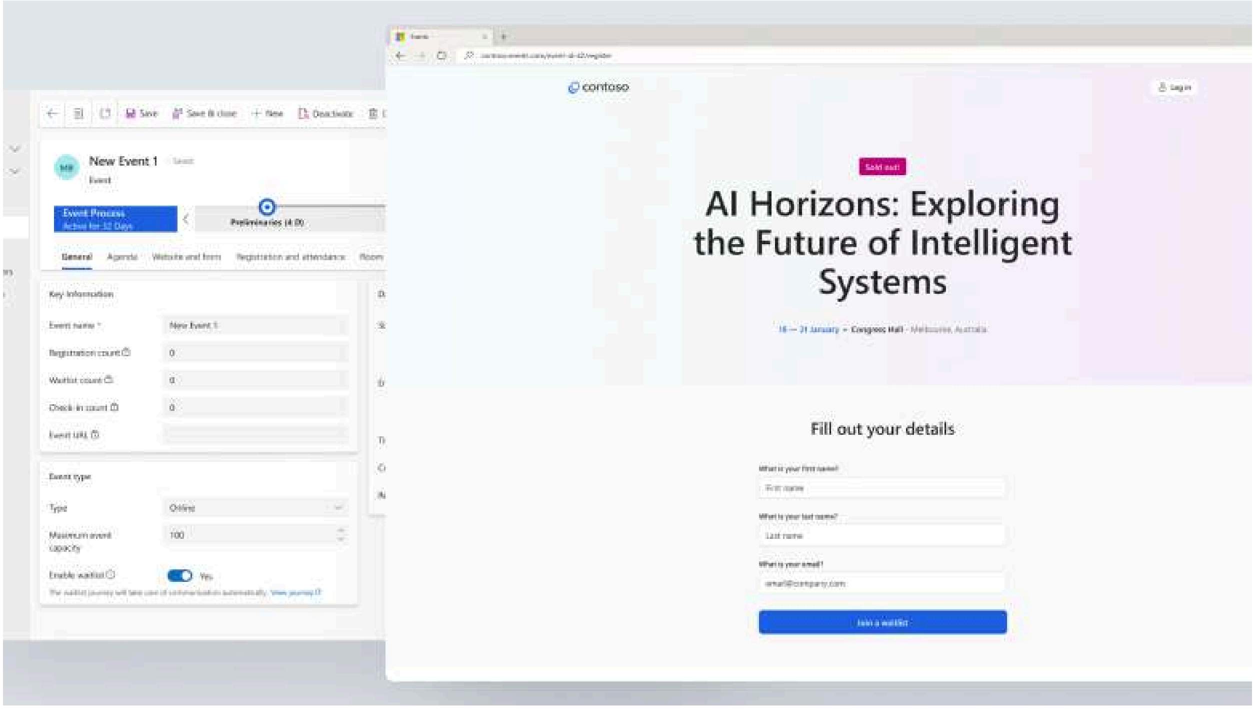
Business value

Crafting event messaging and promotions are important aspects of event planning. Now, with real-time journeys event management, you can attract the right audience, increase registrations, boost ticket revenue, and deliver personalized experiences with out-of-the-box journeys that help you optimize communication before, during, and after your event. This streamlines the event creation process, allowing you to create and manage all the event communication within the event management experience.

Feature details

Pre- and post-event communications include the following options:

- Use segmentation to target the appropriate audience for your event.
- Choose templates tailored for events and use Copilot for more efficient creation of captivating content.
- Enhance engagement before the event and boost attendance with ready-made multichannel journeys.
- Gather valuable feedback and learn from attendees using post-event satisfaction surveys and follow-up emails.



ⓘ **Note:** The author created this article with assistance from AI. [Learn more](#)

Feedback

Was this page helpful? Yes No

Export your data to your own storage for custom reporting

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Dec 2024	-	Mar 2025

Business value

In today's data-driven world, marketers face the challenge of gaining a comprehensive view of their campaigns to make informed decisions. While Customer Insights - Journeys offers advanced custom reporting capabilities with Microsoft Fabric, in some cases it's easier to integrate with your existing reporting systems. Now, in real-time journeys, you can export your Customer Insights - Journeys data to your own storage solution without requiring Fabric, empowering you to conduct custom reporting and analysis that aligns with your existing systems.

Feature details

With data export, you can:

- Securely export your Customer Insights - Journeys data directly to your preferred storage.
- Export data from Customer Insights - Journeys including interaction data and entity details.
- Use data with your existing reporting system to create custom reports.

Feedback

Was this page helpful? Yes No

Generate leads that link to an existing contact

Article • 08/16/2024

ⓘ Important

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Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	Feb 2025	Mar 2025

Business value

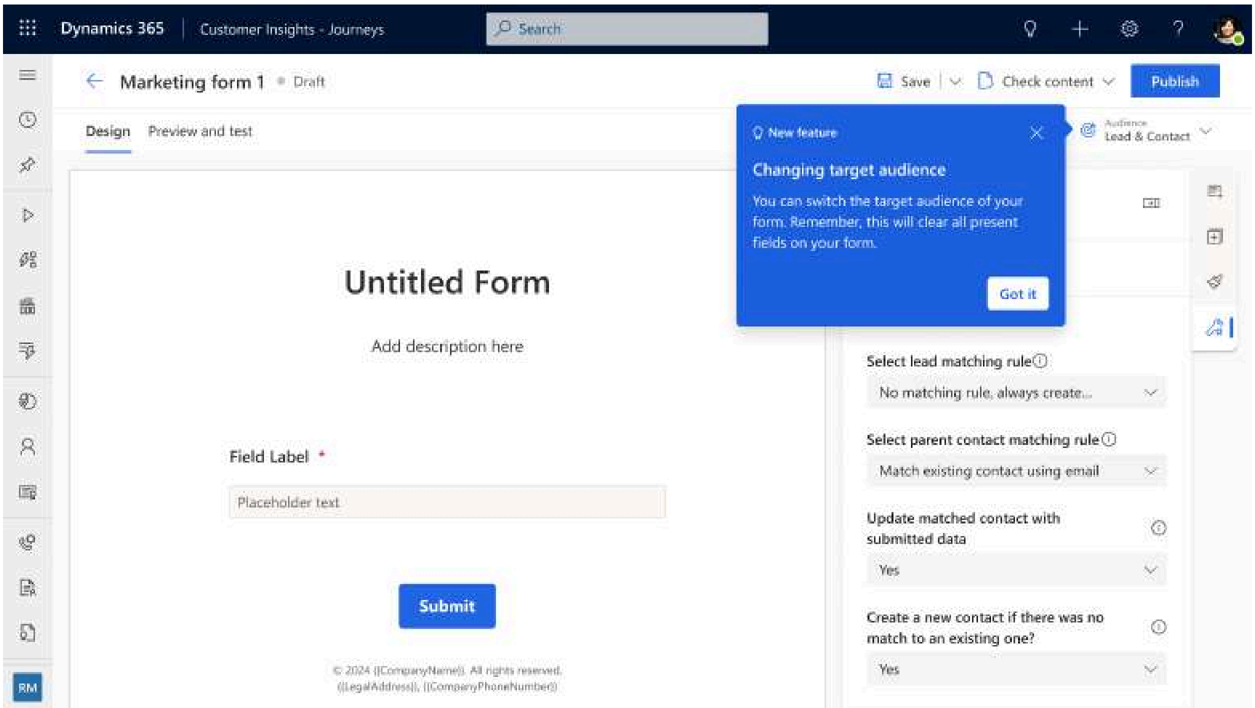
Your business has unique ways of organizing customer data and classifying potential leads. Now with real-time journey forms, you can manage your contacts and leads more effectively, according to your company's established processes. For example, you can recognize existing customers who fill out a lead form, so they're not mistaken for new leads.

With this new set of capabilities to connect lead and contact data, you can choose how existing contact or lead details should be updated and define advanced matching rules to prevent duplicate records. Additionally, you can set defaults so everything is already configured each time a new form is created. All these new capabilities allow you to fine-tune how form data is handled to provide better quality leads and match your company's established processes.

Feature details

Use parent contacts for leads in real-time journeys forms. The detailed settings for form audiences let you decide whether to update existing contact or lead information with the data submitted through the forms, helping you keep your customer data accurate and up to date.

- Update both lead and contact data at the same time with form submissions.
- Define if the existing record should be updated with the form submission to keep quality of the existing data.
- Set up more granular matching rules to avoid duplicate records.
- Preset the default target audience configuration for your forms.



Feedback

Was this page helpful? Yes No

Get insights on email engagement with heatmap analytics

Article • 07/16/2024

ⓘ Important

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Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	-	-

Business value

Understanding the effectiveness of email campaigns can often be complex, particularly when information and links are abundant. Gaining clarity on which areas or links captivate your audience and drive them to act is crucial for refining the user experience and boosting email performance.

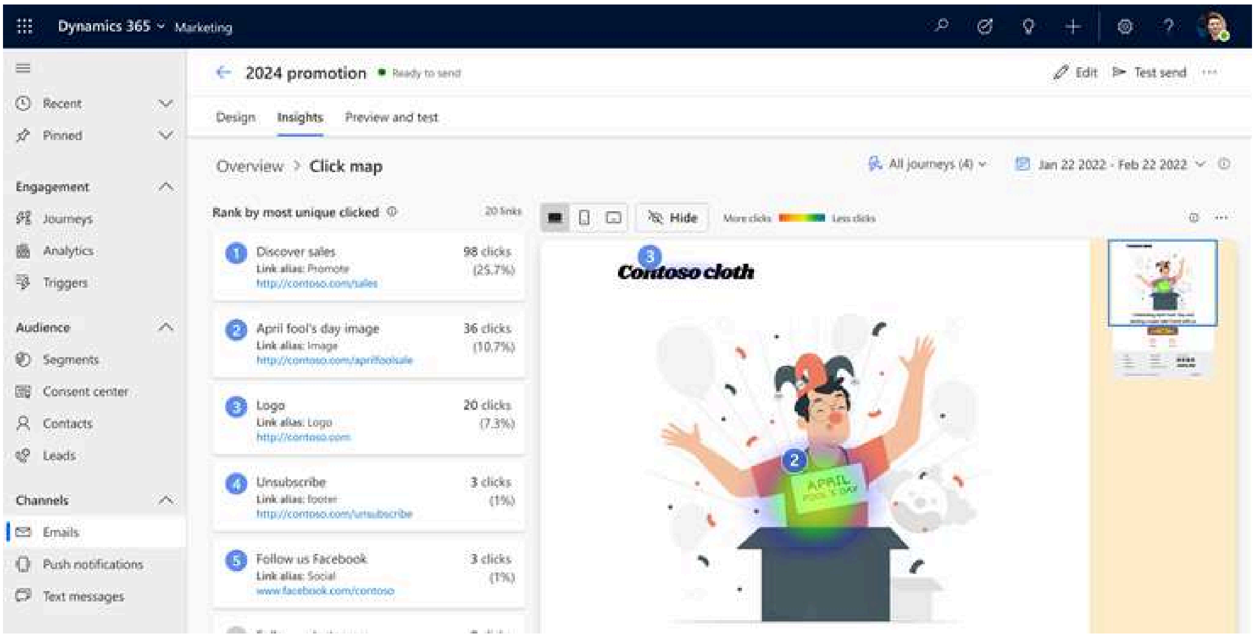
Real-time journeys email insights now offer a clear view of your audience's preferences by illustrating their interactions within your emails. This immediate visual feedback highlights the content that resonates the most, empowering you to adjust your messaging for heightened impact and better conversion rates.

Feature details

Deep dive into customer interactions with actionable insights that you can leverage to refine your email strategy. Tweak content placement, layout, and design to elevate user engagement.

- Get a fast and visual way to understand engagement based on your email design.
- Understand which email area and links get the most and the least engagement by viewing the click-through rate (CTR), total clicks, and unique clicks.

- Filter the heat map based on the email version, journey version, and date.



Feedback

Was this page helpful? Yes No

Improve engagement and compliance with double opt-in

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2024	-	Oct 2024

Business value

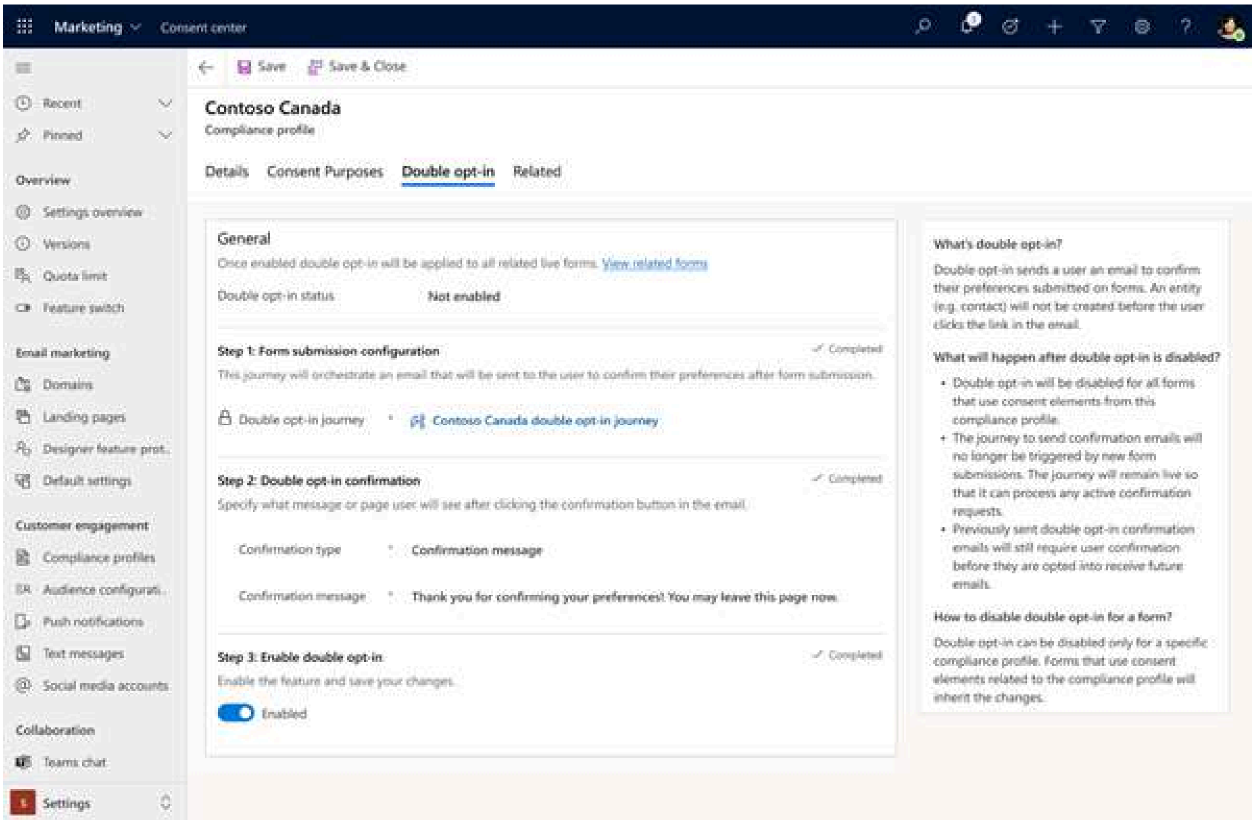
By implementing double opt-in, you can cultivate a more effective email marketing strategy, leading to improved compliance, increased open and click-through rates, and a better overall brand experience for subscribers.

Privacy and data protection laws in many regions require double opt-in functionality to help verify customer information. Double opt-in requires users to confirm subscription preferences through a follow-up email after the initial subscription. By confirming subscription preferences a second time, you comply with legal requirements and improve engagement by ensuring that users who've subscribed are intent on receiving future communications. When customers are certain they want to receive email communications, spam complaints and bounce rates are reduced, and your sender reputation is improved.

Feature details

- Administrators can enable double opt-in at a compliance profile-level and can easily enforce the double opt-in flow for all the forms using the compliance profile.

- Familiar concepts like triggers and journeys are used to orchestrate the double opt-in process, allowing you to customize the process to meet your business needs.
- New contacts (or leads) won't be created until the customer has confirmed their opt-in, keeping your contact and lead lists free of bad data.



Feedback

Was this page helpful? Yes No

Maximize event capacity with waitlist registrations

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	-	-

Business value

Ensuring marketing events are filled to capacity is crucial for success and return on investment. To encourage a high turnout for marketing events, you can now enable waitlist registrations, which ensures spots are filled when registered attendees cancel.

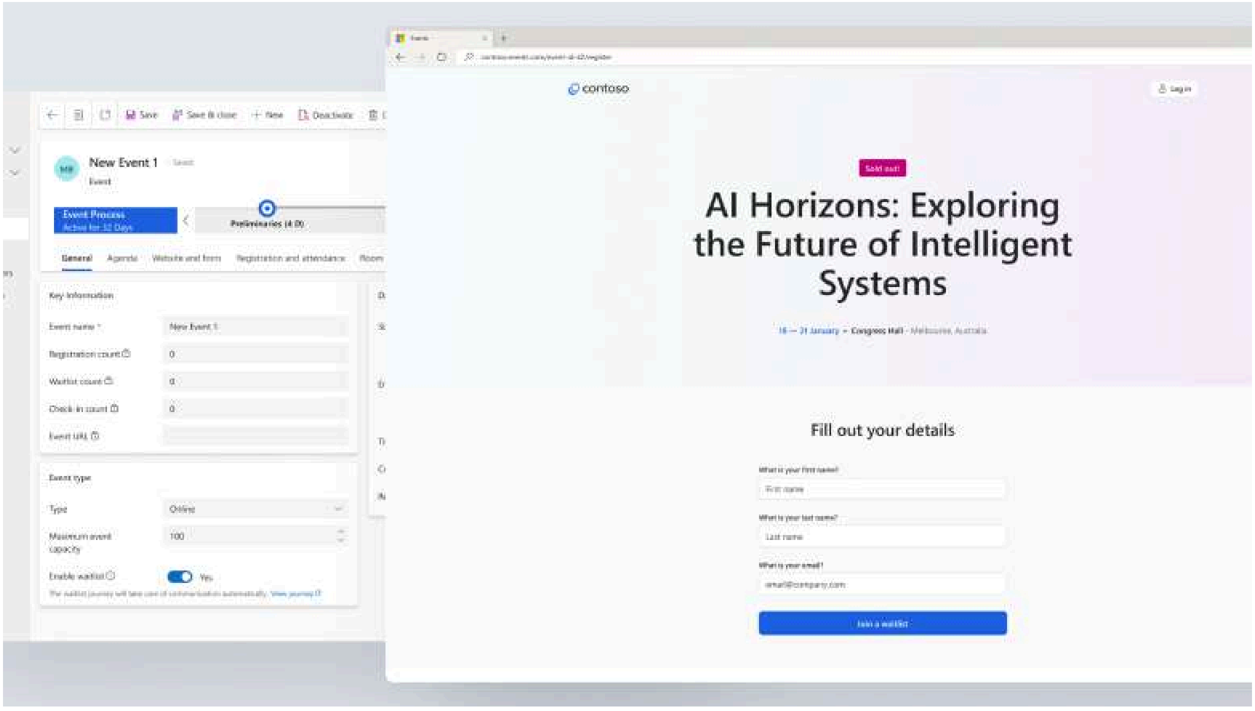
By setting the capacity for events and sessions, prospective attendees are placed on a waitlist when events and sessions are full. Should a slot open, the system automatically registers the individual next on the waitlist, who then automatically receives registration confirmation and personalized event information, ensuring your event is filled to capacity.

Feature details

Event capacity and waitlist registrations include the ability to:

- Enable a waitlist for your event and sessions to maximize attendance.
- Easily review the list of waitlist registrations and build a waitlist segment for any further communication with interested attendees.
- Send the relevant event and waitlist registration communication effortlessly with out-of-the-box trigger-based journeys.

- Add an out-of-the-box cancellation button in your emails to let uninterested attendees release their spot to someone else.



Feedback

Was this page helpful? Yes No

Orchestrate journeys using any marketing interaction

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Oct 2024

Business value

Transform the way you communicate with your customers. By leveraging marketing interaction triggers to orchestrate or branch customer journeys, you can now engage your customers based on the interactions they have with your marketing messages.

Instantly adapt your strategies based on your customers' real-time interactions, ensuring that every message you send hits the right note. By engaging customers based on their interactions, you can significantly ramp up your chances of conversion with greater personalization. For example, you can branch and orchestrate journeys based on customer interactions with emails such as "email link clicked" or "email blocked."

Feature details

- Use the standard out-of-the-box triggers to facilitate greater engagement with your customers rather than using more complex approaches such as Power Automate flows.
- Use marketing interactions such as "email link clicked" to orchestrate customer journeys based on a certain customer interaction.

- Make the right business decisions by branching journeys based on customer interactions and responses.

Geographic areas

This feature will be released into the following Microsoft Azure geographic areas:

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- Brazil
- Canada
- India
- Japan
- France
- Korea
- China

Feedback

Was this page helpful? Yes No

Personalize customer messages based on web interactions

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	-	Feb 2025

Business value

With Customer Insights - Journeys, you can now track and leverage your customers' online behavior to deliver personalized experiences across your digital channels. For example, you can boost conversions and customer loyalty by sending tailored offers after customers visit your website and show interest in a product or service. Furthermore, by tracking additional data about customers' online journeys, you can get valuable insights into your customers' preferences and needs and easily measure your campaign's effectiveness.

Feature details

- Easily generate a tracking script and embed it in your website.
- Use web interaction triggers to build personalized customer experiences.
- Get a holistic view of your customer engagement across touchpoints leveraging first-party data, protecting your customer privacy, and complying with data privacy regulations.

Feedback

Was this page helpful? Yes No

Prevent duplicate emails to shared email addresses

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	-	-	Feb 2025

Business value

Effective email management is crucial for maintaining strong customer relationships and ensuring your business's success. By enabling email deduplication, you can ensure that even if your data has multiple contacts with the same email address, your message will be sent only once to your customers, keeping their inboxes clutter-free and preserving your brand reputation.

Feature details

- Enable or disable email deduplication for real-time segment-based journeys.
- Ensure that each message is sent just once to each unique email address for segment-based journeys.
- Review duplicated email addresses in journey analytics.

Feedback

Was this page helpful? Yes No

Split audience into groups to deliver unique customer experiences

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Aug 2, 2024	-	Nov 2024

Business value

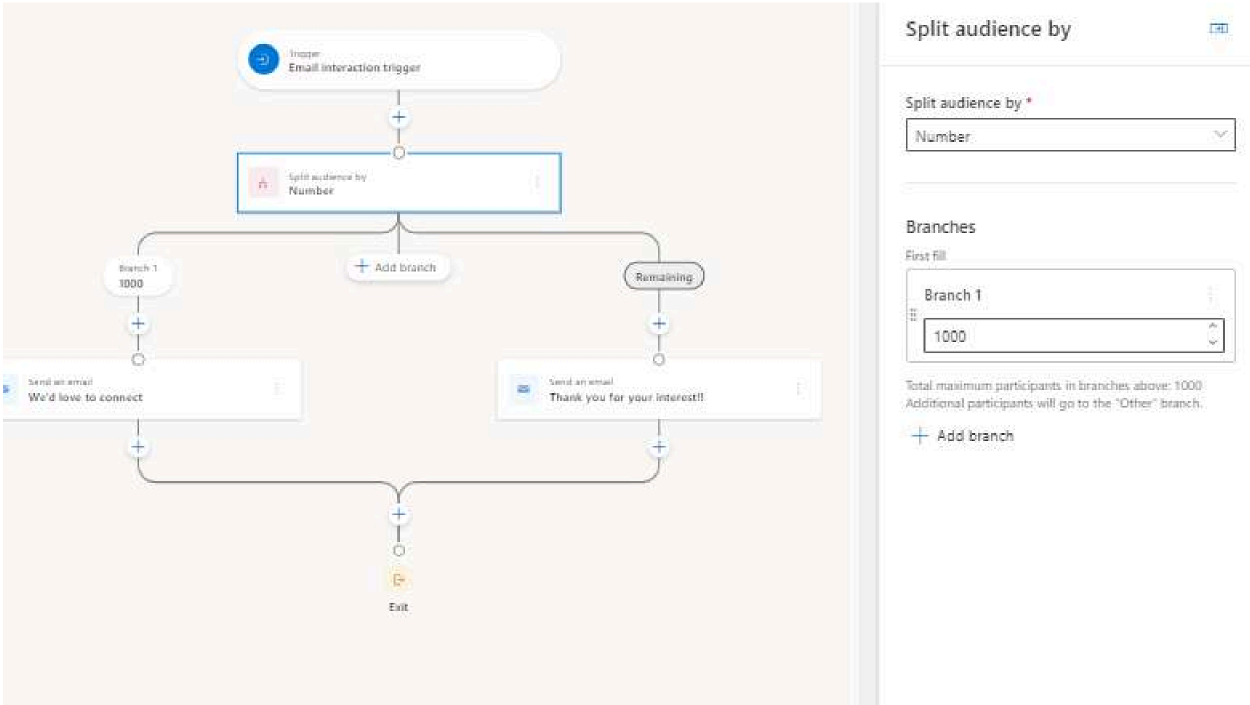
When you want customers to have different experiences in one journey, you need to divide them into groups. While this is possible today using attribute branches or segments, sometimes the number of customers in each branch is more important than what those customers have in common. For example, you may want to send a survey out to a random subset of your customers for feedback, something that would be time-consuming to configure today.

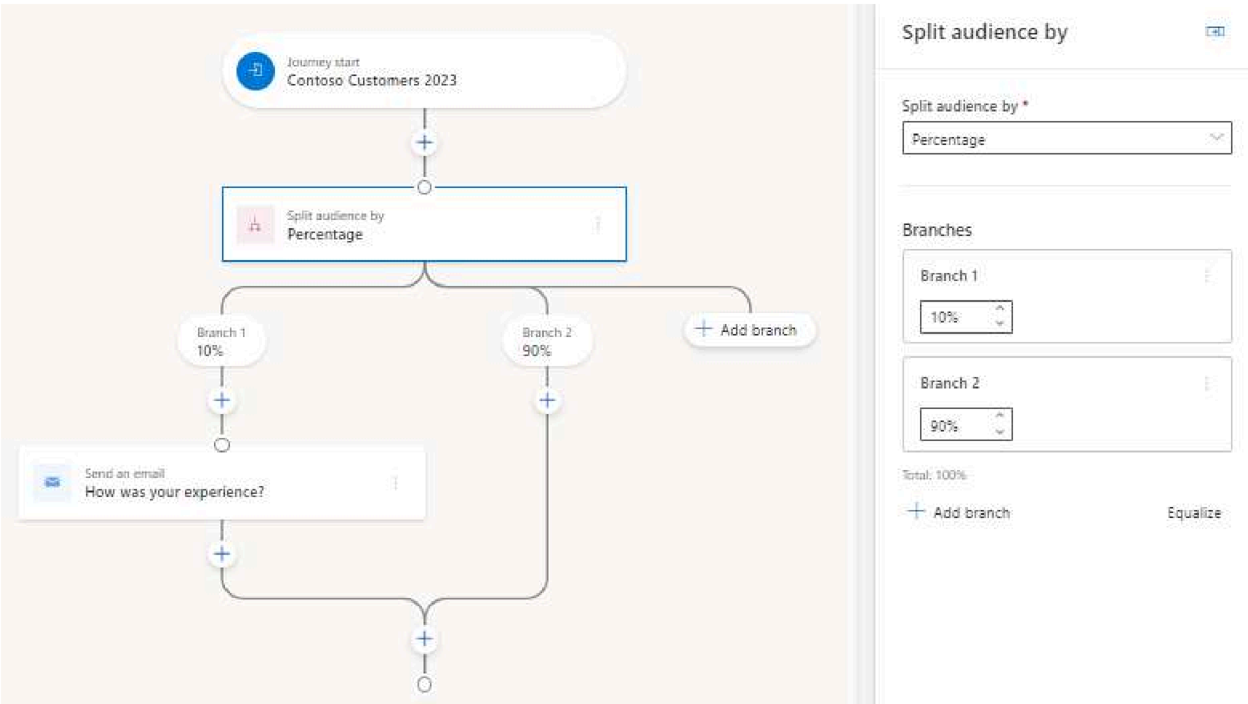
The new journey split tile allows you to split your audience into branches to provide a subset of your audience with unique experiences, whether that be a survey, a new type of experience to test, or a first-come promotional offer. You can split your audience by percentages (for cases where you need randomness) or by numbers (for cases where you want to deliver specific experiences to a set number of people).

Feature details

The journey split tile creates branches in your journey to split up the participant population and provides them with different experiences. You can split by percentage or by number, each of which supports up to 25 branches.

- **Split by percentage**: Breaks the audience up randomly into the percentages associated with each branch. The random assignment is done for each participant individually, therefore, this works best for larger populations (more than 2,000 participants). This option is useful for scenarios that need randomness, such as sending an experience survey to a subset of your customers.
- **Split by number**: Fills up branches from left to right based on how many participants are configured to go down each branch. This is best for scenarios that need specific numbers of participants, such as offering a promotion for the first 1,000 customers that sign up for a newsletter.





See also

Split your audience into groups (docs)

Feedback

Was this page helpful? Yes No

Form prefill simplifies form filling and event sign-up

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	-	-

Business value

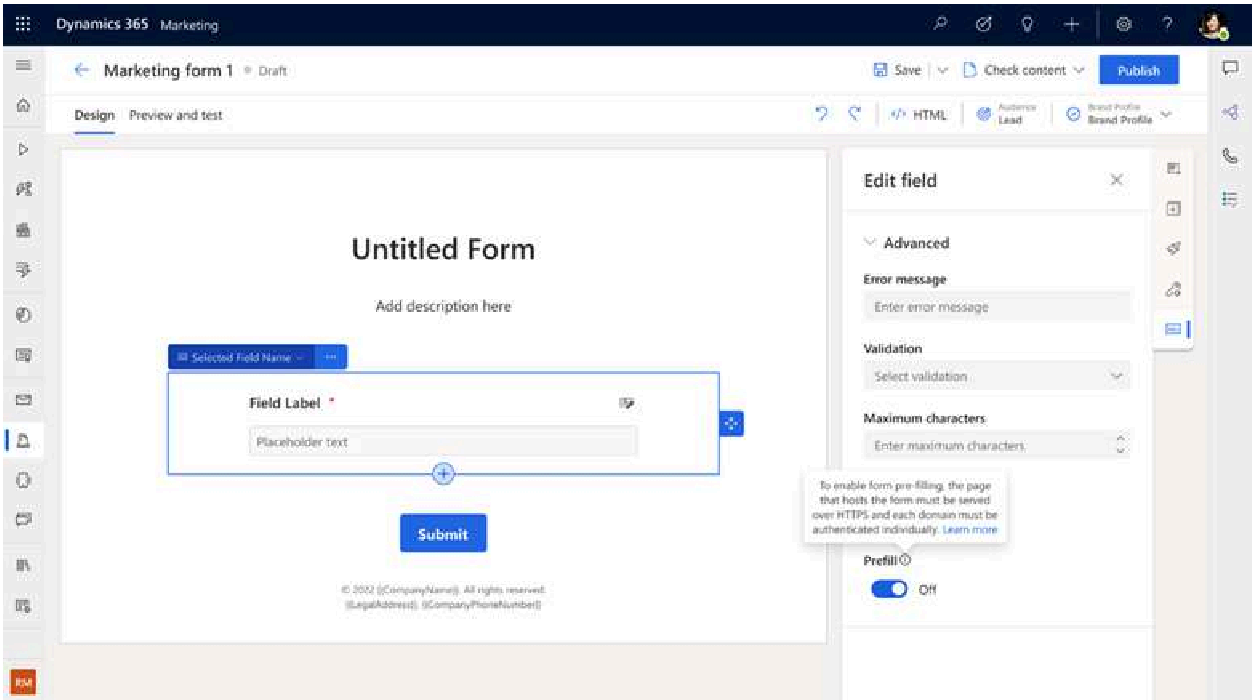
The repetitive task of filling out forms can be a significant deterrent to event registration. Nobody likes to repeat information that they've already provided. Imagine loyal customers who attend multiple conferences each year and have to input their contact information and preferences every time.

Form prefill in Dynamics 365 Customer Insights eliminates the need to repeatedly request basic details from your customers, reducing redundancy and saving time. This not only expedites the registration process but also allows for more strategic collection of customer data over time.

Feature details

Your customers can now register for upcoming events with minimal effort, simply confirming or updating their pre-populated data. The ease of use enhances the overall customer experience and boosts your conversion rates.

- To have the form automatically filled, your customer needs to open the form from the link sent in the Customer Insights-generated invite email.
- Available for both marketing and event registration forms.



Feedback

Was this page helpful? Yes No

Understand customer inflows and exits at every journey step

Article • 08/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Oct 2024	-	Jan 2025

Business value

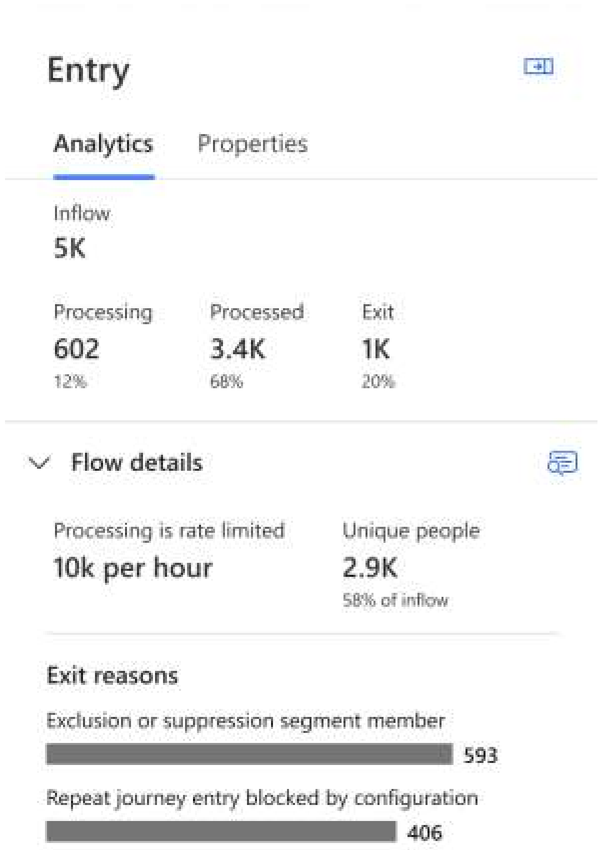
It's critical to understand exactly what happened to each customer who entered and exited your real-time journeys. With improved journey analytics, you'll gain confidence in the processing of every step in your journey through improved metrics and an increased ability to export data.

For example, if your journey uses exit or exclusion segments, you'll be able to see and understand why fewer customers started your journey than were in the entry segment. You'll also be able to see the list of customers who entered and exited each step in the journey and export lists of up to 50,000 people for further analysis.

Feature details

Improved journey analytics provide clear and actionable data into exactly what happened in every step of your journey. New exit analytics show why customers may not have started your journey due to exclusion segments or other unmet criteria and where in the journey customers may have exited early due to exit segments or other exit conditions.

- Get lists of customers who entered and exited each step of the journey and filter those lists based on how they were processed by the journey step.
- Export lists of customers who reached each step in the journey (up to 50,000 records).
- Understand why the number of customers in your starting segment is different than the number of customers who reached the first step in your journey.
- Understand why and where customers exited your journey before completing each step in the journey flow.
- Understand why customers triggered to start your journey didn't reach the first step in your journey.



Feedback

Was this page helpful? Yes No

Use segments to decide which path a customer should take

Article • 07/16/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2024	-	Nov 2024

Business value

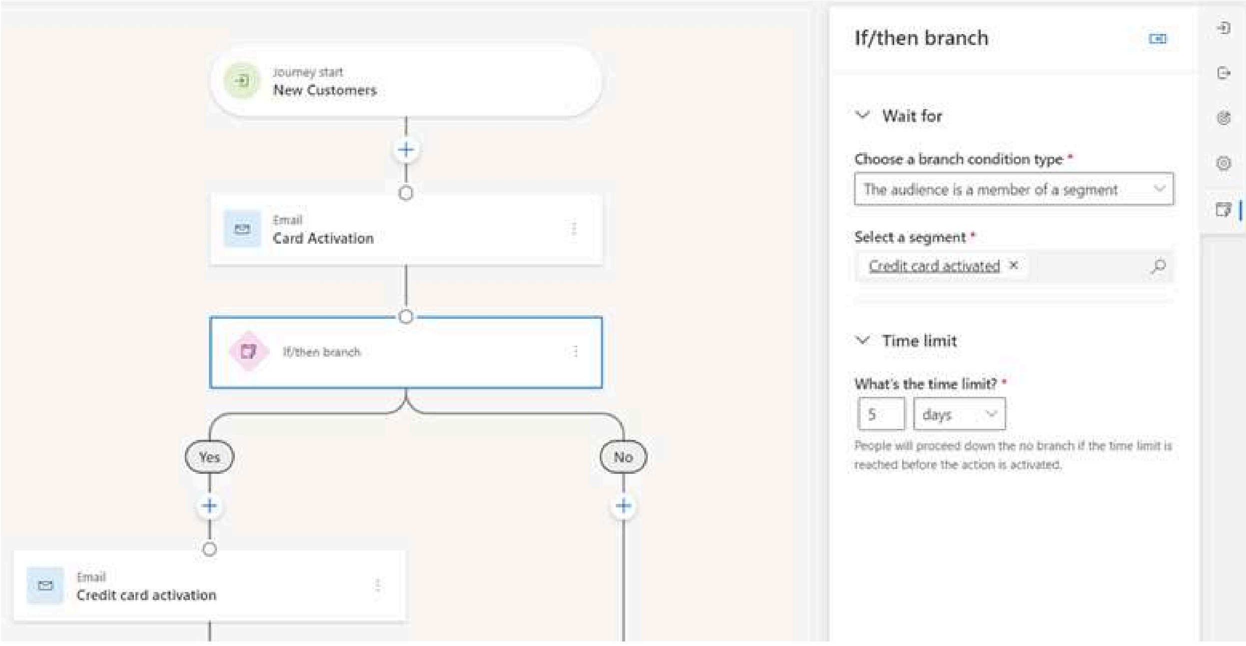
Gain even more control over your customers' experience by waiting for them to become a member of a segment before continuing to the next steps in a journey. This added capability lets you personalize each customer's experience by choosing the correct path and actions relevant to individual customers based on whether they're in a segment. This capability adds to existing if/then capabilities that let you wait for a customer to open an email, click on a link, or for another trigger to be activated before moving on to the next step in the journey.

For example, let's say you use your journey to send credit card activation emails and you want to wait for the customer to activate their card before sending a welcome email. If the customer doesn’t activate their credit card within a few days, you want to send another reminder email. If you have a segment that includes all customers who have activated credit cards, you can use that segment as the condition for the if/then branch to wait for each customer to activate their credit card and send them the right communications.

Feature details

Create journeys that wait until a customer becomes part of a segment before continuing to the next steps in the journey.

- Choose a segment as the condition for an if/then branching step.
- Set the amount of time you want to wait for the customer to become a member of the segment before continuing.
- Choose which actions to take if the customer is or is not a member of the segment.



Feedback

Was this page helpful? Yes No

Dynamics 365 Implementation Portal

Article • 07/16/2024

ⓘ **Important**

Some of the functionalities described on this release plan has not yet been released. Delivery time may change and projected functionality may not be released (refer to Microsoft policy).

ⓘ **Note**

Check out what's new in the portal. Share your feedback and help us improve.

Overview

The FastTrack Implementation Portal is a web-based platform that helps customers and partners accelerate their cloud adoption journey with Microsoft. The portal provides access to resources, tools, and best practices as well as guidance for planning, deploying, and adopting Microsoft cloud services. The portal also enables customers and partners to track their progress, manage their tasks, and collaborate with FastTrack engineers and experts.

Planned Enhancements

- **Improved usability**: The portal will get a facelift with an updated User Interface and expanded functionality to improve project analysis and management efficiency.
- **Expanded Copilot scenarios**: The FastTrack Implementation Portal Copilot will be expanded to cover more Success by Design scenarios and Telemetry insights. Additionally, Copilot agents will be leveraged to improve project onboarding, nomination, and review processes.
- **Collaboration**: Telemetry insights will provide enhanced team collaboration functionality for results.
- **Faster performance**: The portal will improve its loading speed, responsiveness, and reliability to ensure a smooth and seamless user experience.

Feedback

Was this page helpful? Yes No

Deprecation of Dynamics 365 apps

Article • 07/16/2024

A feature or capability that's deprecated is one that we intend to remove in a future release. The feature or capability will continue to work and will be fully supported until it's officially removed. After it's removed, the feature or capability will no longer work. Deprecation notifications can span a few months or years.

We encourage you to use this information, along with the release plans, to prepare for future releases. This notice is intended to give you sufficient time to plan and update your code before a deprecated feature or capability is removed.

- A deprecated feature is not in active development and may be removed in a future update.
- A removed feature is no longer available in the product.

For the current lists of Dynamics 365 deprecations, visit:

- Sales
- Customer Service
- Field Service
- Finance and operations apps
- Universal Resource Scheduling
- Healthcare accelerator
- Financial services accelerator
- Business Central - Base App
- Business Central - Platform - Clients, Server, and Database
- Customer Insights
- Dynamics 365 for Customer Engagement

Other deprecations

For the lists of other deprecations, visit:

- Important changes (deprecations) coming in Power Apps and Power Automate
- Important upcoming changes (deprecations) in canvas apps
- Important upcoming changes and deprecations in Power Pages
- Microsoft Cloud for Financial Services

See also

- Release plans for Dynamics 365, Power Platform, and Cloud for Industry
- Microsoft Lifecycle Policy

Feedback

Was this page helpful? Yes No

Microsoft Power Platform: 2024 release wave 2 plan

Article • 08/16/2024

The Microsoft Power Platform release plan for the 2024 release wave 2 announces the latest updates to customers as features are prepared for release. You can browse the release plan here online (updated throughout the month), view it in the Release planner, or download the document as a PDF file, which is updated with every publish. The plan for 2024 release wave 2 covers new features for Power Platform releasing from **October 2024** through **March 2025**.

Download the 2024 release wave 2 PDF for Power Platform or select the option at the bottom of the table of contents.

The Dynamics 365 features coming in the 2024 release wave 2 have been summarized in a separate release plan and a downloadable PDF.

The Microsoft Cloud for Industry features coming in the 2024 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

2024 release wave 2 overview

Microsoft Power Platform enables users and organizations to analyze, act on, and automate the data to digitally transform their businesses. Microsoft Power Platform today comprises five products: Power BI, Power Apps, Power Pages, Power Automate, and Microsoft Copilot Studio. It also includes the AI Builder add-in. The 2024 release wave 2 contains hundreds of new features across Power Platform applications, including Power BI, Power Apps, Power Pages, Power Automate, Microsoft Copilot Studio, and AI Builder, as well as Microsoft Dataverse and Power Platform capabilities for governance and administration.

Power BI and data integration have moved to Microsoft Fabric. With this transition, you can view how Power BI will work to empower all levels of an organization to make confident decisions at any scale by enhancing copilot experiences and continuing to invest in meeting customer demands. Data integration, now Data Factory, will focus on broadening connectivity options and enrich its library of transformations, enabling real-time data replication for analytics in the data lake.

Power Apps

Power Apps will continue to transform app experiences with infused intelligence, enabling users to be more productive; leveraging Copilot to work with data, get insights and improve their apps. Makers will continue to benefit from AI assisted development, enabling rich and complex applications to be built with monitoring, control, and unmatched governance for admins ensuring organizations can adopt low code and AI transformation at scale.

Power Pages

Power Pages will expedite site building for a low-code maker or pro developer to build intelligent sites that reimagine the way you interact with your employees, customers, and partners.

Power Automate

Power Automate will continue to make it easier to build flows by using natural language and multi-modal generative AI capabilities across cloud flows and desktop flows, troubleshooting runs, and manage your automation estate with an end-to-end view. This, along with improvements in process mining to jumpstart creation of automation through Microsoft 365 integration and ongoing improvements to scaling, means it'll be easier than ever for new users to get started and scale.

Microsoft Copilot Studio

Microsoft Copilot Studio is advancing Copilot capabilities and IVR support with Dynamics Customer Service and will expand geographically to the UAE and Germany. Additionally, the team is improving software lifecycle management capabilities with topic-level import/export and RBAC, as well as enhancing governance and administration functionalities.

AI Builder

AI Builder is investing in Prompt Builder for creating and deploying GPT prompts with enterprise data to enhance flows, apps, data tables, and Copilots. We are also enhancing Intelligent Document Processing with a new validation station in Power Automate, ALM support, and pre-built AI models for translation, classification, and PII detection. Lastly, we'll improve AI Governance through capacity management, data policies, and including AI Builder capacity in the Power Apps developer plan.

Microsoft Dataverse

Microsoft Dataverse is enhancing the maker experience by boosting app building productivity with Copilot, ensuring seamless connectivity to external data and knowledge sources, and integrating AI-powered Enterprise Copilot in Microsoft 365. These investments aim to streamline development and leverage AI for more efficient and intelligent solutions.

Governance and administration

Governance and administration continues to advance through tools and insights that empower Power Platform admins to easily get their job done. This wave focuses on governing Copilot adoption and easily securing low code assets, helping enterprises boost adoption of Power Platform solutions in their organization while keeping their digital environment safe.

Key dates for the 2024 release wave 2

These release plans describe functionality that may not have been released yet. Delivery timelines and projected functionality may change or may not ship (go to Microsoft policy).

Here are the key dates for the 2024 release wave 2.

Expand table

Milestone	Date	Description
Release plans available	July 16, 2024	Learn about the new capabilities coming in the 2024 release wave 2 (October 2024 – March 2025) across Microsoft Power Platform, Dynamics 365, and Microsoft Cloud for Industry.
Early access available	August 12, 2024	Test and validate new features and capabilities that will be a part of the 2024 release wave 2, coming in October, before they get enabled automatically for your users. You can view the Microsoft Power Platform 2024 release wave 2 early access features now.
Release plans available in 11 additional languages	August 2, 2024	The Microsoft Power Platform, Dynamics 365, and Microsoft Cloud for Industry release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	October 1, 2024	Production deployment for the 2024 release wave 2 begins. Regional deployments will start on October 1, 2024.

Just like the previous release waves, we continue to call out how each feature will be enabled in your environment:

- **Users, automatically** – These features include changes to the experience for users and are enabled automatically.
- **Admins, makers, or analysts, automatically** – These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts** – These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

You can get ready with confidence knowing which features will be enabled automatically.

We've done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We're looking forward to engaging with you as you put these new services and capabilities to work, and we're eager to hear your feedback as you dig into the 2024 release wave 2.

Let us know your thoughts. Share your feedback in the Microsoft Power Platform community forum. We'll use your feedback to make improvements.

Feedback

Was this page helpful? Yes No

Microsoft Cloud for Industry: 2024 release wave 2 plan

Article • 08/16/2024

The Microsoft Cloud for Industry release plan for the 2024 release wave 2 announces the latest updates to customers as features are prepared for release. You can browse the release plan online (updated throughout the month) or download the information as a PDF file, which is updated with every publish. The plan for 2024 release wave 2 covers new features for Microsoft Cloud for Industry releasing from **October 2024** through **March 2025**.

Download the 2024 release wave 2 PDF for Microsoft Cloud for Industry or select the option at the bottom of the table of contents.

The Dynamics 365 features coming in the 2024 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

The Microsoft Power Platform features coming in the 2024 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

2024 release wave 2 overview

The 2024 release wave 2 for Microsoft Cloud for Industry brings new innovations that provide you with significant capabilities to transform your business. The release contains several new features across Microsoft Cloud for Industry applications, including Microsoft Cloud for Retail, Azure Data Manager for Agriculture, Microsoft Cloud for Sustainability, and Microsoft Cloud for Sovereignty.

Microsoft Cloud for Retail

Microsoft Cloud for Retail will enhance existing solutions and foster ISV engagement. Store operations application template will include additional "Better Together" features with MW FLW applications that support partner extensibility. The copilot templates for store operations and personalized shopping will enable capabilities like multilingual support, extensibility support through 3P plugins, functional improvements like better crafted responses based on shopper insights, SME data etc. Retail data solutions will offer ready-made industry templates for inventory optimization, customer segmentation, and demand forecasting.

Microsoft Cloud for Sustainability

Microsoft Cloud for Sustainability is designed to help organizations accelerate their sustainability progress and business growth by leveraging data, Copilot, and other AI capabilities. It offers a suite of ESG capabilities, enabling data transparency and insights for action. The platform supports operational and cost efficiencies, ESG data intelligence, sustainable IT systems, and improved ESG performance. It empowers organizations to manage their environmental footprint, and comply with various regulatory standards, ultimately unlocking sustainable growth.

Azure Data Manager for Agriculture

Azure Data Manager for Agriculture currently known as ADMA, extends the capabilities of Microsoft Fabric by introducing industry-specific data connectors that bridge the gap between disparate data sources, enabling organizations to utilize high-quality datasets and fast-track the development of digital agriculture solutions. With the upcoming 2024 Release Wave 2, we're enhancing the agriculture-specific Common Data Model (CDM) to offer more flexibility and extensibility to empower our customers to process a variety of data types that are crucial for Digital Agriculture. This release will also make all 1P data connectors available on Fabric, streamlining the data management process and making it easier for our customers to access and utilize their data.

Microsoft Cloud for Sovereignty

Microsoft Cloud for Sovereignty is adding new capabilities to the Sovereign Landing Zone. We are also expanding our portfolio of policy initiatives and previewing new tools to help manage, assess, and detect changes in policy configurations. Sovereign accelerators and reference architectures for Azure OpenAI are also available to help meet regulatory requirements while reaping the benefits of the latest in AI.

Key dates for the 2024 release wave 2

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Here are the key dates for the 2024 release wave 2.

Expand table

Milestone	Date	Description
Release plans available	July 16, 2024	Learn about the new capabilities coming in the 2024 release wave 2 (October 2024 - March 2025) across Microsoft Cloud for Industry, Dynamics 365, and Microsoft Power Platform.
Release plans available in additional languages	August 2, 2024	Microsoft Power Platform, Dynamics 365, and Microsoft Cloud for Industry release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	October 1, 2024	Production deployment for the 2024 release wave 2 begins. Regional deployments will start on October 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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Let us know your thoughts. Share your feedback in the Microsoft Power Platform community forum. We will use your feedback to make improvements.

Feedback

Was this page helpful? Yes No

Dynamics 365: 2024 release wave 1 plan

Article • 07/31/2024

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, Customer Insights - Data, and Customer Insights - Journeys.

Sales

Dynamics 365 Sales, the leading sales application, enhances customer understanding and boosts sales through data, intelligence, and user-friendly experiences. The 2024 release wave 1 focuses on providing sellers timely customer information, expediting deals with actionable insights, improving productivity, and empowering organizations through open configurability and expanded generative AI leadership.

Microsoft Copilot for Sales continues to deliver and enhance cutting-edge generative AI capabilities for sellers by enriching the Copilot in Microsoft 365 capabilities with sales-specific skills, data, and actions. Additionally, the team will focus on assisting sellers on the go within the Outlook and Teams mobile apps.

Service

Dynamics 365 Customer Service will continue to empower agents to work more efficiently through Copilot filtering response verification, diagnostic tools for admins and agents, and usability improvements to multisession apps. Additionally, we are making enhancements to the voice channel, and improving unified routing assignment accuracy and prioritization.

Dynamics 365 Field Service is a field service management application that allows companies to transform their service operations with processes and experiences to manage, schedule, and perform. In the 2024 release wave 1, we are introducing the next generation of Copilot capabilities, modern experiences, Microsoft 365 integrations, vendor management, and finance and operations integration.

Finance and Supply Chain

Dynamics 365 Finance continues on its journey of autonomous finance, building intelligence, automation, and analytics around every business process, to increase user productivity and business agility. This release focuses on enhancing business performance planning and analytics, adding AI-powered experiences, easing setup of financial dimension defaulting with AI rules guidance, increasing automation in bank reconciliation, netting, expanding country coverage, tax automation, and scalability.

Microsoft Copilot for Finance will be available as a public preview for finance professionals using productivity applications such as Microsoft Excel and Outlook to complete financial tasks. The new capabilities will provide users with financial insights directly in Outlook and Excel and help craft timely and accurate email responses and store communication summaries in the central location. Users will also get support while reconciling financial data from two data sources in Excel, with Copilot-guided prompts when comparing the data and troubleshooting the discrepancies.

Dynamics 365 Supply Chain Management enhances business processes for increased insight and agility. Copilot skills improve user experiences, while demand planning transforms the forecast process, and warehouse processes are optimized for greater efficiency and accuracy.

Dynamics 365 Project Operations is focused on enhancing usability, performance, and scalability in key areas such as project planning, invoicing, time entry, and core transaction processing. The spotlight is on core functionality improvements, including support for discounts and fees, enhanced resource reconciliation, journals, approvals, and contract management, with added mobile capabilities to handle larger projects and invoices at an increased scale.

Finance and operations cross-app capabilities continues to invest in capabilities that apply to all finance and operations apps, including Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations, infusing Copilot experiences across applications, and bringing additional value and insights to finance and operations apps data.

Dynamics 365 Human Resources will continue to improve recruiting experiences with functionality to integrate with external job portals and talent pools. We will continue to expand our HCM ecosystem to include additional payroll partners and build better-together experiences that span the gamut of what Microsoft can offer to improve employee experiences in corporations of any size and scale across the globe.

Commerce

Dynamics 365 Commerce continues to invest in omnichannel retail experiences through advancements in mobile point of sale (MPOS) experiences like Tap to Pay for iOS and offline capabilities for Store Commerce on Android. The B2B buying experience is enhanced with new capabilities and a streamlined order management solution for buyers who work across multiple organizations.

SMB

Dynamics 365 Business Central is delivering substantial enhancements, with a central emphasis on harnessing the power of Copilot. Available in over 160 countries, the team is focused on Copilot-driven capabilities to streamline and enhance productivity through enhanced reporting and data analysis capabilities, elevated project and financial management, and simplified workflow automation. We've also upgraded our development and governance tools and introduced improvements in managing data privacy and compliance.

Remote Assist

Dynamics 365 Remote Assist will continue to invest in stability, performance optimization and usability improvements to across HoloLens 2, iOS and Android.

Customer Insights

Dynamics 365 Customer Insights - Data empowers every organization to unify and enhance customer data, leveraging it for insightful analysis and intelligent actions. With this release we are making it easier and faster to ingest and manage your data. AI enables quick insights and democratized access to analytics. Real-time data ingestion, creation, and updates further enable the optimization of experiences in the moments that matter.

Dynamics 365 Customer Insights - Journeys brings the power of AI to revolutionize how marketers work, enabling businesses to optimize every interaction with their customers with end-to-end journeys across departments and channels. With this release we empower marketers with a deeper customer understanding, we enable them to create new experiences within minutes, reach customers in more ways, and continuously optimize results. Thanks to granular lead qualification, we continue to boost the synergy between sales and marketing to achieve superior business outcomes.

Key dates for the 2024 release wave 1

These release plans describe functionality that may not have been released yet. Delivery timelines and projected functionality may change or may not ship (see Microsoft policy).

Here are the key dates for the 2024 release wave 1.

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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 additional languages	February 19, 2024	The Dynamics 365, Microsoft Power Platform, and Microsoft Cloud for Industry release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
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:

- **Users, automatically**: These features include changes to the user experience for users and are enabled automatically.

- **Admins, makers, or analysts, automatically**: These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

You can get ready with confidence knowing which features will be enabled automatically.

We've done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We're looking forward to engaging with you as you put these new services and capabilities to work, and we're eager to hear your feedback as you dig in to the 2024 release wave 1 plans.

Let us know your thoughts. Share your feedback in the Microsoft Dynamics 365 community forums . We will use your feedback to make improvements.

Feedback

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