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Novedades Microsoft Dynamics 365 2025 Release Wave 1.

ARBENTIA
Project Management

Microsoft

Microsoft Dynamics 365: 2025 release wave 1 plan

Article • 01/23/2025

The Dynamics 365 and Microsoft release plan for the 2025 release wave 1 announces the latest updates to customers as features are prepared for release. You can browse the release plan online (updated throughout the month), view it in the Release planner, or download the information as a PDF file, which is updated with every publish. The plan for 2025 release wave 1 covers new features for Dynamics 365 releasing from **April 2025** through **September 2025**.

Download the 2025 release wave 1 PDF for Dynamics 365 or select the option at the bottom of the table of contents.

The Microsoft Power Platform features coming in the 2025 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

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

The Microsoft Cloud for Industry features coming in the 2025 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

2025 release wave 1 overview

The 2025 release wave 1 for Dynamics 365 brings new innovations that provide you with significant capabilities to transform your business. The release contains hundreds of new features across Dynamics 365 applications, including Sales, Customer Service, Contact Center, Field Service, Finance, Supply Chain Management, Project Operations, finance and operations cross-app capabilities, Human Resources, Commerce, Business Central, Customer Insights - Data, and Customer Insights - Journeys.

Sales

Dynamics 365 Sales brings the power of AI to help sellers meet their targets while boosting seller productivity. Copilot and agents enhance performance and simplify tasks to help grow your pipeline, sharpen strategies, and accelerate deals. A reimagined user experience ensures sellers never miss the best move. Automated research, ongoing follow-ups and prioritized tasks provide continuous guidance, allowing you to focus on the right actions to drive success and grow your business.

Service

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

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

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

Finance and supply chain

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

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

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

Finance and operations cross-app capabilities will continue enabling AI and autonomous ERP with capabilities that support ERP suite in Dynamics 365, including Dynamics 365 Finance, Supply Chain Management, Commerce, Human Resources, and Project Operations. We are infusing agent experiences across applications, including chat, embedded AI, and intelligent process automation, and enabling extensibility for agent scenarios along with enterprise-grade security and compliance at scale.

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

Commerce

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

SMB

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

Customer Insights

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

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

Key dates for the 2025 release wave 1

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

Here are the key dates for the 2025 release wave 1.

Expand table

Milestone	Date	Description
Release plans available	January 23, 2025	Learn about the new capabilities coming in the 2025 release wave 1 (April 2025 - September 2025) across Dynamics 365, Microsoft Power Platform, role-based Copilot offerings, and Microsoft Cloud for Industry.
Early access available	February 3, 2025	Test and validate new features and capabilities that will be part of 2025 release wave 1, coming in April, before they are enabled automatically for your users. You can view the Dynamics 365 **2025 release wave 1 early access features** now.
Release plans available in additional languages	February 7, 2025	The Dynamics 365, Microsoft Power Platform, role-based Copilot offerings, and Microsoft Cloud for Industry release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	April 1, 2025	Production deployment for the 2025 release wave 1 begins. Regional deployments will start on April 1, 2025.

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

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

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

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

We've done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We're looking forward to engaging with you as you put these new services and capabilities to work, and we're eager to hear your feedback as you dig in to the 2025 release wave 1 plans.

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

Feedback

Was this page helpful? Yes No

Get started with this release wave

Article • 01/23/2025

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

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

2025 release wave 1

April 2025 – September 2025

Sales

See what's new and planned
Watch latest videos

Customer Service

See what's new and planned

Dynamics 365 Contact Center

See what's new and planned
Watch latest videos

Field Service

See what's new and planned

Finance

See what's new and planned
Watch latest videos

Supply Chain Management

See what's new and planned

Project Operations

See what's new and planned

Human Resources

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Watch latest videos

Commerce

See what's new and planned

Business Central

See what's new and planned

Customer Insights - Data

See what's new and planned

Customer Insights - Journeys

See what's new and planned

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2025 release wave 1 features available for early access

Article • 01/23/2025

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

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

- Dynamics 365 Sales
- Dynamics 365 Commerce
- Dynamics 365 Customer Service
- Finance and operations cross-app capabilities
- Dynamics 365 Finance
- Dynamics 365 Human Resources
- Dynamics 365 Supply Chain Management

The features from these apps update the existing user experiences. You can opt in early to enable these features in your environment. This will allow you to test these features and then adopt them across your environments. For information on how to enable these features, go to Opt in to 2025 release wave 1 updates.

> ⓘ **Important**
>
> Other early access features may impact your users. To learn more about these features, visit:
>
> - Power Platform 2025 release wave 1 features available for early access

Dynamics 365 Sales

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

Expand table

Feature	Enabled for	Early access	General availability
Integrate with Exchange using server-side	Users,	Feb 2025	Apr 2025

Feature	Enabled for	Early access	General availability
synchronization	automatically		

Dynamics 365 Commerce

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

Expand table

Feature	Enabled for	Early access	General availability
Roll out multifaceted pricing strategies	Users by admins, makers, or analysts	✔ Oct 25, 2024	Apr 2025
Enable use of sales order attributes to define pricing rules	Users by admins, makers, or analysts	Jan 2025	Apr 2025
Monitor and manage Store Commerce offline readiness	Admins, makers, marketers, or analysts, automatically	Feb 2025	Apr 2025

Dynamics 365 Customer Service

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

Expand table

Feature	Enabled for	Early access	General availability
Inbox view is on by default for service reps	Users, automatically	-	Apr 2025
Configure timeout rules override in SLA-based automatic actions	Users, automatically	-	Apr 2025

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
Enable support for asynchronous operation in dual-write functionality	Users by admins, makers, or analysts	✔ Oct 31, 2024	Apr 2025

Dynamics 365 Finance

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

Expand table

Feature	Enabled for	Early access	General availability
Empower users with generative help and guidance	Users, automatically	✔ Aug 30, 2024	Apr 2025
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
Improve bank account lifecycle management	Users by admins, makers, or analysts	✔ Jul 31, 2024	Jun 2025
Optimize user security configurations and licensing costs	Users, automatically	Jan 2025	Jul 2025

Dynamics 365 Human Resources

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

Expand table

Feature	Enabled for	Early access	General availability
Explore recruiting copilot scenarios	Users by admins, makers, or analysts	Jan 2025	Jun 2025

Feature	Enabled for	Early access	General availability
Use recruiting for service-centric organizations	Users by admins, makers, or analysts	✔ Jul 17, 2024	Jun 2025

Dynamics 365 Supply Chain Management

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

Expand table

Feature	Enabled for	Early access	General availability
Keep conversations going with Copilot follow-up questions	Users, automatically	✔ Oct 31, 2024	Apr 2025
Enhance vendor rebate management	Users by admins, makers, or analysts	Jan 2025	Apr 2025
Support contract lifecycle management in source to pay by flexible integration	Users by admins, makers, or analysts	✔ Oct 25, 2024	Apr 2025

Feedback

Was this page helpful? Yes No

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

Article • 01/23/2025

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

Overview

https://aka.ms/ReleaseHighlight/2025W1/Sales

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

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

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

Investment areas

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

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

Lead management
Lead management in Dynamics 365 Sales helps determine if a lead or prospect is a good fit for your product or service by understanding customer needs and aligning solutions to those needs.

The pipeline generation process involves deeply understanding customer needs, challenges, and buying habits and providing an overview of solutions that best meet their specific requirements. Dynamics 365 Sales streamlines this process by offering capabilities for outreach, prospecting, and researching and qualifying leads, ensuring that sales efforts are focused on activities with the highest impact.

Dynamics 365 Sales aids in boosting the qualified pipeline by providing AI-powered assistance during the sales process. Discovering leads from service interactions ensures that no potential lead is overlooked, while the automation of follow-up communications through an agent enhances response rates and keeps prospects engaged. Additionally, the system automatically disqualifies low-intent leads, helping to maintain a clean and focused lead pipeline.

Personalized email engagement, enabled by using one's own tone of voice, further improves interaction rates. Finally, augmenting research with custom insights and knowledge sources empowers sales teams with relevant information, thereby enhancing their ability to meaningfully connect with prospects. Collectively, these features provide a robust framework for effective sales qualification, driving better customer engagement and higher conversion rates.

Sales management and operations
Dynamics 365 Sales provides capabilities for sales managers and sales operations to manage and enable sales teams to achieve their sales goals.

Sales managers need to monitor, coach, and lead sales teams. Dynamics 365 Sales helps managers manage quotas, review forecasting in real time, and provide feedback on how conversations are going with customers. This enables managers to identify coaching opportunities while monitoring the pulse of the business.

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

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

Check out the release plan

For application administrators

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

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

Get the most out of Sales

Expand table

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

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Was this page helpful? Yes No

What's new and planned for Dynamics 365 Sales

Article • 01/23/2025

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

For a list of the previous wave's release plans, go to 2024 release wave 2 plan.

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

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

Administration and extension experiences

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Integrate with Exchange using server-side synchronization	Users, automatically	-	Feb 2025	Apr 2025

Lead management

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Boost qualified pipeline with sales qualification agent	Users by admins, makers, or analysts	Mar 2025	-	Apr 2025
Expand qualified pipeline with leads from service interactions	Users by admins, makers, or analysts	Apr 2025	-	-
Boost response rate by automating follow-up communications	Users by admins, makers, or analysts	Apr 2025	-	-
Increase pipeline quality with intent-to-buy analysis	Users by admins, makers, or analysts	Apr 2025	-	-
Provide your own tone of voice across all email communications	Users by admins, makers, or analysts	Apr 2025	-	-

Sales management and operations

Sales management and enablement capabilities to optimize sales operations.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Improve qualification rate by grounding agent in external data sources	Users by admins, makers, or analysts	Apr 2025	-	-

You are able to opt into some features as part of early access on February 3, 2025, including all mandatory changes that affect users. To learn more, go to Early access FAQ .

Description of **Enabled for** column values:

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

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

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

Feedback

Was this page helpful? Yes No

Administration and extension experiences

Article • 01/23/2025

ⓘ Important

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

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

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Feedback

Was this page helpful? Yes No

Integrate with Exchange using server-side synchronization

Article • 01/23/2025

ⓘ Important

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Expand table

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

Business value

We are upgrading our Exchange infrastructure to enhance support for Dynamics 365 Sales Premium features such as Relationship analytics and Who knows whom. With this release, Exchange data integration will shift to server-side synchronization (SSS), enabling more granular control over email sync settings. This boosts reliability and provides users with greater flexibility in managing the timing and scope of their email synchronization.

Feature details

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

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

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Lead management

Article • 01/23/2025

ⓘ Important

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Lead management in Dynamics 365 Sales helps determine if a lead or prospect is a good fit for your product or service by understanding customer needs and aligning solutions to those needs.

The pipeline generation process involves deeply understanding customer needs, challenges, and buying habits and providing an overview of solutions that best meet their specific requirements. Dynamics 365 Sales streamlines this process by offering capabilities for outreach, prospecting, and researching and qualifying leads, ensuring that sales efforts are focused on activities with the highest impact.

Dynamics 365 Sales aids in boosting the qualified pipeline by providing AI-powered assistance during the sales process. Discovering leads from service interactions ensures that no potential lead is overlooked, while the automation of follow-up communications through an agent enhances response rates and keeps prospects engaged. Additionally, the system automatically disqualifies low-intent leads, helping to maintain a clean and focused lead pipeline.

Personalized email engagement, enabled by using one's own tone of voice, further improves interaction rates. Finally, augmenting research with custom insights and knowledge sources empowers sales teams with relevant information, thereby enhancing their ability to meaningfully connect with prospects. Collectively, these features provide a robust framework for effective sales qualification, driving better customer engagement and higher conversion rates.

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Was this page helpful? Yes No

Boost qualified pipeline with sales qualification agent

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

As a seller, you typically need to build a qualified pipeline to cover 2-3 times of your target quota goal. However, doing so requires manual work across fragmented tools. It's also inefficient as you have to spend hours each week sending hundreds of prospecting emails, only to book 2-3 meetings with prospects, of which perhaps one will convert to a qualified opportunity.

The sales qualification agent in Dynamics 365 Sales now eliminates the human toil by autonomously researching information about every lead from CRM data and public web sources, making a recommendation on whether that lead should be qualified and pregenerating an email with highly personalized talking points to grab the prospect's attention. To ensure that you never miss the best moves to build a qualified pipeline, the agent surfaces the most important actions you should take on your leads in a new UI that follows you across lead and opportunity grids. With the agent, you can now spend more time meeting customers and less time triaging leads.

Feature details

The sales qualification agent combines the power of three agents that work together to help sellers build a qualified pipeline more efficiently:

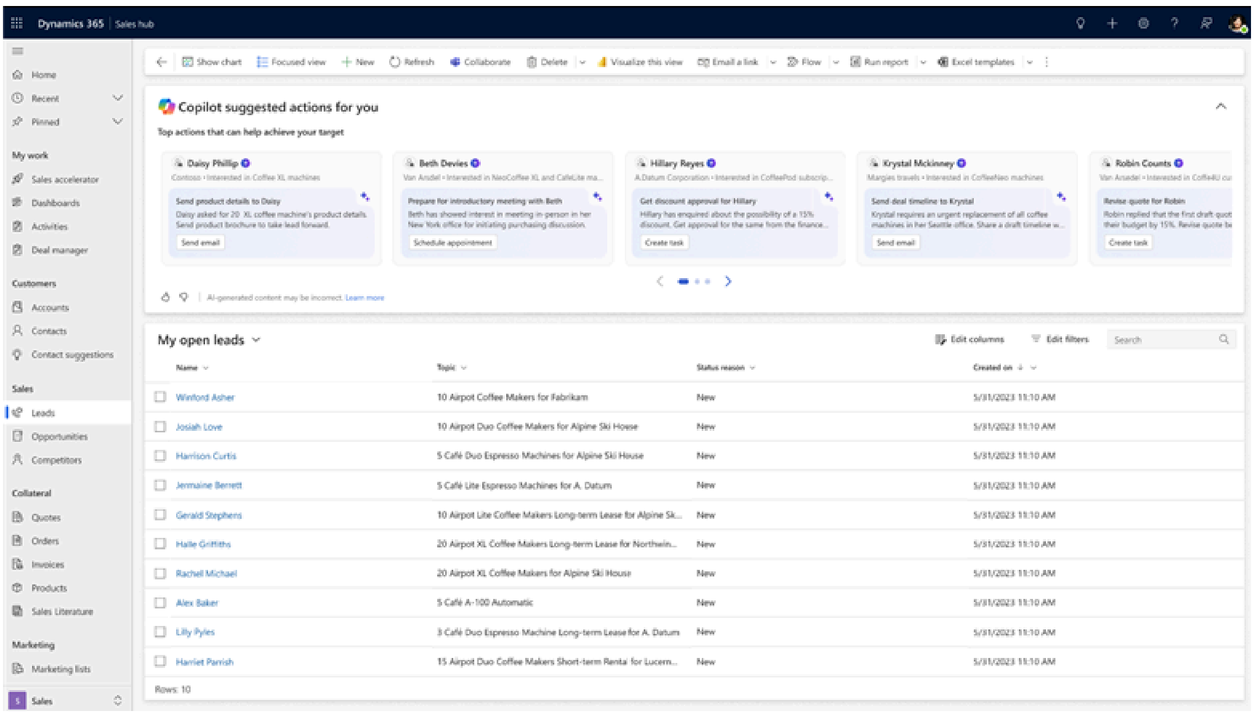
The *research agent* uses data from CRM and public web sources as well as existing copilot skills to synthesize key customer and account data. It enables sellers to:

- Decide whether to engage with the lead using the agent-generated recommendation.
- Get a 360-degree picture through lead and account summaries.
- Confirm that the lead has a valid email address and has consented to emails and phone calls.
- Know who can make an introduction (coworkers who know the lead).
- Verify that the lead's company's finances, priorities, and business environment are aligned with their solution area (Account 10-K, strategic priorities, and so on).
- Get suggestions for who else at the lead's company to contact.
- See existing opportunities tied to lead/contact and account.
- Review a personalized email, composed using talking points generated from the synthesized research, to send to the prospect.

The *prioritization agent* assesses the strength of the data and signals, and evaluates common criteria such as authority, budget, and others to identify leads with the highest likelihood to close. It enables sellers to:

- Get the list of leads to focus on instantly.
- Stay on top of triaging high-quality leads as the new UI follows you across lead and opportunity grids.

The *engagement agent* creates a personalized email to engage the lead, based on all the data gathered by the research agent, to maximize response rates.



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Boost response rate by automating follow-up communications

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Sellers know that sending follow-up emails significantly increases their chance of getting a reply, booking a meeting, and accurately qualifying a lead. However, they often miss out on follow-ups due to insufficient time, competing tasks, lack of a reminder, and so on. The sales qualification agent automates follow-ups with leads, nudging if there is no response, reminding if they're out of the office, and facilitating a meeting when positive intent is detected.

Unlike traditional cadences, the agent can dynamically adjust what is sent and when, based on the context of a lead's response. This way, sellers can ensure they consistently engage leads with the right content, at the right time, and without manual effort. This will make sellers more effective by increasing the number of replies received, customer meetings set and leads progressed through the sales process.

Feature details

- **Automated and dynamic follow-ups based on lead response**: Eliminate manual effort to draft, send, and track the right follow-up emails with automatic follow-ups that are triggered after an initial email and dynamically adjust the number of mails, the cadence, and the content according to a lead's reply.

- **Out-of-office (OOF) response management**: Improve engagement efficiency by automatically detecting out-of-office responses and adjusting the follow-up schedule, resuming only when the prospect is available to respond.
- **Lead self-booking**: Save sellers time on admin tasks by allowing prospects to easily schedule meetings by selecting available times that align with the seller's calendar in real time.

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Expand qualified pipeline with leads from service interactions

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

As a seller, you aim to expand your pipeline and boost conversions but often you might miss valuable cross-sell and upsell opportunities hidden within service interactions. Customer service teams handle product inquiries and challenges that signal high purchasing intent, yet you may struggle to receive these insights in time.

The sales qualification agent in Dynamics 365 Sales bridges this gap by automatically identifying new leads from existing accounts and customers by aggregating their service interactions and case history. For example, a customer reaching out to support after hitting a service limit could indicate a need for an upgrade, or frequent inquiries about a premium feature might signal interest in an upsell. By leveraging these insights, you can drive revenue growth and strengthen customer relationships.

Feature details

As a seller, you get the following experiences:

- **Pipeline expansion**: Uncover cross-sell and upsell opportunities by automatically analyzing customer support cases, surfacing potential leads that might have otherwise been missed.

- **Complete customer view**: Gain complete insights into customers' service engagement histories, empowering sellers to tailor their outreach with personalized messaging based on previous interactions, only at the right time. For example, only when the service case has been closed, or an outage has been resolved for optimal, effective engagements.

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

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Was this page helpful? Yes No

Increase pipeline quality with intent-to-buy analysis

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Sellers frequently face delays in following up to customer replies because they must manually sort through each response, decide who to pursue, who to disqualify, and who to route to support.

With the support of the sales qualification agent, sellers can automate this task of reading each reply and classifying the intent. The agent can parse replies to automatically identify budget, need, timing, or other purchase criteria and separate out support queries to redirect to your support teams. This allows sellers to act swiftly on warm leads while ensuring the leads that are low on purchasing intent are automatically routed to the right marketing nurture or customer support channels, optimizing both the seller’s time and the customer’s experience.

Feature details

- **Automated response classification**: Automatically classify customer responses by purchase intent (Interested, Not Interested, Disqualified), enabling sellers to prioritize effectively.
- **Lead auto-disqualification**: Automatically disqualify leads based on low/no-interest responses, ensuring sellers focus on high-quality prospects.

- **Support inquiry identification**: Detect and route customer messages flagged as support requests, freeing sellers to concentrate on sales activities.
- **Admin control for intent classification**: Admins can toggle predefined intent classifications, allowing customization of automated response handling based on business needs.

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

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Feedback

Was this page helpful? Yes No

Provide your own tone of voice across all email communications

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Sellers have their own tried-and-true selling techniques, including a unique tone of voice to use in email outreach to leads. This is important to improve email engagement from leads because it allows sellers to personalize outreach with an effective tone that differentiates them from other sellers. The sales qualification agent will now generate emails in the seller's own tone of voice, so they draft more consistent communications that lead to better response rates and qualification outcomes.

Feature details

- **Custom tone creation**: Allow sellers to create and save a personalized tone of voice to match their unique communication style, based on a simple natural language description or from sample prior emails they have sent.
- **Tone application in emails**: Apply a seller's personalized tone of voice automatically to emails, ensuring consistent, authentic messaging across communications.
- **Predefined tone selection**: Enable sellers to choose from a library of predefined tones of voice, such as formal, casual, or friendly.

- **Tone consistency across communications**: Ensure emails reflect the seller's preferred tone, maintaining consistency and enhancing rapport with leads and customers.

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

Feedback

Was this page helpful? Yes No

Sales management and operations

Article • 01/23/2025

ⓘ Important

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

Dynamics 365 Sales provides capabilities for sales managers and sales operations to manage and enable sales teams to achieve their sales goals.

Sales managers need to monitor, coach, and lead sales teams. Dynamics 365 Sales helps managers manage quotas, review forecasting in real time, and provide feedback on how conversations are going with customers. This enables managers to identify coaching opportunities while monitoring the pulse of the business.

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

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

Feedback

Improve qualification rate by grounding agent in external data sources

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

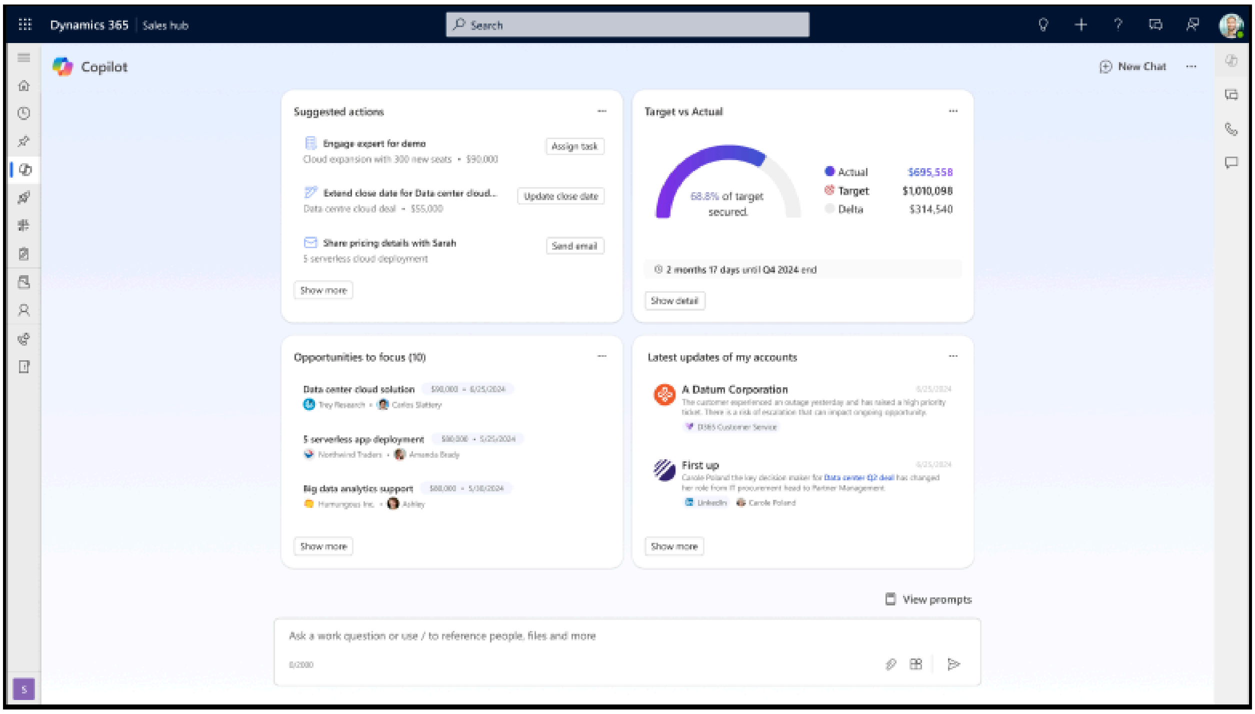
Boost your sales team's efficiency with a customized sales qualification agent that seamlessly integrates industry and company-specific insights to streamline workflows and sharpen lead qualification. Different industries and companies rely on unique data to assess a lead's fit with their ideal customer profile (ICP). For instance, financial services teams may prioritize prospects based on total assets under management, while technology teams may focus on subscription usage.

While much of this information comes from CRM data, key insights can come from outside the CRM—proprietary tools, public web resources, SharePoint files or internal data estates. By tailoring the agent to your specific data needs, your sellers gain quick access to the insights that matter most, enabling them to spend less time on research and more time engaging in high-value conversations that drive meaningful results.

Feature details

You can now fine-tune the sales qualification agent by defining custom instructions that mimic the intuition of the best sellers on your team. Enable the Sales qualification agent to make more informed qualification and prioritization decisions by configuring it to use external data sources.

- Specify openly accessible web resources the Sales qualification agent can access to identify the lead's company finances, priorities, and business environment. For instance, organizations selling to public sector companies may need data available on government websites.
- Effortlessly ground the agent with your first-party data sources—for instance, lakehouses such as Microsoft Fabric and databases such as Azure SQL and Oracle—using Microsoft Copilot Studio’s out-of-the-box tools.
- Customize the agent to retrieve insights from third-party platforms, including case history from ServiceNow, keyword search data from 6Sense, order history from SAP, and specific insights from designated websites.
- Easily define the qualification and prioritization criteria by explaining it in simple words.



ⓘ **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 Customer Service in 2025 release wave 1

Article • 01/23/2025

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

Overview

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.

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

Investment areas

Copilot and AI innovation
Copilot transforms the Customer Service support experience with generative AI. Service representatives are more productive and deliver a better service experience with Copilot helping them find resources to resolve issues faster, handle cases more efficiently, and

automate time-consuming tasks. Copilot harvests knowledge from internal and external sources to draft contextual answers to questions in email and chat conversations. Service representatives can ask Copilot questions as they conduct research for a case, and they can use Copilot to generate case and conversation summaries in a single click.

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

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.

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 Customer Service

Article • 01/23/2025

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

For a list of the previous wave's release plans, go to 2024 release wave 2 plan.

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

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

Copilot and AI innovation

Copilot in 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
Update knowledge base using Customer Knowledge Management Agent	Users by admins, makers, or analysts	Jan 2025	-	Apr 2025
Use Copilot-powered email template recommendations	Users by admins, makers, or analysts	Apr 2025	-	-
Use Copilot Studio agents for customer surveys	Users by admins, makers, or analysts	✔ Nov 18, 2024	-	Apr 2025
View customer sentiment indicators on email	Users by admins, makers, or analysts	Apr 2025	-	-

Feature	Enabled for	Public preview	Early access*	General availability
Insert Copilot prompts in email templates	Users by admins, makers, or analysts	Apr 2025	-	-
Automate case lifecycle tasks with Case Management Agent	Users by admins, makers, or analysts	Feb 2025	-	May 2025

Service representative experiences

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Configure session limits for multisession apps	Users by admins, makers, or analysts	Feb 2025	-	Jun 2025
Create personalized case views in the inbox	Users by admins, makers, or analysts	-	-	Apr 2025
Automatically restore sessions after a browser refresh	Users by admins, makers, or analysts	✔ Oct 1, 2024	-	Apr 2025
Inbox view is on by default for service reps	Users, automatically	-	-	Apr 2025
Configure timeout rules override in SLA-based automatic actions	Users, automatically	-	-	Apr 2025

You are able to opt into some features as part of early access on February 3, 2025, including all mandatory changes that affect users. To learn more, go to Early access FAQ .

Description of **Enabled for** column values:

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

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

For 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 • 01/23/2025

ⓘ Important

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

Copilot transforms the Customer Service support experience with generative AI. Service representatives 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. Service representatives 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.

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

Feedback

Was this page helpful? Yes No

Automate case lifecycle tasks with Case Management Agent

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Case Management Agent automates case details during live chats and from incoming emails, saving time for customer service representatives and reducing conversation wrap-up time. It also sends follow-up emails and resolves cases automatically, improving service representative efficiency and satisfaction by eliminating manual administrative tasks. Moreover, it identifies experts automatically and prompts customer service representatives to collaborate with them directly through Teams chat, providing a seamless experience through automatic summarizing of case context. Collaboration summaries are integrated into the application, enhancing the knowledge base and minimizing the need for future collaborations.

Feature details

When a live chat is accepted by a customer service representative, the Case Management Agent automatically creates a case, filling in the required information. As the conversation progresses, service representatives can use the Case Management Agent to update case fields. When the conversation ends, it updates the fields on the case automatically. Similarly, when an email gets converted to a case through automatic record creation (ARC) rules, it automatically fills in the required information from the email. It also keeps the case up to date using information from new emails, as and when the customer sends them.

Case Management Agent further offers service representatives one-click collaboration through intelligent prompts, identifies the right experts automatically, and provides a concise case summary for experts to get up to speed quickly. Collaboration insights are integrated into the case timeline for streamlining future processes. Finally, it tracks cases requiring attention, sends follow-up emails based on SLA criteria, and either resolves the case or notifies the service representative upon customer response. This aims to boost case creation and closure efficiency, thus reducing case handling time.

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

Insert Copilot prompts in email templates

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

You can accelerate email responses with intelligent template prompts. Copilot prompts in email templates automatically populate email templates with the prompt content, reducing service representative workload and ensuring consistent, accurate customer communication.

Feature details

With this feature, administrators can configure email prompts as part of email templates. When a customer service representative inserts an email template, Copilot autopopulates content from the prompts, improving agent productivity and reducing manual effort.

Feedback

Was this page helpful? Yes No

Update knowledge base using Customer Knowledge Management Agent

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

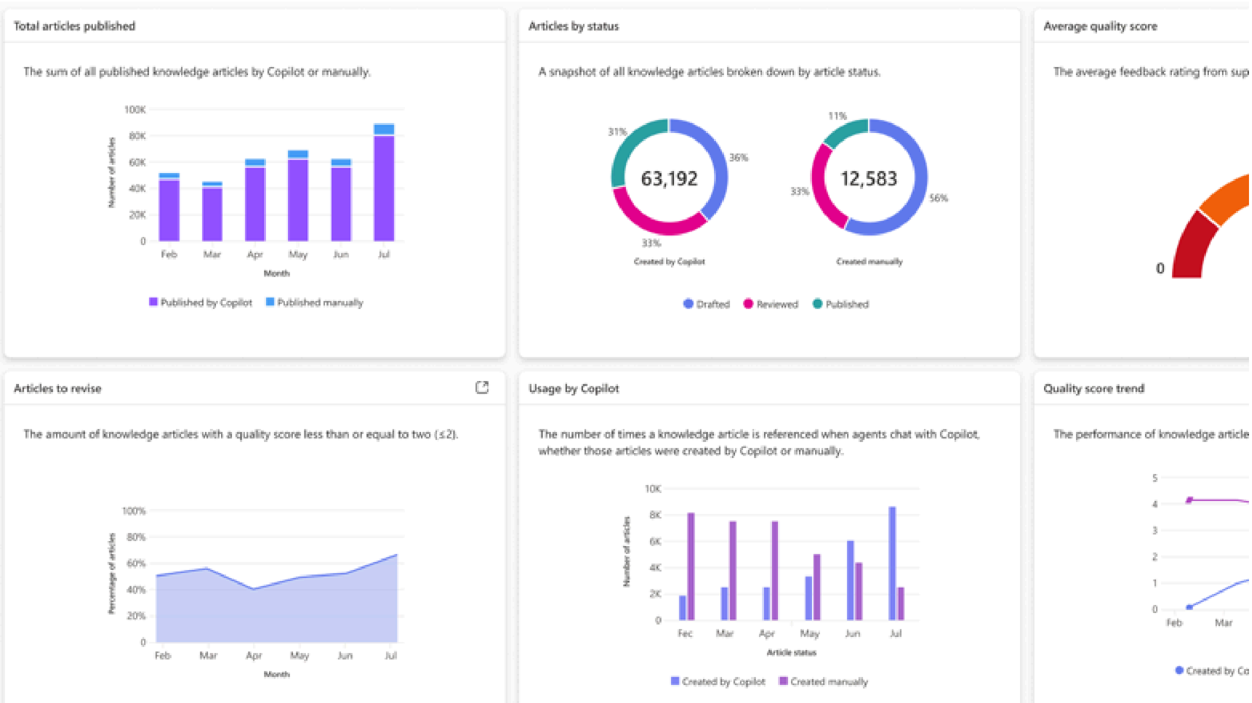
Customer Knowledge Management Agent automatically turns untapped case and case-related conversation data into knowledge that supports your contact center. Customer Knowledge Management Agent harvests knowledge from cases in real time as service representatives close cases, helping your contact center respond to emerging issues in minutes. That means no more waiting weeks and months for long knowledge lifecycles. With historical article creation, Customer Knowledge Management Agent can help you quickly turn your historical case data (including case-related conversations, emails, case notes, and other details) into ready-to-use knowledge articles.

Actionable knowledge insights allow supervisors and content managers to monitor Customer Knowledge Management Agent as well as the health and usage of knowledge used by Copilot. Tailored analytics empower users to enhance the quality and relevance of knowledge articles, resulting in more accurate Copilot guidance. Ultimately, this feature boosts productivity and decision-making accuracy, leading to improved user satisfaction and operational efficiency.

Feature details

With real-time creation, the moment agents close a case, Customer Knowledge Management Agent analyzes the case and case-related notes, conversations, and emails to draft a knowledge article that fills knowledge gaps and helps your organization respond to emerging issues in minutes. Customer Knowledge Management Agent compares the content of the case against your Dynamics 365 knowledge base to determine if a new article is needed, while also ensuring that content isn't duplicated. It ensures compliance by scrubbing sensitive data, and it can be extended with custom automated compliance checks from your organization.

It can automatically publish the article, if configured to do so, and make the article accessible to support representatives, Copilot, and even self-service portals depending on your configuration. Supervisors can always review, edit, and monitor Customer Knowledge Management Agent's work.

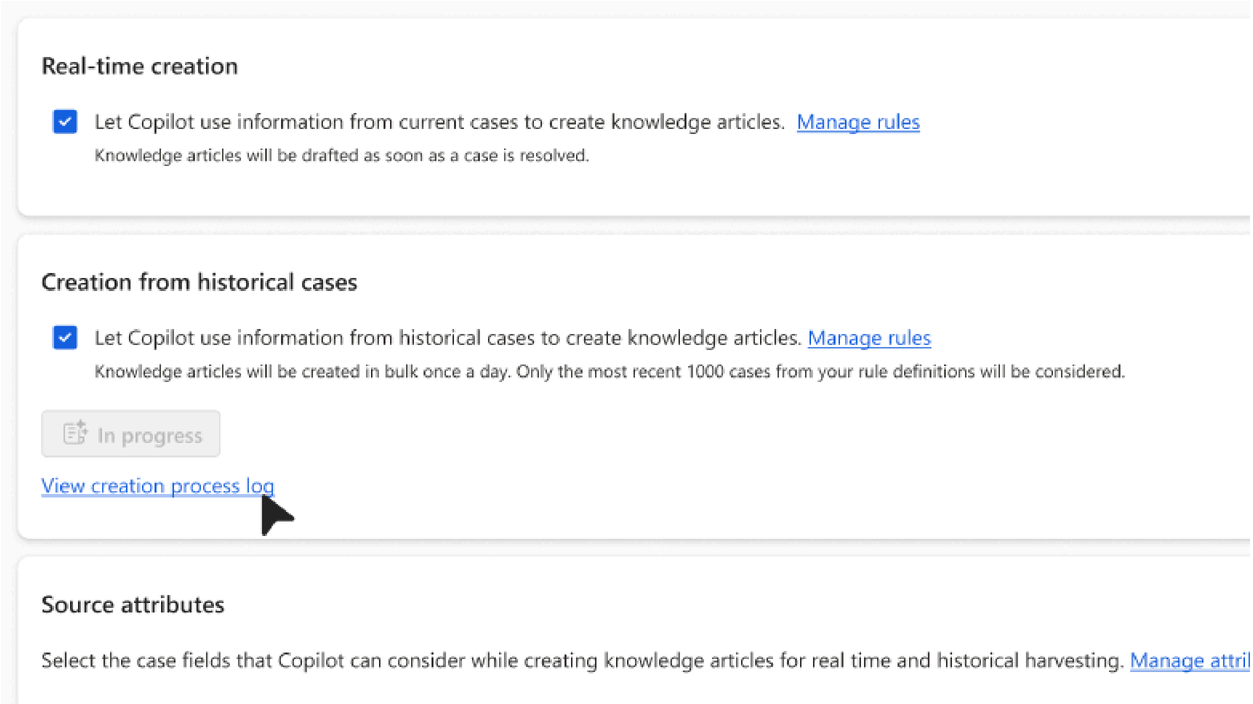


Historical creation brings Customer Knowledge Management Agent's power to help you unlock knowledge from your historical cases, turning them from raw case data into ready-to-publish knowledge articles, all while preventing duplication, ensuring compliance, and giving supervisors the same tools to monitor Customer Knowledge Management Agent's work.

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

This feature will be automatically available to supervisors using Customer Knowledge Management Agent. Based on the autonomous-level preference (semi-autonomous or fully autonomous), supervisors will see a dashboard highlighting the corresponding performances from draft creation to publishing, and the articles' usage by Copilot.

Supervisors are also guided to articles that require review and are approaching expiration, so they can act on high-priority articles in a timely manner.



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

Feedback

Was this page helpful? Yes No

Use Copilot-powered email template recommendations

Article • 01/23/2025

ⓘ Important

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Expand table

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

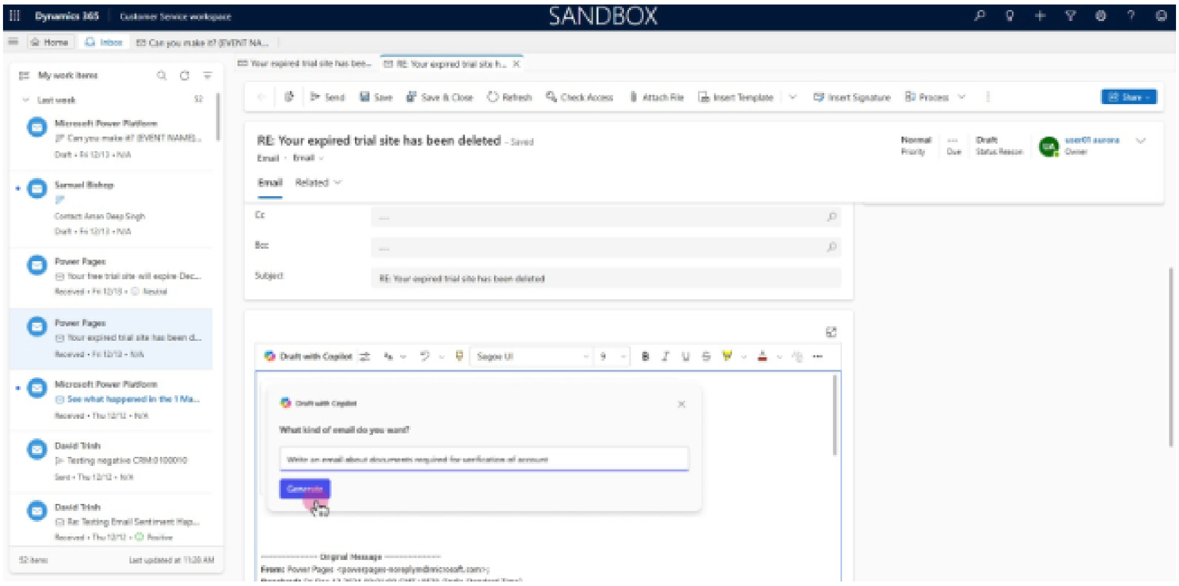
Business value

Transform customer support communication with intelligent template recommendations that cut response times and eliminate administrative friction. By leveraging AI to precisely match contextual templates, support teams can dramatically reduce manual template searching, accelerate case resolution, and deliver more consistent, accurate customer communications.

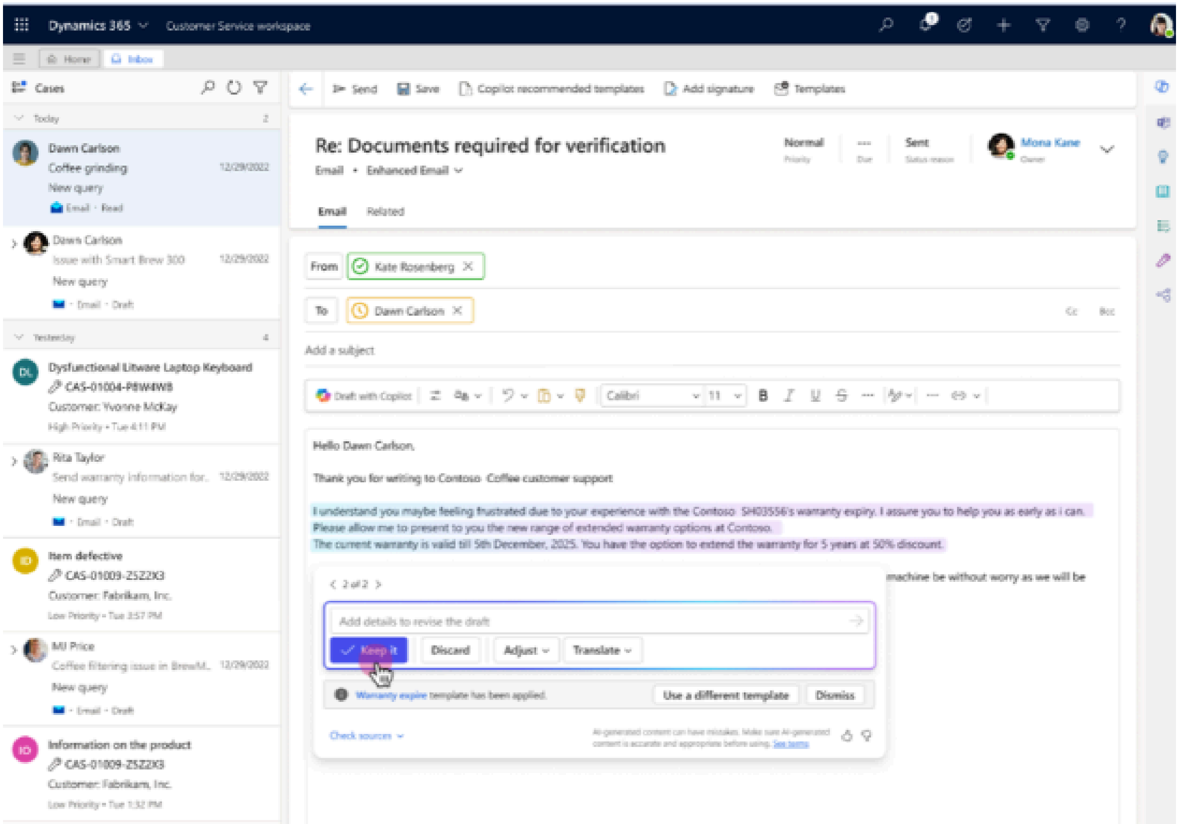
Feature details

Copilot email assist now suggests relevant email templates, reducing the need for customer service representatives to search for email templates manually. Copilot's template suggestions are based on email content, search context, and thread intent. Representatives can access these suggestions through the email editor itself.

- Representatives can enter the custom prompt in the inline email assist card when replying to the customer.
- Copilot matches the prompt with the email templates stored in the application and selects the most appropriate email template in the Inline Email form.



- Representatives can see the name of the email template selected. They can also select a different email template, if required.



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

- Enable the feature.
- Create email templates in the application, as Copilot only recommends existing templates.
- Manually tag the email template for LOB, language, and geography segregation, if needed.

Feedback

Was this page helpful? Yes No

Use Copilot Studio agents for customer surveys

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Nov 18, 2024	-	Apr 2025

Business value

Traditional customer feedback management takes a long time (days/weeks) to close the loop with action on feedback provided. Additionally, different tools are used to capture customer feedback across different channels within Dynamics 365 Customer Service. In the era of AI, we have an opportunity to reimagine customer feedback management in Customer Service, with automated and personalized feedback loops to help our customers unlock immense business values. This feature unifies the process of configuring these surveys across channels while leveraging the generative AI capabilities of Copilot Studio bots, as well as how the feedback collected is presented to supervisors.

Feature details

The key capabilities of the survey agents include:

- Use Copilot Studio agents to gather customer feedback and configure contextual actions depending on feedback.
- Unify and centralize the process of configuring surveys across email, messaging, voice, and custom channels.
- Use predefined templates to create surveys easily.
- View feedback summarized into actionable insights available for supervisors to review.

Additional resources

Configure feedback surveys using Copilot Studio (docs)

Feedback

Was this page helpful?   Yes   No

View customer sentiment indicators on email

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Agents can view the customer's sentiment for an incoming email, improving response quality and allowing them to manage escalations effectively.

Feature details

With this feature, agents can view sentiment indicators in the inbox and email editor view and respond appropriately. Administrators and supervisors can view the average sentiment scores in the dashboard view under Email Analytics.

Feedback

Was this page helpful? Yes No

Service representative experiences

Article • 01/23/2025

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Automatically restore sessions after a browser refresh

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Oct 1, 2024	-	Apr 2025

Business value

When service representatives refresh their browser windows while in Customer Service workspace, they expect all previously opened sessions and tabs to reappear. Current functionality requires that users reopen their sessions and tabs one by one. This usability improvement saves time and allows service representatives to be more productive.

Feature details

While using Customer Service workspace, users expect their refreshed browser to reload previously opened sessions and tabs.

Current experience

Currently, if a browser in Customer Service workspace is refreshed or reconnected for any reason, the app reloads only the home page. Users then have to manually reopen any other tabs or sessions one by one, such as calls, cases, chats, messages, and so forth. This manual reload is forced in any of the following scenarios:

- Slow browsers due to memory issues.
- Microphone or headset issues.
- Network issues.
- Accidentally or intentionally closing a browser tab, or the browser completely.

New experience with session restore

In the new experience, the following automatic actions occur when the browser refreshes:

- Entities, such as case, accounts, and so forth, and their application tabs are restored.
- Focus is restored to the last session or app tab that was previously in view.
- After the user's presence is reloaded, conversations are restored, such as calls, chats, and so forth.

New experience callouts

Users should be mindful of the following caveats when using the new browser refresh experience:

- The order of session tabs might change.
- If there are multiple browser sessions and tabs open, only the latest updated browser sessions and tabs are reloaded.
- Cross-browser functions aren't supported. For example, refreshing from Edge to Chrome.
- The productivity pane state and focus are restored, but the productivity tool state isn't restored.
- Chats, calls, and other generic sessions are restored only after the user presence is reestablished. There is a delay in this functionality when compared to the restoration of other sessions and tabs.

Additional resources

Enable session restore to automatically reopen sessions and tabs (docs)

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

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Feedback

Was this page helpful? Yes No

Configure session limits for multisession apps

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Admins can configure a maximum number of up to nine sessions that their customer service representatives can have open at one time.Different industries, businesses, and even workforce management philosophies have unique best practices about the correct number of sessions their service representatives should work on concurrently. Session limit configuration provides your administrators with a systematic way to facilitate these best practices.

Feature details

The session limit feature lets administrators configure the maximum number of sessions for customer service representatives to use in Customer Service workspace.

Administrators can figure session limits between three and nine, with nine being the default and maximum setting. This configuration is available in the app settings for Customer Service workspace.

ⓘ Note

Configuring the session limit allows you to lower the default, maximum-allowed number of sessions for service representatives to use. It doesn't provide the ability to allow for more sessions beyond the default number of nine sessions.

Feedback

Was this page helpful? Yes No

Configure timeout rules override in SLA-based automatic actions

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

In scenarios where a service representative might be on leave, needs more response time, or transfers a conversation to a different queue, the service representative should be able to change the flow of the rules for automatic actions.

Feature details

The service representative should be able to turn off each of the automatic actions that would be enacted on the conversation by instance. Additionally, administrators can add more settings, such as actions (Active to Waiting) and trigger events (Agent Non-response time), so that they can configure the timeout rules.

Feedback

Was this page helpful? Yes No

Create personalized case views in the inbox

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Personalized case views let your service representatives create case views that work best for them in the inbox. These customized case views can help your representatives increase their productivity and organize their work more efficiently.

Feature details

Personalized case views are comprised of the following steps:

1. Admins create personal views on a grid page for the case entity.
2. Service representatives add the personal views to the inbox.
3. The personal views are then visible in the inbox.

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

Feedback

Was this page helpful? Yes No

Inbox view is on by default for service reps

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

The inbox is a single view where customer service representatives can see all of their work items in a consolidated location. This experience will be enabled by default for out-of-the-box and newly created representative profiles.

Feature details

Help your customer service representatives view all of their work items in a single, consolidated location in the inbox.

Benefits of this experience include the following highlights:

- Currently available for all service representative experience profiles.
- Will be turned on by default for out-of-the-box and newly created service represenative profiles.

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

Feedback

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

Article • 01/23/2025

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

Overview

https://aka.ms/ReleaseHighlight/2025W1/ContactCenter

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

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

Investment areas

Copilot and AI innovation

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

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

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

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

Supervisors can also use the extensibility feature and customize data models to add metrics and report on custom entities to improve contact center efficiency.

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

routing service uses AI to automatically classify, route, and assign work items, 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 service representatives help optimize the routing of work items to the best-suited service representatives.

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

Check out the release plan

For application administrators

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

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

Get the most out of Dynamics 365 Contact Center

Expand table

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

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Contact Center

Article • 01/23/2025

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

For a list of the previous wave's release plans, go to 2024 release wave 2 plan.

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

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

Copilot and AI innovation

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

Expand table

Feature	Enabled for	Public preview	General availability
Use Customer Intent Agent to improve service	Users by admins, makers, or analysts	Jan 2025	Apr 2025
Use contact center for sales	Users, automatically	Apr 2025	Jul 2025

IVR capabilities

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

Expand table

Feature	Enabled for	Public preview	General availability
Edit business rules for omnichannel bots	Users by admins, makers, or analysts	-	Apr 2025

Omnichannel customer experiences

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

Expand table

Feature	Enabled for	Public preview	General availability
Integrate biometric authentication and fraud prevention	Users by admins, makers, or analysts	Mar 2025	Jun 2025
Use AI summary for call quality management	Users, automatically	-	Apr 2025
Add messaging to native mobile apps	Users by admins, makers, or analysts	-	Jul 2025
Manage sessions and live conversation details in CCaaS	Users, automatically	-	Apr 2025

Service representative experiences

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

Expand table

Feature	Enabled for	Public preview	General availability
Use Copilot Studio agents to get customer feedback	Users by admins, makers, or analysts	✔ Nov 18, 2024	Apr 2025

Supervisor experiences

Enable supervisors to monitor and improve contact center operations.

Expand table

Feature	Enabled for	Public preview	General availability
Use enhanced analytics for voicemail and direct callback	Users by admins, makers, or analysts	-	Apr 2025

Unified routing

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

Expand table

Feature	Enabled for	Public preview	General availability
Route to least active service reps in messaging channels	Users by admins, makers, or analysts	-	Apr 2025
Select a representative automatically in consult to queue	Users by admins, makers, or analysts	-	Aug 2025
Enable blocking of capacity for consulted conversations	Users by admins, makers, or analysts	-	May 2025
Enable direct transfer of conversations	Users by admins, makers, or analysts	-	Jul 2025
Use first in, first out order based on interaction times	Admins, makers, marketers, or analysts, automatically	-	Sep 2025

You are able to opt into some features as part of early access on February 3, 2025, including all mandatory changes that affect users. To learn more, go to Early access FAQ .

Description of **Enabled for** column values:

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

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

For 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 • 01/23/2025

ⓘ Important

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

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

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

Feedback

Was this page helpful? Yes No

Use Dynamics 365 Contact Center for sales

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2025	Jul 2025

Business value

Customers can use Dynamics 365 Contact Center for sales to:

- Generate new business and cross or upsell from existing customers.
- Present product offerings and address customer objections.
- Qualify leads and assess sales potential.
- Nurture prospects through the sales funnel.
- Convert conversations into sales or follow-ups.

Feature details

The key features include:

- **Integrated lead management**: Create, manage, and qualify leads directly.
- **Integrated opportunity management**: Create and manage opportunities, including adding products and generating quotes.
- **Quote and order management**: Create and manage quotes, orders, and invoices.
- **Omnichannel engagement**: Interact with customers via voice, email, chat, and social media.
- **Multisession capability**: Engage with multiple customers simultaneously to handle high volumes efficiently.

- **Copilot support**: Sales representative workflows augmented by Copilot to ensure decision support for positioning and next best actions.
- **Seamless CRM system integration**: Automatically sync all activities and customer data with the underlying CRM system.
- **Unified interface**: Access all customer interactions and data from a single, intuitive workspace.

Feedback

Was this page helpful? Yes No

Use Customer Intent Agent to improve service

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

By enabling support representatives to quickly understand customer needs and provide real-time tailored solutions, this feature reduces handling time and improves overall customer service. It also resolves customer issues more efficiently and reduces the need for human interactions, allowing support reps to focus on more complex cases and improving operational efficiency.

Feature details

Customer Intent Agent uses generative AI to autonomously discover ongoing intents from your CRM instance, analyzing past interactions to create an intent library that enhances dynamic conversations. This benefits both assisted and self-service scenarios by enabling support reps to quickly understand customer needs, guide conversations with follow-up questions, and provide tailored solutions in real time.

The feature also presents a curated list of questions and suggested solutions in the chat response box, enhancing support rep efficiency and reducing manual typing. For self-service, it generates relevant follow-up questions and uses collected information to query the knowledge source, leading to higher deflection rates and allowing support reps to focus on cases requiring manual intervention. This results in quicker issue resolution, reduced handling time, and improved overall customer service.

Geographic areas

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

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

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

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Feedback

Was this page helpful? Yes No

IVR capabilities

Article • 01/23/2025

ⓘ Important

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

Conversational IVRs (interactive voice responses) enable enterprises to increase containment, improve customer satisfaction, and reduce 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

Edit business rules for omnichannel bots

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

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

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

Feature details

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

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

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

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

Feedback

Was this page helpful? Yes No

Omnichannel customer experiences

Article • 01/23/2025

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Add messaging to native mobile apps

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

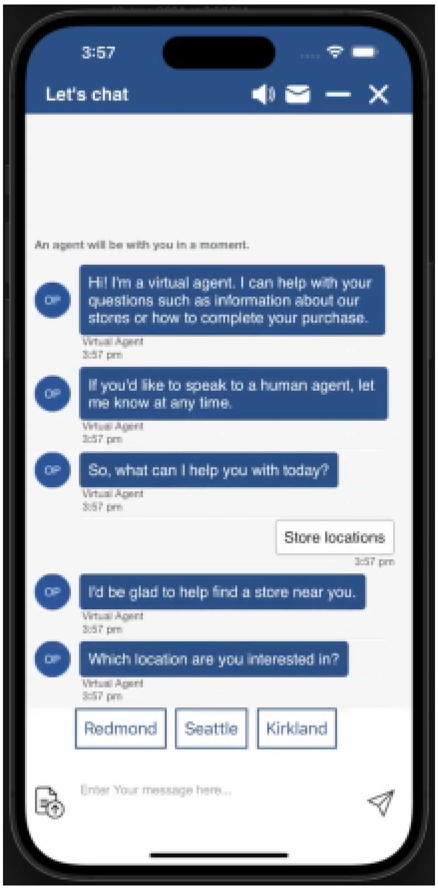
Reach your customers through your branded mobile application with our easy-to-integrate mobile messaging experience.

Feature details

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

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

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



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

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Feedback

Was this page helpful? Yes No

Integrate biometric authentication and fraud prevention

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

The interoperation with selected biometric verification engine with the voice channel in Dynamics 365 Contact Center enables organizations to improve customer satisfaction and contact center efficiency through voice biometric authentication and intelligent fraud prevention.

The use cases are as follows:

- Voice authentication for customers from directly within the Dynamics 365 Contact Center workspace, enabling fast, secure, personalized service.
- Fraud prevention capabilities alert service reps about known fraudsters and spoofing attempts, and allow service reps to flag conversations for further investigation by a fraud analyst.
- Supervisors can monitor conversations flagged as suspicious or fraudulent.
- Integrated reporting for fraud analysis.

The benefits are as follows:

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

Feedback

Manage sessions and live conversation details in CCaaS

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Enhanced sessions management and live conversation details for embedded contact center as a service (CCaaS) will allow for the service representative to view their conversations in a more robust fashion as well as pick the conversations they would like to assign themselves. Additionally, it would help the service representative be the most informed with assisting the customer with live details that would attach to the conversation such as set customer and conversation details.

Feature details

Moving forward, the embedded contact center experience will include set customer, conversation details, sign-out, sessions management, pick mode, and voicemail capabilities.

Pick mode will let customers assign conversations to themselves, adding more work items to their plate. This will go along with the sessions management.

Customer and conversation details will be accessible while conversing to allow real-time scanning of the holistic picture. Voicemail and other async channels will be visible to the service representatives now, and sign-out of the embed experience will also be allowed.

Feedback

Was this page helpful? Yes No

Use AI summary for call quality management

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

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

Feature details

Key capabilities of this feature include:

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

Geographic areas

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

- Germany
- Switzerland
- United Arab Emirates

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

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

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Feedback

Was this page helpful? Yes No

Service representative experiences

Article • 01/23/2025

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

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

Feedback

Was this page helpful? Yes No

Use Copilot Studio agents to get customer feedback

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Traditional customer feedback management can take a long time, sometimes weeks, to close the loop with action on feedback provided. Different tools are used to capture customer feedback across different channels within your contact center. With AI, you have an opportunity to enable real-time feedback, with automated and personalized feedback loops to help unlock immense business values. This feature unifies the process of configuring the surveys across channels while using the generative AI capabilities of Copilot Studio agents.

Feature details

With this feature, you can:

- Use Copilot Studio agents 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.

Additional resources

Configure feedback surveys using Copilot Studio (docs)

Feedback

Was this page helpful? Yes No

Supervisor experiences

Article • 01/23/2025

ⓘ Important

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

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

Supervisors can also use the extensibility feature and customize data models to add metrics and report on custom entities to improve contact center efficiency.

Feedback

Use enhanced analytics for voicemail and direct callback

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Currently, analytics aren't available to track direct callback activity, and the out-of-the-box analytics categorizes voicemails as abandoned conversations. Supervisors lack insights into conversations that go through overflows leading up to voicemails or callbacks. Now, analytics for voicemails and direct callback actions for overflows will give supervisors insights into these overflow actions and help them plan efficiently.

Feature details

The new metrics for overflow actions help in the following ways:

- **Voicemails**:
  - Voicemail left during business hours vs. outside-of-business hours.
  - Voicemail left for individual or group.
  - Time to voicemail assign: The time taken by the system to assign the voicemail to a service rep after the voicemail was created.
  - Time to voicemail close: The time taken by the service rep to address the voicemail after it was created.
  - Open voicemail trend: Cumulative per timeframe.
  - Filter out empty voicemails and count them as abandoned calls.

- **Direct callback and general overflow actions**:
  - List conversations with overflow action of any type that triggered direct callback.
  - Identify the overflow condition that's triggered, before work items are queued, when work items are queued, or out of operation hours.
  - Identify the time the overflow action was triggered.
  - Identify whether the customer accepted the callback option and the time it was accepted.
  - Identify when callback was initiated by the system.
  - Identify if and when the callback notification was accepted by a service representative.

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

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Feedback

Was this page helpful? Yes No

Unified routing

Article • 01/23/2025

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

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

Feedback

Was this page helpful? Yes No

Enable blocking of capacity for consulted conversations

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

By enabling blocking of capacity, businesses can prevent overbooking of service representatives. This feature improves resource management, reduces the risk of service representatives being overburdened, and enhances overall efficiency and customer satisfaction.

Feature details

The key capabilities of this feature are as follows:

- Administrators can enable the option to block capacity for messaging and voice channels in the work distribution settings of the corresponding workstreams.
- The presence of service representatives is automatically updated when they are engaged in consult conversations.
- The capacity is automatically released when the consult session ends or the representative leaves the consult conversation.

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

Feedback

Enable direct transfer of conversations

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

- Administrators can enable direct transfer of conversations.
- Service representatives can transfer conversations to other representatives within their queue or other queues without the need to consult first.

Feedback

Was this page helpful? Yes No

Route to least active service reps in messaging channels

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

By routing work items to the least active service representatives, admins ensure that the customer service representatives aren't over-burdened with consecutive messaging assignments. This allows service representatives to be well-rested before new work is assigned, ensuring a higher customer-satisfaction score and handling times.

Feature details

The least active assignment method is available out of the box. Administrators can now use the least active setting in the messaging queues as an assignment method so that service representatives with the lowest number of active conversations will be prioritized first. If all representatives have the same number of active conversations, the representative with the oldest capacity release time is prioritized. The admins can also use the least active method as an ordering attribute in custom assignment rules.

Feedback

Was this page helpful? Yes No

Select a representative automatically in consult to queue

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Service representatives can now seamlessly consult with the best service representative who is automatically suggested in the queue. Representatives can save time that they spend in manual selection of a consultee and have better conversation handling time to enhance the overall customer experience.

Feature details

The key capabilities of automatic selection of a service representative for consult in a queue are as follows:

- Administrators can enable consult to queue for the messaging and voice channels.
- Service representatives can select a queue for consult when they are unsure of finding the appropriate representative to consult.
- The system automatically assigns a consult representative based on the conversation context.

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

Feedback

Was this page helpful? Yes No

Use first in, first out order based on interaction times

Article • 01/23/2025

ⓘ Important

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

Expand table

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

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 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 of the custom prioritization rule.

Feedback

Was this page helpful? Yes No

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

Article • 01/23/2025

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

Overview

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 2025 release wave 1, we bring the next generation of Copilot-first, modern, task-oriented experiences across all Field Service personas and app areas.

- Copilot brings inspections to the next level by automatically generating inspections from existing templates, and empowering frontline workers to perform inspections with a Copilot-first experience.
- Schedulers can use Copilot to get insights and to take action with our new scheduling agent that optimizes the schedules for frontline workers.
- Frontline workers and managers can use Copilot to quickly get key information and complete tasks.

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

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.

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. The Scheduling Optimization Agent that lets you schedule frontline workers is now easier to use than ever.

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.

Helpful links	Description
Product trials	Get started with Field Service.

ⓘ **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 Field Service

Article • 01/23/2025

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

For a list of the previous wave's release plans, go to 2024 release wave 2 plan.

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

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

Boost technician productivity

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Access online data with your offline-first application	Users by admins, makers, or analysts	✔ Sep 13, 2024	-	Apr 2025
Select table columns to include in mobile offline sync	Admins, makers, marketers, or analysts, automatically	✔ Jun 18, 2024	-	Apr 2025

Optimize resource scheduling

Dynamics 365 Field Service resource scheduling features include key enhancements with agentic, manual, and automated scheduling.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Improve schedule board usability and performance	Users by admins, makers, or analysts	-	-	Apr 2025
Optimize schedules with Scheduling Operations Agent	Users by admins, makers, or analysts	Mar 2025	-	Sep 2025
Improve schedule assistant matching across locations	Users by admins, makers, or analysts	-	-	Apr 2025

You are able to opt into some features as part of early access on February 3, 2025, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
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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 • 01/23/2025

ⓘ Important

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

Service technicians and frontline workers are the 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.

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Feedback

Was this page helpful? Yes No

Access online data with your offline-first application

Article • 01/23/2025

ⓘ Important

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Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Sep 13, 2024	-	Apr 2025

Business value

Frontline workers face variable network conditions while working on remote job sites. They need a reliable offline-enabled application that can work seamlessly with or without network connectivity. By using the offline-enabled Field Service mobile application, data the technicians can access is limited by the mobile offline profile configured for their environment.

However, the unpredictable nature of frontline workers' day-to-day activities often requires broader data access than what is defined in their mobile offline profile. With this feature, frontline workers can access online data when the network is available, giving them full access to the data stored in Dataverse.

Feature details

When frontline workers have network access with their mobile device, they can choose to switch the application to online mode, giving them access to Dataverse data in the cloud.

- Users can switch between online and offline-first mode.
- Devices automatically switch back to offline-first mode when the network connectivity is lost.

- A sync icon indicates the application mode for users at a glance.

Additional resources

Configure offline data synchronization (docs)

Feedback

Was this page helpful? Yes No

Select table columns to include in mobile offline sync

Article • 01/23/2025

ⓘ Important

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Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jun 18, 2024	-	Apr 2025

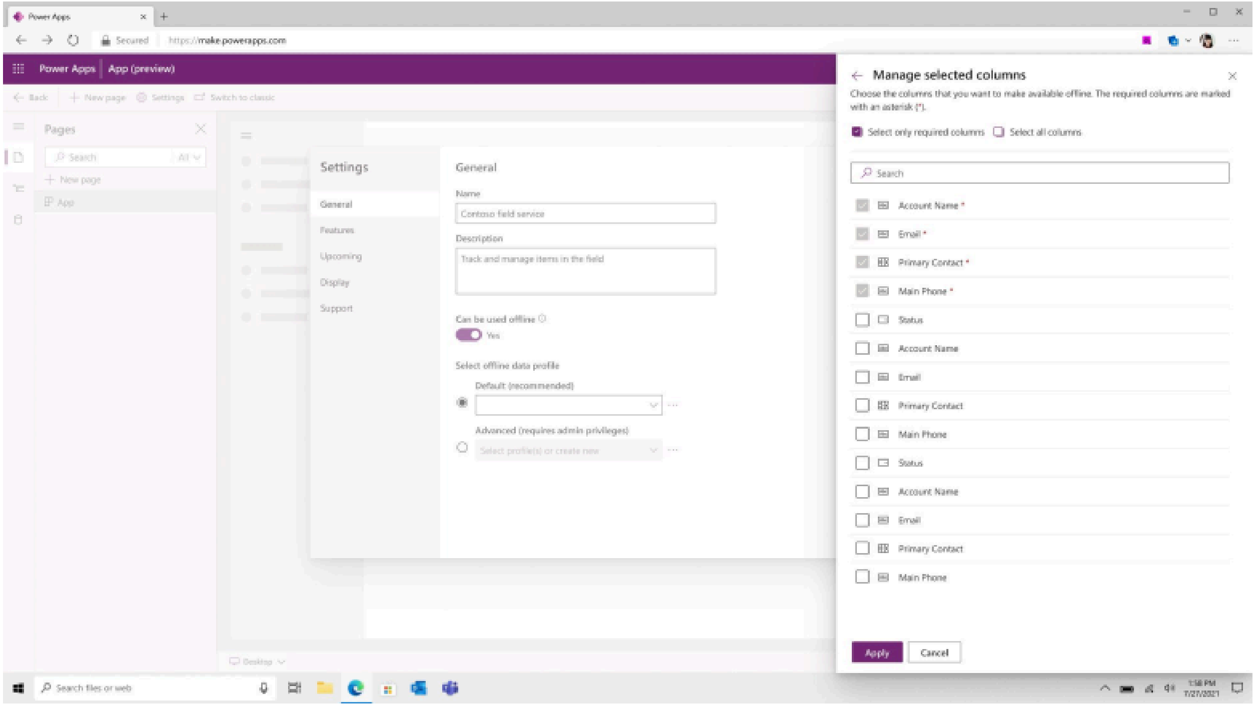
Business value

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.



Additional resources

Optimize columns included within the offline profile (docs)

Feedback

Was this page helpful? Yes No

Optimize resource scheduling

Article • 01/23/2025

ⓘ Important

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

Resource management and scheduling optimization are 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. The Scheduling Optimization Agent that lets you schedule frontline workers is now easier to use than ever.

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

Feedback

Was this page helpful? Yes No

Improve schedule assistant matching across locations

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

This feature allows businesses to efficiently match resources with requirements on a calendar day basis, without requiring precise time slot matches as typically demanded by schedule assistant. Companies can ensure that projects across different locations are staffed with the best available resources worldwide, improving project delivery times and overall customer satisfaction.

Feature details

The schedule assistant feature can efficiently match resources with requirements. However, it can be challenging to find matches between resources and requirements across different time zones and locations. This feature solves this geolocation problem with two powerful new capabilities:

- **Time zone-agnostic matching**: Resources and requirements can be matched based on relative availability, regardless of their respective time zones. For example, if a resource works from 9 AM to 5 PM in their local time, they can be matched with a requirement that spans 9 AM to 5 PM in their local time, even if the resource and requirement are in different geolocations.

- **Day-based matching**: Resources and requirements can be matched based on the availability of work hours within the same calendar day, even if the exact hours do not align perfectly. For example, a resource working from 9 AM to 5 PM can be matched with a requirement from 12 PM to 8 PM on the same day.

With this new feature, organizations can overcome the challenges of managing resources across different geolocations, ensuring that projects are staffed efficiently and effectively.

Feedback

Improve schedule board usability and performance

Article • 01/23/2025

ⓘ Important

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Expand table

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

Business value

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

Feature details

We've encountered issues with the updated schedule board that we recently released. As a result, we are temporarily disabling the updated board to address these issues before reenabling. We are fully committed to delivering this update and will communicate our plans to roll it out once the issues have been resolved. In the meantime, the board will revert back to its prior functionality. If you have manually installed Universal Resource Scheduling solution version 3.12.144.84, we will remotely disable the update with no further action required on your end. If you are on any other prior version of the Universal Resource Scheduling solution, there will be no change to your schedule board.

- **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.

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

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Feedback

Was this page helpful? Yes No

Optimize schedules with Scheduling Operations Agent

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

In this release, the Scheduling Operations Agent for Dynamics 365 Field Service enables dispatchers to quickly and easily optimize schedules for technicians as conditions change throughout the workday, significantly improving their productivity. Dispatchers can ask Copilot to optimize and address issues such as traffic delays, double bookings, or last-minute cancellations that often result in conflicts, gaps, or idle time in a technician's schedule. You can instruct Copilot to achieve the desired business objective, such as to maximize technician usage or work order priority while also considering factors like skillset match, territories, and promised time windows.

Feature details

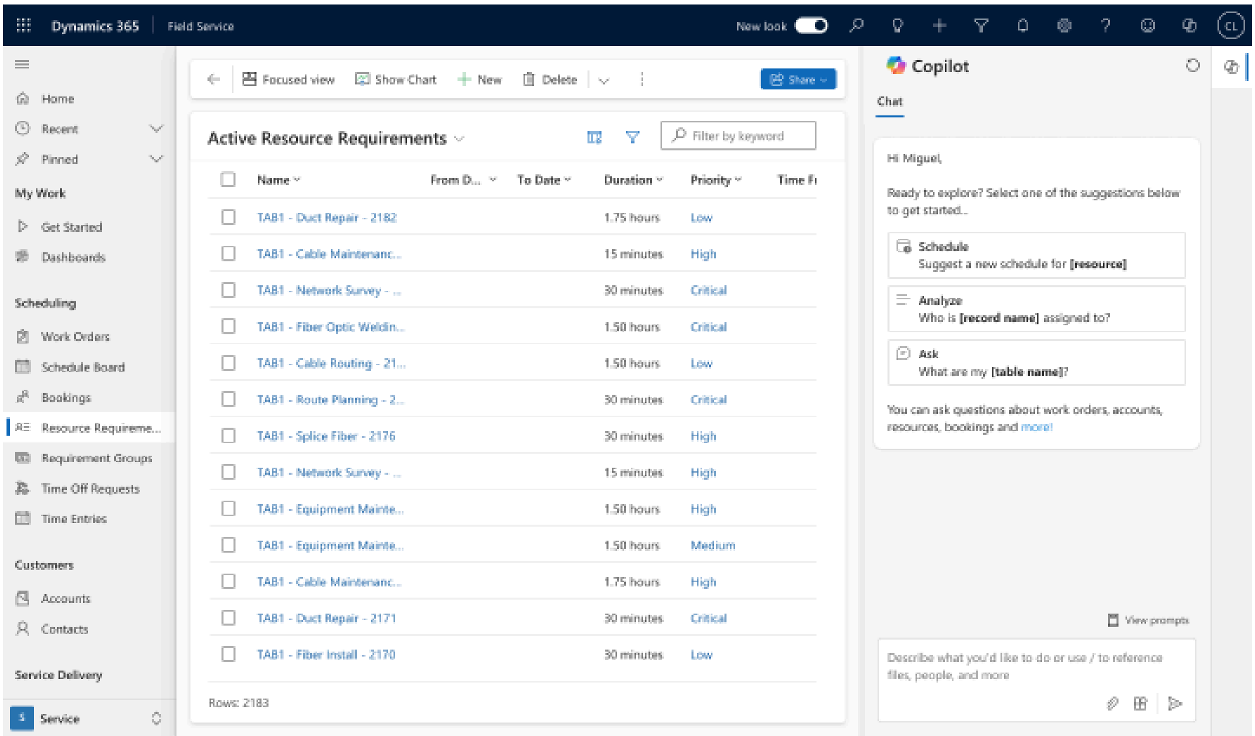
Dispatchers often spend a considerable amount of time and energy to review and adjust each technician's schedule as conditions change throughout the workday:

- A technician has one or more cancellations in the afternoon. What would be the most optimal requirements to use to fill the open slots, so that promise windows are kept and high-priority work is preferred and is located around the same neighborhoods that the technician is due to travel to?
- A technician is running over the planned time for the current booking and as a result they will be late for the next booking and the delay might cascade to

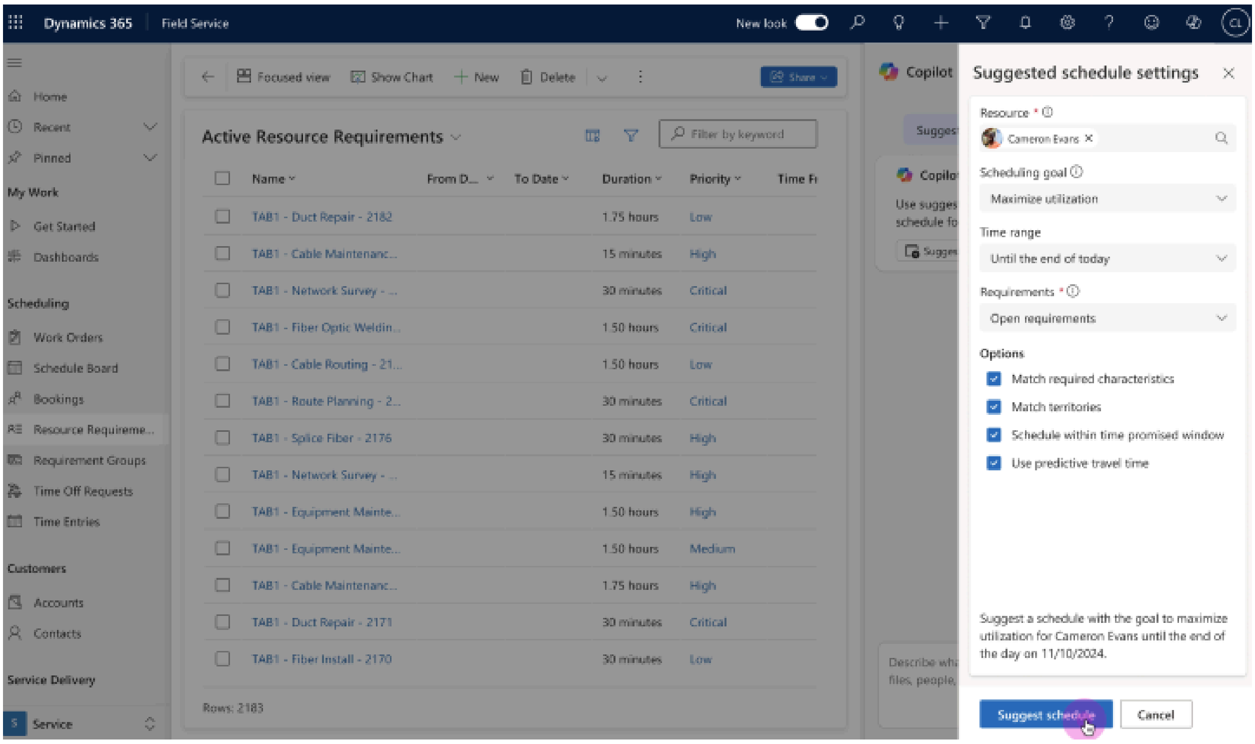
subsequent bookings. How best to adjust the bookings for the remainder of the day?

- A technician recovered from illness sooner than expected and is now available for work earlier than planned. What would be the best way to schedule work for them when they return?
- A technician's schedule appears to contain a lot of low-priority work that isn't due for weeks. How best to improve the schedule with work that better meets desired business goals?
- A technician's schedule for the day has been built manually or with the schedule assistant. What would be the best way to rearrange the schedule so that the resource's travel time is reduced?

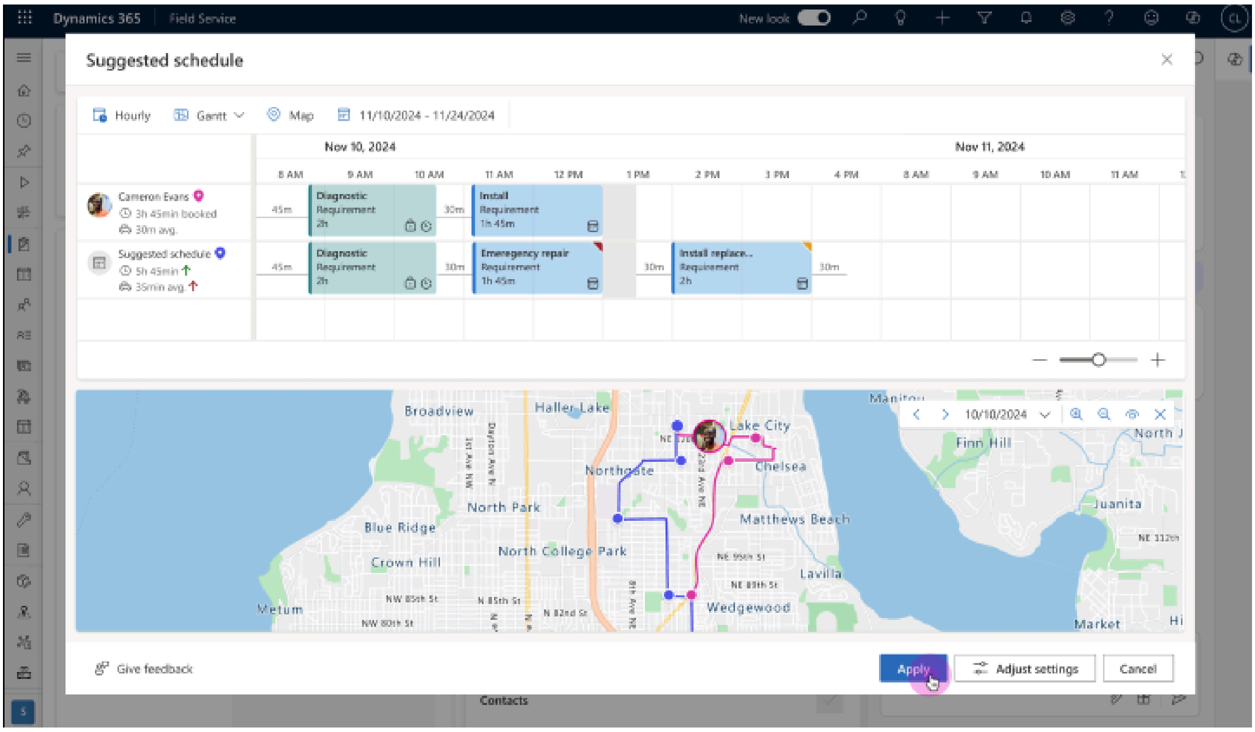
In each case, the dispatcher has to carefully assess the situation, determine which business goals apply, and then proceed to update the schedule manually, one booking at a time.



With this release of the Scheduling Operations Agent, dispatchers can just ask Copilot to provide the best schedule for the affected technician. Within seconds, the dispatcher gets a suggested schedule for review, and can apply the updates.



Copilot can be directed to optimize for the desired business goal, such as to maximize technician usage or work order priority. It can intelligently choose among existing bookings and new unfulfilled work orders based on factors like skillset match, territories, and customer promise windows. Users can access the feature from the Copilot side pane anywhere within the Dynamics 365 Field Service application.



Geographic areas

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

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

Feedback

Was this page helpful? Yes No

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

Article • 01/23/2025

ⓘ **Important**

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

Overview

https://aka.ms/ReleaseHighlight/2025W1/Finance

Finance continues to be a strategic leader in an organization's growth plan, and a key aspect is gaining competitive advantage by leaning in on how AI can transform not only the productivity of an organization, but the ability to view deep insights on data for faster decision-making. We continue to strengthen our autonomous financial application goals by bringing additional copilot and agentic capabilities to customers, while strengthening the core offering setting the foundation for end-to-end automation and copilot experiences.

In this release, we continue our preview of the account reconciliation agent, moving this process from end of period to a systematic, real-time experience. We are also introducing a new journal framework, bringing additional control, hyper-scale and multicompany capabilities to both the entry and import experience. Modern bank reconciliation and automation continue to be enhanced to reach deeper capabilities based on user feedback. In globalization, we continue expanding our out-of-the-box localizations with releases for Türkiye and Argentina, ensure the system stays up to date with evolving electronic invoicing, tax reporting, and other legislations, while also enhancing tax automation capabilities.

Business performance analytics introduces increased data fresh and extensibility capabilities, and business performance planning provides intelligent actions and templates for quickly starting with the continuous planning process.

Features and user experience enhancements are designed with copilot first experience, using copilot to gain deep insights across documents in the application, gain insights into fixed assets book, help with increasing automation in bank reconciliation, and reduce the manual work involved in managing taxes and applying regulatory updates.

Investment areas

Business performance

The business performance suite of capabilities brings together analytics, planning, and insights as an extensible solution on a single platform to continuously plan, act, and analyze your financial and operational data. Features in business performance showcase our enhancements around Business performance planning and business performance analytics.

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 let users 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

Our solution is used by customers in over 210 countries and regions to meet various tax compliance and local requirements (localizations). We offer out-of-the-box localizations and continuous regulatory updates for multiple countries and regions, available in multiple languages. Our no-code/low-code Globalization Studio services automate complex tax scenarios, enabling partners and customers to easily extend localizations.

We are investing in expanding out-of-the-box country coverage, automating continuous regulatory updates, and reducing the manual efforts involved in managing taxes.

To follow our planned and released regulatory updates, visit Search for country-specific regulatory updates.

For more information on Globalization Studio, visit 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 • 01/23/2025

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

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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
Put planning into action using outlier detection	Users, automatically	Jun 2025	-
Start planning quickly with template solutions	Users, automatically	-	Jun 2025
Empower users with generative help and guidance	Users, automatically	✔ Aug 30, 2024	Apr 2025
Create dimensions and cubes using copilot in business performance planning	Users, automatically	Apr 2025	-
Refresh data frequently in Business performance analytics	Users by admins, makers, or analysts	Feb 2025	Apr 2025

Feature	Enabled for	Public preview	General availability
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	Jul 2025	Sep 2025
Streamline Dynamics 365 finance and operations integration	Users, automatically	May 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
Experience immersive homepage and Copilot for AP clerks	Users by admins, makers, or analysts	Jun 2025	-
Summarize fixed asset book with Copilot	Users by admins, makers, or analysts	Jul 2025	-
Search documents using natural language in document explorer	Users, automatically	Jul 2025	-

Core financials

Automation, AI, and enhancements to core financials.

Expand table

Feature	Enabled for	Public preview	General availability
Cancel customer payment journals from bank reconciliation worksheet	Users by admins, makers, or analysts	Apr 2025	Jul 2025
Preview automatic bank reconciliation matching results	Users by admins, makers, or analysts	Jul 2025	Sep 2025

Feature	Enabled for	Public preview	General availability
Generate one journal for multiple vendor payment lines	Users by admins, makers, or analysts	Jul 2025	Sep 2025
Further bank reconciliation report enhancements	Users by admins, makers, or analysts	-	Apr 2025
Reconciliation matching rules data entity improvements	Users by admins, makers, or analysts	-	Aug 2025
Improve bank account lifecycle management	Users by admins, makers, or analysts	✔ Jul 31, 2024	Jun 2025
New Ledger account only journal using new journal framework	Users by admins, makers, or analysts	Jul 2025	Sep 2025
Expand the use of financial tags	Users, automatically	-	Sep 2025
Split fixed assets	Users by admins, makers, or analysts	Jul 2025	Sep 2025
Transfer fixed assets between legal entities	Users by admins, makers, or analysts	Jul 2025	Sep 2025
Use agents for recommended actions on Account reconciliation agent workspace	Users by admins, makers, or analysts	Apr 2025	-
Get greater budget control for multiple account structures	Users by admins, makers, or analysts	Aug 2025	Sep 2025
Optimize user security configurations and licensing costs	Users, automatically	Jan 2025	Jul 2025
View cross-company transactional data using accounting source explorer	Users by admins, makers, or analysts	-	Sep 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 210 countries/regions.

Expand table

Feature	Enabled for	Public preview	General availability
Comply with e-invoicing requirements in Poland	Users by admins, makers, or analysts	-	Sep 2025
Update to OIOUBL format 3.0 for electronic invoicing in Denmark	Users by admins, makers, or analysts	-	Sep 2025
Convert Excel business documents to PDF locally	Users by admins, makers, or analysts	Apr 2025	Oct 2025
Expand country coverage to Türkiye	Users by admins, makers, or analysts	Apr 2025	-
Access electronic invoicing phased rollout in Belgium	Users by admins, makers, or analysts	-	Sep 2025
Use the enhanced Poland JPK KR PD annual regulatory report	Users, automatically	Apr 2025	Oct 2025
Extend support for multiple tax registration numbers in tax reporting	Users by admins, makers, or analysts	-	Apr 2025
Use the security enhancements in UK MTD VAT integration	Users by admins, makers, or analysts	Apr 2025	Apr 2025
Automate tax feature creation based on tax master data	Users, automatically	Jul 2025	Oct 2025
Use electronic invoicing in Bolivia	Users by admins, makers, or analysts	-	May 2025

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Feedback

Was this page helpful? Yes No

Business performance

Article • 01/23/2025

ⓘ Important

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Feedback

Was this page helpful? Yes No

Create dimensions and cubes using copilot in business performance planning

Article • 01/23/2025

ⓘ Important

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Expand table

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

Business value

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

Feature details

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

Feedback

Was this page helpful? Yes No

Empower users with generative help and guidance

Article • 01/23/2025

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Aug 30, 2024	Apr 2025

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 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 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.

Additional resources

Generative help and guidance (docs)

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

Feedback

Was this page helpful? Yes No

Get support for multiple languages in Business performance analytics

Article • 01/23/2025

ⓘ Important

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Expand table

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

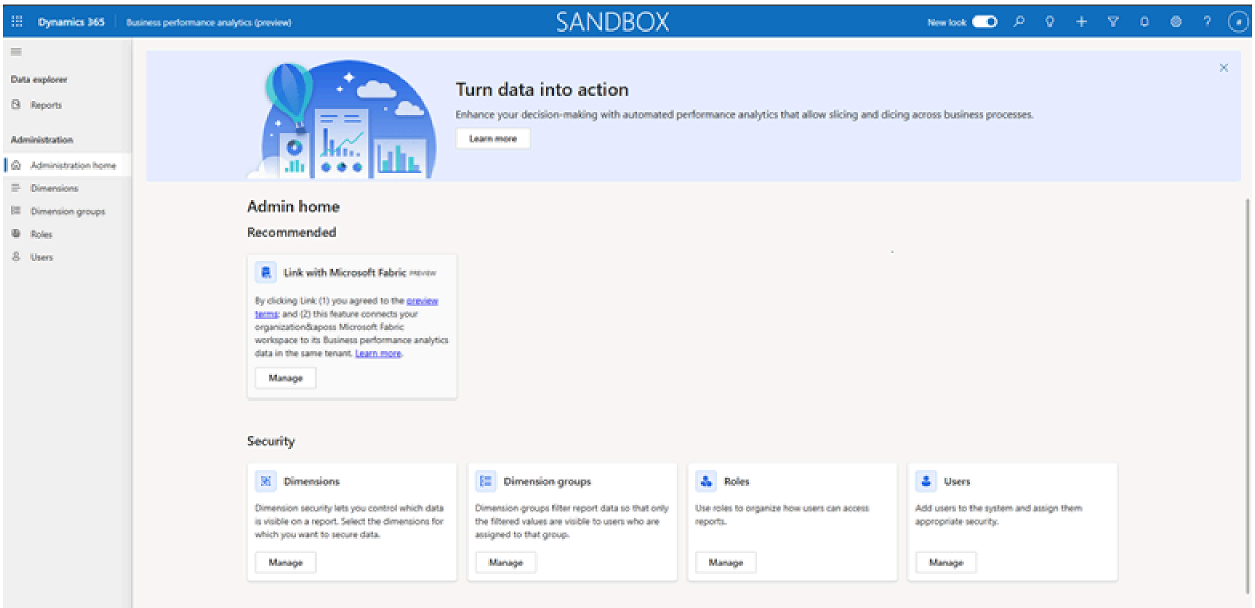
Business value

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 the reach and effectiveness of Business performance analytics.



Feedback

Was this page helpful? Yes No

Put planning into action using outlier detection

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Organizations can streamline their planning process with outlier detection, 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.

Using algorithms for outlier detection or for forecasting, businesses can have a more reliable plan. By automating these planning actions and creating new scenarios and reports, companies can save time by eliminating manual processes. Automating the full plan to act to analyze process is possible with the business performance capabilities, Power Automate, and Dynamics 365 Finance.

This feature will provide:

- Visualization of outliers
- Ability to exclude outliers from planning scenario

Feedback

Was this page helpful? Yes No

Refresh data frequently in Business performance analytics

Article • 01/23/2025

ⓘ Important

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

Expand table

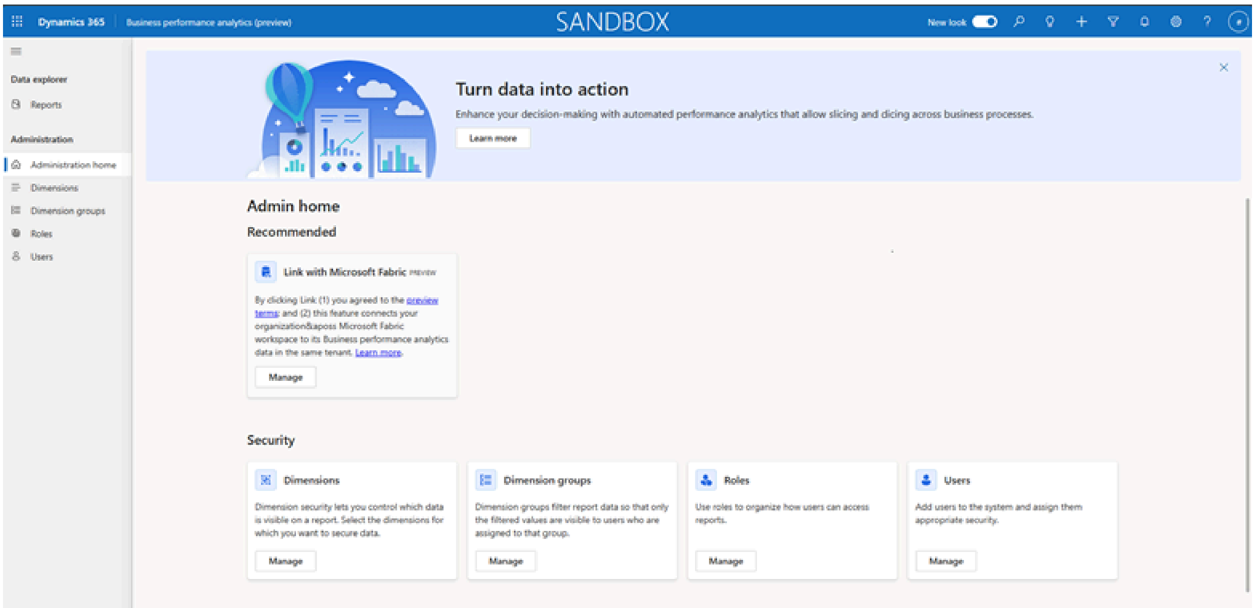
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2025	Apr 2025

Business value

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

Feature details

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



Feedback

Was this page helpful? Yes No

Start planning quickly with template solutions

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	-	Jun 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.

This feature provides the ability to import and export a Business performance planning data model (cube and dimension) from one environment to another.

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

Feedback

Was this page helpful? Yes No

Streamline Dynamics 365 finance and operations integration

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Streamlining access to Dynamics 365 Finance data with Business performance planning provides the following benefits:

- Boost efficiency: You save time by cutting down on manual data entry, letting you dive straight into the analysis that matters.
- Improved accuracy: With direct integration, your planning uses the latest financial data, so you can trust your numbers.
- Smooth experience: A unified platform means a consistent, user-friendly experience, making your tools easier to use.
- Real-time insights: You get up-to-date financial info, helping you make quick, informed decisions.
- Cut costs: Fewer systems mean lower maintenance and training costs, putting money back in your pocket.
- Strategic edge: Using integrated data for planning gives you an advantage, helping you spot trends and opportunities first.

This feature turns financial planning into a more efficient, accurate, and strategic process, driving better business outcomes for you.

Feature details

The integration between Business performance planning and Business performance analytics enhances financial planning, forecasting, and operational efficiency by providing a seamless connection between Business performance planning and Dynamics 365 finance and operations. This feature allows you to leverage analytical tables built by Business performance analytics, enabling better decision-making and agility in planning. The integration addresses key challenges such as data inconsistencies, lack of direct data import methods, unfriendly table names, and performance issues. By simplifying the process and using AI to assist in building and planning data models, this integration helps you make timely, data-driven decisions and improves the overall user experience.

- Allow users to access the Business performance analytical tables.
- Pick and choose the tables you need to start planning.
- Perform transformation (such as Group By, Filter) on those tables before importing into Dataverse.

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

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Feedback

Use managed extensibility of data models

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

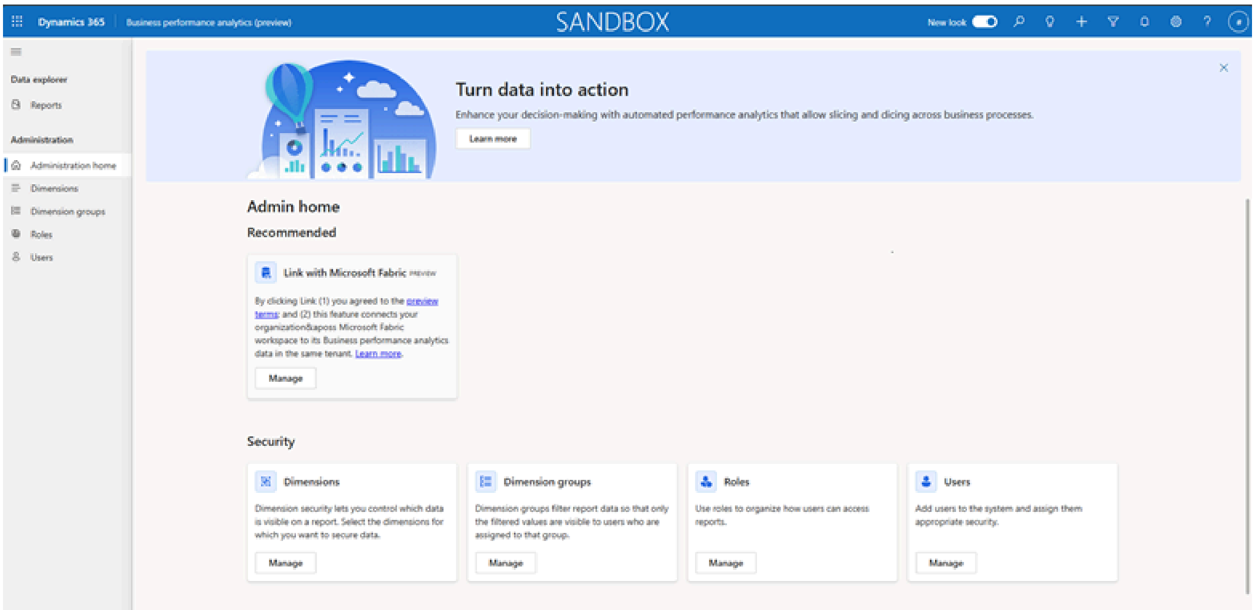
The managed extensibility of data models in Business performance analytics significantly enhances its business value by offering customers the flexibility to seamlessly integrate data from Dynamics 365 extensions and proprietary sources.

This feature allows for a more comprehensive and customized data analysis, ensuring that all relevant information is included in decision-making processes. By enabling easy integration of additional data, businesses can achieve deeper insights, improved accuracy in reporting, and tailored analytics that meet specific business needs. This adaptability drives better strategic planning, operational efficiency, and supports continuous growth and innovation.

Feature details

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

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



Feedback

Was this page helpful? Yes No

Copilot

Article • 01/23/2025

ⓘ Important

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

Copilot 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 let users spend time on more value-added activities.

Feedback

Was this page helpful? Yes No

Experience immersive homepage and Copilot for AP clerks

Article • 01/23/2025

ⓘ Important

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

Expand table

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

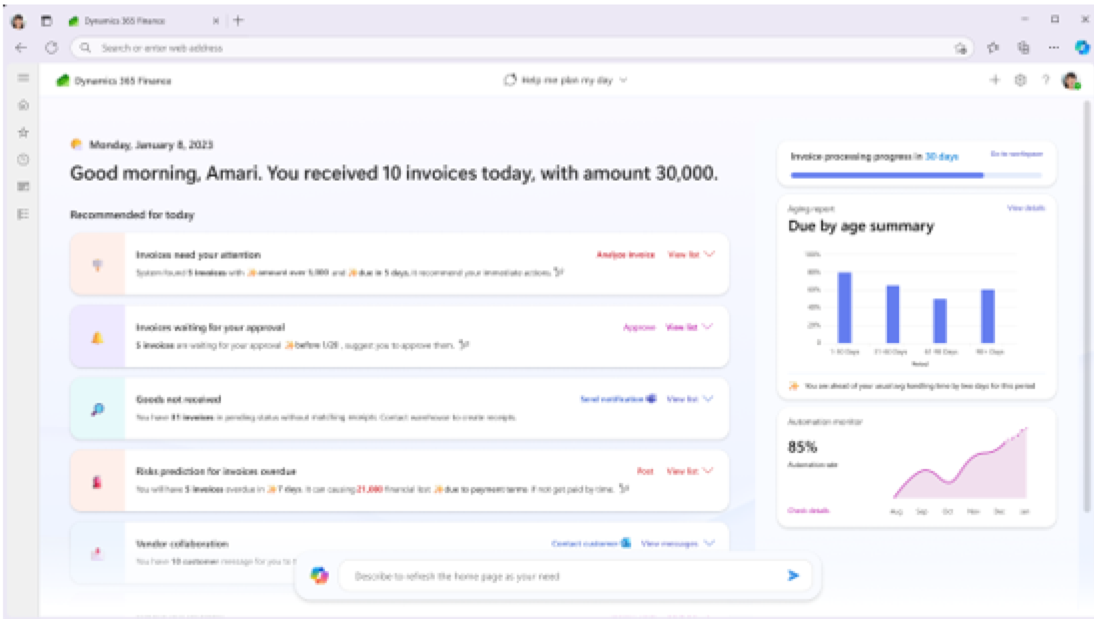
Business value

New immersive homepages and redesigned workspaces help accounts payable (AP) clerks 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 clerks to more efficiently handle AP tasks and shift effort to more value-added, strategical work.

Feature details

The central immersive homepage for AP clerks 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

Search documents using natural language in document explorer

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Dynamics 365 finance and operations offers comprehensive document tracking for the entire business process. For example, in the order-to-cash workflow, key documents include sales agreements, sales orders, packing slips, customer invoices, collection letters, and customer payments. The **Document explorer** workspace lets users search documents using natural language, view end-to-end document relationships, and display documents across legal entities without needing to switch contexts. These enhanced capabilities offer a more seamless and efficient experience.

Feature details

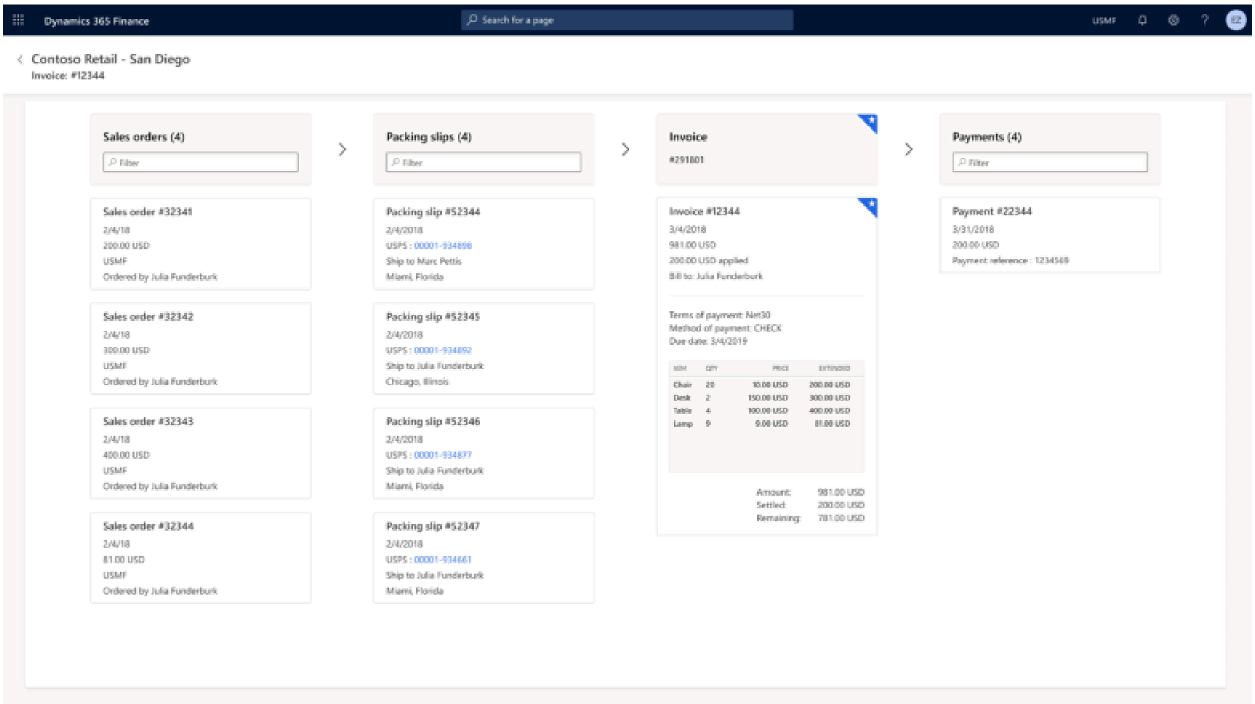
The new **Document explorer** workspace enhances document management with these powerful capabilities:

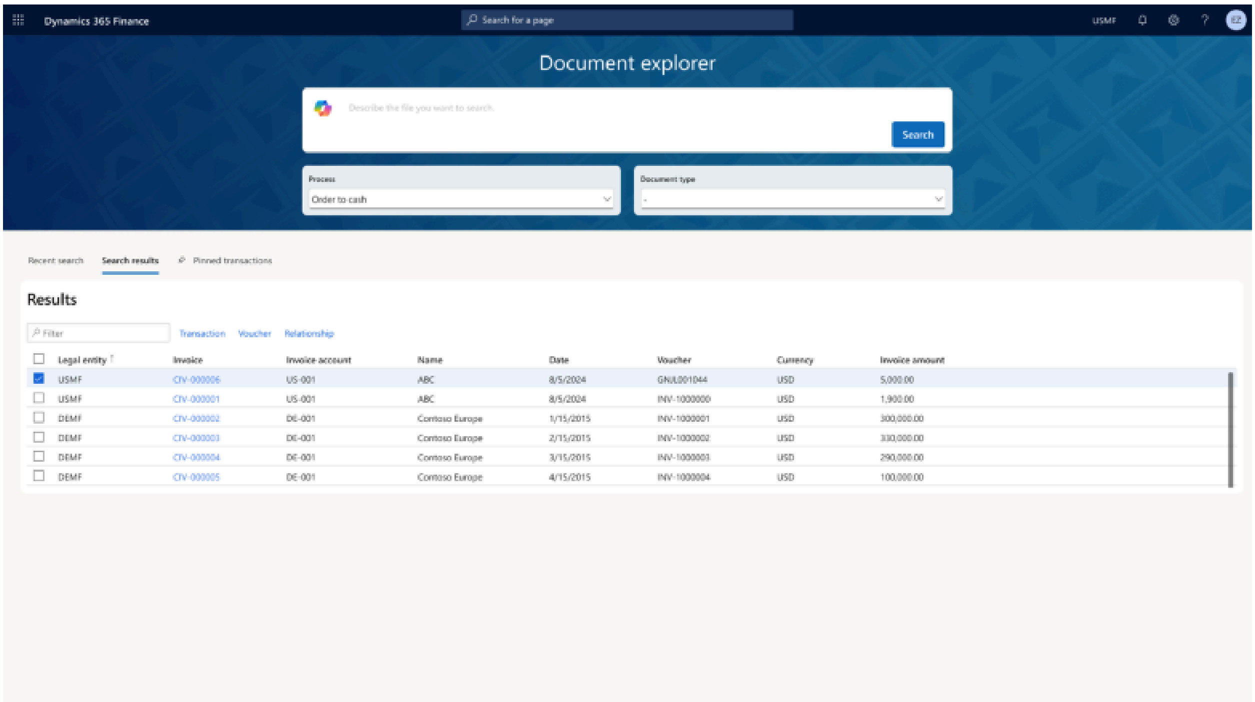
- Natural language document search.
- Document search across legal entities.
- End-to-end document relationship views.

In public preview, the following modules and documents are supported:

- **Accounts Payable**: Purchase orders, product receipts, vendor invoices, vendor payments.

- **Accounts Receivable**: Sales orders, packing slips, customer invoices, customer payments.
- **Cash and Bank Management**: Bank statements.





Feedback

Was this page helpful? Yes No

Summarize fixed asset book with Copilot

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Fixed asset book summaries with Copilot provide a quick overview of the most important information related to a selected fixed asset book. By pulling data from actual posted transactions, Copilot presents essential details—like acquisition cost, depreciation, and net book value—without the need to manually dig through reports. The summaries are designed to fit seamlessly into your daily workflows, helping you make informed decisions faster and manage your assets more effectively.

Feature details

The **Asset book** page now includes a **Summary by Copilot** FastTab that summarizes the currently selected asset book and shows status on the asset historical transactions and insights about the asset future.

Copilot offers an overview of fixed assets, including acquisition dates, service dates, and initial acquisition costs. It summarizes acquisition adjustments, write-ups/downs, and total accumulated depreciation, calculating the net book value (NBV). Additionally, it provides future-focused insights, such as remaining depreciation periods, upcoming depreciation periods reminders, and disposal considerations based on the asset book's depreciation method and service life.

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

Feedback

Was this page helpful? Yes No

Core financials

Article • 01/23/2025

ⓘ Important

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

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

Get greater budget control for multiple account structures

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

The current budget control functionality supports one account structure that could be a limitation in order to address the customer needs for budget control. By having budget control across different account structures, organizations will be able to gain a more detailed and comprehensive view of their financial health, allow for better tracking and management of expenses and revenues across the organization, and gain greater flexibility in financial reporting and analysis.

Feature details

The solution for enhanced budget control management in Dynamics 365 Finance offers the option to select multiple account structures during budget control configuration. The solution introduces flexibility and enhances process flow for customers who are using multiple account structures in their organization.

Planned improvements in this area allow more precise budget control on various levels, as well as enhanced reporting opportunities. Budget control for multiple account structures in Dynamics 365 Finance include the following capabilities:

- Option to select several account structures during budget control configuration.
- Allow budget dimension rule flexibility.

- Improved budget control reporting.

Feedback

Was this page helpful? Yes No

Cancel customer payment journals from bank reconciliation worksheet

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

The **Cancel customer payment journals from bank reconciliation worksheet** feature allows users to reverse posted customer payments directly from the bank reconciliation worksheet. This feature will minimize errors in financial records, streamline the process of managing customer payments, saving time and effort for financial teams, and disables unmatched actions for generated payment-related statements. This will ensure more accurate financial reporting. The functionality provides better control over customer payment transactions during the bank reconciliation process.

Feature details

Advanced bank reconciliation in Dynamics 365 Finance helps businesses manage this process more efficiently. In the **Cancel customer payment journals from bank reconciliation worksheet** feature, the existing reconciliation functionality is enhanced with an option to cancel customer payment journals directly from the bank reconciliation worksheet.

Feedback

Further bank reconciliation report enhancements

Article • 01/23/2025

ⓘ Important

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

Expand table

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

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

Within this feature, the existing bank reconciliation statement report in advanced bank reconciliation is updated with the following enhancements:

- Redesigned report body to include details about trading party, trading party name, and type.
- Report body to include voucher and voucher description.

Feedback

Generate one journal for multiple vendor payment lines

Article • 01/23/2025

ⓘ Important

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

Expand table

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

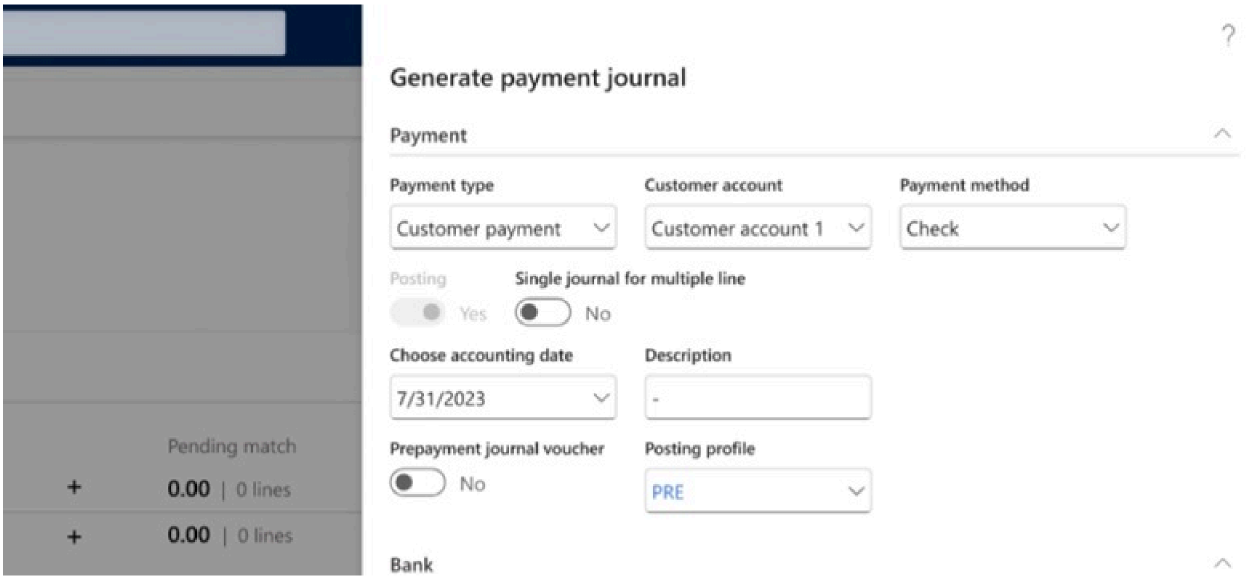
Business value

Bank reconciliation is a crucial step for businesses. This process can be time-consuming, error-prone, and labor-intensive because it requires careful matching of records, journal creation ad-hoc, and generation of reports. With this feature, the existing bank reconciliation process has been improved with an option to generate a single vendor payment journal linked to multiple payment lines during the bank reconciliation process.

Feature details

The existing advanced bank reconciliation feature is enhanced to support generation of a single vendor payment journal for multiple vendor payment lines during the bank reconciliation process. The functionality will allow users to determine the posting for the journal:

- A single payment journal per reconciliation worksheet
- A single payment journal per bank reconciliation rule
- A single payment journal for selected lines



Feedback

Was this page helpful? Yes No

Improve bank account lifecycle management

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 31, 2024	Jun 2025

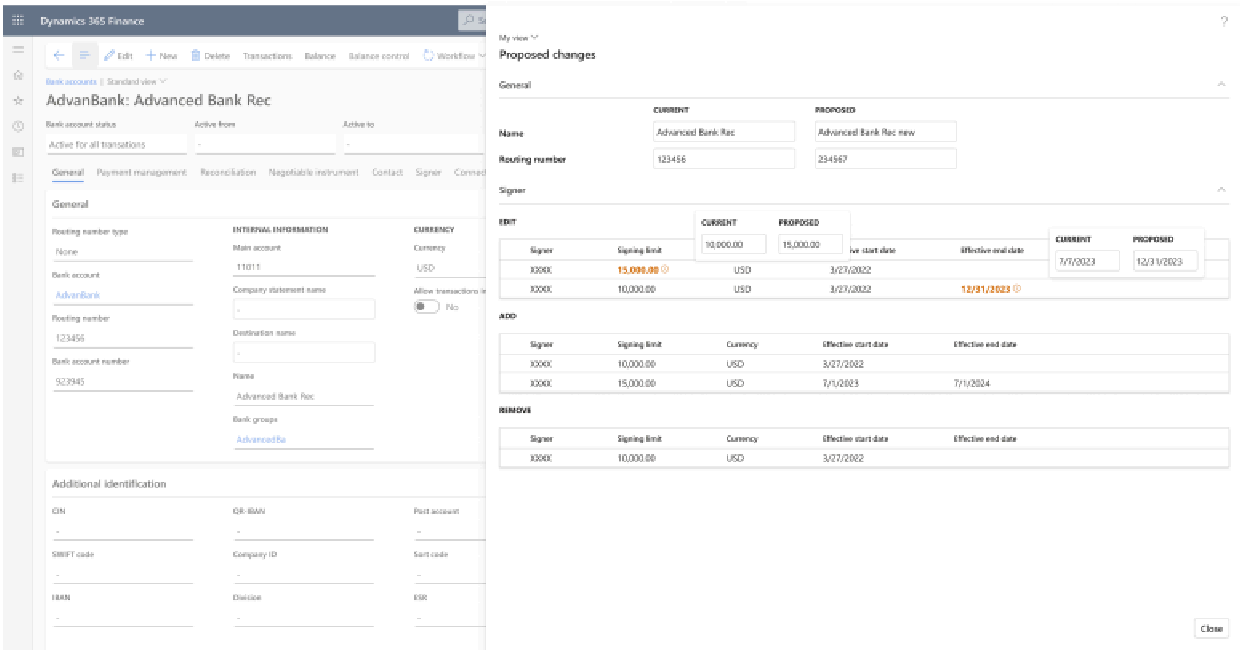
Business value

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.



Additional resources

Bank account lifecycle management (docs)

Feedback

Was this page helpful? Yes No

Expand the use of financial tags

Article • 01/23/2025

ⓘ Important

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Expand table

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

Business value

Financial tags were introduced as an alternative to financial dimensions to track transactional data. Tags are often used to track data that isn't reusable but still provides analytical context to an organization. Tags have been implemented on many transaction types and inquiries within Dynamics 365 finance and operations. Customers also need this data available within Business performance analytics and the Accounting source explorer in order to define the tags as an additional dimension for analysis.

Feature details

Financial tags are already introduced into some inquiry pages, such as the **Voucher transactions** page. This feature will introduce the financial tags into the Accounting source explorer inquiry within Finance.

In addition, we will also add the financial tags to the data model for Record to Report within Business performance analytics, making them available as dimensions for analysis.

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

Feedback

New Ledger account only journal using new journal framework

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Most organizations heavily use the financial journals, such as the general journal, vendor/customer payment journals, and vendor invoice journal. The wide use of these journals has an impact on the efficiency of daily tasks, and especially at period end. The goal of this series of features is to address the following challenges faced by users when using the financial journals:

- Unacceptable performance for importing, validation, and posting of large journals.
- No support for a 'true' global or multicompany journal, which allows entry of vouchers for different legal entities within a single journal. This is necessary to support how organizations work, which is by management of business units/regions/cost centers rather than by legal entity. -
- Transactions that can't be easily reversed due to limitations in the current design.
- Financial dimensions that don't default for the originating company when an intercompany voucher is entered on multiple lines.
- No ability to preview accounting entries prior to posting.
- Poor visibility into errors per voucher.

Feature details

The primary focus of this release is creating a new set of financial journals using the new journal framework. For this wave, we'll begin by focusing on the architecture of a new journal framework. During this phase, we are taking into consideration the goodness of the current journals while also addressing the challenges faced by finance users. For the first release of the new journal framework, we will introduce a *new* general journal that supports the following:

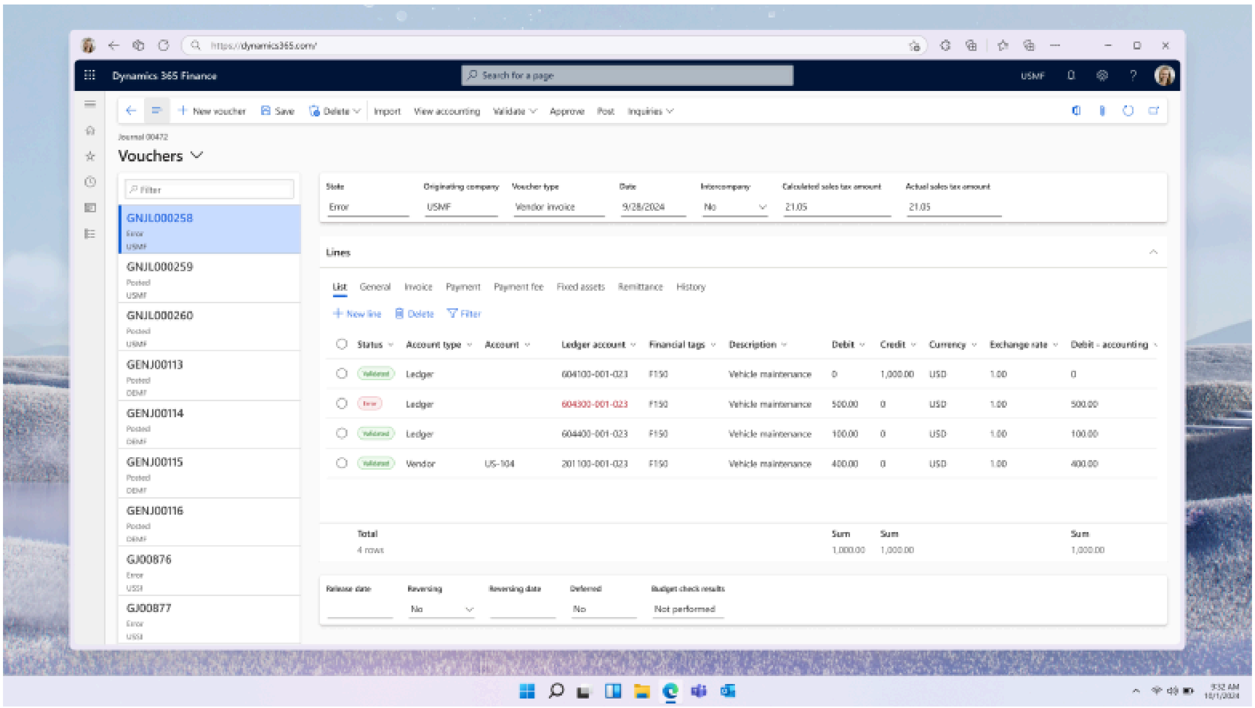
- Ledger account adjustments only (for phase 1).
- Exponentially better performance for the end-to-end process of importing, validation, and posting of vouchers/journals.
- Importing and manual entry of vouchers for multiple companies within a single journal. For example, you can create a journal and enter transactions for USMF and USSI without creating a new journal and signing in/out. This will be limited to legal entities based on your security access.
- Move processing down to the voucher level. Validation, approvals, and posting can be initiated at the journal level still, but the processing will be done at the voucher level.
- Introduction of a 'Voucher type' that is used to identify what type of transaction is being entered. This allows for better lifecycle control of each type of transaction.
- New entities for both Odata and DMF for the new general journal.

> ⓘ **Important**
>
> The existing financial journals will *not* change and will *not* be deprecated.

As the new journal framework is finalized, all financial journals will continue to evolve as follows:

- Add support for the additional account types (vendor, customer, assets, project, bank, and so on) to the general journal.
- Evaluate all other journals and determine how to create a new version of those journals using the new journal framework.
- Improve the reversal experience for all voucher types.
- Reevaluate existing functionality such as how accrual entries are posted or how periodic journal/voucher templates work.
- Address the data model issues to fix the One voucher issues.
- Evaluate the addition of new journals such as a bank transfer journal.

As new journals are introduced with the new journal framework, they will be communicated with new release plan features.


https://dynamics365.com/
Dynamics 365 Finance
Search for a page
USMF
New voucher
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View accounting
Validate
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Inquiries
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Voucher type
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Date
9/28/2024
Intercompany
No
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Invoice
Payment
Payment fee
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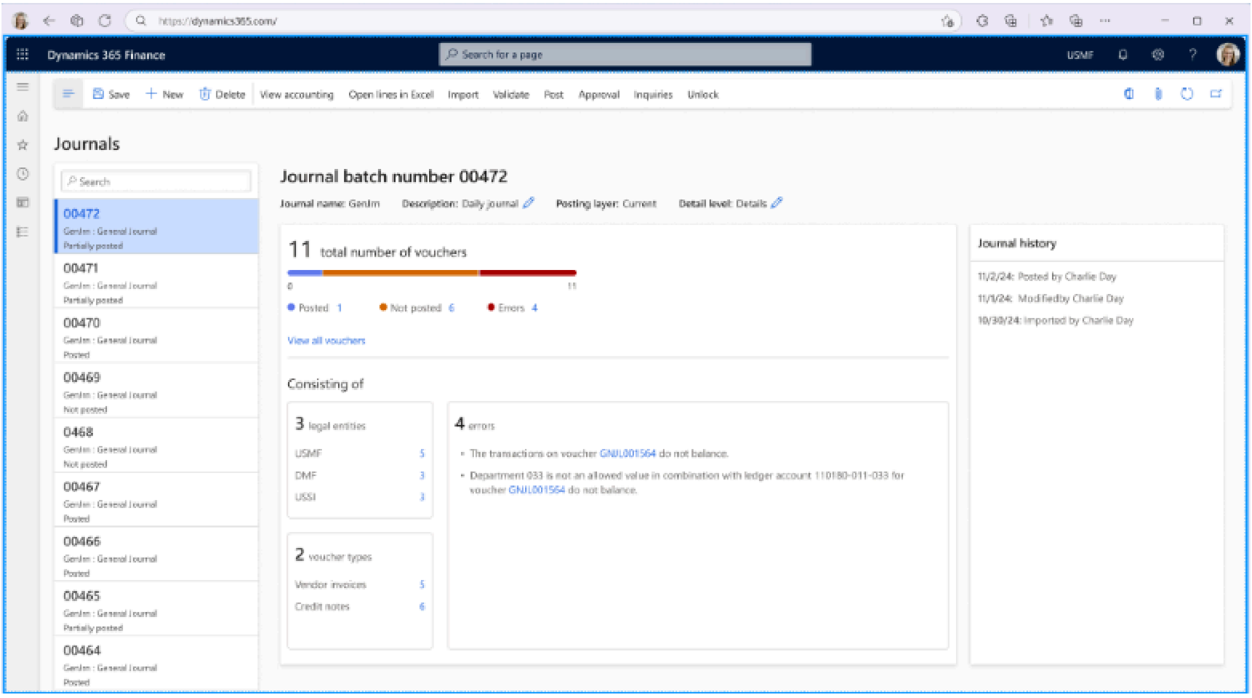
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View accounting
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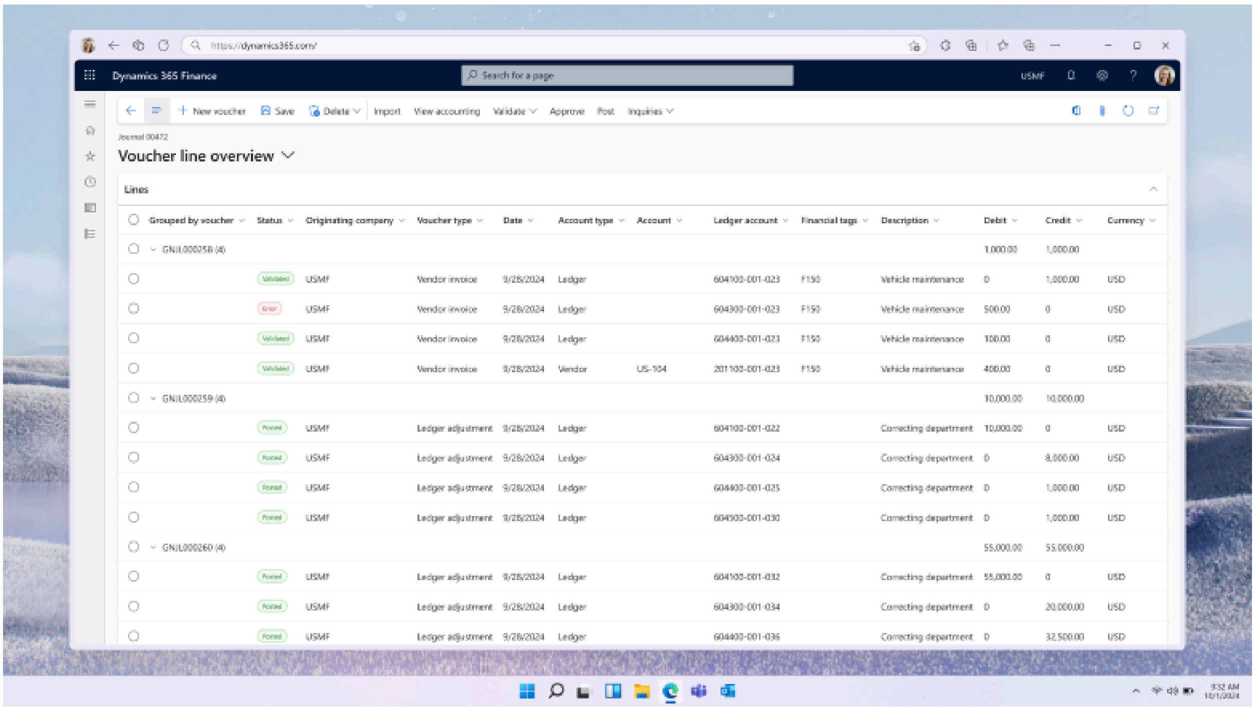
Partially posted
00464
GenJrn : General Journal
Posted
Journal batch number 00472
Journal name: GenJrn
Description: Daily journal
Posting layer: Current
Detail level: Details
11 total number of vouchers
0
11
Posted 1
Not posted 6
Errors 4
View all vouchers
Consisting of
3 legal entities
USMF 5
DMF 3
USSI 3
2 voucher types
Vendor invoices 5
Credit notes 6
4 errors
The transactions on voucher GNJL001564 do not balance.
Department 033 is not an allowed value in combination with ledger account 110180-011-033 for voucher GNJL001564 do not balance.
Journal history
11/2/24: Posted by Charlie Day
11/1/24: Modified by Charlie Day
10/30/24: Imported by Charlie Day



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

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Feedback

Was this page helpful? Yes No

Optimize user security configurations and licensing costs

Article • 01/23/2025

ⓘ Important

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

Expand table

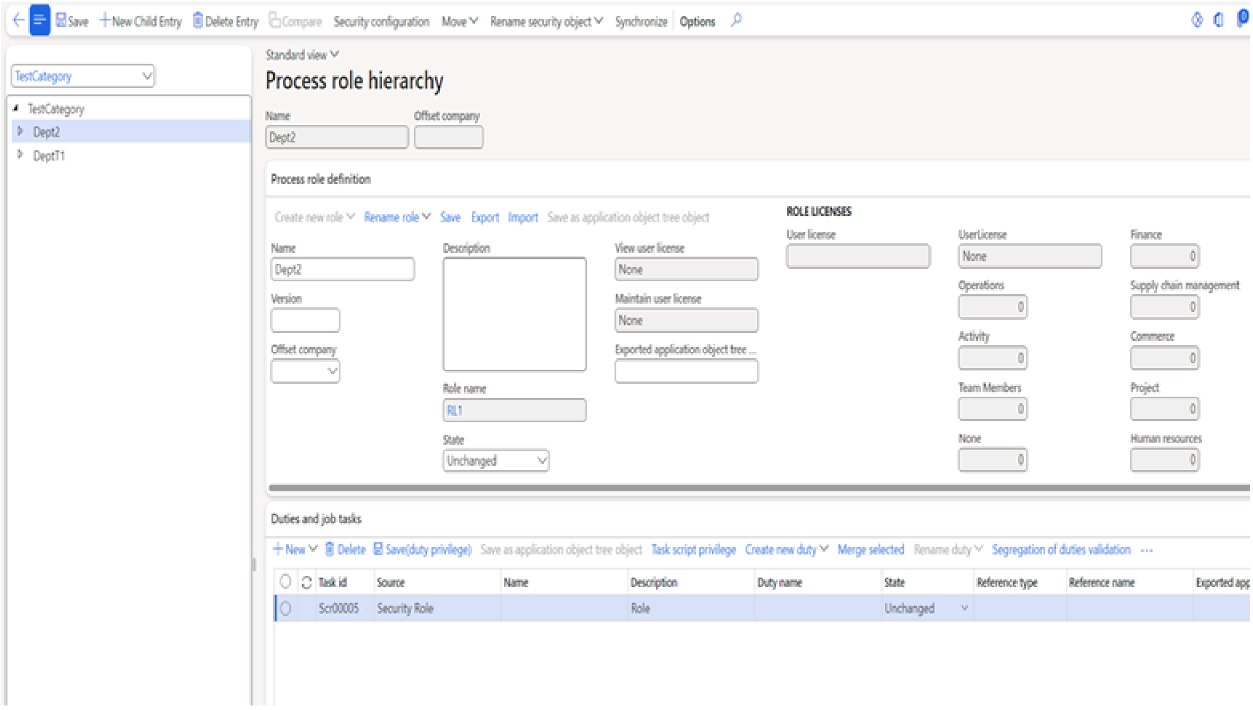
Enabled for	Public preview	General availability
Users, automatically	Jan 2025	Jul 2025

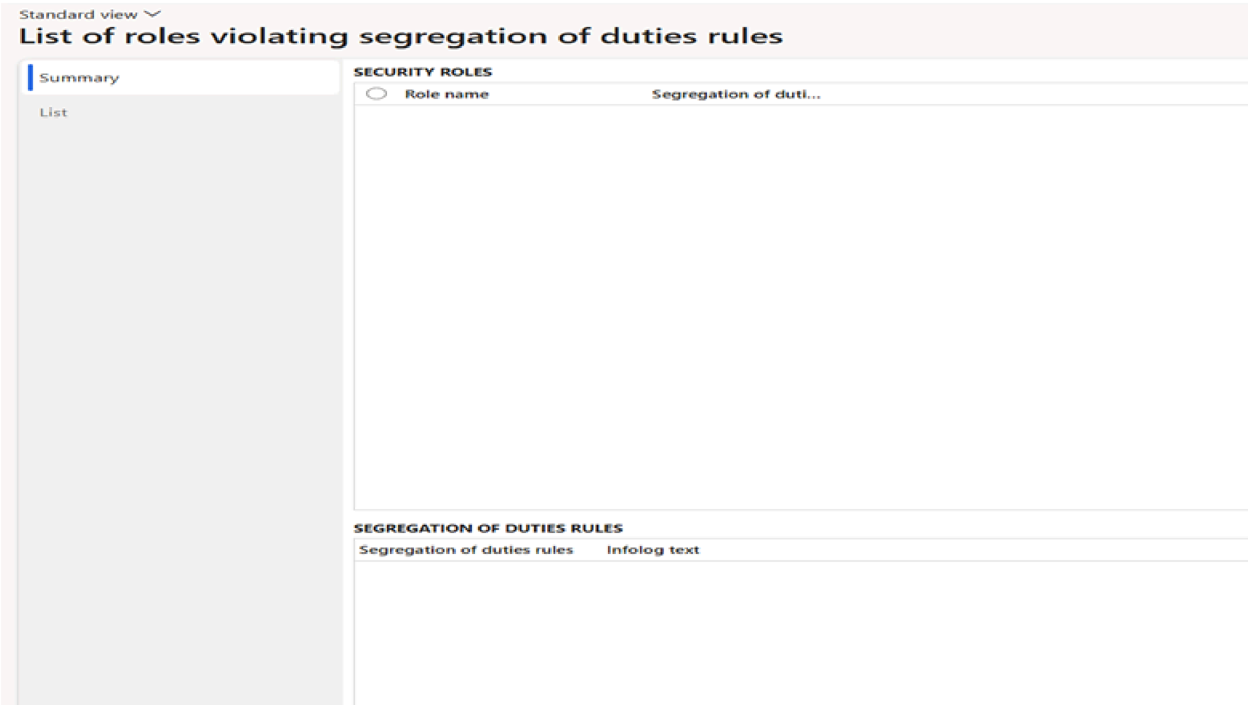
Business value

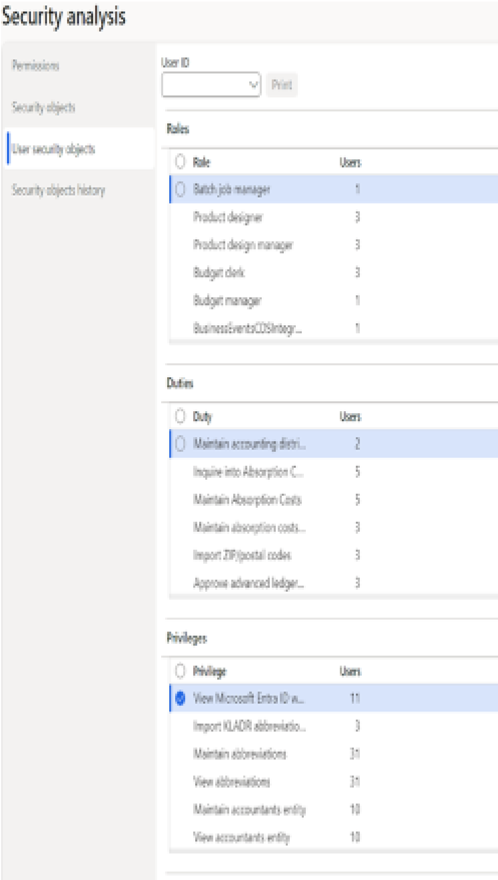
These features designed for system administrators offer significant business value by streamlining role management, auditing licenses, and enhancing audit trails and versioning. They provide valuable reports on license usage and separation of duties violations, helping organizations optimize software investments, ensure compliance, and maintain robust security and internal controls.

Feature details

User security governance is a set of advanced features that provide useful tools to system administrators for role management, license auditing, enhanced audit trails, and versioning, supported with some useful reports around license usage and separation of duties violations.







Feedback

Was this page helpful? Yes No

Preview automatic bank reconciliation matching results

Article • 01/23/2025

ⓘ Important

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

Expand table

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

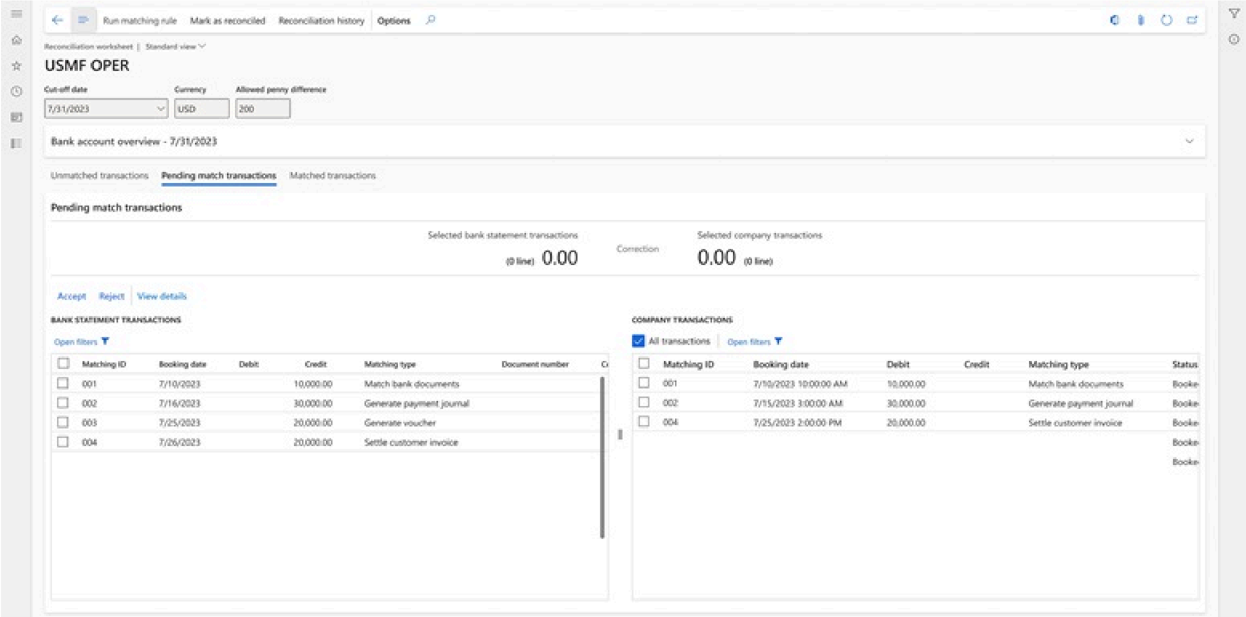
Business value

The **Preview automatic bank reconciliation matching results** feature allows users to preview matching results, and review and handle exceptions during an automatic bank reconciliation matching process. The feature ensures accurate matching and discrepancy minimization by allowing users to select which exceptions require review and are selected for user checks.

Feature details

The **Preview automatic bank reconciliation matching results** feature includes the following:

- Matching rule simulation.
- Matching preview and option to update bank reconciliation results.
- Ability to select matching rules that should be manually reviewed before posting results during reconciliation process.
- Pending review screen for user to investigate matching results.
- Option to review bank reconciliation matching exceptions.



Feedback

Was this page helpful? Yes No

Reconciliation matching rules data entity improvements

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

The existing matching rule data entity in advanced bank reconciliation is enhanced to allow bulk upload of matching rules for the bank reconciliation process. This speeds up the setup process and allows easier configuration when bank reconciliation rules are moved from existing systems to Dynamics 365 Finance.

Feature details

The existing advanced bank reconciliation matching rule data entity is enhanced with the following functions:

- Option to upload 1-to-many and many-to-1 matching rules.
- Support all matching types.
- Support upload of various matching criterias and conditions.

Feedback

Was this page helpful? Yes No

Split fixed assets

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

The enhanced Fixed asset split functionality allows businesses to manage asset splits with greater precision and flexibility. By offering options, such as selecting reporting currency exchange rate and previewing split outcomes, this feature simplifies the complex asset split process. It enables more accurate reporting, better audit trails, and efficient processing of asset splits.

Feature details

Key improvements include the ability to identify the source (from) asset and destination (to) asset, select either spot or historical exchange rates for reporting currency, and preview fields that display asset values before and after the split in accounting and reporting currencies. Users can split assets by amount or percentage. A new Fixed asset split list page offers a detailed audit trail, and the feature supports split updates across legal entities.

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

Feedback

Was this page helpful? Yes No

Transfer fixed assets between legal entities

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

The Fixed asset transfers between legal entities feature simplifies the process of moving assets across legal entities, enabling businesses to manage intercompany asset transfers with ease. By automating the creation of destination assets and ensuring accurate transfer of financial data like acquisition costs and depreciation, this feature reduces manual effort and ensures smooth, compliant asset transactions across entities.

Feature details

The **Fixed asset inter-company transfer** allows users to transfer assets between legal entities by selecting the source asset and its book, previewing key financial details such as acquisition cost, accumulated depreciation, and net book value (NBV). The transfer can be processed as disposal. Users can choose to either create the destination asset automatically or select precreated assets. The feature copies asset data to the destination entity, allows previewing of destination values, and automates the posting of acquisition in the destination asset and disposal transactions in the source asset.

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

Feedback

Was this page helpful? Yes No

Use agents for recommended actions on Account reconciliation agent workspace

Article • 01/23/2025

ⓘ Important

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

Expand table

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

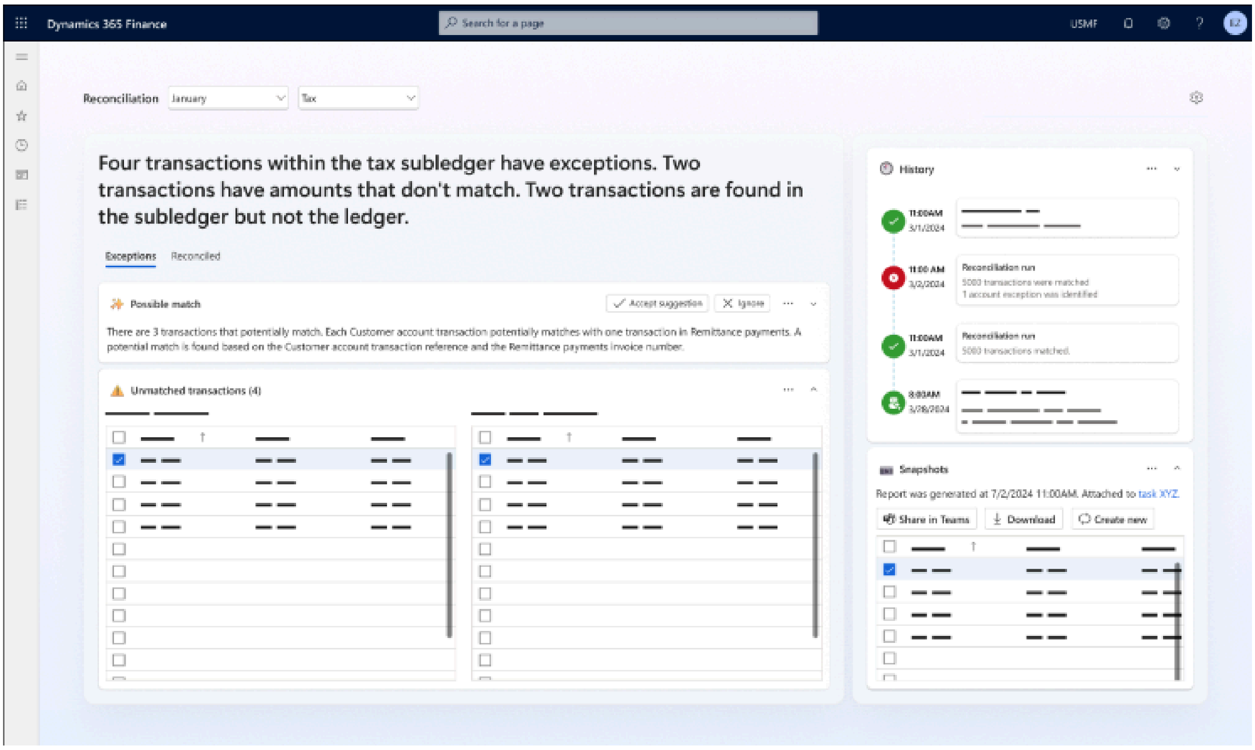
Business value

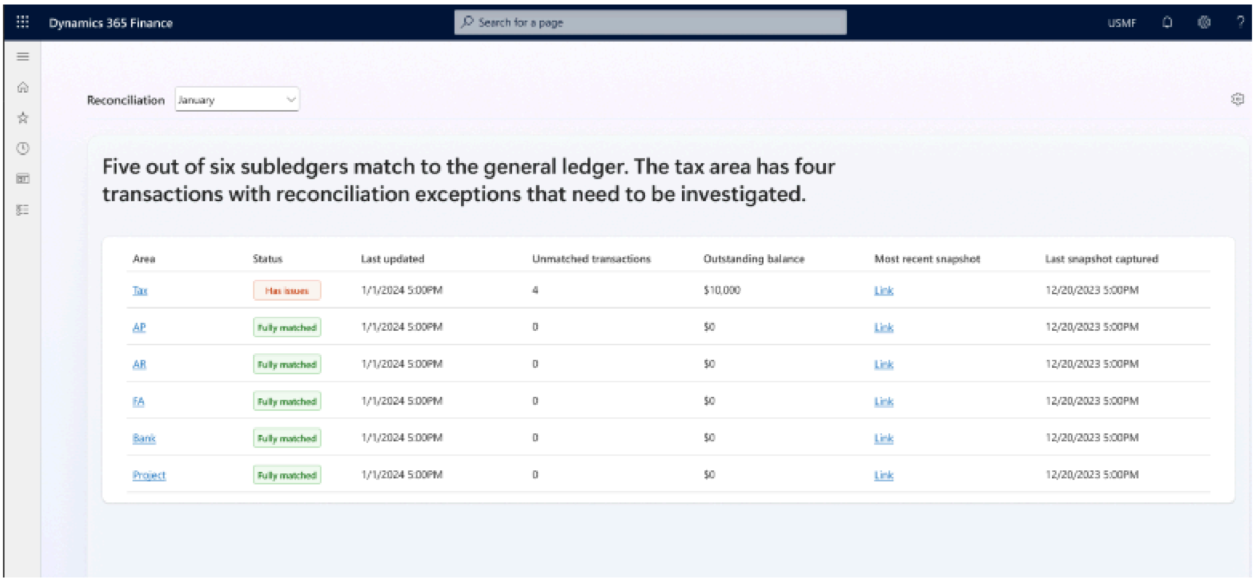
Reconciliation of data is a time-consuming process, often deferred until the end of a period. This can add time and headaches to the completion of the period end tasks. The subledger to general ledger reconciliation feature will change this process to be proactive, rather than reactive, when a difference is identified. Copilot will be used to notify the user of a difference between the subledger and the general ledger, provide options for how to resolve the issue, and eventually resolve the issue on behalf of the user. Reconciliation should no longer be a bottleneck, but instead, is always in a continuous state of readiness.

Feature details

The first reconciliation automations focus on reconciling subledgers to the general ledger balances. SSRS reports will be a thing of the past, and are replaced with a near-real time process that proactively notifies the finance team of any reconciliation issues. Upon recognition of an issue, each transaction provides numerous options for possible solutions. That solution may be changing a setting on the main account (such as don't allow manual entry) or may recognize when a posting profile has changed, causing a different balance sheet account to be used for reconciliation. An audit trail will be maintained when issues are identified, along with the solution.

The first public preview included the subledger-to-ledger reconciliation automation but it did not include recommendations by the Account reconciliation agent for how to address exceptions. The second public preview will introduce the agent functionality for recommending the action to take to address the exception for individual transactions. Copilot will learn from the solutions of the past, and move toward automatic resolution to any reconciliation issues (longer-term vision). Again, it's all tracked with an audit trail for actions taken by Copilot.





Feedback

Was this page helpful? Yes No

View cross-company transactional data using accounting source explorer

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Accountants using Dynamics 365 Finance to view detailed transactional data are often viewing data across multiple companies that are related to the overall parent business. It's important for them to quickly and easily view data across related companies. This feature will allow data to be viewed or exported to Excel to view deep financial analysis across those companies.

Feature details

The current accounting source explorer page in Dynamics 365 Finance is a key tool for accounting personnel to view financial transactions. The current limitation to view data from one company or legal entity at a time causes a great deal of wasted time switching to each company and reloading the data into the accounting source explorer page.

This update to the accounting source explorer will allow exporting of transactional data quickly and easily for the selected companies. The ability to export data from multiple companies to Excel will also let the accounting team do deeper analysis across companies.

The key change for this feature will be an improved export option that will allow the user to select which companies they want to export data from along with the other existing filter options in the accounting source explorer.

Feedback

Was this page helpful? Yes No

Globalization Studio

Article • 01/23/2025

ⓘ Important

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

Our solution is used by customers in over 210 countries and regions to meet various tax compliance and local requirements (localizations). We offer out-of-the-box localizations and continuous regulatory updates for multiple countries and regions, available in multiple languages. Our no-code/low-code Globalization Studio services automate complex tax scenarios, enabling partners and customers to easily extend localizations.

We are investing in expanding out-of-the-box country coverage, automating continuous regulatory updates, and reducing the manual efforts involved in managing taxes.

To follow our planned and released regulatory updates, visit Search for country/region-specific regulatory updates.

For more information on Globalization Studio, visit Globalization Studio documentation.

Feedback

Was this page helpful? Yes No

Access electronic invoicing phased rollout in Belgium

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Global and local customers who deploy Microsoft Dynamics 365 Finance in Belgium can access electronic invoicing functionality that meets Belgium requirements.

Feature details

This feature aims to comply with the Belgium-specific requirements for enforcing electronic invoicing for business-to-business communications starting January 1, 2026.

You can communicate invoices and credit notes created from sales orders, free text invoices, or project invoices in the PEPPOL-based XML format that complies with the Belgian electronic invoicing standards.

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

Feedback

Was this page helpful? Yes No

Automate tax feature creation based on tax master data

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Jul 2025	Oct 2025

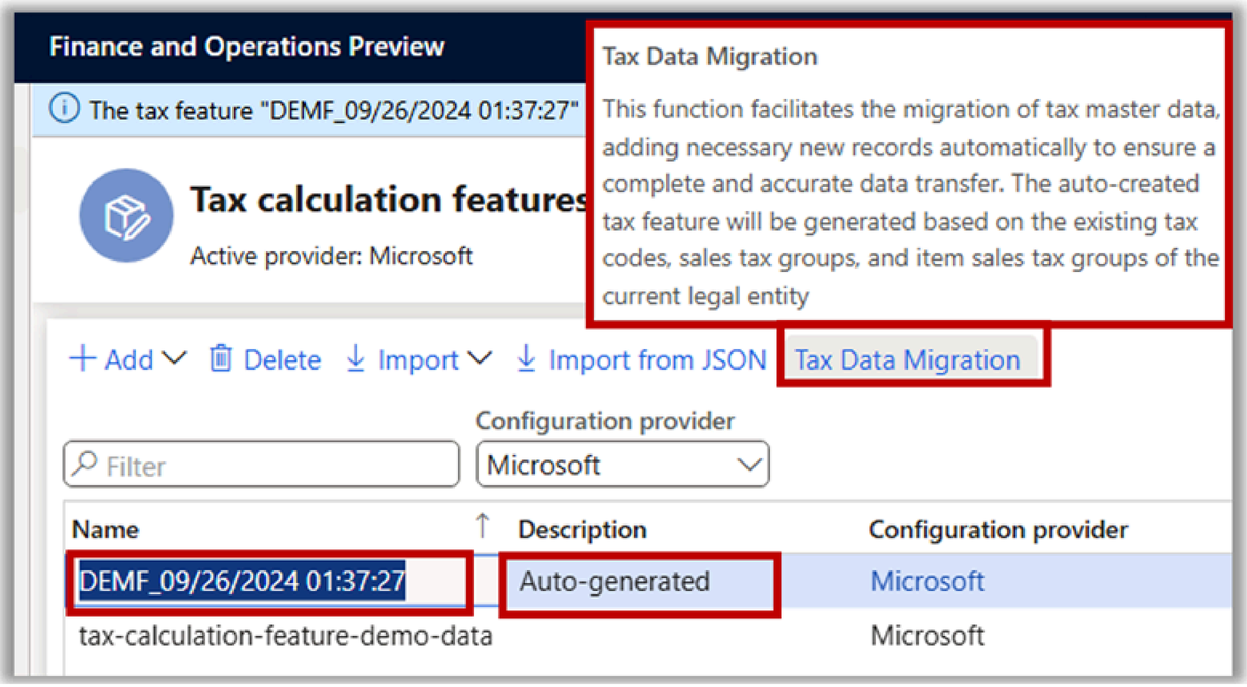
Business value

Save time and effort for the business by simplifying the migration process from the core tax functionality to the tax calculation functionality. With an easier migration process, businesses can start using and benefiting from the tax calculation functionality faster and more effectively.

Feature details

We are introducing the automated tax calculation feature based on the core tax master data available in the legal entity through *Tax Data Migration*.

This function eases the migration of the core tax master data to our more advanced tax calculation engine, automatically adding necessary new records to ensure a complete and accurate data transfer. The auto-created tax feature will be generated based on the existing tax codes, sales tax groups, and item sales tax groups of the current legal entity.



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

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Feedback

Was this page helpful? Yes No

Convert Excel business documents to PDF locally

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

This feature enables local PDF conversion for Microsoft 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.

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

Feedback

Was this page helpful? Yes No

Expand country coverage to Türkiye

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Apr 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 countries provide 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 to address the needs of multiple global and local customers. Out-of-the box localization for Republic of Türkiye is available. The country localization indicated below is provisional and may change prior to general availability. Additionally, not all of the following capabilities might be available for preview.

- Exchange rate import from CBRT.
- Continuous serial numbers for invoices and packing slips.
- Currency conversion in purchase and sales orders.
- Exchange rate difference invoices.
- Electronic invoice generation and submission.
- Cheque and promissory note enhancements.
- Pro-rata depreciation of fixed assets and depreciation rounding per year.
- Inflation adjustments.

- E-Ledger generation and submission.

Feedback

Was this page helpful? Yes No

Extend support for multiple tax registration numbers in tax reporting

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

A multinational corporation that operates across geographic locations can configure one legal entity in Dynamics 365 Finance with addresses and related tax registration numbers in different countries/regions. They can provide some tax regulatory reports (VAT Declaration, EU Sales List, Intrastat) directly from this legal entity based on tax transactions posted per specific tax registration number.

Feature details

In a legal entity with the Support multiple VAT registration numbers feature enabled, you can generate VAT Declaration, EU Sales List, and Intrastat reports. A list of supported countries and tax regulatory reports is available at Reporting for multiple VAT registrations.

For this release, we plan to extend the list of supported countries and tax regulatory reports. We plan to release EU Sales List correction for Poland (`VAT_UEK`) with support of multiple VAT registration numbers.

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

Feedback

Was this page helpful? Yes No

Update to OIOUBL format 3.0 for electronic invoicing in Denmark

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Global and local customers who deploy Dynamics 365 ERP apps in Denmark can access a configurable electronic invoice in an updated OIOUBL format, which meets local Danish requirements.

Feature details

This feature 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.

OIOUBL 3 Invoice Package Postponed - Revised Schedule:

The Danish Business Authority expects the OIOUBL 3 invoice package to be upgraded from Release Candidate to Final Release in **mid-May 2025**.

After that, it's expected to be voluntarily implemented until **mid-November 2025**, when support for OIOUBL 3 is to be made mandatory in Nemhandel.

End-of-life for OIOUBL 2.1 is expected in **mid-May 2026**.

Additional resources

Use electronic invoicing for Denmark (docs)

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

Feedback

Was this page helpful? Yes No

Use electronic invoicing in Bolivia

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

This update includes the Bolivian electronic invoicing feature of the integration with the Bolivian Tax Authorities. It covers the required end-to-end process of the outbound flow of e-invoices submission.

Feature details

Microsoft has released the Bolivian electronic invoicing feature of the integration with the Bolivian Tax Authorities. This feature can only be imported into the new Globalization Studio and isn't supported in Regulatory Configuration Service (RCS).

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

Feedback

Was this page helpful? Yes No

Comply with e-invoicing requirements in Poland

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

The Electronic Invoicing service offers a no-code/low-code e-invoicing solution that allows businesses to fully automate the electronic invoicing process end-to-end. This includes issuing Sales, Free text, Project, and Advance electronic invoices, submitting them to the authorities for clearance purposes, and receiving incoming Vendor invoices from the authorities.

This feature ensures the compliance with new legal requirements for electronic invoicing in Poland.

Feature details

Poland is introducing legislation to establish the continuous transaction control (CTC) system. The Polish CTC system, called Krajowy System of e-Faktur (KSeF), was made available for all taxpayers in 2022 for voluntary adoption.

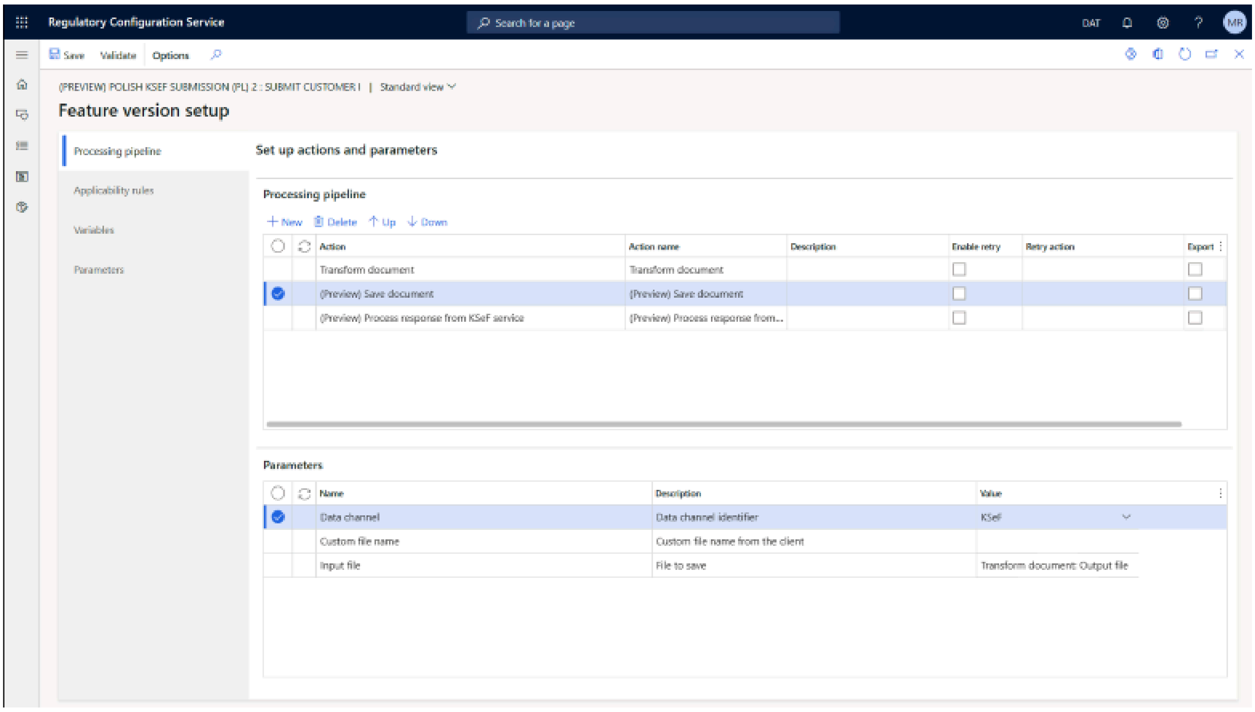
To comply with these legal requirements, the following functionality is implemented and available as public preview: Electronic invoicing for Poland

- Generation of XML files of Sales, Project, and Advance electronic invoices in the legally required format provided by KSeF.
- Automatic submission of generated electronic invoices to KSeF.

- Import of incoming Vendor electronic invoices issued and available for recipients on the KSeF platform.

The legal requirements are not fully finalized yet. As of now, the KSeF system will be rolled out as mandatory, in phases, depending on a company's size, following this implementation timeline:

- February 1, 2026, for large taxpayers (over PLN 200 million per annum).
- April 1, 2026, for all taxpayers.



Additional resources

Electronic invoicing for Poland (docs)

Feedback

Was this page helpful? Yes No

Use the enhanced Poland JPK KR PD annual regulatory report

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2025	Oct 2025

Business value

Building on the preview released in the previous wave, this extension enhances support for the JPK_KR_PD reporting structure for companies in Poland. Effective January 1, 2025, this mandatory tax reporting format ensures compliance with Polish tax authorities. The current wave introduces additional capabilities to further streamline reporting and reinforce regulatory adherence.

Feature details

The following capabilities are planned for JPK_KR_PD reporting:

- Adding an option to define main accounts markers (`S_12`) using Financial Dimensions and report trial balance (ZOiS) section based on dedicated dimension set including main account and the markers.
- Adding an option to report the journal entry number (`D_1`) using Journalizing journals.
- Adding an option to report the date of the economic transaction (`D_6`) for vendor invoices using the **Date of Vendor VAT Register** field.
- Adding the report **Settlement of income tax** section (`RPD`).
- Adding Microsoft Excel format to preview the data.

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

Feedback

Was this page helpful? Yes No

Use the security enhancements in UK MTD VAT integration

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

This feature strengthens the security of direct VAT return submissions for companies registered for UK VAT under Making Tax Digital (MTD). By upgrading key submission processes to more secure executable classes, businesses reduce the risk of data breaches or unauthorized access during VAT filings, ensuring safer compliance with UK tax regulations.

Feature details

When you enable the **Security enhancements in UK MTD VAT integration** feature, **UK MTD VAT TEST** and **UK MTD VAT** electronic message processing automatically updates to enhance the security of your Dynamics 365 Finance integration for direct VAT return submissions for your UK VAT registration.

The following **Web service** actions have been changed to **Executable class**:

- Retrieve VAT obligations
- Test retrieve VAT obligations
- Submit VAT return
- Test submit VAT return
- Request VAT liabilities

- Request VAT payments

> Note
>
> Once the **Security Enhancements in UK MTD VAT Integration** feature is enabled, it cannot be disabled.

Additional resources

Making Tax Digital – VAT return submission in the United Kingdom (docs)

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

Feedback

Plan and prepare for Dynamics 365 Supply Chain Management in 2025 release wave 1

Article • 01/23/2025

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

Overview

Dynamics 365 Supply Chain Management offers comprehensive capabilities for end-to-end processes that manufacturers, distributors, consumer product groups, and retailers need to meet their supply chain requirements. Its functionality spans product information management, forecasting, planning, inventory, sales, and procurement, as well as complex manufacturing, asset maintenance, warehousing, transportation management, and costing.

The 2025 release wave 1 introduces several key enhancements:

- **Demand Planning**: Copilot, generative insights, and cell-level explainability improve forecasting accuracy.
- **Manufacturing**: New features include optimized testing strategies and digitized records for quality management. Copilot-assisted updates enhance manufacturing planning data, leading to more accurate production processes.
- **Planning Optimization**: Integrates lean manufacturing principles, catch weight, and step consumption for better material use management.
- **Contract Lifecycle Management**: Supports integration with external systems for efficient supplier contract management.
- **Vendor Rebate Management**: Updated with reconciliation and resubmission workflows, allowing for more flexible vendor transactions.

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.

Manufacturing and asset management

The manufacturing and asset management features in Dynamics 365 Supply Chain Management help companies gain agility, efficiency, and visibility in their manufacturing and maintenance operations while maximizing asset uptime and productivity. Investments are focused on increasing flexibility and agility. Manufacturers having requirements for compliance with multiple inventory accounting practices across multiple currencies continue to benefit from enhancements to the Global Inventory Accounting add-in. Improvements in material picking and handling last-minute manufacturing changes increase the agility on the shop floor.

Planning

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.
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 • 01/23/2025

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

For a list of the previous wave's release plans, go to 2024 release wave 2 plan.

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
Keep conversations going with Copilot follow-up questions	Users, automatically	✔ Oct 31, 2024	Apr 2025
Automate procure-to-pay tasks with supplier communications agent	Users by admins, makers, or analysts	Apr 2025	Jun 2025

Inventory and logistics

Inventory and logistics features help organizations gain visibility and resiliency in their supply chain.

Expand table

Feature	Enabled for	Public preview	General availability
Enhance vendor rebate management	Users by admins, makers, or analysts	Jan 2025	Apr 2025
Track with tracking attributes and data collection in Supply Chain Traceability	Users by admins, makers, or analysts	Apr 2025	-

Manufacturing and asset management

Manufacturing and asset management features help companies gain agility and visibility in their operations while maximizing asset productivity.

Expand table

Feature	Enabled for	Public preview	General availability
Achieve regulatory compliance and quality excellence	Users by admins, makers, or analysts	Apr 2025	-

Planning

Demand and supply planning include forecasting future customer demand for your products or services and managing supply to fulfill it.

Expand table

Feature	Enabled for	Public preview	General availability
Implement lean manufacturing, catch weight, and step consumption	Users by admins, makers, or analysts	Jul 2025	Sep 2025
Enhance your demand forecasting and planning	Users by admins, makers, or analysts	-	Apr 2025

Procurement

Procurement and sourcing capabilities help organizations increase resiliency in their supply chain.

Expand table

Feature	Enabled for	Public preview	General availability
Support contract lifecycle management in source to pay by flexible integration	Users by admins, makers, or analysts	✔ Oct 25, 2024	Apr 2025
Manage supplier relationships and improve collaboration	Users by admins, makers, or analysts	Jul 2025	-

You are able to opt into some features as part of early access on February 3, 2025, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

For 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 • 01/23/2025

ⓘ Important

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

Dynamics 365 Supply Chain Management provides a rich set of capabilities for supporting organizations' business processes with innovative, in-product, AI-based features that empower users to rapidly unlock the full potential of Supply Chain Management.

Feedback

Was this page helpful? Yes No

Automate procure-to-pay tasks with supplier communications agent

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

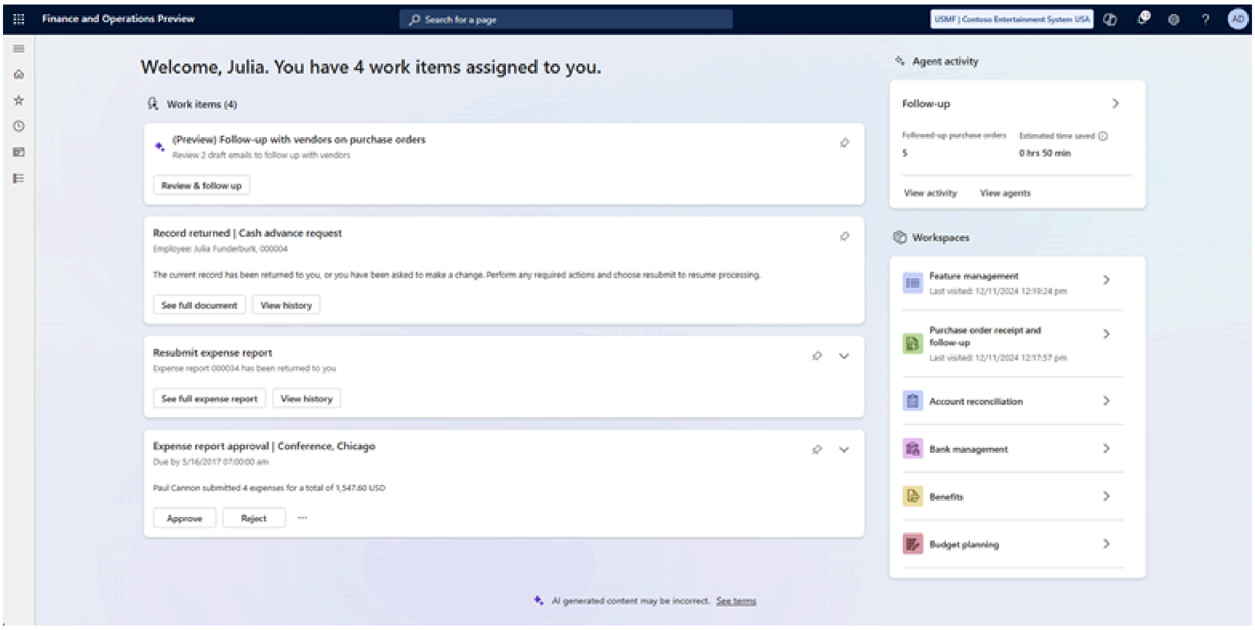
For many businesses, a large part of the procurement process is still manual. This includes collaborating and following up with vendors, manually updating purchase orders, and managing change requests. The supplier communications agent helps purchasers save time by automating manual and repetitive tasks based on user-defined rules. The agent helps you achieve a resilient and efficient supply chain and increase procurement productivity.

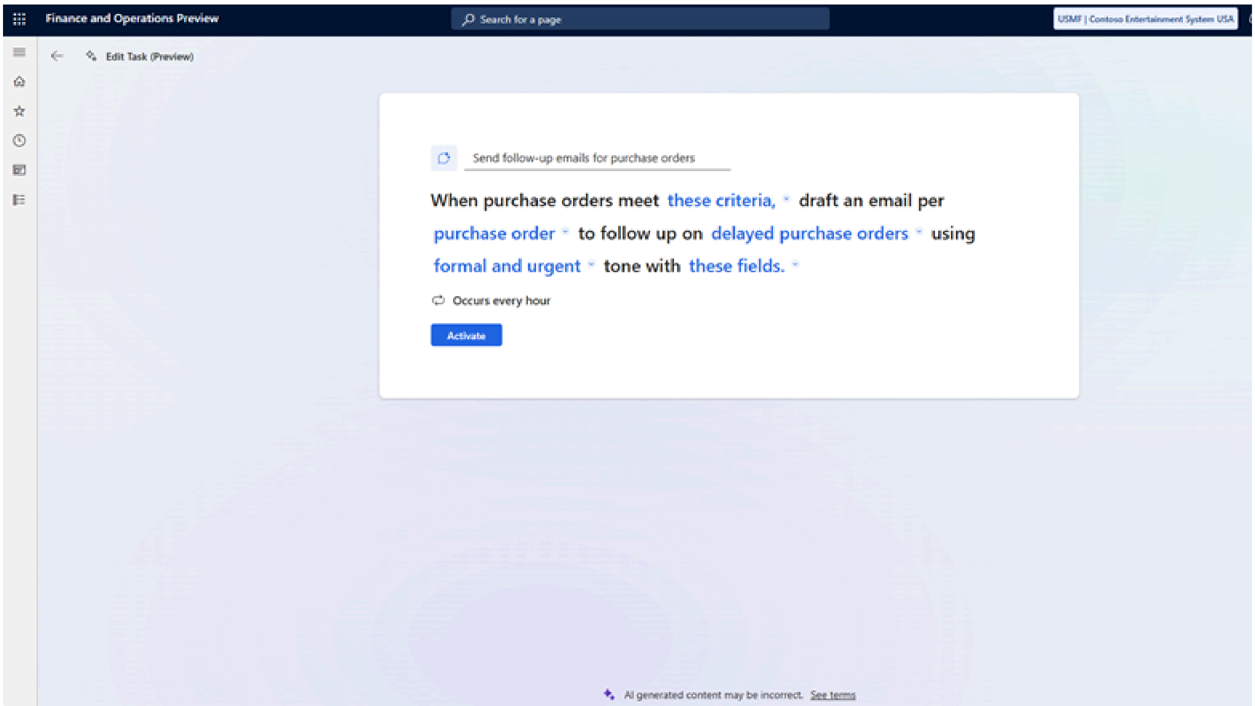
Feature details

Purchasers spend significant manual effort checking incoming emails, assessing the status of each purchase order, replying to and following up with suppliers, and updating systems. The supplier communications agent helps purchasers by providing the following features:

- **Follow-up with vendors on purchase orders**: The agent can automatically draft ready-to-send emails that, for example, ask a vendor about the status of a delayed order or remind them to confirm a purchase order.
- **Speed up purchase order updates based on incoming vendor emails**: The agent automatically reads your email inbox to analyze communications from your

vendors. It finds messages related to purchase orders and analyzes them together with organizational data to identify both purchase order confirmations and change requests. It then runs automated tasks based on your own, user-defined rules.





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

Feedback

Was this page helpful? Yes No

Keep conversations going with Copilot follow-up questions

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	✔ Oct 31, 2024	Apr 2025

Business value

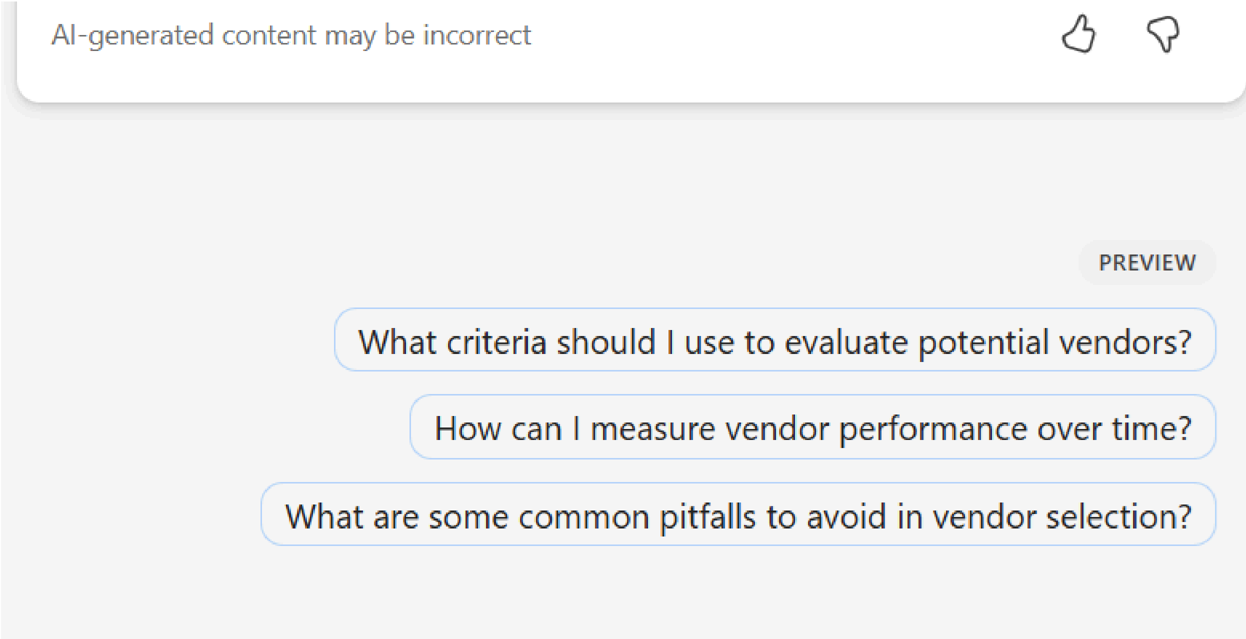
Finance and operations apps already offer innovative in-product, AI-based, contextual help with Copilot. Now, you can easily keep the conversation going with a single click by selecting among a short list of likely follow-up questions that are automatically generated by Copilot based on your previous 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

Additional resources

Responsible AI FAQ for Follow-up questions in the Copilot sidecar (docs)

Feedback

Was this page helpful? Yes No

Inventory and logistics

Article • 01/23/2025

ⓘ Important

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

The 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

Enhance vendor rebate management

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Vendor rebate management clerks can now resubmit and edit vendor rebate deals. Source transaction vendors can now reconcile their company output (such as accounts payable invoices), which adds flexibility.

Feature details

The key capabilities that provide approval and reconciliation flexibility include:

- A new rebate management workflow-resubmission process for vendors.
- Enhanced posting profiles that allow transactions to be reconciled according to the purchased-from vendor rather than using fixed, predefined vendors.
- Improved rebate output for vendor invoices by consolidating multiple ledger lines for the same vendor into a single vendor line with several ledger lines.

Feedback

Was this page helpful? Yes No

Track with tracking attributes and data collection in Supply Chain Traceability

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Tracking attributes help enhance supply chain traceability and enable stakeholders (such as quality managers, sales managers, and production managers) to analyze deviations using captured data. Stakeholders can now retrieve lists of product serial or batch numbers based on business activities and tracking attribute data.

Feature details

You can now configure data collection and assign it to specific activity types and codes to store measurements and attributes for tracking and tracing. This configuration allows you to monitor and manage various activities within the supply chain in detail.

The system also enables you to retrieve all measurements and attributes related to each serial, batch, asset, or lot number. This retrieval process ensures that all relevant data is accessible for analysis and decision-making.

Finally, you can perform a where-used search to retrieve impacted products based on specific measurements and attributes. For example, you can retrieve all impacted VIN numbers of Model Y vehicles produced between August 23, 2024, and September 25, 2024, where the painting temperature was below 80 degrees. This capability helps you identify and address potential issues in the production process.

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

Feedback

Was this page helpful? Yes No

Manufacturing and asset management

Article • 01/23/2025

ⓘ Important

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

The manufacturing and asset management features in Dynamics 365 Supply Chain Management help companies gain agility, efficiency, and visibility in their manufacturing and maintenance operations while maximizing asset uptime and productivity. Investments are focused on increasing flexibility and agility. Manufacturers having requirements for compliance with multiple inventory accounting practices across multiple currencies continue to benefit from enhancements to the Global Inventory Accounting add-in. Improvements in material picking and handling last-minute manufacturing changes increase the agility on the shop floor.

Feedback

Was this page helpful? Yes No

Achieve regulatory compliance and quality excellence

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Integrate advanced quality-management capabilities across the supply chain, fostering continuous improvement, customer satisfaction, regulatory compliance, and quality excellence. Advanced quality management minimizes reliance on third-party quality-management solutions, ensures adherence to regulations, enhances product quality, and boosts customer satisfaction. This solution also fosters continuous improvement and risk mitigation through a feedback-driven strategy.

Feature details

Advanced quality management integrates throughout the Supply Chain Management solution. Key features include:

- **Optimized testing strategies**: Flexible sampling plans, skip-lot testing, quality-order creation triggers, sample management, instrument calibration, and acceptable quality limits (AQL) testing.
- **Regulatory compliance**: Approved customer lists, customer-specific certificates of analysis (COA), and enhancements to electronic signatures.
- **Digitized manufacturing for precision and compliance**: Electronic batch records, production dispensing.

- **Continuous improvement and risk mitigation**: Corrective and preventive actions (CAPA) management and enhancements to non-conformance.
- **Enhanced user experience**: Simplified entry of quality test results and new workspaces for quality management.

Feedback

Was this page helpful? Yes No

Planning

Article • 01/23/2025

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

Demand planning 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

Enhance your demand forecasting and planning

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

The latest enhancements for Demand planning in Dynamics 365 Supply Chain Management provide new insights into your supply chain planning. Take advantage of them to help optimize your supply chain and boost your financial outcomes.

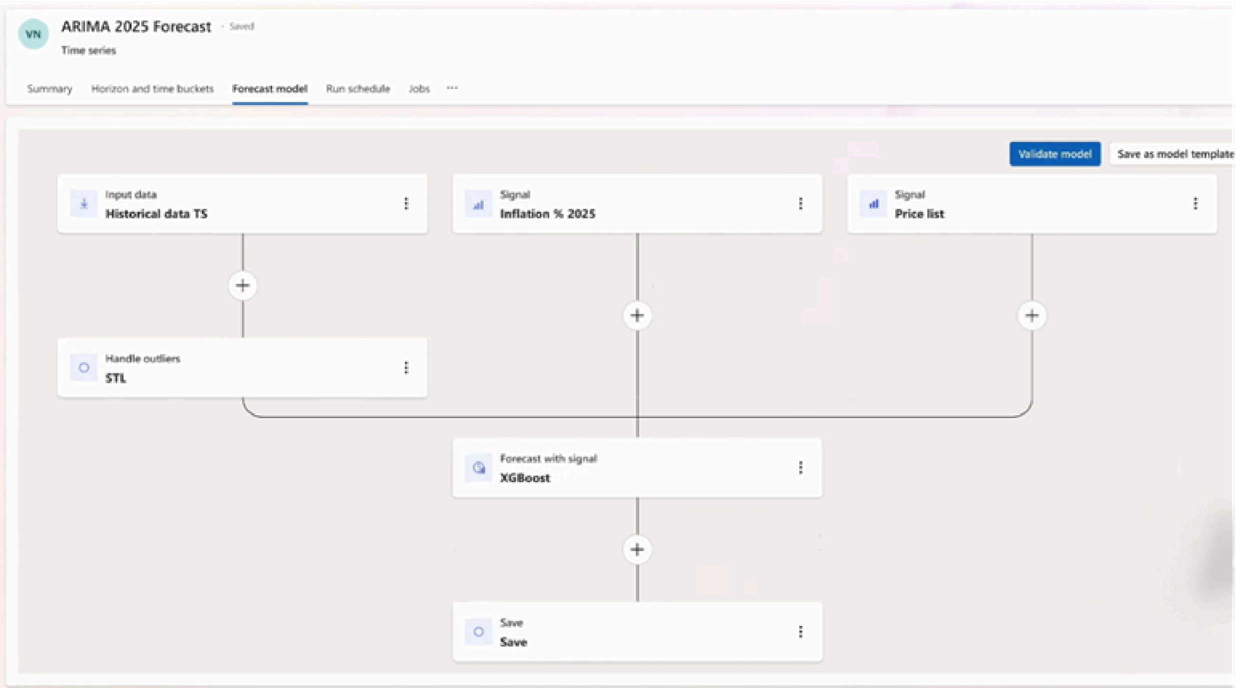
Feature details

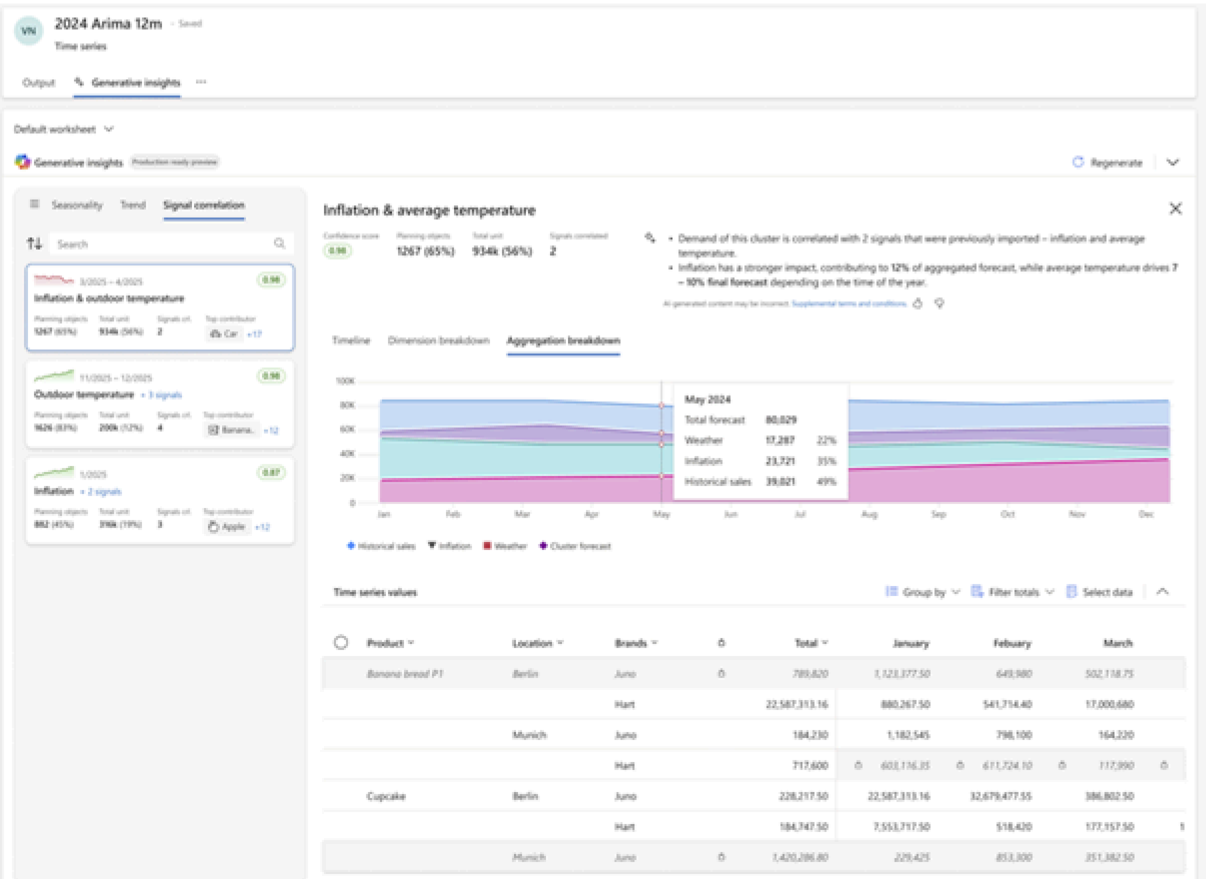
Demand planning in Supply Chain Management helps you plan and forecast demand based on various data sources and signals. The app now provides capabilities that enhance the accuracy of the demand forecast to better help you optimize your supply chain and boost your financial outcomes.

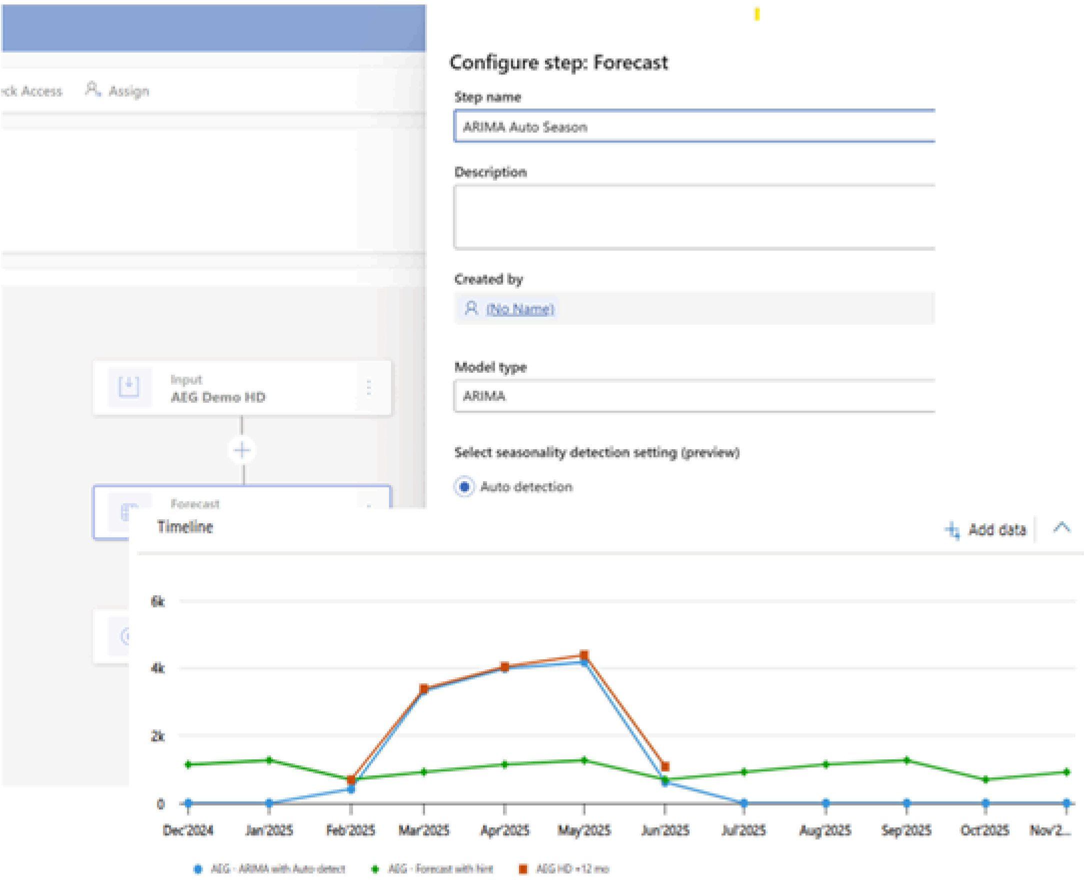
All the new capabilities are enabled by default. You can use each of them as needed with your new and existing forecasts to help improve their accuracy. The new capabilities include:

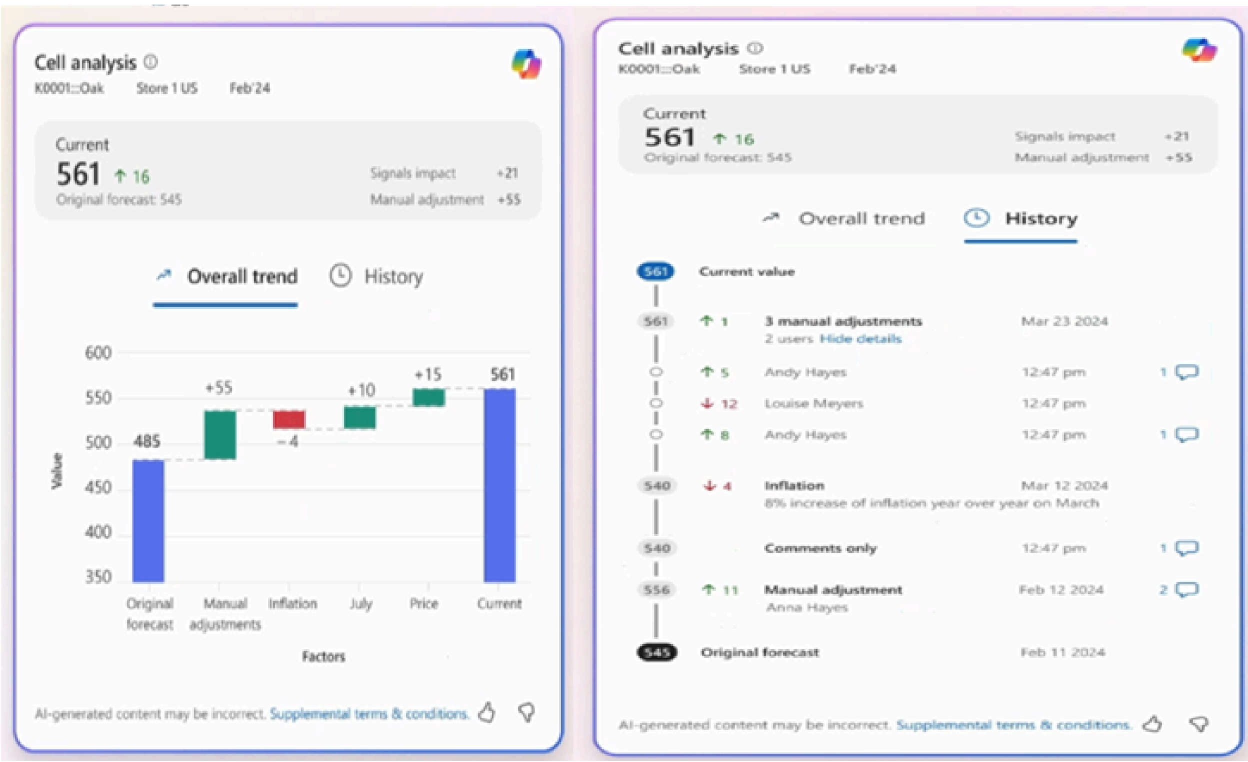
- **Assortment planning**: Forecast from top to bottom by allocating demand across different dimensions (such as products, customers, or channels) based on an allocation basis that you define.
- **Time freeze**: Establish periods during which forecast calculations set to run continuously won't update their baseline forecasts.

- **Forecast with signals**: Now allows you to define multiple input signals and lets you choose to between the Prophet forecast algorithm, XGBoost forecast algorithm, or best-fit forecast model (which automatically calculates both XGBoost and Prophet results for each combination of dimensions and choose the best one for the final forecast).
- **Auto detect seasonality**: Automatically detect seasonality patterns for all forecast algorithms. The system runs an algorithm to detect distinct seasonality patterns across different dimensions (such as products and locations).









Feedback

Was this page helpful? Yes No

Implement lean manufacturing, catch weight, and step consumption

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

The Planning Optimization planning engine empowers businesses to streamline their planning processes, reduce costs, and improve service levels by enabling fast and accurate supply plans. This ultimately leads to a more agile and responsive supply chain. Planning Optimization now includes features that allow companies using lean manufacturing, catch weight pricing and measurement systems, and step consumption with process manufacturing to benefit from this planning engine.

Feature details

Planning Optimization now provides the features required to support the following business processes:

- **Lean manufacturing**: A production philosophy aimed at maximizing value for customers while minimizing waste. It originates from the Toyota production system and focuses on continuous improvement and operational efficiency.
- **Catch weight**: A pricing and measurement system used primarily in the food industry, where products are sold based on their actual weight rather than a predetermined fixed weight. This is particularly important for items that naturally vary in size and weight, such as meat, seafood, and fresh produce.

- **Step consumption**: Manages material consumption in a way that accommodates non-linear consumption rates based on production quantities.

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

Feedback

Was this page helpful? Yes No

Procurement

Article • 01/23/2025

ⓘ Important

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

Procurement and sourcing cover all steps from identifying a need for products and services, through procurement, receipt, invoicing, and processing payments with vendors. Procurement processes can be configured toward specific business needs by defining purchasing policies and workflows.

Feedback

Was this page helpful? Yes No

Manage supplier relationships and improve collaboration

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Procurement professionals can now manage supplier relationships for all legal entities from a single central dashboard. From there, procurement professionals can view supplier performance, schedule appointments, and manage many other aspects of their supplier relationships. A new supplier portal provides an improved experience for onboarding new suppliers and then engaging and collaborating with them throughout the relationship, including during requests for quotation, purchase ordering, and invoicing.

Feature details

The new *supplier relationship management* feature provides a Microsoft Power Apps experience that integrates with Dynamics 365 Supply Chain Management and Dynamics 365 Finance. The app lets you manage both strategic and tactical areas of your supplier relationships, including scheduling appointments, tracking performance, scheduling supplier reviews, and managing prospective suppliers that aren't registered yet.

The experience also provides a supplier-facing portal, which is based on Microsoft Power Pages. The new supplier portal supports many aspects of the supplier relationship, ranging from tactical to more operational, transactional ones. It helps new suppliers to onboard and enables existing suppliers to engage with your company through transactions such as requests for quotation (RFQs), managed bidding, purchase orders, and invoices. The supplier portal works together with the existing vendor-collaboration capabilities of Supply Chain Management.

Feedback

Support contract lifecycle management in source to pay by flexible integration

Article • 01/23/2025

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 25, 2024	Apr 2025

Business value

With flexible integration to external contract lifecycle management systems, businesses can efficiently manage the creation and management of contract lifecycles with suppliers in their source-to-pay process. Purchase agreements stipulated in the contracts integrate seamlessly with operations such as applying the correct terms and pricing.

Feature details

Contract lifecycle management (CLM) is a key element of the source-to-pay process. Dynamics 365 Supply Chain Management now provides a platform that makes it easy to integrate it with an external CLM system. The feature supports out-of-the-box rules and integration points for interacting with CLM. The integration supports purchase agreements and non-disclosure agreements and leverages master data from Supply Chain Management.

Additional resources

Contract lifecycle management integration overview (docs)

Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Project Operations in 2025 release wave 1

Article • 01/23/2025

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

Overview

In one application, Microsoft 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 2025 release wave 1, we're delivering functionally rich experiences in the following areas:

- Improvements to the expense management experiences on mobile and browser.
- Improvements to the Time entry experiences on mobile and browser.
- Improvements in Project planning with support for WBS templates and copy experiences.
- Usability improvements in billing backlog review, pro forma invoice review, approval, and contract management experiences.
- Improved and enhanced support for stocked items on the modern architecture.
- Support for discounts and fees on the modern architecture.
- Continued investment in the ability to migrate from project management and accounting (PMA) to the modern architecture of Project Operations.
- Flexibility in financial dimensions, revenue recognition based on contract line, and support for creating project G/L journals on the modern architecture.

In addition to the above set of functional and usability investments, this release also includes some important investments in extensibility, reliability, and performance in the following areas:

- Support for larger invoices in the modern architecture that leverages async dual-write.
- Extensibility patterns for additional fields in Invoice summary on the modern architecture.
- Consistent paradigms for time zone agnostic date concepts where applicable.

Investment areas

Copilot in Project Operations
With every new release wave, AI and automation investments through Copilot empower consultants, sales personnel, project and resource managers, as well as project accountants in Dynamics 365 Project Operations, providing them with intelligent, natural-language interactions. These enhancements extend beyond business applications to productivity tools like Microsoft Teams, Microsoft Outlook, and Microsoft Excel, meeting employees where they are most productive. Copilot features in Project Operations streamline and expedite workflows from the frontline to the back office, optimizing operational efficiency for service delivery organizations.

Optimize Project Operations
In one application, Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams so they can win more deals, accelerate delivery, empower employees, and maximize profitability. Project Operations is continuing to invest in capabilities to improve usability, performance, and scale across key areas of the product like project planning, invoicing, time entry, and core transaction processing flows. Project Operations continues to invest in capabilities to improve usability, performance, and scale across critical areas of the product like project sales, planning, resourcing, budgeting and tracking, invoicing, and core transaction process flows.

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

Check out the release plan

For application administrators

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

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

Get the most out of Project Operations

Expand table

Helpful links	Description
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 • 01/23/2025

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

For a list of the previous wave's release plans, go to 2024 release wave 2 plan.

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

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

Copilot in Project Operations

Introducing Copilot capabilities in Dynamics 365 Project Operations.

Expand table

Feature	Enabled for	Public preview	General availability
Optimize processes with agent-led time, expense, and approvals	Users by admins, makers, or analysts	Apr 2025	Sep 2025

Optimize Project Operations

Dynamics 365 Project Operations features optimize project execution operations from ideation and sales, to invoicing and accounting.

Expand table

Feature	Enabled for	Public preview	General availability
Use general journals against projects for resource nonstocked scenarios	Users by admins, makers, or analysts	-	Sep 2025
Use the improved project contract experience	Users by admins, makers, or analysts	Aug 2025	Oct 2025
Simplify expense management using new enhancements	Users, automatically	-	Jun 2025
New user experience for copy project	Users by admins, makers, or analysts	Sep 2025	Mar 2026
Customize the task details view	Users by admins, makers, or analysts	Sep 2025	Mar 2026
Add support for WBS and project templates	Users by admins, makers, or analysts	Sep 2025	Mar 2026
Increase work breakdown structure limits	Users by admins, makers, or analysts	Sep 2025	-
Use integration troubleshooting for modern projects	Users by admins, makers, or analysts	Mar 2025	Jun 2025
Use what-if analysis on estimates	Users by admins, makers, or analysts	Aug 2025	Oct 2025
Use improved subcontract info for one vendor in one place	Users by admins, makers, or analysts	Sep 2025	-
Use financial tags for project sales orders and journals	Users by admins, makers, or analysts	-	Jun 2025
Support for line discounts and fees in resource-based deployments	Users by admins, makers, or analysts	-	Jul 2025
Calculate revenue recognition based on contract line value	Users by admins, makers, or analysts	-	Sep 2025
Simplify editing of project invoices to improve efficiency	Users by admins, makers, or analysts	-	Sep 2025
Use the new Time Entry mobile app	Admins, makers, marketers, or analysts, automatically	Mar 2025	Aug 2025
Use the new Calendar interface for time entry	Users by admins, makers, or analysts	May 2025	Sep 2025

Feature	Enabled for	Public preview	General availability
Enable time phasing of quote and contract lines	Users by admins, makers, or analysts	Mar 2025	Sep 2025
Use the enhanced quote experience	Users by admins, makers, or analysts	Mar 2025	Sep 2025
Use the simplified Approvals page	Users by admins, makers, or analysts	-	Sep 2025
Use stocked products in resource-based deployments	Users by admins, makers, or analysts	Jul 2025	Sep 2025
Import projects in MPP files into existing projects	Users by admins, makers, or analysts	Sep 2025	Mar 2026
Copy externally scheduled projects	Users by admins, makers, or analysts	Sep 2025	Mar 2026
Add calendar control to the work hour template entity	Users by admins, makers, or analysts	Sep 2025	Mar 2026
Enable expense delegates to create cash advance requests	Users by admins, makers, or analysts	-	Jun 2025
Enable number sequences in expense management	Users, automatically	-	Jun 2025
Edit per diem transaction date, exchange rate in expense management	Users by admins, makers, or analysts	-	Jun 2025
Post expenses on the expense report posting date	Users by admins, makers, or analysts	-	Jun 2025

You are able to opt into some features as part of early access on February 3, 2025, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

For 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 Project Operations

Article • 01/23/2025

ⓘ Important

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Feedback

Was this page helpful? Yes No

Optimize processes with agent-led time, expense, and approvals

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Copilot and agentic automation enable the detection of work from Outlook and Teams. By streamlining time entry, expense report creation, and approval processes, we significantly reduce administrative burdens and improve invoice accuracy. This leads to faster invoicing, fewer errors, and enhanced satisfaction for project managers, consultants, and invoice administrators.

Feature details

Using Copilot and agentic automation, we will eliminate inefficiencies in the invoice process by automatically detecting work from Microsoft Outlook calendars and Microsoft Teams meetings. These features will allow for automated creation and submission of time entries, and remove the need for alerts and reminders that often frustrate project managers, consultants, and invoice administrators.

Additionally, our automation will facilitate the creation, submission, and policy checking of expense reports from emails and receipt scans, and incorporate automatic policy validations. Project managers will have the capability to upload documents that contain rules to flag approvals that need review while allowing others to be automatically approved.

Overall, these advanced technologies, through natural language inferences and automation, will help project-centered companies submit accurate invoices, minimize corrections, and eliminate frustrations and last-minute issues for everyone involved.

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

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

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Feedback

Was this page helpful? Yes No

Optimize Project Operations

Article • 01/23/2025

ⓘ Important

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Feedback

Was this page helpful? Yes No

Add calendar control to the work hour template entity

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2025	Mar 2026

Business value

This feature makes it easier to update the work hour template by reducing the number of steps to complete this action.

Feature details

Work hour templates are based on a bookable resource's work hours, but they don't have a calendar tab. To view or edit these templates, you need to go to the resource and update their work hours. Similarly, if the work hours in the templates change, you must check the resource's calendar to see those changes.

To make it easier to update the work hour template, we plan to add a calendar tab within the work hour template entity.

Feedback

Was this page helpful? Yes No

Add support for WBS and project templates

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2025	Mar 2026

Business value

This feature enhances reusability in Project Operations by enabling users to import tasks from existing projects, reducing the need for manual task creation.

Feature details

Currently, to bring tasks from another project into a new project, users must manually enter the task details in the task grid or use schedule APIs. They can also use the copy project feature to create a new project with the same tasks, but this has limitations:

- The entire project is copied, including unwanted tasks and extra information.
- Tasks from multiple projects cannot be combined into a new project.

This new feature allows users to select and import tasks from one or more existing projects into a new project, saving time and effort. Users can choose the project and tasks to import while adhering to the task limits per project as specified in the public documentation.

Feedback

Copy externally scheduled projects

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2025	Mar 2026

Business value

This feature gives customers who use external scheduling in Project Operations the same copy functionality that's available to those using the default scheduling engine.

Feature details

Copy project functionality is available for customers who use the default scheduling engine, but not for externally scheduled projects. This new feature adds copy project functionality for externally scheduled projects, allowing the project entity in Microsoft Dataverse to be copied to a new project.

Feedback

Was this page helpful? Yes No

Customize the task details view

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2025	Mar 2026

Business value

This feature enables extensibility of the **Task details** pane so you can create tailored experiences.

Feature details

In the task grid, when you select the (i) icon next to a task name, the **Task details** pane opens so you can enter more information. This pane is part of Microsoft Project for the web and is embedded in an iframe that makes it non-customizable.

With this new feature, we plan to introduce a customizable Task form. This form will display essential task attributes and allow users to view and edit custom columns. This will enable customers to manage and track project tasks more easily in one place. .

Feedback

Was this page helpful? Yes No

Edit per diem transaction date, exchange rate in expense management

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Currently, expense management does not allow for editing transaction dates and exchange rates, which may lead to compliance concerns for organizations if specific regulatory requirements for expense conversions are not met. By addressing this gap, organizations can ensure accurate expense reporting, reduce compliance risks, and enhance the overall integrity of the expense management process.

Feature details

By enabling this capability, users will be able to:

- Manually edit the transaction date for per-diem expenses.
- Manually update the exchange rate to be used for currency conversion.

The modified information will be used in subsequent expense-related calculations and postings.

The feature will be released behind a feature flag or as a parameter within the expense management parameters page.

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

Feedback

Was this page helpful? Yes No

Enable expense delegates to create cash advance requests

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Extending the expense delegation feature to include cash advance requests streamlines the delegation process, reducing administrative overhead and improving overall efficiency. This enhancement allows delegated users to manage both expenses and cash advances, providing a more comprehensive and seamless experience, and enabling employees to delegate all expense-related tasks more effectively.

Feature details

This feature will be released behind a feature flag, allowing it to be enabled or disabled based on the specific needs and requirements of your organization. Once activated, expense delegates will have the ability to create and submit cash advance requests on behalf of other users. They can do this seamlessly through the cash advance section of the module, providing consistent and streamlined experience for delegates.

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

Feedback

Enable number sequences in expense management

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Expense management currently lacks a straightforward method for configuring number sequences, requiring users to access the number sequence master, which is a time-consuming and cumbersome process. This not only creates operational overhead but also increases the potential for configuration issues. By introducing a user-friendly interface within the expense management module, users can manage number sequences directly, reducing effort and minimizing issues.

Feature details

The feature will introduce a new tab on the expense management parameters page, allowing users to assign number sequences directly. The process of configuring number sequences will align with the experience in other modules of the application, making it more intuitive. This enhancement enables users to manage number sequences within the module itself, rather than having to access and modify the number sequence master.

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

Feedback

Enable time phasing of quote and contract lines

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Import projects in MPP files into existing projects

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2025	Mar 2026

Business value

This feature simplifies the import process by allowing MPP file imports directly into an existing project to help make online and offline planning seamless.

Feature details

Previously, importing from an MPP file would create a new project, copying the WBS from the MPP file to the new project. It wasn't possible to import into an existing project. This made it difficult when overall planning was done in Project Operations and individual planning was done offline in Microsoft Project for desktop.

This feature allows users to import MPP files into existing projects to keep overall planning intact. It aligns with the **Copy project** feature but uses an MPP file for importing.

Users can:

- Set calendar hours (existing capability)
- Set the project manager (existing capability)
- Set schedule mode if override is allowed (existing capability)
- Select the source MPP file (existing capability)
- Select the target project (new capability)

- Choose what to import from the MPP file (new capability)

Feedback

Was this page helpful? Yes No

Increase work breakdown structure limits

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Enhance customer satisfaction by boosting the performance of the work breakdown structure.

Feature details

This feature will be implemented in phases. In phase 1, we are increasing the limits for:

- Number of tasks per project.
- Number of assignments per task.
- Number of assignments per project.

In phase 2, we plan to enhance overall performance after increasing these limits to reduce performance-related tickets and boost customer satisfaction with Project Operations.

Feedback

Was this page helpful? Yes No

New user experience for copy project

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Sep 2025	Mar 2026

Business value

Currently, users can copy a project using the **Copy Project** option on the main project form, which uses the Copy Project V3 API. However, this doesn't allow copying team members and their mappings. The Copy Project V4 API supports copying team members and their mappings, but it lacks a user interface.

Feature details

This feature combines the capabilities of both V3 and V4 into a single, user-friendly interface. Users can copy projects according to their needs.

On the user interface, users can select:

- Source Project
- Target Project
- Team Member Mapping:
  - Don't copy team members
  - Replace team members with generic team members
  - Copy the named/generic team members as in the source project

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

Feedback

Was this page helpful? Yes No

Post expenses on the expense report posting date

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

This feature enables businesses to post expense transactions on a specific posting date rather than the expense report date. This improves G/L management, ensures sequential voucher numbering, and simplifies statutory compliance, leading to more accurate financial reports.

Feature details

The feature will provide administrators with a parameter on the **Expense Management Parameters** page. When this parameter is enabled, expenses are posted based on the posting date instead of the transaction date.

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

Feedback

Was this page helpful? Yes No

Calculate revenue recognition based on contract line value

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

This feature helps organizations define the contract line value on the project contract lines. Revenue recognition is calculated based upon contract line value amount.

Feature details

In Revenue recognition, Fixed price billing arrangements are used along with billing milestones to set the contract value. Customers have a need for a separate calculation for the contract value from the billing milestones when additional effort or resources may be required to complete a fixed price project or when a contract line is discounted.

The contract value is used for calculating revenue recognition while billing milestones are used to invoice the customer. Separating these values allows users to recognize revenue based on the effort or stand-alone selling price aligning better with ASC 606 and IFRS 15 requirements.

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

Feedback

Simplify editing of project invoices to improve efficiency

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

It's common for project-based companies to create an invoice for a large team that is working on a project with a recurring lifespan. Each invoicing period can involve thousands of transactions across time, expense, and material usage activity for projects that will need to be reviewed and confirmed before generating a customer-facing invoice. This process of reviewing is an essential function to ensure a quick invoice and maintain healthy operational metrics. Keeping a clean, intuitive, and performant experience for reviewing and making corrections for the project manager will add strong business value to ensure the smooth running of a service-centric practice.

Customers often have the need to edit invoice line details on an invoice that may contain hundreds of transactions. This need could be driven either by changes required during an audit of the invoice prior to confirmation or by a need to correct a wrong invoice that has been confirmed. In both these scenarios, invoice editing is a critical step during billing and being able to edit quickly has a huge impact on the usability of the billing system.

Feature details

This feature aims to improve the usability of invoice editing. The changes include:

- Reduced clicks to edit one or more invoice line details.
- Reduced clicks to bulk-edit multiple fields on an invoice line detail.

Additionally, it will provide billing administrators with an improved invoice summary that provides key invoice insights to enable faster decision making.

Feedback

Simplify expense management using new enhancements

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

These enhancements address key functional gaps in the **Expense Reports Re-Imagined** feature to bring the feature to parity with the legacy expense management interface. This will enable a streamlined and intuitive expense creation and submission process, and reduce the time needed to complete a report.

Feature details

Key enhancements in this feature include:

- Inclusion of workflow history
- Ability to map expenses to a travel requisition
- Quick matching of expenses with receipts
- Ability to add interim and final approver
- Ability to merge/match expenses
- Ability for expense submitters to attest anti-corruption

These enhancements will be released behind a feature flag, **Expense Reports Re-Imagined Enhancements**, and will require the **Expense Reports Re-Imagined** feature to be enabled first.

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

Feedback

Was this page helpful? Yes No

Support for line discounts and fees in resource-based deployments

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

This feature lets you configure the line Discount and Fee for resource-based deployments. Project managers can use the discount and fee calculations for project quotations, contracts, and invoices. In some cases, discounts might apply to the contracts that organizations enter into with customers. Alternatively, organizations might choose to charge extra fees, such as administrative fees.

Feature details

Project Operations lets you define discount percentages and fee percentages at the level of the project quotation or the contract line. When a transaction is generated and approved, the system applies the appropriate discount or fee, based on the contract line setup. Then the system updates the actuals accordingly. During the invoicing process, discounts and fee amounts, if applicable, are applied and financial transactions will be generated accordingly.

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

Feedback

Use financial tags for project sales orders and journals

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

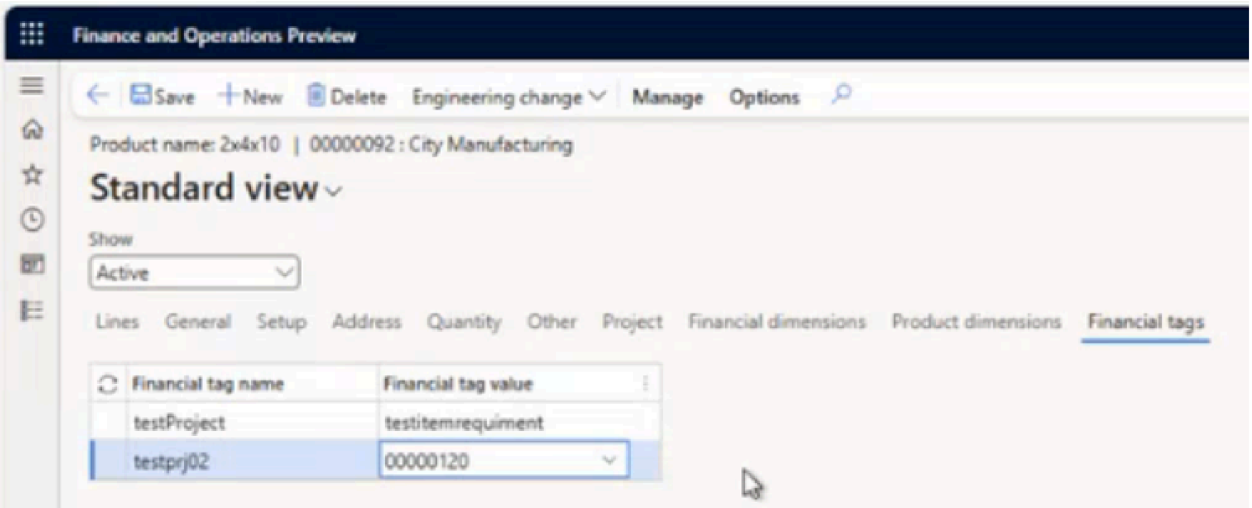
Financial tags let organizations track user-defined fields on accounting entries posted to the general ledger, eliminating the need to create financial dimensions that contain values that aren't reusable.

The financial tag values can be used for reporting purposes. For example, you can create a financial tag to track time and expenses related to some initiative without requiring a unique financial dimension to do so.

Feature details

Financial tags that are defined within the general ledger are stored on accounting entries posted to the general ledger. The financial tag names can be defined by the user, giving clarity to data entry clerks about the data expected in each field. Financial tag values are not validated or entered by default. Tags are entered on the journals and flow through to the invoice.

For this release, we are adding tags in many of the common project accounting documents and processes. Project journals and sales orders are the first documents with added support. Tags flow through from document posting to invoicing.



Feedback

Was this page helpful? Yes No

Use general journals against projects for resource nonstocked scenarios

Article • 01/23/2025

ⓘ Important

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

Expand table

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

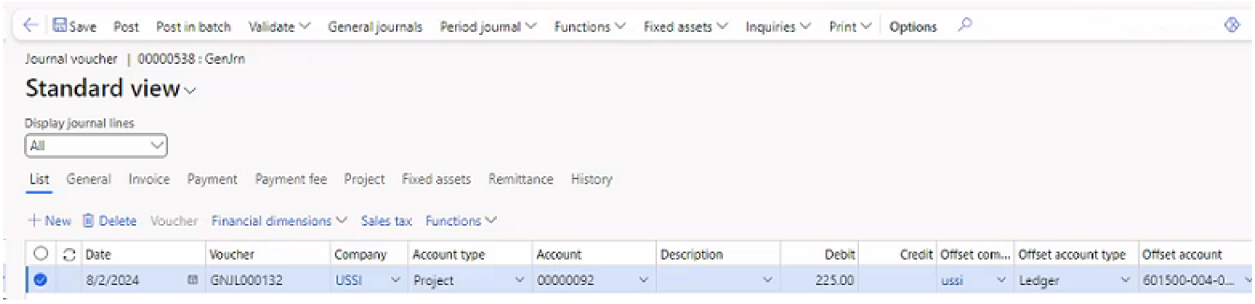
Business value

Microsoft Dynamics 365 Finance has rich functionality in the ability to use journals for many scenarios with advanced capabilities such as workflow and reversals. This functionality is being delivered to allow for general journals to be created in Finance against Microsoft Dataverse-based projects for expense postings.

Feature details

We have received requests for the ability to use journals in Dynamics 365 Finance against resource and non-stocked projects. This feature relaxes restrictions and allows for expense type general journals to be created and flow through to Dataverse. New capabilities include:

- Using the resource/non-stocked deployment, you'll be able to select **Project** as the source or the offset for the journal, with **Ledger** being the other side of the transaction.
- Journals created in Finance will integrate and flow back into Dataverse. Within Dataverse, actuals will be created against the project.



Feedback

Was this page helpful? Yes No

Use improved subcontract info for one vendor in one place

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Project managers currently need to navigate through multiple forms and interfaces when managing vendors and subcontracts across various projects. The upcoming feature enhancement will streamline this process, allowing project managers to handle all subcontracts associated with a single vendor across multiple projects more efficiently.

Feature details

Some of the most commonly used business processes that project managers perform during subcontract management include:

- Modify subcontract line
- Track subcontract usage
- Monitor billing progress for subcontracts

Currently, project managers need to navigate through multiple forms and interfaces to use these business processes. This complexity increases when managing vendors and subcontracts across various projects.

The upcoming feature enhancement will streamline this process, allowing project managers to handle these tasks more efficiently.

This feature will be enabled behind a feature flag to ensure that customers and partners can adapt to the changes on top of any customizations they might have added.

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

Feedback

Was this page helpful? Yes No

Use integration troubleshooting for modern projects

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

This feature saves time troubleshooting for customers and partners and makes it easier to find when data has not integrated between the finance and operations architecture and Microsoft Dataverse.

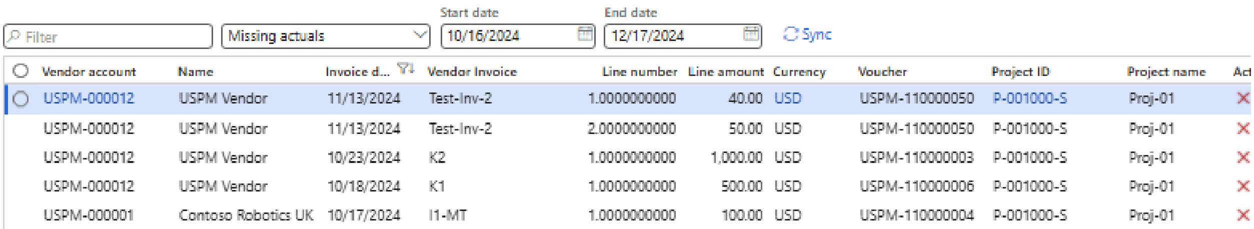
Feature details

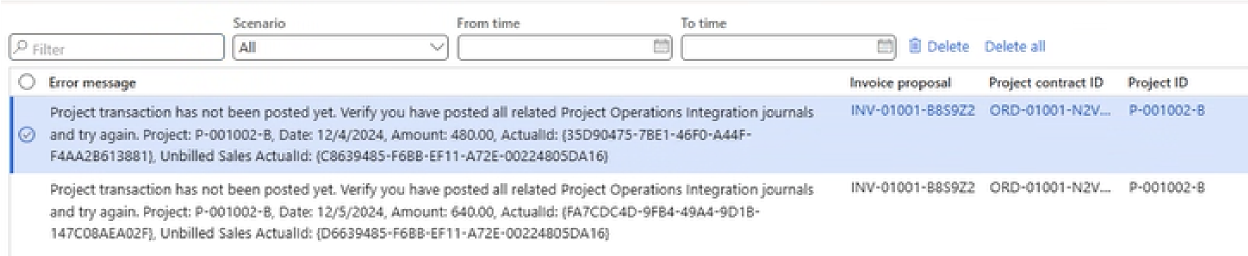
A new workspace has been introduced for the resource/nonstocked deployment type of Dynamics 365 Project Operations. This workspace enables new scenarios to save time troubleshooting errors and reviewing configuration errors, system errors, and other potential issues that otherwise would be buried in logs or missed. For example, the workspace enables customers to identify and resolve dual-write synchronization issues specifically related to vendor invoices and expenses. It provides detailed insights into the root causes of errors, including the number of affected records and associated amounts, ensuring a clear understanding of the scope of the issue.

New capabilities include:

- A new dashboard supporting accountants by highlighting pending journal postings and integration journal lines that have not been created, as well as any missing records, facilitating efficient ledger reconciliation.

- A new batch process to resync data, allowing users to address and resolve issues effectively, ensuring data consistency and operational continuity.
- A detailed view of several documents such as expense reports and vendor invoices indicating if they are in sync between Dataverse and the finance and operations infrastructure.
- A troubleshooting view where the full logs of the integration journal and invoice proposals are available and aren't truncated.





Feedback

Was this page helpful? Yes No

Use stocked products in resource-based deployments

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

This feature helps project managers manage projects that require inventoried products. Project managers can look at on-hand inventory counts at different sites and warehouse locations to estimate, procure, and manage the usage of inventoried products on their projects.

Feature details

The experiences for using inventoried products in Projects Operations will use the Inventory and Warehouse modules of Dynamics 365 Supply Chain Management. Pricing and Inventory visibility services are used to accurately estimate the availability of stocked items and their costs. The Inventory close process in Supply Chain Management will be used to update project cost to reflect accurate consumption of project budgets. This will be a multiple release wave effort to fully light up all the capabilities needed to manage stocked items on projects.

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

Feedback

Was this page helpful? Yes No

Use the enhanced quote experience

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

This feature reduces manual effort and minimizes errors by enabling users to add or edit quote line details directly from a unified grid interface. 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

This feature introduces 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.

These improvements streamline quote management to enhance 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

Use the improved project contract experience

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Many customers face challenges with the usability of the contract form, as highlighted by their feedback. Several areas requiring improvement have been identified, including navigation inefficiencies, inconsistent field layouts, and limited customization options, which hinder productivity and user satisfaction.

This feature streamlines the process of creating, viewing, and editing contract lines and their details by reducing the number of interactions required. By highlighting relevant information upfront and minimizing unnecessary clicks, it enhances accessibility, improves efficiency, and provides a more seamless user experience, ultimately increasing productivity and user satisfaction.

Feature details

This feature enhances contract management by improving usability, streamlining workflows, and providing quick access to essential information. Key updates include:

- **Nested grids**: View detailed estimates breakdown for each contract line in an organized format.
- **Simplified detail creation**: Create new Contract Line Details directly from one grid.

- **Price overrides**: Apply price adjustments on Contract Line Details directly within the grid.
- **Contract KPIs**: Display critical KPIs on the summary page for better decision-making.
- **Contract closure**: Easily close contracts to streamline lifecycle management.
- **Enhanced header information**: View gross margins and total costs directly in the contract header.
- **Billing transparency**: Access the current billing status for the contract in real time.
- **Tax visibility**: Display the "Tax" field directly on the contract line grid for easier access.

Feedback

Use the new Calendar interface for time entry

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Every organization requires an efficient time entry experience for their consultants and team members. This involves giving users flexibility to log time in various ways, by minimizing the number of clicks and effort required to do so.

Feature details

The web experience for time entry in Dynamics 365 Project Operations is receiving a series of improvements to facilitate faster, more accurate time entry, with better overall tracking for team members.

These upgrades include:

- A new Calendar interface to view, create, and modify time entries.
- The ability to track time logged across varying timelines (weekly, monthly, and so on).
- Tighter integration of work breakdown structure (for assigned tasks and projects) within the time entry creation step (Quick create forms).
- Improved tracking in the form of benchmarking (Actuals vs. Target hours) and visualizations to help team members track their progress on project tasks.

Feedback

Was this page helpful? Yes No

Use the new Time Entry mobile app

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2025	Aug 2025

Business value

Project consultants often travel for work and find it challenging to log weekly time entries on the go. Users now have a new mobile experience within Dynamics 365 Project Operations to view, create, and submit their time entries for approval.

Feature details

Project team members on Lite and resource/nonstocked-based deployments of Project Operations now have a new mobile application based on Microsoft Power Apps. The new mobile app helps them log time, keep track of submitted entries, and view the work assigned to them.

The application provides users with the following capabilities:

- A view that summarizes all Microsoft Outlook meetings and Microsoft to-do items for that day. These meetings and to-do items can then directly be used to log time entries.
- The ability to view projects and tasks on which the team member is currently staffed, and the duration that the staffed project is going to run for.
- A section to view day-wise time entries, across statuses (Draft, Submitted, and so on) where users can modify or delete editable entries, submit entries for approval or recall already submitted entries.

- Users now get access to a new mode of logging time with the help of a timer that can be used to record the duration of granular work performed, and then later be tagged to a project or task and turned into a time entry.

All changes made on the mobile app will be synced to the web app for Project Operations or Project Operations Team Member and vice versa. Steps to install or enable this mobile app will be updated soon.

Feedback

Was this page helpful? Yes No

Use the simplified Approvals page

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

The **Approvals** page in Dynamics 365 Project Operations today is difficult to navigate and sort. This leads to unnecessary extra time spent by project managers navigating the UI when they work on approving time, material, and expense entries. We aim to simplify and optimize the UI design to make the approvals process smoother and easier.

Feature details

The Approvals feature will get an overhaul of the UI experience for approvals in Project Operations. These UI changes include showing approvals in a calendar grid, like the Time entry creation grid, and highlighting the most relevant information so project managers can easily see which records need their attention.

Feedback

Was this page helpful? Yes No

Use what-if analysis on estimates

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

This feature empowers users to simulate various estimation scenarios by adjusting key pricing dimensions, providing real-time insights into quote estimations. Users can explore different strategies and quickly identify the most effective path to achieve their financial goals. By manipulating factors such as price, discount rates, and cost reductions, users can optimize profitability and align quotes with specific sales targets.

Automated calculations save time, reduce errors, and enhance negotiation flexibility, enabling sales teams to confidently tailor proposals to client needs while safeguarding their bottom line. This ensures that every quote meets both customer satisfaction and business objectives.

Feature details

This feature introduces a robust what-if analysis capability for estimates, enabling users to model scenarios and evaluate their impact on key financial goals.

- **Scenario modeling**: Use existing quotes to simulate scenarios and assess their effects on goals like profitability and gross margins.
- **Goal-oriented analysis**: Select specific goals and target values to model pricing changes effectively.
- **Dynamic pricing dimensions**: Adjust key pricing dimensions to explore how changes influence the selected goals.

- **Informed decision-making**: Review multiple what-if analysis models, compare outcomes, and apply the most suitable option to the quote.

Feedback

Was this page helpful? Yes No

Plan and prepare for finance and operations cross-app capabilities in 2025 release wave 1

Article • 01/23/2025

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

Boost productivity with copilot

AI provides opportunities to empower enterprise users through copilot experiences.

These experiences increase productivity by using 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 Azure 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

What's new and planned for finance and operations cross-app capabilities

Article • 01/23/2025

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

For a list of the previous wave's release plans, go to 2024 release wave 2 plan.

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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Boost productivity with copilot

Increase your productivity with copilot, enabling AI operations and queries in natural language.

Expand table

Feature	Enabled for	Public preview	General availability
Ask questions about your ERP data in natural language	Admins, makers, marketers, or analysts, automatically	Apr 2025	Oct 2025

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 finance and operations virtual tables	Admins, makers, marketers, or analysts, automatically	Apr 2025	Oct 2025
Enable support for asynchronous operation in dual-write functionality	Users by admins, makers, or analysts	✔ Oct 31, 2024	Apr 2025

You are able to opt into some features as part of early access on February 3, 2025, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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For 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 productivity with copilot

Article • 01/23/2025

ⓘ Important

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

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Feedback

Was this page helpful? Yes No

Ask questions about your ERP data in natural language

Article • 01/23/2025

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2025	Oct 2025

Business value

Users can get quick answers to questions from their enterprise data by asking agents in natural language chat.

Feature details

Makers will have the ability to add Dataverse virtual tables for finance and operations apps as knowledge sources to the agents in Microsoft Copilot Studio. This provides users the ability to ask questions in their agent chat experiences in natural language and get answers from their enterprise business data in finance and operations apps.

Feedback

Was this page helpful? Yes No

One Dynamics One Platform

Article • 01/23/2025

ⓘ Important

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Customers using Export to Azure 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 • 01/23/2025

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 31, 2024	Apr 2025

Business value

This feature enables asynchronous business processes for dual-write functionality for your business.

Feature details

Dual-write functionality currently supports initial synchronization and live synchronization modes. In this release wave, dual-write functionality supports continuous, asynchronous data movement between finance and operations apps and Microsoft Dataverse for eventual data consistency. It enables asynchronous business processes to participate in dual-write functionality. By executing bulk create and update operations in asynchronous mode, you can avoid session timeout problems and delays that can occur with blocking synchronous operations.

Additional resources

Dual-write async in finance and operations (docs)

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

Feedback

Was this page helpful? Yes No

Get offline support for finance and operations virtual tables

Article • 01/23/2025

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2025	Oct 2025

Business value

Many enterprise mobile applications are used in the field where there may be inconsistent access to Internet resources. In these cases, the mobile application must continue to function in offline mode. For mobile Power Apps built against Dataverse virtual tables for Dynamics 365 finance and operations apps, there will now be offline support to ensure work isn't 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 2025 release wave 1

Article • 01/23/2025

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

Overview

https://aka.ms/ReleaseHighlight/2025W1/HumanResource

Microsoft Dynamics 365 Human Resources is a comprehensive HR solution designed to support organizations in managing the entire hire-to-retire lifecycle of an employee. With 2025 release wave 1, Dynamics 365 Human Resources is enhancing capabilities to optimize core HR operations, covering personnel management, compensation, benefits, and performance management. These improvements are aimed at helping HR teams streamline administrative tasks, improve employee experience, and foster greater alignment with organizational goals.

This release also introduces new innovations in Copilot and AI. With these advancements, HR professionals can leverage the power of AI to gain actionable insights, automate repetitive tasks, and support more strategic decision-making. From automating administrative workflows to providing employees with self-service options for common HR requests, Copilot and AI innovation are positioned to redefine productivity and engagement across HR functions.

Key investment areas for 2025 release wave 1:

- **Optimize human resource operations**: Enhancements across personnel, compensation, benefits, and performance management bring a seamless, connected approach to the hire-to-retire lifecycle. This ensures that organizations can efficiently manage and support employees throughout their tenure.
- **Copilot and AI innovation**: By embedding AI-driven capabilities, Dynamics 365 Human Resources provides a proactive approach to HR, enabling data-driven

insights and automating routine tasks. These innovations empower HR teams to focus on strategic priorities while enhancing the employee experience with intuitive, intelligent tools.

With Dynamics 365 Human Resources, organizations can build a modern, resilient workforce by enabling HR to be more efficient, responsive, and aligned with the evolving needs of their people and business.

Investment areas

Copilot in Dynamics 365 Human Resources
With every new release wave, AI and automation investments empower employees, HR managers, administrators, and recruiting agents, providing them with intelligent, natural-language interactions. These enhancements extend beyond business applications to productivity tools like Microsoft Teams, Microsoft Outlook, and Microsoft Excel, meeting employees where they are most productive. Copilot features in Human Resources streamline and expedite workflows from the frontline of employee experiences to the human resources back office, optimizing operational efficiencies.

Optimize human resource operations
Every new release wave of the Dynamics 365 Human Resource application brings new enhancements for corporations and organizations to optimize their human resource operations from personnel management, compensation, benefits, and performance management. Improvements in recruiting operations, skills and competency management, and succession management bring efficiencies in the hire-to-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

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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 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.

Helpful links	Description
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 • 01/23/2025

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Copilot in Dynamics 365 Human Resources

Introducing copilot capabilities in Dynamics 365 Human Resources.

Expand table

Feature	Enabled for	Public preview	General availability
Explore recruiting copilot scenarios	Users by admins, makers, or analysts	Jan 2025	Jun 2025
Simplify onboard process for new hires with Copilot	Users by admins, makers, or analysts	Jun 2025	Sep 2025
Streamline onboard process for hiring managers with Copilot	Users by admins, makers, or analysts	Jun 2025	Sep 2025
Boost candidate screening efficiency with automated assessments	Users by admins, makers, or analysts	Aug 2025	Sep 2025

Optimize human resource operations

Optimize human resource operations from personnel, compensation, and benefits to performance management in a hire-to-retire lifecycle of an employee.

Expand table

Feature	Enabled for	Public preview	General availability
Avoid duplication with Microsoft Entra ID integration	Users by admins, makers, or analysts	Jul 2025	Sep 2025
Use recruiting for service-centric organizations	Users by admins, makers, or analysts	✔ Jul 17, 2024	Jun 2025
Integrate Human Resources with Viva Connections	Users by admins, makers, or analysts	Mar 2025	Sep 2025

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Was this page helpful? Yes No

Copilot in Dynamics 365 Human Resources

Article • 01/23/2025

ⓘ Important

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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

Boost candidate screening efficiency with automated assessments

Article • 01/23/2025

ⓘ Important

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Expand table

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

Business value

Automated assessments make your screening process more efficient by reducing initial review time and eliminating biases, allowing you to focus on the most qualified candidates.

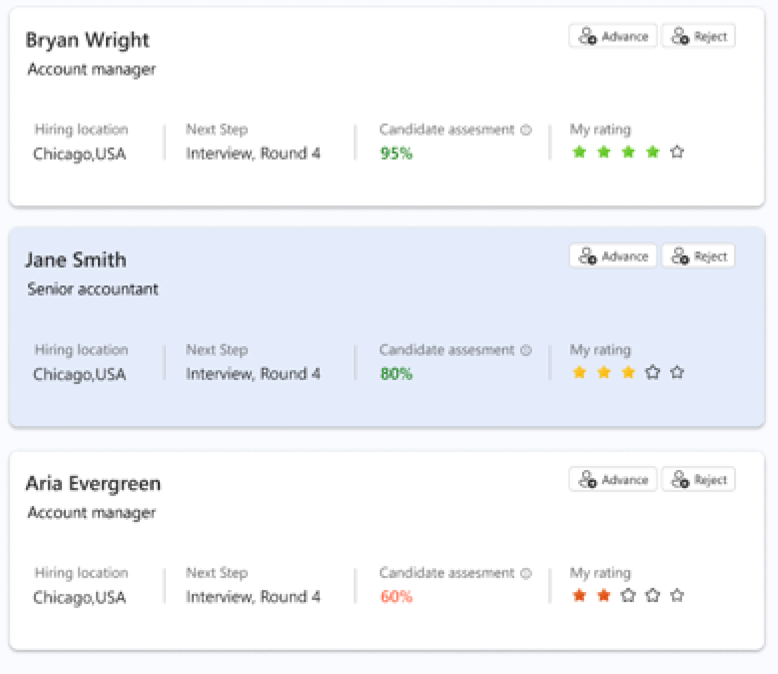
Feature details

Automated assessments streamline the screening process by reducing the time needed for initial reviews. The application now includes a section where you can create and manage these assessments, which can be customized to match specific job requirements. Standardized tests help eliminate biases, enabling you to evaluate applicants based on their skills and competencies rather than personal opinions.

Candidate assessment leverages AI-powered resume screening and matching to efficiently sift through large volumes of resumes and automatically match candidates to job descriptions based on their skills, experience, and qualifications. This feature offers the following out-of-the-box functionalities:

- Uses advanced AI algorithms to analyze and screen resumes quickly and accurately.

- Matches candidates to job descriptions by evaluating their skills, experience, and qualifications.
- Capable of handling and processing large volumes of resumes efficiently.
- Assesses candidates' skills and experience to ensure the best fit for job roles.
- Ensures candidates meet the necessary qualifications for the job descriptions.
- Provides dynamic filtering options to refine candidate searches based on specific criteria.
- Offers real-time updates on candidate matches and screening results.



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

Feedback

Was this page helpful? Yes No

Explore recruiting copilot scenarios

Article • 01/23/2025

ⓘ Important

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Expand table

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

Business value

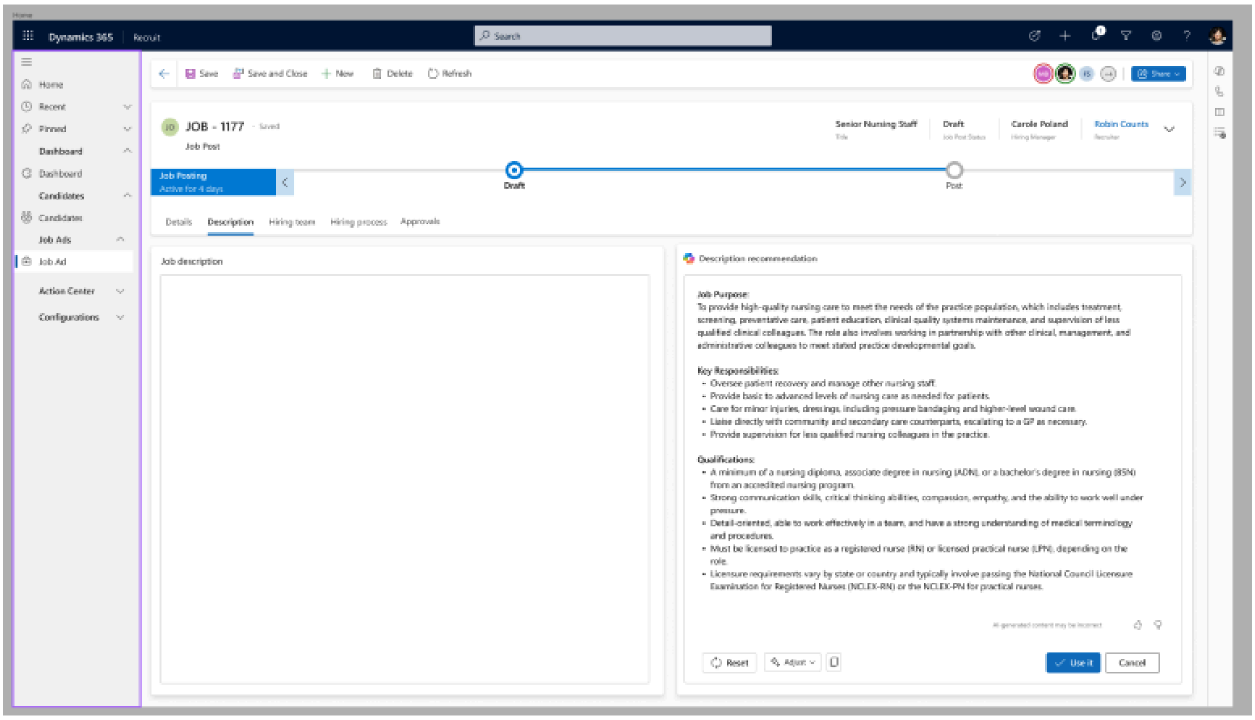
The copilot scenario in recruiting provides a range of benefits, enhancing the efficiency and effectiveness of the entire hiring process. Human resources administrators, recruiters, and hiring managers can make use of a candidate's autocalculated fitment percentage and autojob description generation features. This allows them to focus on more strategic aspects of the hiring process. It leads to a more efficient, objective, and candidate-centric hiring process, contributing to the overall success of talent acquisition efforts.

Feature details

This is an extension of the recruiting app where end-to-end flow of the hiring process aligns with the different personas in the process.

The following scenarios are planned as part of this release:

- **Job description generation**: Quickly create 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**: Provide 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

Simplify onboard process for new hires with Copilot

Article • 01/23/2025

ⓘ Important

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Expand table

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

Business value

This feature helps an organization's HR staff to streamline the overall onboarding process for their new hires. It starts as soon as you start onboarding a new employee, using the guides you've already set up in Dynamics 365 Human Resources. You save time and reduce the administrative burden by automating tasks like document collection and training schedules. In addition to that, new employees get a smoother, more engaging onboarding experience, helping them integrate faster and feel welcomed from day one.

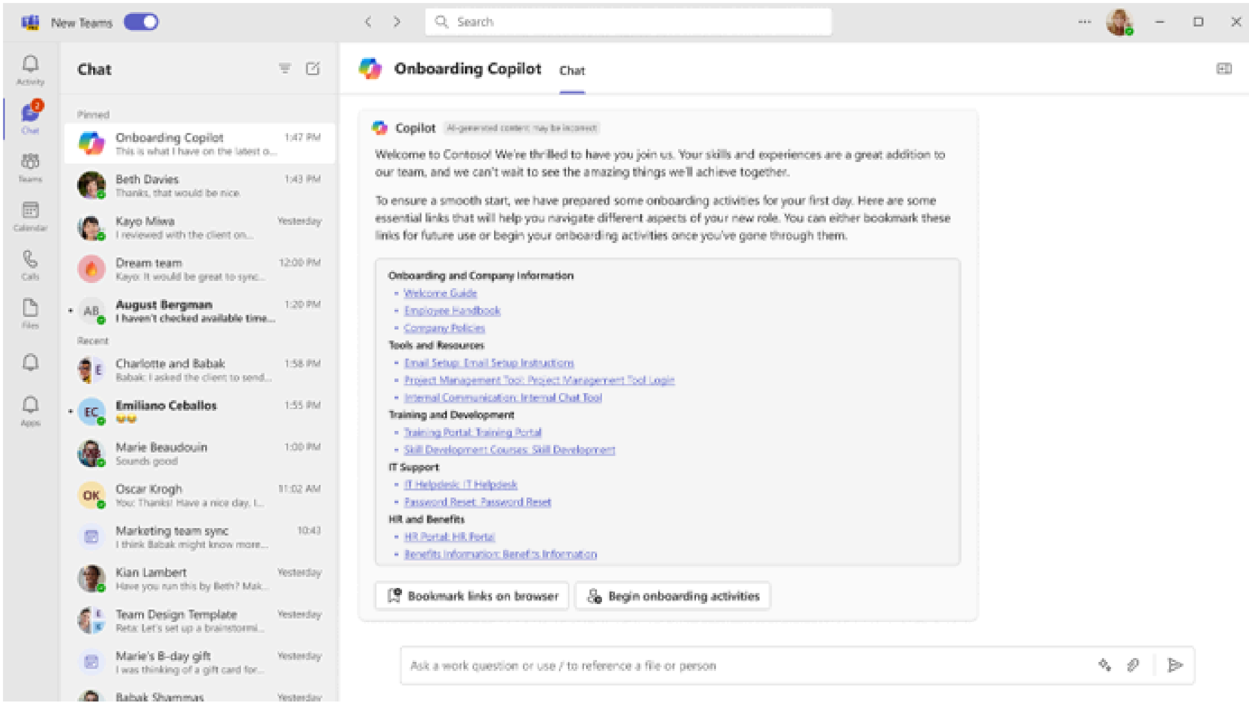
Feature details

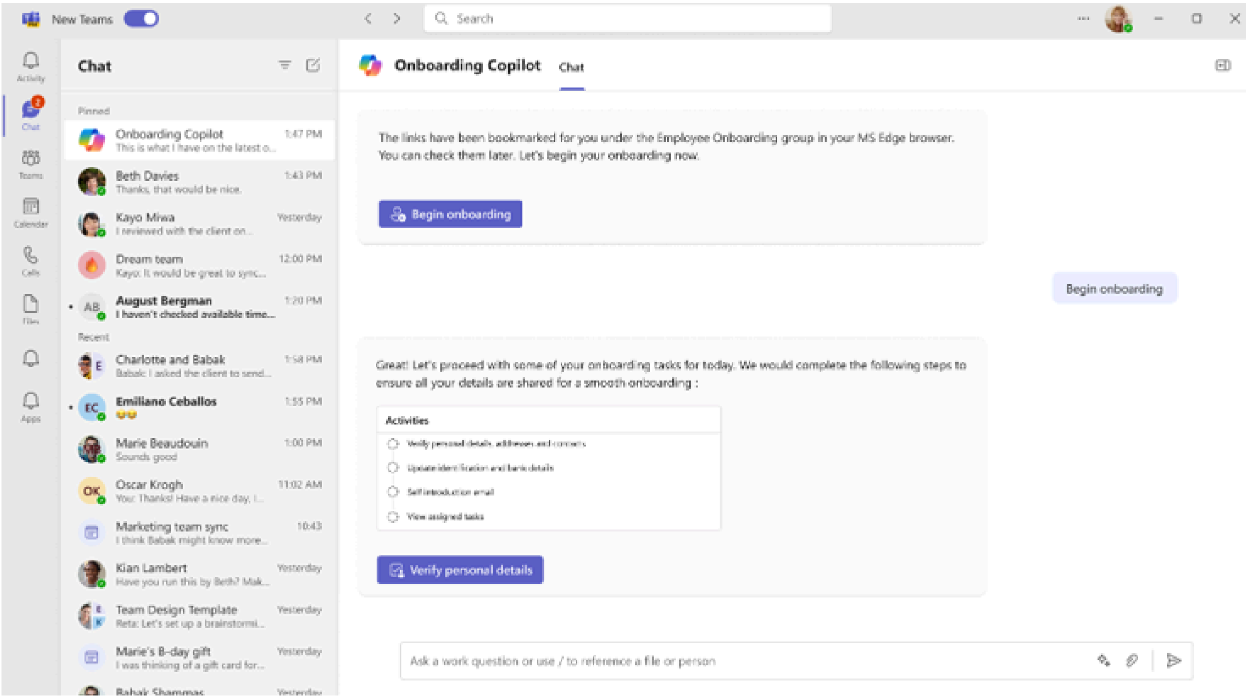
The Copilot-powered onboarding for Dynamics 365 Human Resources makes use of the onboarding guides you've already created. The user-friendly interface displays pending tasks, upcoming deadlines, and personalized tips for new employees. It automates document collection, training schedules, and introductions to team members, ensuring a smooth and efficient onboarding experience. Some of the benefits include:

- Reduced administrative workload.
- Faster integration of new hires.
- A more engaging onboarding process.

By integrating directly into Microsoft Teams, it streamlines the onboarding process and reduces the risk of errors. The onboarding assistant offers the following out-of-the-box functionalities:

- Embedded within Microsoft Teams, accessible via a chat interface.
- Automates repetitive tasks such as document submission, training module completion, and policy acknowledgments.
- Ensures all new hires receive the same information and experience.
- Tailors the onboarding process to the specific role and department, providing customized content and resources.
- Allows new hires and HR personnel to track the completion of onboarding tasks in real time.
- In-app notifications and reminders to keep new hires on track.





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Feedback

Was this page helpful? Yes No

Streamline onboard process for hiring managers with Copilot

Article • 01/23/2025

ⓘ Important

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Expand table

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

Business value

Leveraging a Copilot-powered onboarding experience can significantly enhance efficiency by drastically reducing workload through the automation of tedious and repetitive tasks. It is crucial to implement not just a proper onboarding program, but a well-designed, automated, and structured onboarding process with the ability for the hiring managers to track the overall onboarding of their new hires.

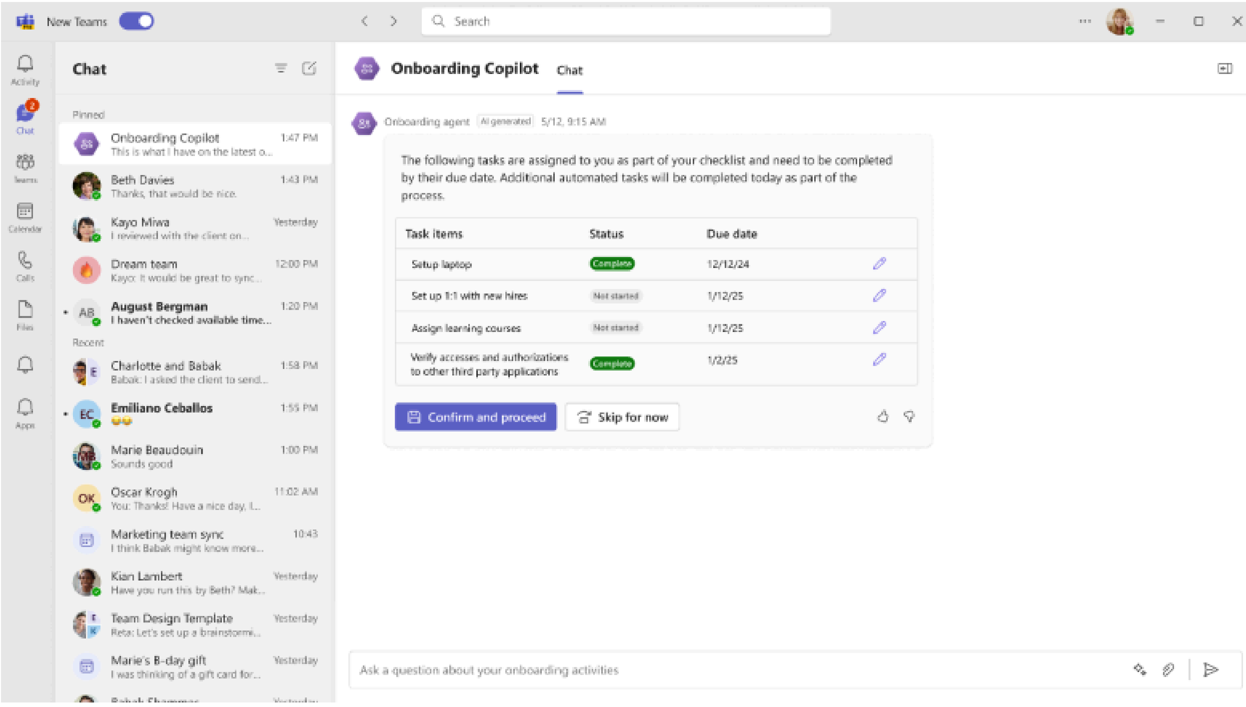
Feature details

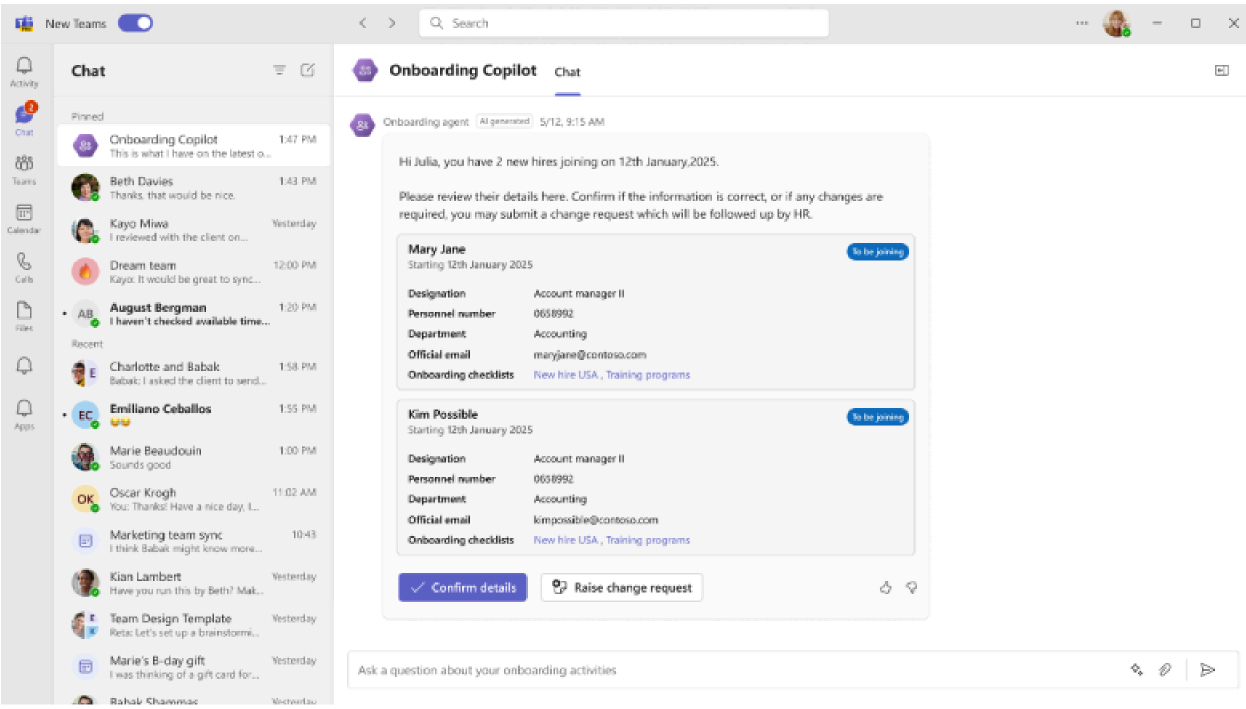
The Copilot-powered onboarding for hiring managers is designed to streamline the onboarding process for new hires within Microsoft Teams. It helps hiring managers efficiently manage and track the onboarding activities assigned to their new employees. Additionally, it assists in drafting introduction emails for new hires, ensuring a smooth and welcoming start for them.

In this release, the following key capabilities are planned:

- **Track onboarding activities assigned to employees**: Help track the various statuses of the tasks assigned to new employees as part of the onboarding process.

- **Help draft introduction emails**: Automatically draft introduction emails for new hires to the team.





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Feedback

Was this page helpful? Yes No

Optimize human resource operations

Article • 01/23/2025

ⓘ Important

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Feedback

Was this page helpful? Yes No

Avoid duplication with Microsoft Entra ID integration

Article • 01/23/2025

ⓘ Important

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Expand table

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

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 in 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 • 01/23/2025

ⓘ Important

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Expand table

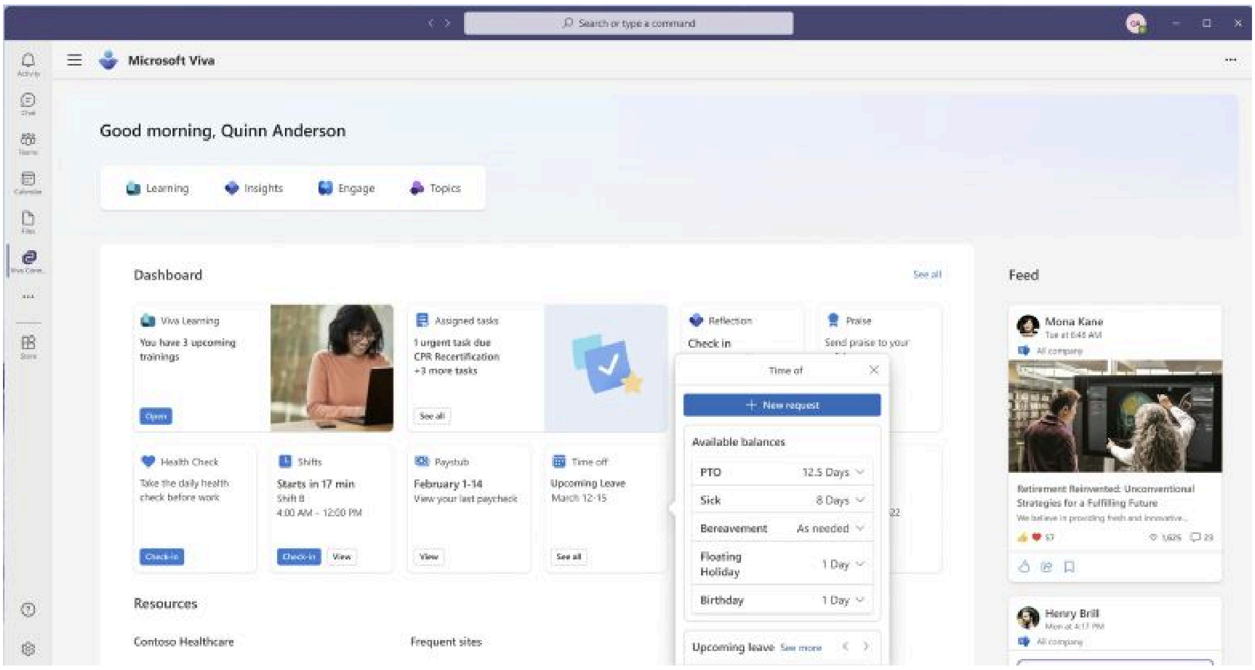
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Mar 2025	Sep 2025

Business value

By integrating Dynamics 365 Human Resources with Microsoft Viva Connections, you can create a seamless and personalized experience for yourself and your employees. Imagine having all your HR-related data in one centralized dashboard without having to sign in to Dynamics 365 finance and operations multiple times to look for HR-related data. This integration saves you time and effort, making your daily work smoother and more efficient. This not only boosts your productivity but also helps you get an enhanced user experience.

Feature details

Enhancing the employee experience, integration with Microsoft Viva Connections centralizes access to HR data and delivers personalized information through adaptive cards. This eliminates the need to sign in to separate systems, simplifying information retrieval. Employees can conveniently access all their HR-related data in one place, with adaptive cards providing targeted information specific to their needs, removing the need to sign in to Dynamics 365 finance and operations for the same details.



Feedback

Was this page helpful? Yes No

Use recruiting for service-centric organizations

Article • 01/23/2025

> ⓘ Important
>
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Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✓ Jul 17, 2024	Jun 2025

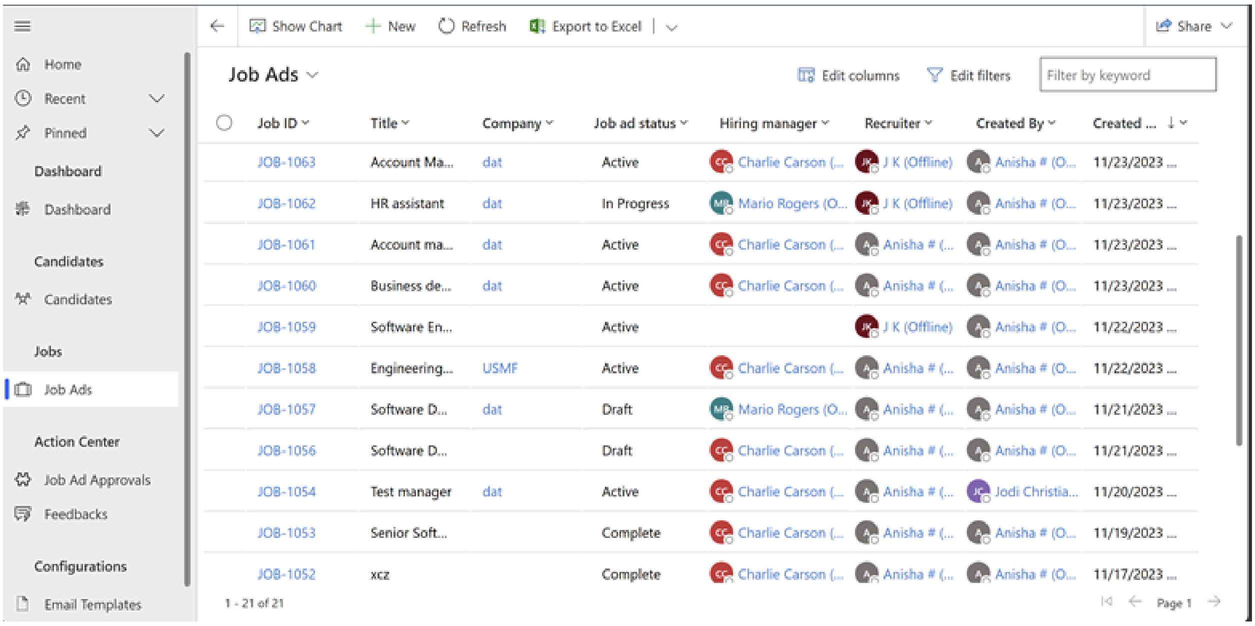
Business value

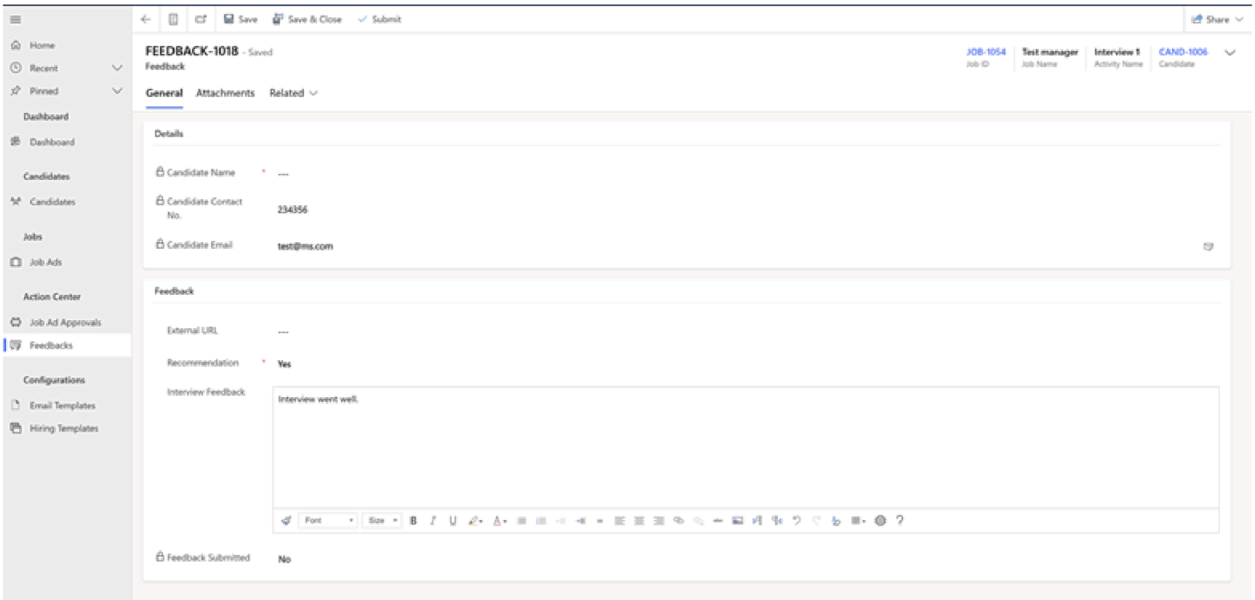
The recruiting feature provides human resources business partners, recruiters, and hiring managers with the ability to create interview process templates, create talent pools, read candidate profile information from LinkedIn, collaborate, and include relevant information related to the position when 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.





Additional resources

Set up the HR Recruiting app (docs)

Feedback

Was this page helpful? Yes No

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

Article • 01/23/2025

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

Overview

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:

- **Support for modern payments**: With support for asynchronous notifications, the out-of-the-box Adyen payment connector enables a pay by link (QR code) payment method that enables the cashiers to complete the transactions without the need of dedicated payment terminals. Additionally, this enables modern buy-now-pay-later payment methods such as Klarna, Affirm, and Afterpay. Moreover, merchants will be able to receive crucial payment-related notifications such as dispute, capture failures, and reconciliation reports.
- **Simplified peripheral integration on iOS**: Simplify peripheral integration in iOS POS devices by eliminating the need for a shared hardware station. This allows extensibility on iOS POS for third-party payment providers and fiscal integration.
- **Improved offline device management**: Offline device dashboards for IT managers to monitor device health and readiness to detect issues. Reduce database sizes of offline devices by leveraging data compression. Notifications and health check on POS devices to notify store employees on device readiness for offline switching.
- **Multifaceted pricing strategies**: Omnichannel pricing that allows attribute-based pricing, price segmentation, complex pricing structures, and more. Flexible pricing strategies can be applied using a rich set of pricing techniques including long-term trade agreements, short-term price adjustments, promotional discounts, auto charges, and retrospective rebates.

Investment areas

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, the Dynamics 365 Commerce 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 result in time saved on every transaction, leading to happier, more efficient sales associates. Customers who want to skip the queue can instead use Store Commerce's fast and frictionless self-checkout functionality to quickly complete their payment.

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

Check out the release plan

For application administrators

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

Features that must be enabled by application administrators
This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the

complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.

Get the most out of Commerce

Expand table

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

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

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Commerce

Article • 01/23/2025

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

For a list of the previous wave's release plans, go to 2024 release wave 2 plan.

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.

Omnichannel commerce

Reimagine cross-channel retail operations with Dynamics 365 Commerce's headless omnichannel retail engine.

Expand table

Feature	Enabled for	Public preview	General availability
Modernize Commerce payments to enable new payment methods	Users by admins, makers, or analysts	Apr 2025	Jun 2025
Roll out multifaceted pricing strategies	Users by admins, makers, or analysts	✔ Oct 25, 2024	Apr 2025
Enable use of sales order attributes to define pricing rules	Users by admins, makers, or analysts	Jan 2025	Apr 2025

Store Commerce

Store Commerce POS on Dynamics 365 Commerce enables retailers to provide efficient and frictionless sales experiences on any device, anywhere in the world.

Expand table

Feature	Enabled for	Public preview	General availability
Monitor and manage Store Commerce offline readiness	Admins, makers, marketers, or analysts, automatically	Feb 2025	Apr 2025
Customize payments, peripherals on Store Commerce app for iOS	Users by admins, makers, or analysts	Apr 2025	Jun 2025
Notify associates of network and offline data issues	Admins, makers, marketers, or analysts, automatically	-	Jun 2025
Improve Store Commerce health check	Admins, makers, marketers, or analysts, automatically	-	Jun 2025
Simplify Store Commerce offline database size management	Users by admins, makers, or analysts	-	Apr 2025

You are able to opt into some features as part of early access on February 3, 2025, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

For 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

Omnichannel commerce

Article • 01/23/2025

ⓘ Important

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

Developed as a modern, cloud-based, software as a service (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

Enable use of sales order attributes to define pricing rules

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Order attributes can influence ordering behavior segmentation and attribute-based pricing. These attributes may include omnichannel attributes such as promotion campaign IDs, order types, and channel-specific attributes. Dynamics 365 Commerce provides the attribute framework to enable you to edit and set attribute values for orders directly in Commerce headquarters, point of sale (POS), and Commerce runtime (CRT).

Order attributes are classified as header and line attributes and can be linked to channels. The unified pricing management feature allows the omnichannel and channel-specific order header and line attributes to be part of the price attributes.

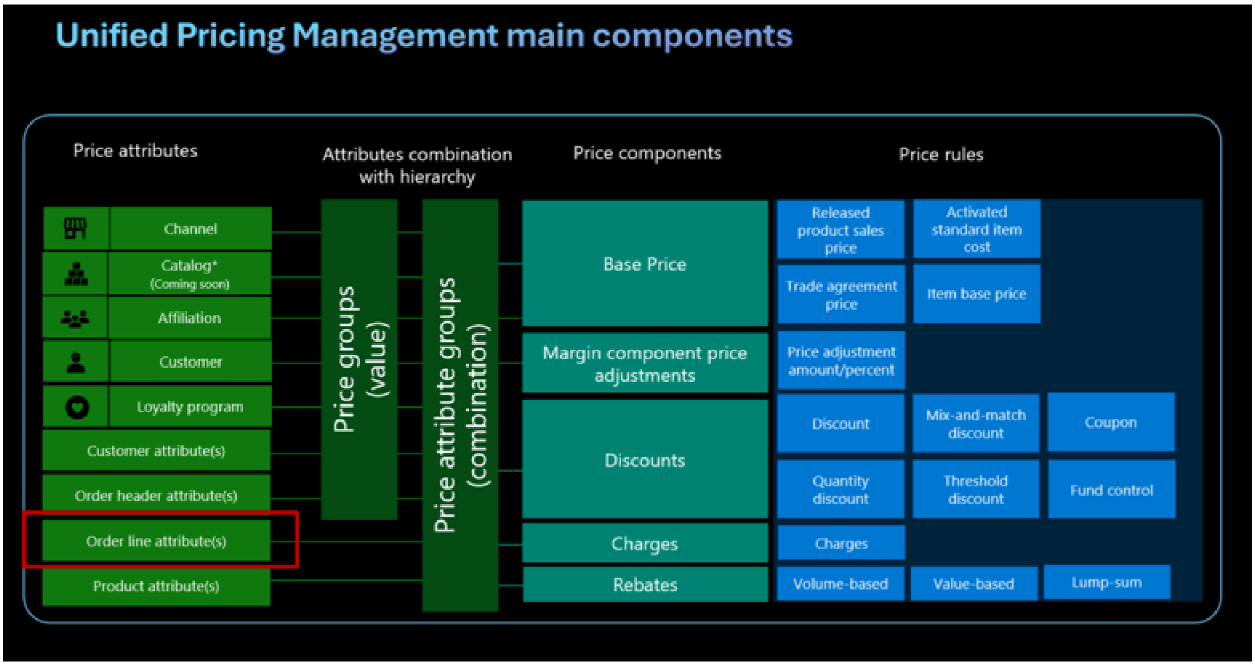
Feature details

With the unified pricing management feature, price managers can use order header and line attribute values to define attribute-based pricing rules.

Price managers can:

- Define omnichannel order attributes by using order attributes defined in Commerce parameters.
- Include channel-specific attributes in the price attribute group.

In addition to Dynamics 365 Commerce users being able to use channel-specific order attributes to define price rules, Dynamics 365 Supply Chain Management users can define the order header and order line attribute groups in parameters and use the attributes to define the price rules.



Feedback

Was this page helpful? Yes No

Modernize Commerce payments to enable new payment methods

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

In today's e-commerce environment, consumers have access to a vast array of payment methods. Businesses aim to provide the flexibility for consumers to choose their preferred payment option. However, unlike traditional credit and debit card payments, many of the modern payment methods don't provide a payment authorization in real time.

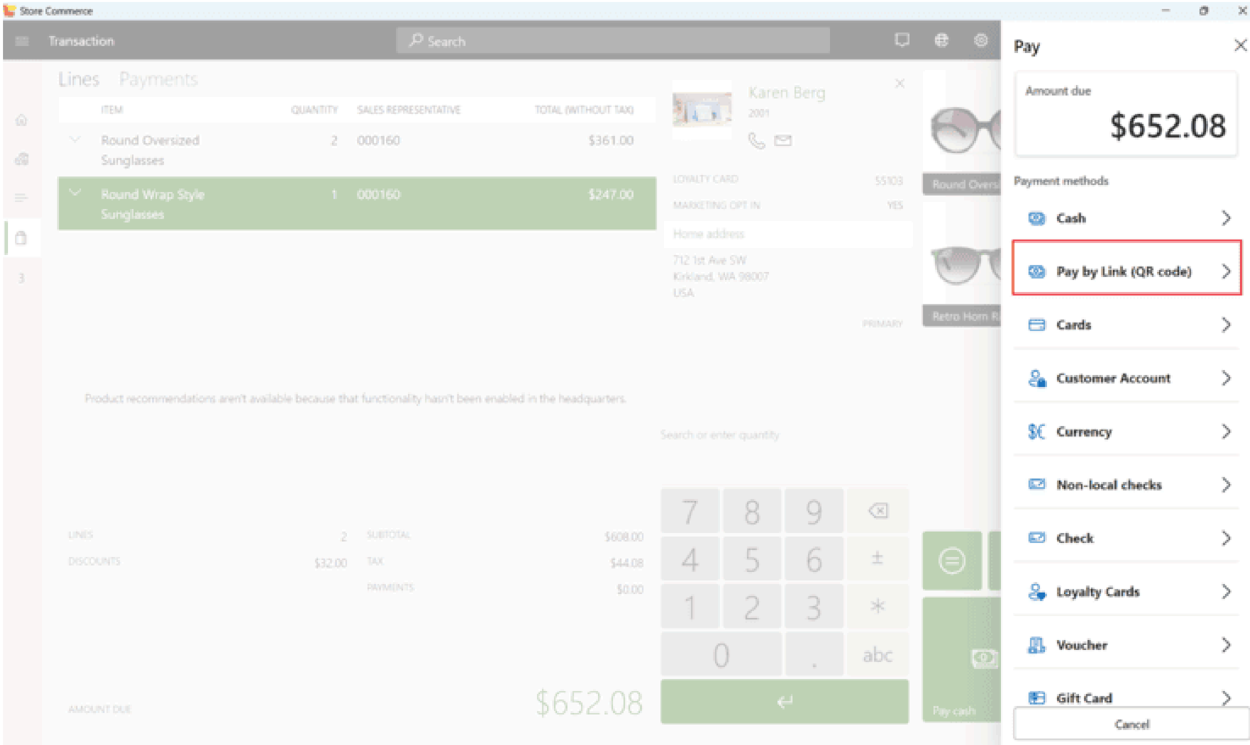
Additionally, many payment providers such as Adyen provide critical information such as dispute notifications and payment-related reports via asynchronous notifications. As a result, modern commerce systems need to support asynchronous payment processing to help businesses improve their sales conversion numbers and streamline crucial post-payment processing activities such as dispute management and reconciliation.

Feature details

As a part of this feature, Dynamics 365 Commerce enables support for asynchronous payment processing by providing the capability to process payment-related notifications from payment service providers such as Adyen. These notifications are accessible via Commerce Scale Unit (CSU) and Commerce headquarters.

The Store Commerce app uses these notifications to enable a new "Pay by Link" quick response (QR) code payment method that can be displayed in the Store Commerce app to be scanned by customers, or that cashiers can use to generate a link to share with customers via email. Customers can then open the webpage mapped to the payment link and complete their payment using the payment options available on the webpage.

Implementation partners can use other payment notifications such as dispute and reports notifications to build customized experiences to meet their business processes.



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

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Feedback

Was this page helpful? Yes No

Roll out multifaceted pricing strategies

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 25, 2024	Apr 2025

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.

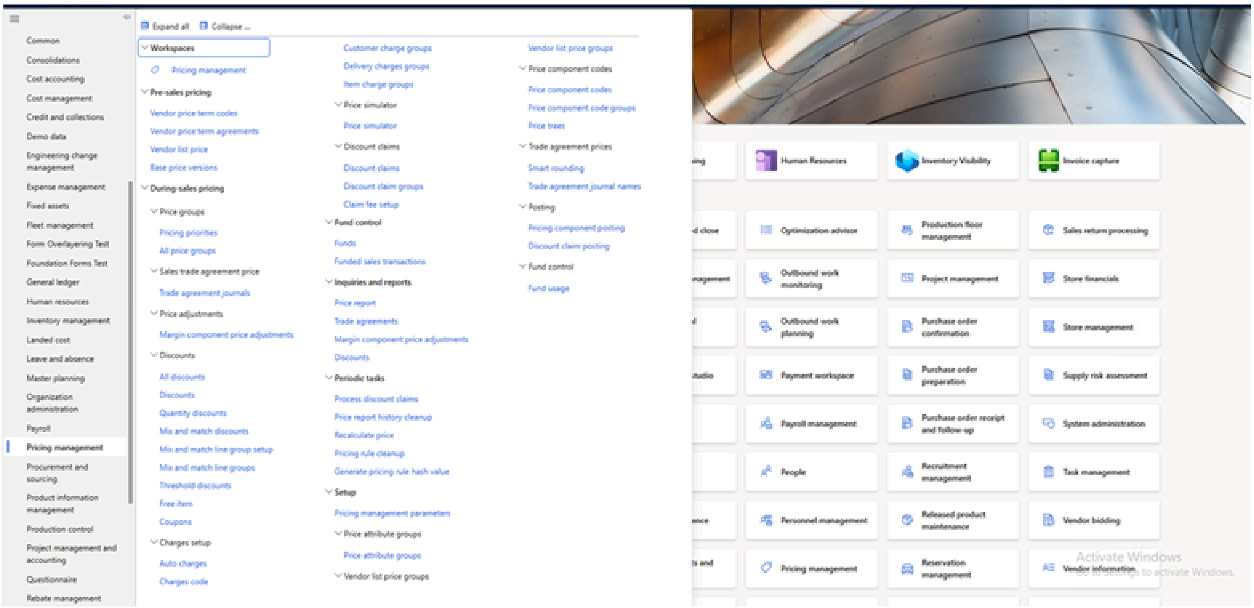
The omnichannel experience also requires a real-time and performant pricing execution that enables businesses to quickly adapt to market changes and customer demands. This feature allows you to implement a unified pricing management module that works consistently and comprehensively across supply chain, 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.



Additional resources

Unified pricing management module overview (docs)

Feedback

Was this page helpful? Yes No

Store Commerce

Article • 01/23/2025

ⓘ Important

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

Built on a modern, headless, omnichannel retail platform, the Dynamics 365 Commerce Store Commerce POS enables retailers to provide fast, efficient, and modern checkout experiences on fixed and mobile devices that operate 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 result in time saved on every transaction, leading to happier, more efficient sales associates. Customers who want to skip the queue can instead use Store Commerce's fast and frictionless self-checkout functionality to quickly complete their payment.

Feedback

Was this page helpful? Yes No

Customize payments, peripherals on Store Commerce app for iOS

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

The sealed Store Commerce app for mobile platforms has greatly simplified deployment and maintenance, making it easier for organizations to introduce or expand mobile point of sale (POS) devices in retail stores. Dynamics 365 Commerce will enable the implementation of hardware station extensions for Store Commerce app for iOS so that customers who use payment providers other than Adyen can easily deploy mobile solutions.

Feature details

This feature introduces hardware station extensibility for Store Commerce app for iOS, enabling greater flexibility in hardware integration. With this feature you can build and deploy customizations for Store Commerce app for iOS's in-built hardware station to support:

- **Integration with your preferred payment processing service**: Easily implement connectors for custom or existing payment processing services, allowing for seamless transactions within your iOS devices.
- **Fiscal printers for compliance needs**: Connect iOS devices with fiscal printers to fulfill specific fiscal integration requirements, ensuring compliance in regions with strict fiscal regulations.

- **Custom peripheral devices**: Enable peripherals not currently supported by the Store Commerce app, allowing you to adapt the system to your store's unique hardware needs.

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

Feedback

Was this page helpful? Yes No

Improve Store Commerce health check

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Admins rely on the health check feature in Store Commerce to gain insights into the overall status of the network and other hardware peripherals. Offline readiness and business continuity are crucial for maintaining service levels and customer satisfaction during network issues. Store employees need to know if their devices are prepared for offline mode to ensure seamless transitions and uninterrupted operations.

This feature aims to introduce a new view for network health checks by surfacing information from the network information API, platform-specific API, and CSU processing times. With these additional insights, store employees will be able to determine whether performance issues are caused by network or server problems, understand why the offline switch is unavailable, and receive recommended actions.

Feature details

With this feature, your store associates and managers will see the following improvements in Store Commerce health check:

- **A new view** for displaying information from the network information API and platform-specific API.
- **CSU processing times** are shown for requests in health check to provide additional insights for store associates.

- **Retry logic** added for failed CSU requests in case of random intermittent network failures.

Feedback

Was this page helpful? Yes No

Monitor and manage Store Commerce offline readiness

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

You can monitor and manage Store Commerce offline readiness to efficiently detect and troubleshoot critical issues that may impact offline readiness and to ensure that all offline-enabled devices running Store Commerce across your organization are healthy and available to switch to offline mode when needed.

Feature details

Dynamics 365 Commerce customers rely on successful operation of Store Commerce in offline mode to maintain business continuity during network or service interruptions.

With offline readiness monitoring, you can quickly ensure that all offline-enabled devices running Store Commerce across your organization are healthy and available to switch to offline mode when needed.

You can also efficiently detect and troubleshoot critical issues that may be impacting offline readiness of multiple devices within or across stores.

Enhanced filtering and summarization of data synchronization sessions will help you with faster correlation and cause detection.

Administrators will automatically have access to offline readiness monitoring for their organization.

Feedback

Notify associates of network and offline data issues

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

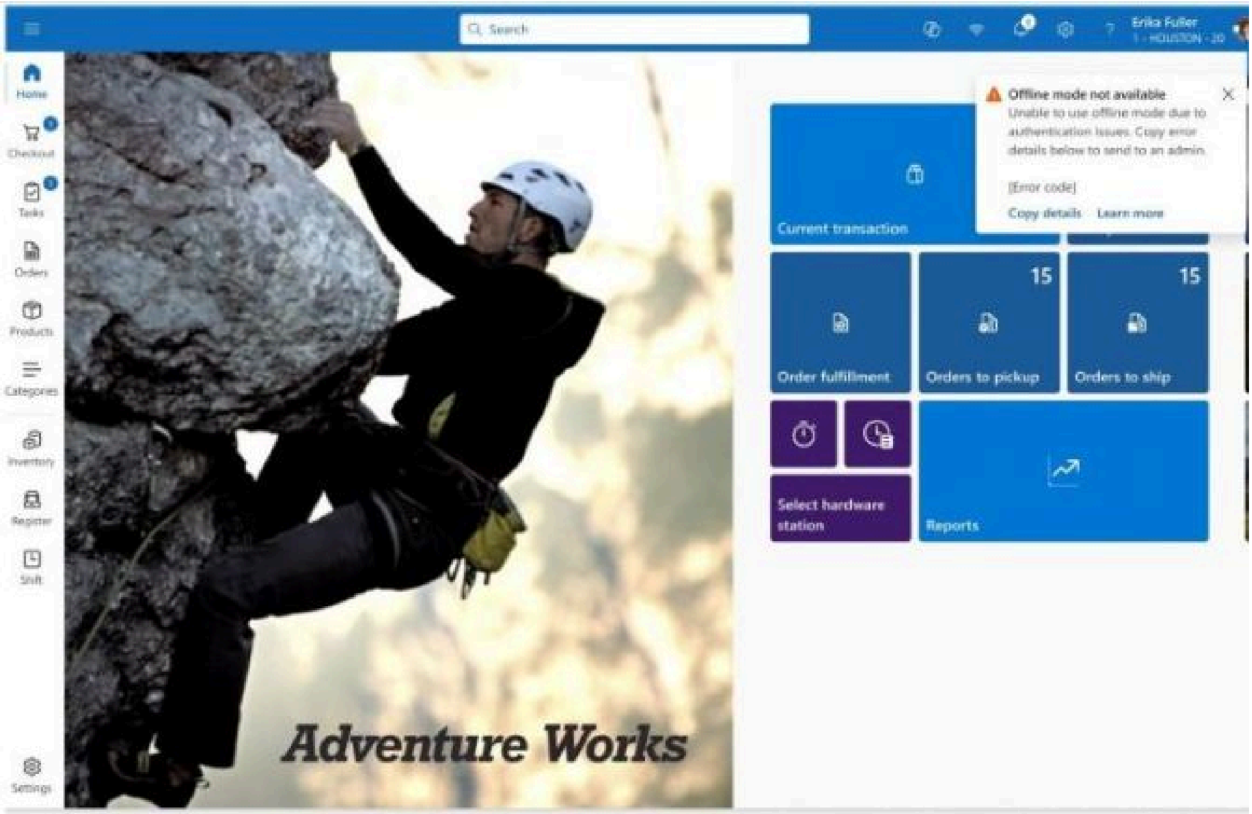
Dynamics 365 Commerce customers use the offline capabilities of the Store Commerce app to maintain business continuity during network or service outages. When customers need to switch to offline, the offline switch can fail due to offline data missing in the offline database. This feature will help create proactive notifications in the Store Commerce app to the cashiers or store managers about the offline health and recommend appropriate actions for mitigation. This will also introduce the toast notification framework for the first time within Store Commerce app that can further expand into other scenarios in the future.

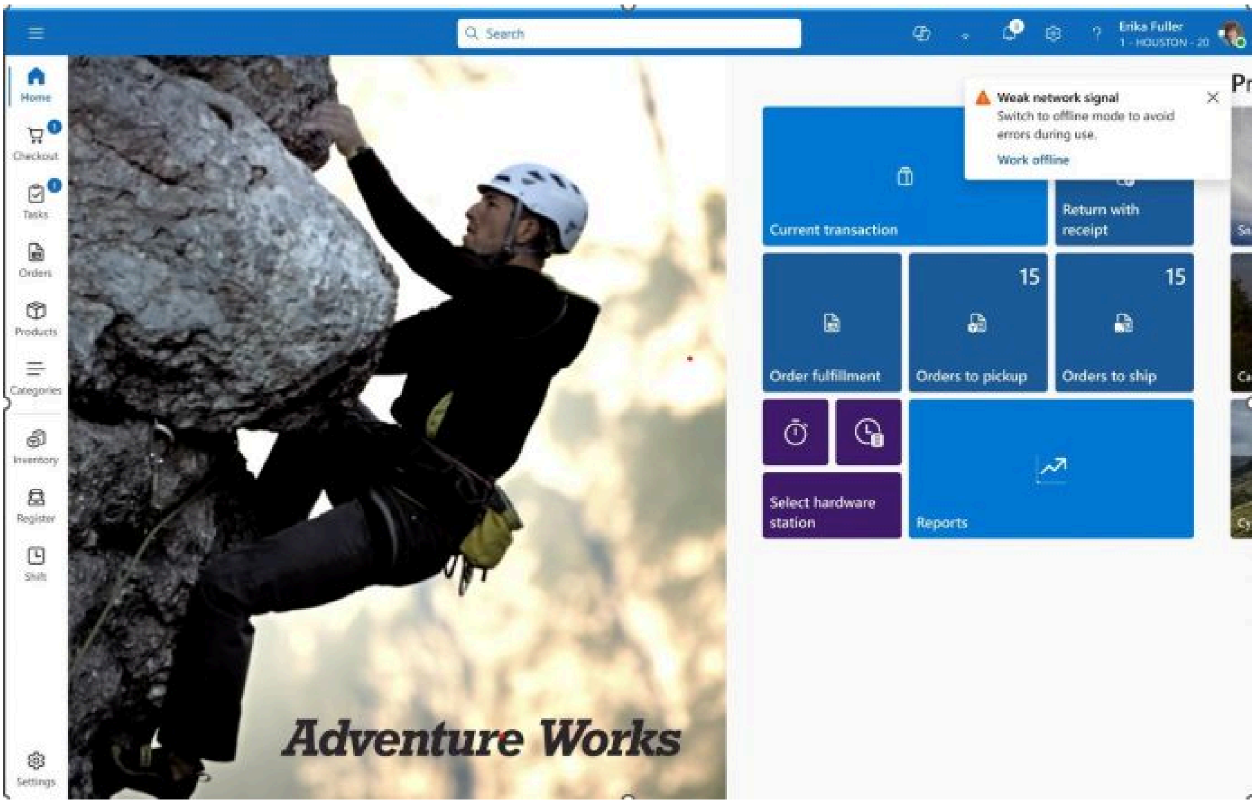
Feature details

With this release, you'll see toast notifications within the Store Commerce app when enabled in headquarters. These notifications will appear if offline data or the network is in an unhealthy state.

- **Offline logon credentials**: Your associate will be notified when the offline logon credentials are not up to date or when the data sync fails. Recommended actions, which may include contacting the admin with specific steps, will be provided.
- **Network connectivity**: Your associate will be notified when there is loss of network or Wi-Fi connection.

- **Seamless offline switch:** Your associate will be promptly notified when the seamless offline switch has occurred.
- **Extensibility:** You'll have the ability to extend the notification framework to use for your core business scenarios.





Feedback

Was this page helpful? Yes No

Simplify Store Commerce offline database size management

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

You can simplify Store Commerce offline database size management by proactively maintaining Store Commerce's offline SQL Server Express database below the size limit. You can also quickly reduce, filter, and reenable offline databases that have exceeded the size limit.

Feature details

Dynamics 365 Commerce customers use the offline capabilities of the Store Commerce app to maintain business continuity during network or service interruptions. Additionally, most customers using Store Commerce offline use SQL Server Express for their offline database, which has a limit on the database size.

With automatic, proactive compression and removal of large indexes, you can prevent the Store Commerce offline database from exceeding the SQL Server Express size limit. By using index compression with extension tables, you can further reduce the size of the offline database.

Automatic index compression and removal capabilities also help speed up and ease the recovery of offline databases that have exceeded the size limit.

Administrators can use the feature management workspace to enable the capabilities for their organization.

Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Business Central in 2025 release wave 1

Article • 01/23/2025

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

In this release, we're taking AI innovation to the next level with the introduction of intelligent agents. These AI-driven agents are designed to seamlessly integrate with Business Central, bringing unparalleled efficiency and automation to your business operations. Our new AI agents can understand and perform complex tasks in the Business Central environment. Whether it's generating insightful reports, automating routine processes, or providing real-time assistance, these agents are equipped to enhance productivity at every level.

One of the standout features of our AI agents is their ability to optimize order creation processes. By leveraging natural language processing, agents can create sales orders directly from email interactions, making the process faster and more intuitive. Agents also play a crucial role in data management. For example, they can assist in creating detailed product information, such as variants and units of measure, to help ensure that your data is accurate and comprehensive. With these advanced capabilities, our agents are set to revolutionize how businesses manage their operations, bringing a new era of efficiency and intelligence to Business Central. We'll continue to improve our core AI-powered business capabilities for this release.

Our application focus will be on the manufacturing area, continuing to enhance our sustainability management and e-document capabilities, and take our integrations to Shopify and Dynamics 365 Field Service to the next level.

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 use Business Central across borders and to manage multiple companies. We're committed to enhancing the Business Central experience by integrating Copilot capabilities that significantly boost productivity in financial data entry tasks.

Copilot and AI
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 Copilot for Dynamics 365 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, enabling customers to orchestrate and automate business processes with help from AI agents. These agents can autonomously perform tasks, respond to events, analyze data, and handle errors using both user input and contextual data from the Business Central environment. Agents operate with minimal user intervention, involving users only when needed, and can act on behalf of a company, department, or team, while maintaining full transparency and bringing humans into the loop when their attention is required. To showcase this capability, we're introducing the Sales Order Agent, our first out-of-the-box agent that automates the end-to-end process of capturing sales quotes and orders from customer emails.

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

Our focus with these releases is on bringing powerful new extensibility features that empower developers to create adaptable, resource-efficient solutions while offering greater flexibility to meet evolving business needs.

With the introduction of the ability to define profile extension objects, developers can modify and customize user profiles without duplicating code, enhancing productivity and maintaining code integrity. Developers can also now include resources in extensions and access them from AL, streamlining data initialization and setup. Enhancements to the Explore in Visual Studio Code feature allow seamless access to GitHub repositories, making it easy to pull, inspect, or hotfix code versions, even with IP protection in place. The full-text search metadata on table fields allows developers to provide data search capabilities that deliver faster, more accurate results to boost user satisfaction and efficiency.

Resellers and publishers can save time when they validate their solutions by running multiple AppSource apps through a public NuGet feed that provides downloadable symbols and AL-Go for GitHub handling this automation. Additionally, a rule-based scheduling mode for performance profiling enables background profiling to pinpoint and address performance issues, reducing troubleshooting time.

E-commerce

In each release of Business Central, we're enhancing its integration with Shopify based on valuable customer feedback. This integration empowers you to efficiently manage planning, procurement, and product costs, while also gaining control over inventory levels across locations and item variants.

Additionally, it simplifies the process of defining prices and discounts, and managing and reporting taxes to comply with government regulations. Whether you're using

Shopify or Shopify Plus, which includes business-to-business capabilities, this integration can help streamline your operations and boost your business efficiency.

Governance and administration
We're giving Business Central administrators more tools for managing environments, apps, and data migrations. The goal is to help administrators be self-reliant, able to solve their customer needs, and easily handle a variety of administrative scenarios.

New features in Business Central improve security, flexibility, and partner management for multi-environment customers. Administrators can now easily assign partner access to specific environments, simplifying control and compliance. Customer-managed encryption keys enhance data protection, allowing businesses to align with privacy standards. Extended update windows provide flexibility in scheduling upgrades during convenient times. A unified interface for managing per-tenant extensions (PTEs) alongside AppSource apps streamlines deployment across environments, saving time for administrators. IPv6 supports future-proofs connectivity, ensures seamless service, and enhances data security, preparing businesses for a growing, interconnected world.

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.

Supply chain management
Supply chain management in Dynamics 365 Business Central is designed to help businesses streamline their operations and improve overall efficiency. This comprehensive solution offers a range of features that cater to the needs of companies, from procurement and production to distribution and logistics.

Business Central provides tools for managing the entire supply chain process, including inventory management, order processing, and demand forecasting. It allows businesses to create and manage purchase orders, track inventory levels, and ensure that products are delivered to customers on time. The system also supports various supply chain methodologies, giving businesses the flexibility to choose the approach that best suits their operations.

One of the key benefits of using Business Central for supply chain management is its integration with other Microsoft products, such as Power BI and Microsoft Teams. This integration enables businesses to gain deeper insights into their supply chain data, collaborate more effectively, and make informed decisions based on real-time information.

The investments for the supply chain management area are currently focused around the service and manufacturing capabilities.

Sustainability Management
We're continuing to build out the capabilities in Sustainability Management in response to customer feedback and new regulations. With the Sustainability Management capabilities in Business Central you can:

- **Collect sustainability information**
  - Use sustainability journals and purchase documents to gather data directly or via formulas. Track emissions per company, country, region, or facility, and purchase carbon credits directly in Business Central.
  - Import emission factors from external sources to ensure accurate calculations using exposed APIs.

- **Track progress**

  Use the modern sustainability Role Center to monitor all sustainability information and various KPIs. Scorecards and goals help you easily track progress against your baselines and targets.

- **Get easy insights and reporting**
  - Leverage standard reports or modern Excel reporting with analysis views for your sustainability entries. Compare your sustainability entries with statistical or GL entries using Financial Reports, and report different greenhouse gases or CO2 equivalents, as well as water and waste management.
  - Customize reports to focus on specific sustainability metrics relevant to your business, ensuring tailored insights for your unique sustainability objectives and reporting requirements.

These capabilities provide comprehensive tools for effective sustainability management, enabling you to track, analyze, and report on your environmental impact efficiently.

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.

ⓘ **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 Business Central

Article • 01/23/2025

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

For a list of the previous wave's release plans, go to 2024 release wave 2 plan.

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

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

Application

Core application functionality is a key investment area for us. We listen to our partners and customers to make sure we deliver what they need to be even more productive with every release.

Expand table

Feature	Enabled for	Public preview	General availability
Integrate Field Service with service management	Users, automatically	-	Apr 2025
View item availability in Field Service work orders	Users by admins, makers, or analysts	-	Apr 2025
Analyze subscription billing data with Power BI reports	Users, automatically	-	Apr 2025
Post foreign currency adjustments to unrealized gain and loss accounts	Users, automatically	-	Apr 2025

Copilot and AI

This wave expands on our first Copilot capability, marketing text suggestions, boosting productivity for a broader set of SMB roles.

Expand table

Feature	Enabled for	Public preview	General availability
Chat with Copilot to learn how to use installed add-on apps	Users, automatically	Apr 2025	-
Summarize with Copilot	Users, automatically	Apr 2025	-
Use Sales Order Agent to automate sales order-taking	Users by admins, makers, or analysts	Feb 2025	Jun 2025
Suggest gas emissions in sustainability journals with Copilot	Users, automatically	Apr 2025	-
Enhance purchase order line matching with Copilot	Users, automatically	Apr 2025	-

Country and regional

We've made Business Central available in more countries and regions in this release wave.

Expand table

Feature	Enabled for	Public preview	General availability
Use Peppol A-NZ format in e-docs in Australia, New Zealand	Users, automatically	-	Apr 2025
Define allowed languages per environment	Users by admins, makers, or analysts	-	Apr 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
Move tables and fields with data across extensions as part of refactoring	Admins, makers, marketers, or analysts, automatically	Apr 2025	Apr 2025
Troubleshoot clients, apps, and add-ins with telemetry	Users, automatically	-	Apr 2025
Mock outbound HttpClient web service calls during testing	Admins, makers, marketers, or analysts, automatically	Apr 2025	Apr 2025
View build metadata in Extension Management page	Admins, makers, marketers, or analysts, automatically	Apr 2025	Apr 2025
Embed Power BI content in web client with new page type	Users, automatically	-	Apr 2025

E-commerce

Broaden your customer reach and handle business-to-business transactions seamlessly with Business Central and Shopify.

Expand table

Feature	Enabled for	Public preview	General availability
Delete incorrect e-documents and avoid duplicates	Users, automatically	-	Apr 2025
Activate sales channels in Shopify Connector	Users by admins, makers, or analysts	-	Apr 2025
Use e-docs with Power Automate and other solutions with APIs	Users, automatically	Jul 2025	Aug 2025
Send e-documents via a service and email simultaneously	Users, automatically	-	Apr 2025
Import and export more data using Shopify metafields	Admins, makers, marketers, or analysts, automatically	-	Apr 2025
Use payments with the E-Document framework	Users, automatically	Apr 2025	May 2025

Feature	Enabled for	Public preview	General availability
Troubleshoot export issues on Shopify Skipped Records page	Admins, makers, marketers, or analysts, automatically	-	Apr 2025
Generate multiple incoming e-documents for multiple attachments	Users, automatically	Apr 2025	May 2025
Automate embedded attachments in PEPPOL	Users, automatically	-	Apr 2025
Create e-documents from posted sales invoices	Users, automatically	-	Apr 2025
Process e-documents in two steps	Users, automatically	-	Apr 2025
Preview incoming e-invoices prior to processing	Users, automatically	Apr 2025	Jun 2025
Export reminders and finance charges as PEPPOL files	Users, automatically	-	Apr 2025
Use e-documents to fix unposted purchase credit memos	Users, automatically	-	Apr 2025

Governance and administration

We're adding new tools and improving existing tools for administrators to manage environments, apps, and data migrations.

Expand table

Feature	Enabled for	Public preview	General availability
Add support for MultiSubnetFailover	Users, automatically	-	Apr 2025
View app compatibility with future versions in admin center	Users, automatically	-	May 2025
Update sandbox environments to preview versions	Admins, makers, marketers, or analysts, automatically	-	Sep 2025
Automate environment management with Power Platform connector	Admins, makers, marketers, or analysts, automatically	-	Jun 2025

Reporting and data analysis

Access to the right reports and data analysis capabilities is essential for companies wanting to be in control of the business and identify new growth opportunities.

Expand table

Feature	Enabled for	Public preview	General availability
Use enhanced analytics for manufacturing	Users, automatically	-	Apr 2025
Access report and request metadata in Word layouts	Users, automatically	-	Apr 2025
Use enhanced Financial Reporting capabilities	Users, automatically	-	Apr 2025

Supply chain management

Business Central has rich supply management functionality from sales, purchase, invoice, inventory and warehouse management, project management, service order management, and manufacturing. In each release we expand the capabilities in these areas to help users be more productive.

Expand table

Feature	Enabled for	Public preview	General availability
Use enhanced customer document layout for service management	Users, automatically	-	Apr 2025
Add more columns to various pages to gain more insight	Users, automatically	-	Apr 2025
Block items or variants from production output	Users, automatically	-	Apr 2025
Avoid document number errors when you post project journals	Users, automatically	-	Apr 2025
Handle production output with warehouse put-aways	Users by admins, makers, or analysts	-	Apr 2025

Feature	Enabled for	Public preview	General availability
Use streamlined product design tools in manufacturing	Users, automatically	-	Apr 2025
Manage document attachments in manufacturing	Users, automatically	-	Apr 2025

Sustainability management

Sustainability in Business Central enables customers to drive positive environmental and social impact, enhance operational efficiency, meet regulatory requirements, and contribute to a more sustainable future.

Expand table

Feature	Enabled for	Public preview	General availability
Generate a CSRD preparation report	Users, automatically	-	May 2025
Specify default sustainability values for various entities	Users, automatically	-	Apr 2025
Enable taxonomy elements for ESRS and other standards	Users, automatically	Apr 2025	Jul 2025
Capture sustainability data with general journals	Users, automatically	-	Apr 2025
Use water and waste management with sustainability	Users, automatically	-	Apr 2025
Enable sustainability Scope 3 value chain for assembly and transfers	Users, automatically	Apr 2025	Oct 2025
Provide carbon equivalent data for sales based on Scope 3 automation	Users, automatically	Apr 2025	Oct 2025
Use ESG Reporting integrated with Business Central	Users, automatically	-	Apr 2025
Start value chain in purchase process for Scope 3 in sustainability	Users, automatically	Apr 2025	Oct 2025
Use sustainability Scope 3 value chain in	Users,	Apr 2025	Oct 2025

Feature	Enabled for	Public preview	General availability
manufacturing	automatically		

User experiences

Great user experiences help users enter, update, and fix mistakes in their data in an intuitive way.

Expand table

Feature	Enabled for	Public preview	General availability
Preview PDF attachments directly in web client	Users, automatically	-	Apr 2025
Optimize screen estate usage on the web	Users, automatically	-	Apr 2025

You are able to opt into some features as part of early access on February 3, 2025, including all mandatory changes that affect users. To learn more, go to Early access FAQ .

Description of **Enabled for** column values:

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

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

Feedback

Was this page helpful? Yes No

Application

Article • 01/23/2025

ⓘ Important

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

To determine what goes into the application in 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 use Business Central across borders and to manage multiple companies. We're committed to enhancing the Business Central experience by integrating Copilot capabilities that significantly boost productivity in financial data entry tasks.

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

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Was this page helpful? Yes No

Analyze subscription billing data with Power BI reports

Article • 01/23/2025

ⓘ Important

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Expand table

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

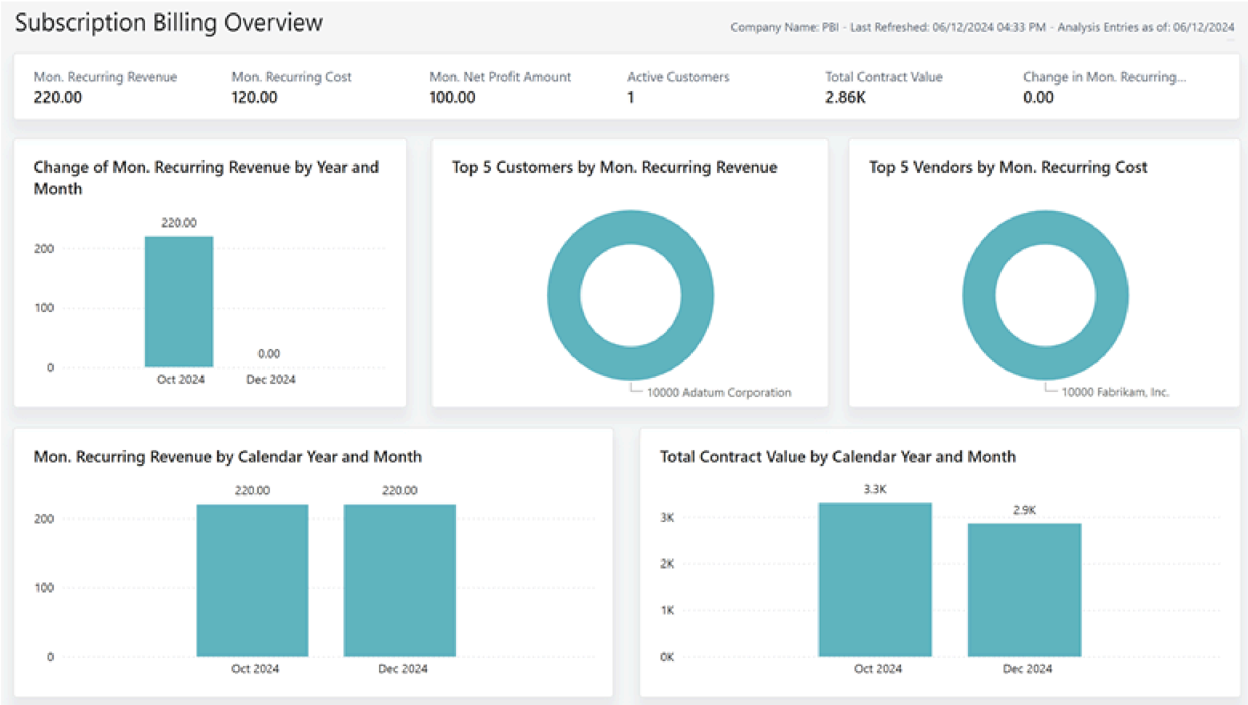
Business value

The new Power BI app for subscription billing data analysis provides you with comprehensive insights into your business. With detailed reports and KPIs, you can monitor critical metrics like monthly recurring revenue and net monthly recurring profit, helping you make informed decisions.

The app's granular insights into revenue by item, customer, and salesperson optimizes your sales and marketing efforts, while tracking customer and vendor deferrals improves cash flow management. Overall, this app enhances your ability to drive your subscription business forward and improve your bottom line.

Feature details

A new Power BI app has been added to help you analyze your subscription billing data.



The app contains reports such as:

- Subscription Overview
- Revenue Year-Over-Year
- Revenue Analysis
- Revenue Development
- Revenue by Item
- Revenue by Customer
- Revenue by Salesperson
- Total Contract Value
- Year-Over-Year Total
- Contract Value Analysis
- Customer Deferrals Vendor

To help you track important metrics for your subscription business, the semantic model for the report includes KPIs such as:

- Monthly Recurring Revenue
- Monthly Recurring Cost
- Net Monthly Recurring Profit
- MRR Churn
- MRR Downgrade
- MRR New
- MRR Upgrade
- MRR Change Usage Based Billing
- MRR Overall Change
- Active Customers

- Total Contract Value
- Revenue Forecast
- Customer Deferrals
- Vendor Deferrals

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Was this page helpful? Yes No

Integrate Field Service with service management

Article • 01/23/2025

Important

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Expand table

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

Business value

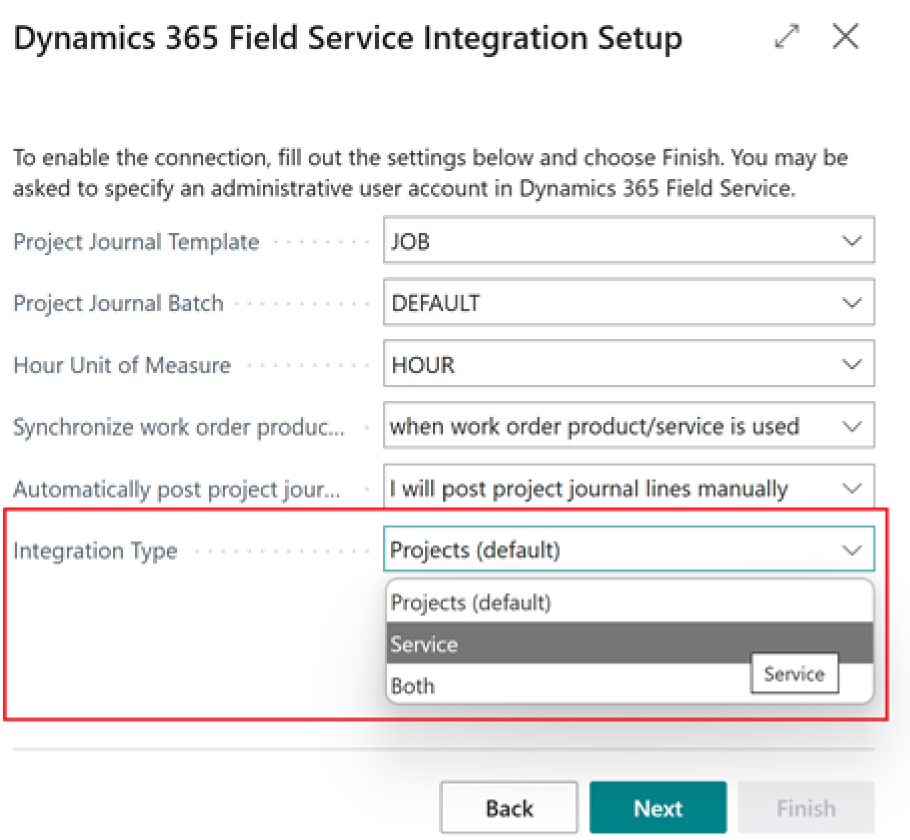
Integrating Business Central with Dynamics 365 Field Service is particularly valuable for organizations that provide regular maintenance and repair services. It offers a seamlessly integrated solution for managing service tasks, consumption, and financial transactions to benefit service technicians, service managers, and finance teams. It's a powerful solution for managing work orders and consumption in Field Service and efficiently invoicing and fulfilling them in Business Central.

Feature details

To integrate Field Service with service management features in Business Central, you must have a Premium license. When you do, on the **Company Information** page in Business Central, you must set the **User Experience** field to **Premium**.

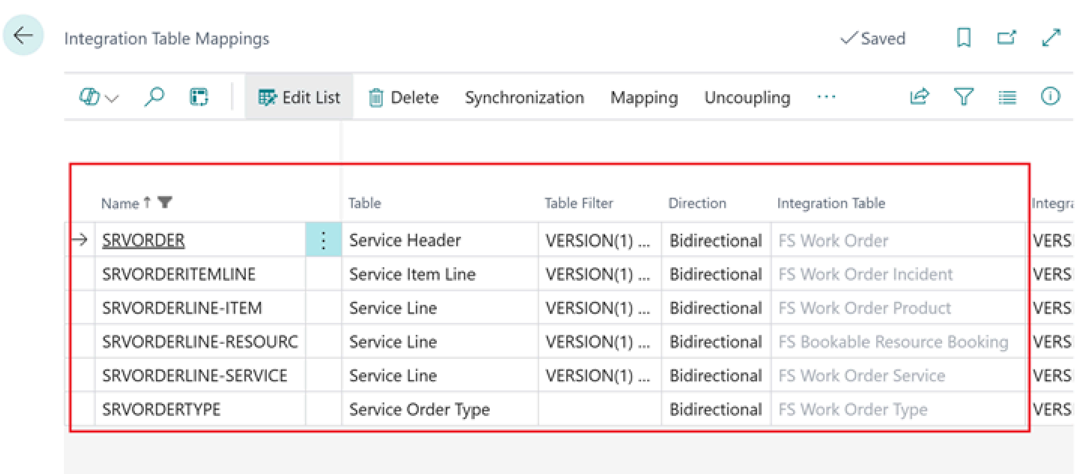
You can enable the integration in the **Integration Type** field by selecting **Project (default)**, **Service**, or **Both** in the following places:

- In the **Set up integration to Dynamics 365 Field Service** assisted setup guide.
- On the **Dynamics 365 Field Service Integration Setup** page.



When the **Integration Type** field is set to **Service** or **Both**, the following things happen when you enable Field Service integration:

- Adds integration table mappings for service order types, service documents, service lines, and service item lines.
- Turns on the **Archive Orders** toggle on the **Service Management Setup** page.
- Makes the **Service Order Type** field on service orders mandatory because the **Work Order Type** is mandatory on Field Service work orders.



- Fields in the headers on service orders and work orders transfer information, such as the **Service Account**, **Billing Account**, and **Work Order Type**.

- **Service Item Lines** and **Work Order Incidents** in Field Service transfer information about the customer assets being repaired.
- **Service Line** fields and **Work Order Products** and **Work Order Services** fields, such as **Qty. to Ship**, **Qty. to Invoice**, and **Qty. to Consume**.

When a technician marks a work order product or service as **Used** on a work order with a specific work order type, the lines sync to a service order. Consumption is also posted, based on settings on the **Dynamics 365 Field Service Integration Setup** page.

During consumption and invoice posting in Business Central, the consumed and invoiced quantities are updated on the original work order product and work order service lines in Field Service.

If you choose **Enable Inventory Availability by Location** when you set up the integration, you can view the allocated product quantity from work orders in Field Service as part of the gross requirements in Business Central's inventory availability calculation. Demand generated by orders in Field Service automatically becomes input for planning through synced service orders.

> **Note**
>
> Dynamics 365 Field Service integration with the Business Central service management module requires use of a Premium license.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Post foreign currency adjustments to unrealized gain and loss accounts

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

You can manage financial reporting more accurately and efficiently with this feature, providing flexibility in handling currency adjustments.

Feature details

When you adjust currency exchange rates for bank accounts, you can choose to post these adjustments to realized or unrealized gain/loss accounts. This option is available on the **Bank Account** card in the **Posting** FastTab.

Tell us what you 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

View item availability in Field Service work orders

Article • 01/23/2025

ⓘ Important

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Expand table

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

Business value

When you integrate Field Service with Business Central, technicians and dispatchers can check item availability at a specific warehouse or technician's truck on a work order in Field Service. Having this information readily available helps businesses optimize work order scheduling, avoid unnecessary (travel) costs, and optimize their service and purchasing operations.

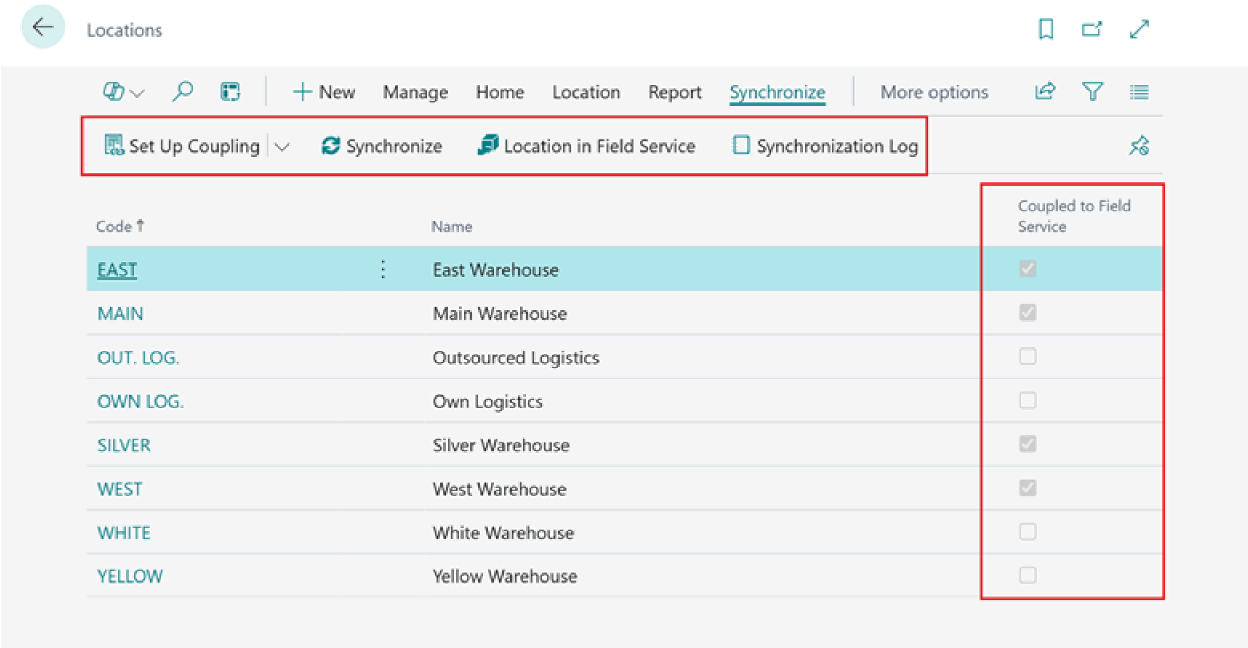
Feature details

You can now integrate, configure, and customize Field Service warehouses with Business Central's locations. To manage the synchronization of data, we've added a unidirectional (from Business Central) integration table mapping between Business Central locations and warehouses in Field Service. To use the new integration table mapping, in Business Central you must turn on the **Location Mandatory** toggle on the **Inventory Setup** page.

Business Central syncs locations with the following settings on the **Location Card** page:

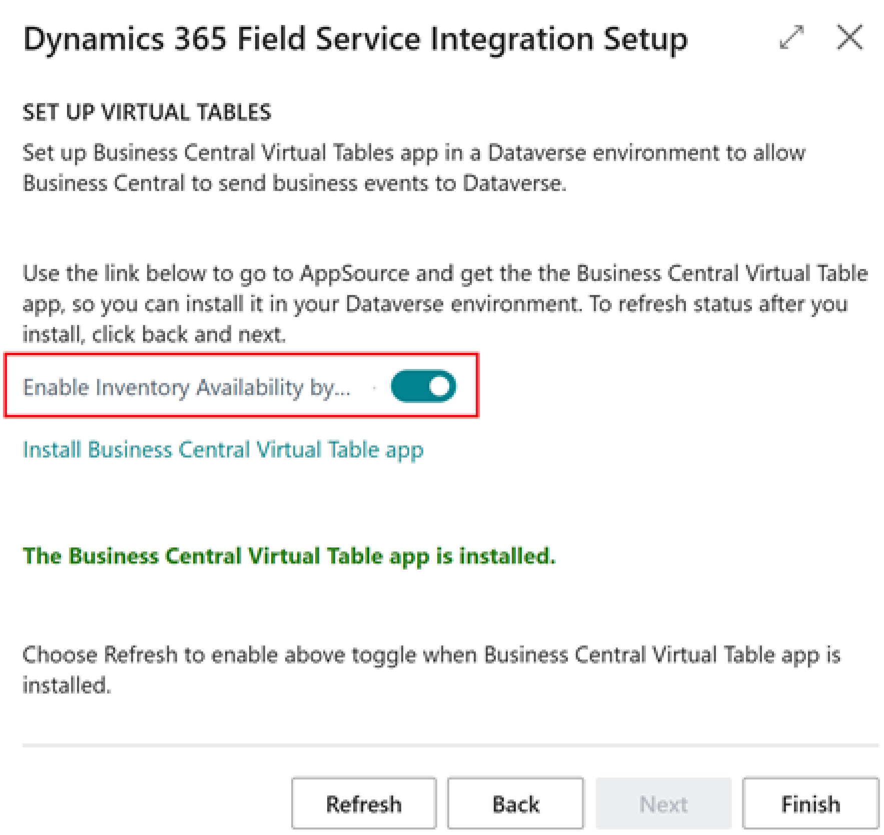
- The **Use as In-Transit** toggle is turned off.
- **Project Consump. Whse. Handling** is different from Warehouse Pick (mandatory).
- **Assm. Consump. Whse. Handling** is different from Warehouse Pick (mandatory).

On the **Locations** and **Location Card** pages, you can use the **Warehouse** action to open a coupled location in Field Service, sync it, set up and delete couplings, and view sync logs.



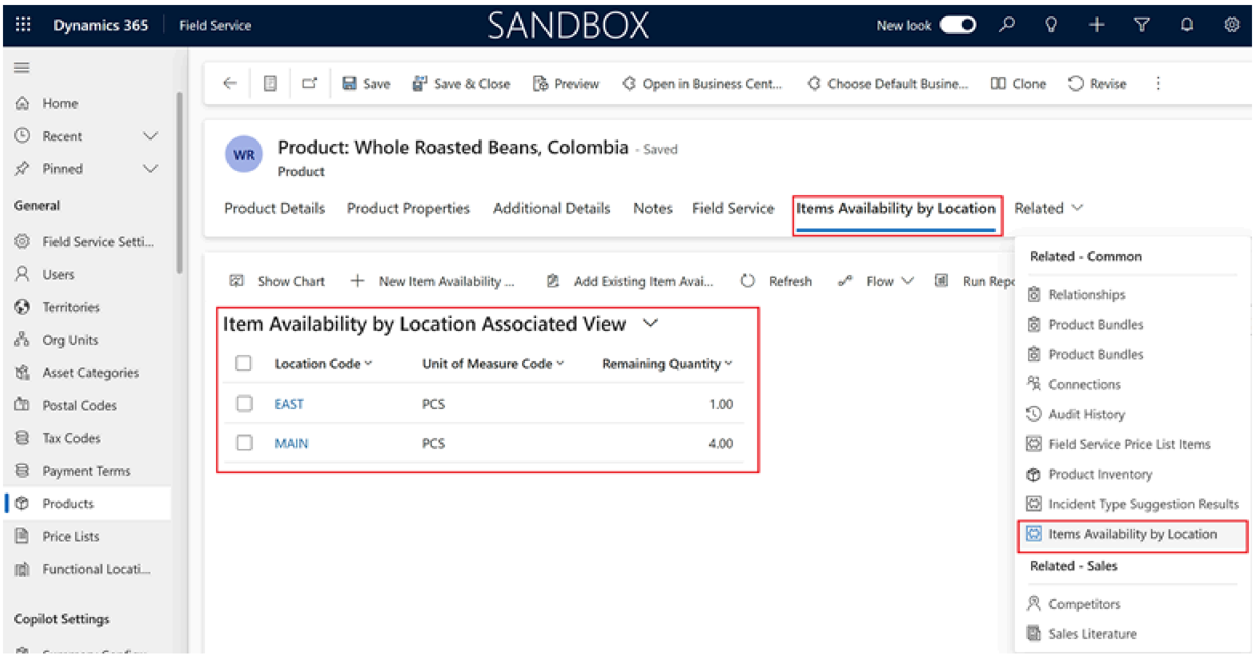
You can use **Open in Business Central** in Field Service to open a location in Business Central that's coupled to a warehouse in Field Service.

Choose **Enable Inventory Availability by Location** in the **Dynamics 365 Field Service Integration Setup** page or in the **Set up integration to Dynamics 365 Field Service** page.



When you enable inventory availability by location, a new Inventory Availability by Location API becomes available as a Dataverse virtual table and a synthetic relationship is created between this virtual table and the native **Products** table in Field Service.

In Field Service, on the **Products** page, technicians can check how much of particular product is available at a warehouse they specify.



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Feedback

Was this page helpful? Yes No

Copilot and AI

Article • 01/23/2025

ⓘ 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 Copilot for Dynamics 365 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, enabling customers to orchestrate and automate business processes with help from AI agents. These agents can autonomously perform tasks, respond to events, analyze data, and handle errors using both user input and contextual data from the Business Central environment. Agents operate with minimal user intervention, involving users only when needed, and can act on behalf of a company, department, or team, while maintaining full transparency and bringing humans into the loop when their attention is required. To showcase this capability, we’re introducing the Sales Order Agent, our first out-of-the-box agent that automates the end-to-end process of capturing sales quotes and orders from customer emails.

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

Chat with Copilot to learn how to use installed add-on apps

Article • 01/23/2025

ⓘ Important

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

Expand table

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

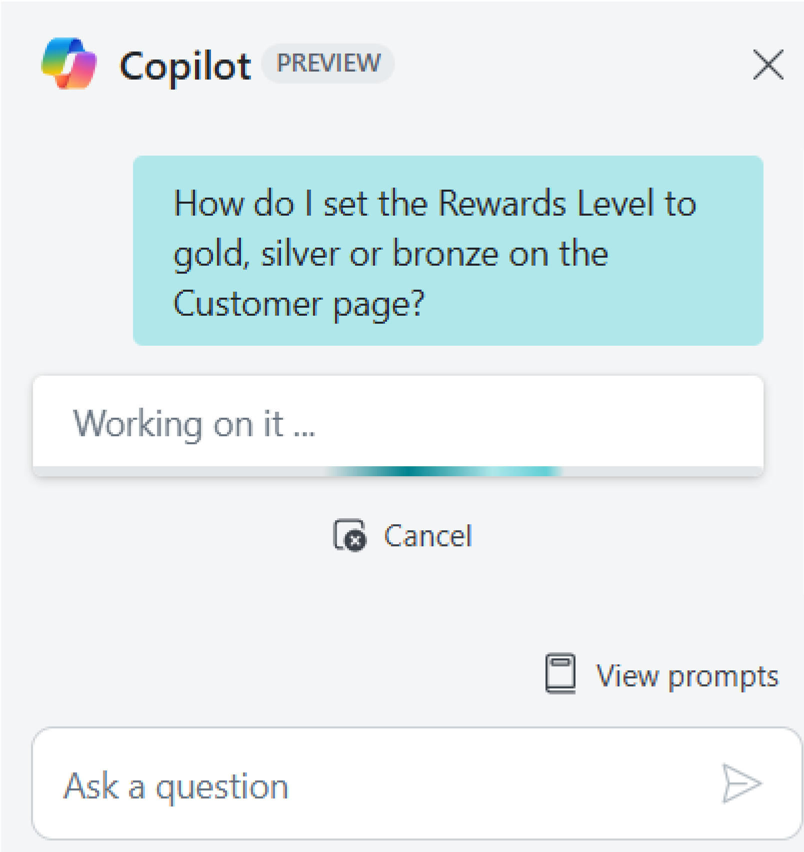
Business value

With 2024 release wave 1, we introduced chat with Copilot: a conversational experience where people can get assistance from Microsoft Copilot to find data, get unblocked, or learn new skills. Most of our customers install one or more ISV add-on apps from Microsoft AppSource to enhance Business Central with industry-specific solutions, localized functionality, or other critical capabilities that meet their needs. Now, Copilot in Business Central can explain and guide workers through using functionality of these add-on apps, transforming Copilot from a simple "librarian" to an in-house expert that understands your unique Business Central.

Feature details

Copilot's chat capabilities have been enhanced with the following:

- Users can ask questions about content from installed add-on apps, such as new pages, fields, and business processes.
- Copilot explains and guides based on documentation provided by the apps installed in your Business Central environment.
- The *Ask Copilot* icon is available in tooltips for custom fields that originate from installed apps.



> **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

Feedback

Was this page helpful? Yes No

Enhance purchase order line matching with Copilot

Article • 01/23/2025

ⓘ Important

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Expand table

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

Business value

The e-documents feature in Business Central plays a key role in automating the receipt and processing of invoices from vendors. Copilot can help this process by improving the mapping and matching of vendor invoices to purchase orders. This assistance reduces time spent on tasks that would normally include extensive search, lookup, and data entry. This feature improves accuracy and adds new capabilities to matching e-document lines with Copilot.

Feature details

ⓘ Note

- This feature is available as a production-ready preview for production and sandbox environments of any country localization. Production-ready previews are subject to supplemental terms of use. For more information, see Supplemental terms of use for Dynamics 365 preview.
- This feature is supported in English only. While it can be used in other languages, it may not function as intended. Language quality may vary based

on the user's interaction or system settings, which may impact accuracy and the user experience.

- AI-generated content may be incorrect.

To experience this feature, sign in to your Business Central online environment and follow these instructions. The feature extends the current Copilot with the following capabilities:

- Beyond using an 80% string match in descriptions for automated matching, Copilot now also incorporates item references and G/L mappings in preprocessing.
- If an incoming e-document has lines that aren't present in the related purchase order, it highlights the discrepancy and you can run the **Transfer to** action, which prompts you to specify the **Type** (**GL Account**, **Item Charge**, and so on) and **Number** you want to connect. Afterward, Copilot creates a new line in the **Purchase Order**.
- If you enable the new **Keep mapping references** setup, lines that Copilot matches are saved for future use, either as an item reference or a G/L mapping.

Join the conversation

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at aka.ms/bcIdeas, or join the partner community 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.

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Was this page helpful? Yes No

Suggest gas emissions in sustainability journals with Copilot

Article • 01/23/2025

ⓘ Important

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Expand table

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

Business value

Microsoft Copilot is the AI-powered assistant that helps spark creativity, boost productivity, and eliminate tedious tasks. This feature will improve accuracy and productivity in collection gas emissions and calculation of emission factors.

Feature details

For greenhouse gas emissions (GHG), Copilot can estimate total emissions based on descriptions and input parameters and adjust emission factors for future use.

ⓘ Note

- This feature is available as a production-ready preview for production and sandbox environments of any country localization. Production-ready previews are subject to supplemental terms of use. For more information, see Supplemental terms of use for Dynamics 365 preview.
- This feature is supported in English only. While it can be used in other languages, it may not function as intended. Language quality may vary based on the user's interaction or system settings, which may impact accuracy and the user experience.

- AI-generated content may be incorrect.

To try out this feature:

1. Sign in to your Business Central online environment.
2. Go to the **Sustainability Journal** page.
3. Enter **Sustainability accounts** and fill in the **Descriptions** field with accurate information as well as other inbound parameters, such as **Fuel/Electricity**, **Distance**, **Custom Amount**, **Installation Multiplier**, or **Time Factor**.
4. Choose **Suggest emissions with Copilot**.

Join the conversation

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at aka.ms/bcIdeas, or join the partner community discussion on the Dynamics 365 Business Central Partner Community Network on Viva Engage (formerly Yammer) to help us shape the future of AI in Business Central.

Feedback

Was this page helpful? Yes No

Summarize with Copilot

Article • 01/23/2025

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see [Microsoft policy](https://go.microsoft.com/fwlink/?linkid=2216528)). Learn more: [What's new and planned](https://learn.microsoft.com/en-us/dynamics365/release-plan/2025wave1/smb/dynamics365-business-central/planned-features)

Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 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 a record into a couple of brief sentences, greatly reducing the effort needed to get an overview of your data and plan your approach.

Feature details

Summarize is a new capability of Copilot in Business Central:

- A new summary FactBox displays on card and document pages, such as a Sales Order, Item, and even your custom pages.
- Summarizes the record by displaying the top three most impactful insights, with even more insights available on demand.
- Interact with the summary to peek into or navigate to related data.
- Refresh the summary based on the latest data.

ⓘ 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

Join the discussion

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 partner community discussion on the Dynamics 365 Business Central Partner Community Network on Viva Engage (formerly Yammer) to help us shape the future of AI in Business Central.

Geographic areas

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

- Germany
- Norway
- Singapore
- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific

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

Feedback

Was this page helpful? Yes No

Use Sales Order Agent to automate sales order-taking

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

We’re at a crucial juncture for AI in the workplace. Just as we now look back at the pre-PC era with astonishment, we'll soon wonder how work was ever done without AI. Workers, overwhelmed by digital debt and workplace stress, are turning to AI for relief. Leaders can harness this momentum for tangible returns on investment. Copilot in Business Central is already enhancing users' creativity and productivity by using AI in key application scenarios and providing guidance along the way. AI will gradually transform every aspect of work, achieving real business impact, and companies that proactively embrace this challenge will excel.

Using Sales Order Agent, which works independently under your direction, drives efficiencies and cost savings, and helps manage heavy workloads. The agent focuses users’ attention on critical tasks, increasing motivation and job satisfaction across the business function to which it is applied. Microsoft studies have shown that over the next five years, 41 percent of business leaders expect to redefine business processes with AI, orchestrating and managing AI agents while prioritizing ethical AI use.

Feature details

Copilot in Business Central is already enhancing users’ creativity and productivity with AI in key application scenarios, providing guidance and assistance in working with the product and finding the right data.

With this release, we're expanding the use of AI to enable customers to orchestrate and automate business processes using AI agents. Agents can work autonomously, perform assigned tasks, respond to different events and inputs, reason over the state of data, and overcome errors based on user input and the context of the Business Central user experience. Agents require minimal to no intervention from users, while bringing them in if circumstances require their attention. Agents can act on behalf of a company, department, or team, not just a user.

To enable this capability in Business Central, we're introducing our first out-of-the-box agent, Sales Order Agent, to automate the process of capturing sales orders from email messages.

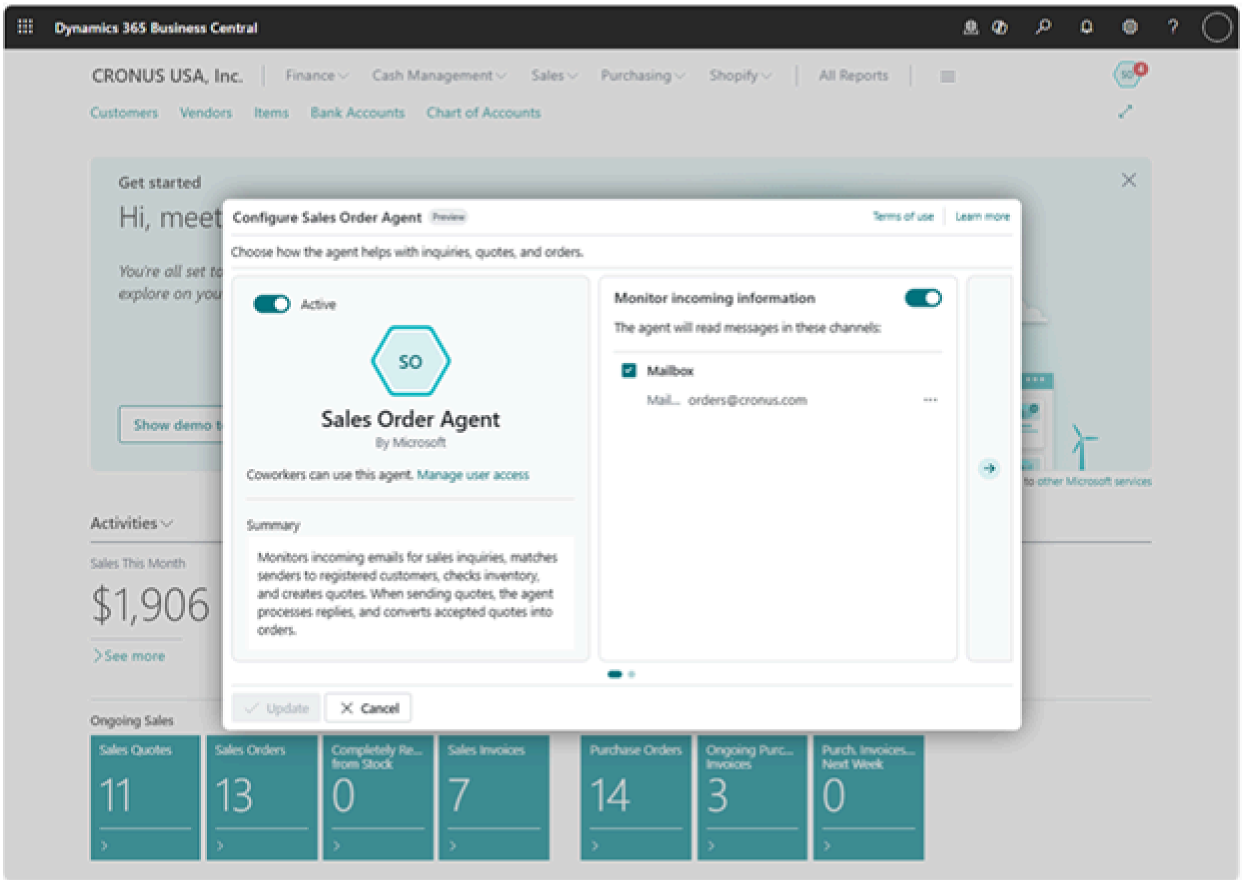
The agent is configured to manage the full process:

1. Receive item requests from customer emails in a shared company mailbox.
2. Identify the customer from those registered in Business Central.
3. Draft the sales quote with the requested items.
4. Verify item availability.
5. Forward the sales quote to the customer for approval.
6. Receive confirmation, convert the quote into a sales order, and share the order with the customer via email.

The agent operates based on the included instructions and user configuration, and uses AI to identify and carry out the necessary steps to complete this task within the Business Central environment. It seeks user intervention when specific situations arise. For example, when it prepares outbound communications or to provide business approval for key operations.

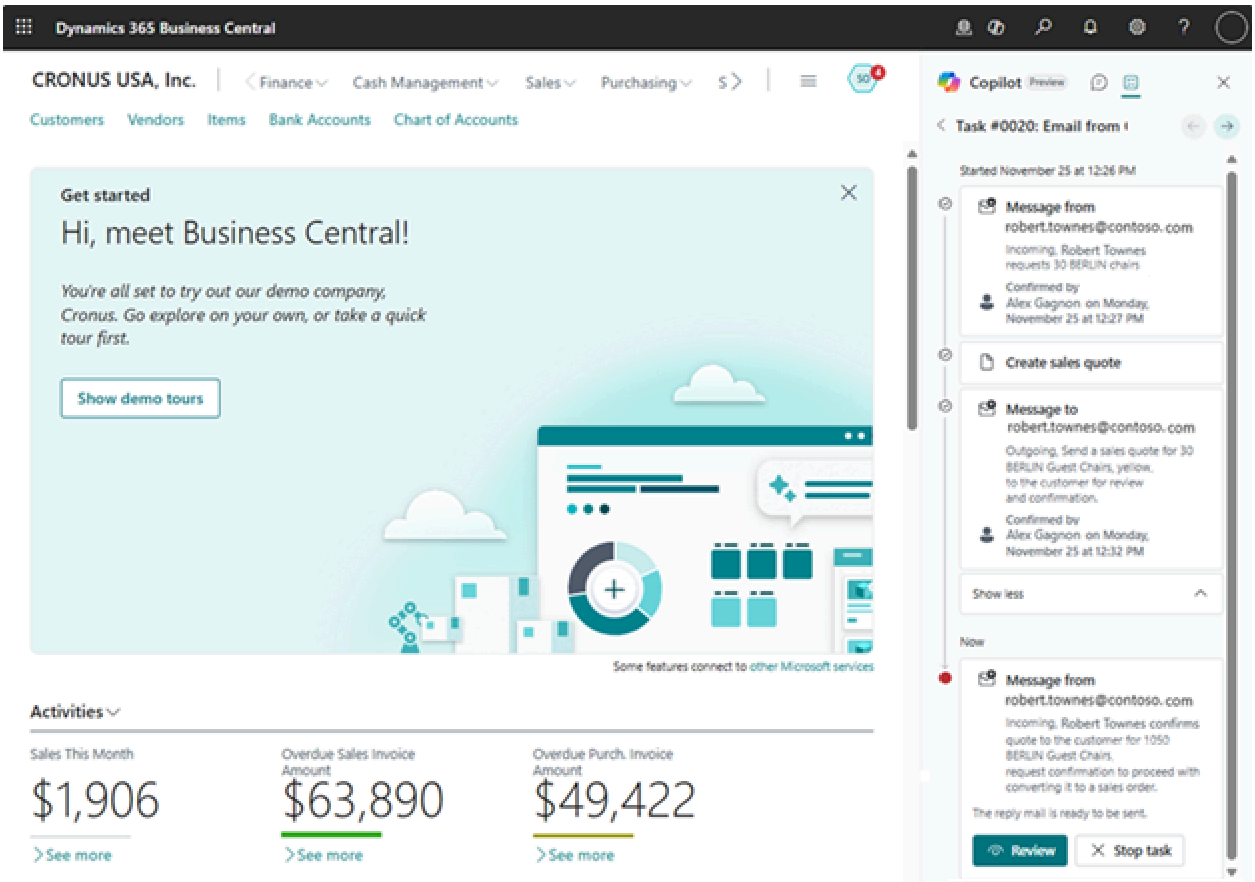
Sales Order Agent can only access the parts of the product it needs to perform its duties. It comes with predefined permissions and role (profile), which is automatically assigned when you activate the agent.

The agent will have a simple configuration experience, where you can define the agent's name, the channel for receiving requests for sales quotes and orders (shared company email), and select the steps you want to include or exclude in the process of taking orders from the customers.



When activated, the agent is ready to perform the process of capturing sales orders autonomously. The agent is started by an internal email processor in Business Central, which is configured to monitor the company mailbox provided in the agent's configuration.

Actions performed by Sales Order Agent, including navigating Business Central pages, creating and modifying records, and calling actions, are fully transparent so that you can review them in the Copilot pane. The actions show the agent's user ID and will show up in the same places and in the same way as other users in list views, history, posted documents, notifications, and so on.



Business Central users maintain full transparency and control over the changes made by Sales Order Agent by using additional experiences, which enable the users to:

- Discover notifications from the agent. For example, when it requires help, or when the process demands human review (such as all inbound and outbound messages, approvals, and adding missing data).
- Get a better understanding of the task's context and history ("timeline" view), including the key steps displayed in the Copilot pane.
- Get a detailed review of each entity the agent created (such as sales quotes or sales orders). You can review all changes and suggestions the agent makes for a specific task, so you can adjust these changes if needed and sign off on proceeding with the task.
- Discard the steps performed by the agent, adjust the quote or order as needed, and ask the agent to proceed with the flow.

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

Feedback

Was this page helpful? Yes No

Country and regional

Article • 01/23/2025

ⓘ Important

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

Business Central 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

Define allowed languages per environment

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

It's now easier to select or change the UI language that you're using. Administrators can save people time and reduce confusion by making only the languages that their environment supports available for selection on the My Settings page.

Feature details

Business Central's user interface is translated by apps that Microsoft provides, or by language apps that our partners provide on AppSource. Administrators install the language apps in their Business Central environment. Afterward, on the My Settings page, you can choose the language in which you want to use Business Central.

Until now, when you selected your desired language, you chose from the full list of all languages that the Business Central platform can support, regardless of whether a language app is installed for them. This sometimes led to confusing experiences and made it more difficult to select a language. In most cases, only a few languages are relevant for an environment.

Administrators can now use the new **Allowed Languages** page to define the languages that should show up when people select their language. Showing only the supported languages makes it easier to select a language you can actually use, which helps avoid confusion.

Feedback

Was this page helpful? Yes No

Use Peppol A-NZ format in e-docs in Australia, New Zealand

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Users in Australia and New Zealand can use e-invoicing in Business Central. This feature introduces electronic documents for invoices, which significantly 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

You can use E-Documents framework localized for Australia and New Zealand. The framework lets you work with the **Peppol A-NZ** electronic invoices format, which is compliant and adapted for these markets. You can choose one of the existing Peppol service providers as your communication channel via access points, exchange documents by uploading them manually, or send them by email.

Tell us what you 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

Development

Article • 01/23/2025

ⓘ Important

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

Our focus with these releases is on bringing powerful new extensibility features that empower developers to create adaptable, resource-efficient solutions while offering greater flexibility to meet evolving business needs.

With the introduction of the ability to define profile extension objects, developers can modify and customize user profiles without duplicating code, enhancing productivity and maintaining code integrity. Developers can also now include resources in extensions and access them from AL, streamlining data initialization and setup. Enhancements to the Explore in Visual Studio Code feature allow seamless access to GitHub repositories, making it easy to pull, inspect, or hotfix code versions, even with IP protection in place. The full-text search metadata on table fields allows developers to provide data search capabilities that deliver faster, more accurate results to boost user satisfaction and efficiency.

Resellers and publishers can save time when they validate their solutions by running multiple AppSource apps through a public NuGet feed that provides downloadable symbols and AL-Go for GitHub handling this automation. Additionally, a rule-based scheduling mode for performance profiling enables background profiling to pinpoint and address performance issues, reducing troubleshooting time.

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

Feedback

Was this page helpful? Yes No

Embed Power BI content in web client with new page type

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Experience an enhanced user interface when viewing embedded Power BI reports in Business Central, making it easier to navigate and interact with your data.

Feature details

In this release wave, you can view embedded Power BI reports or pages with a new slim user interface. If the report has multiple pages, you can easily navigate between them using the new navigation option.

Tell us what you 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

Mock outbound HttpClient web service calls during testing

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

To allow for easier testability of AL code that includes outbound web service calls, we're introducing the ability to mock such calls. This allows the developer to hardcode return values to the calling code during tests, without actually performing the outbound web service call. The ability to mock calls is especially valuable when testing Copilot and AI features, as developers can write unit tests for these without actually connecting to Azure OpenAI Service, and thereby save any unnecessary token consumption.

Feature details

AL developers will be able to easily mock out HttpClient Get/Put/Delete/Post calls in unit tests. The idea is to allow easy substitutions of the responses of HttpClient calls in unit tests by introducing a new handler function to intercept HttpClient calls.

The signature is expected to be:

```
[HttpClientHandler]
procedure MyHandler(path: Text/Uri; requestType: HttpRequestType; var
response: TestHttpResponseMessage; var success: Boolean): boolean
```

The default behavior will be to prevent making an actual request, but there should be the option to do so by changing the exit 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

Move tables and fields with data across extensions as part of refactoring

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

As extensions mature or as a consequence of an extension initially created as a large monolith, the requirement emerges to be able to split up the extension and move ownership of tables or fields along with data. This feature introduces the same controlled process for releasing and taking ownership of tables or fields as part of the extension upgrade process to partner extensions.

Feature details

In the past two releases, the ability to move tables and fields across extensions has been enabled for first-party extensions from Microsoft. In this release we add the ability for partners to use the same capabilities on their extensions.

For the best coverage of the capabilities, see the existing documentation that was made available to cover the support in first-party apps. Learn more in Moving tables and fields between extensions.

Feedback

Was this page helpful? Yes No

Troubleshoot clients, apps, and add-ins with telemetry

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

This new feature in the Business Central client enhances the overall reliability and user experience by logging exceptions in client add-ins. Administrators can swiftly identify and address issues before they impact users, ensuring smoother operations and reducing downtime. By capturing detailed telemetry data, businesses can gain valuable insights into the performance and stability of their extensions, ultimately leading to improved user satisfaction.

Feature details

The Business Central client emits a telemetry event if an exception occurs in a client add-in. The telemetry helps administrators monitor and react to errors before users report them.

The client logs the following types of information about issues:

- The environment and company.
- The extension, app, or add-in.
- The type of client (browser, tablet, phone, and so on).
- The error information.
- The user who experienced the error.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

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

Feedback

Was this page helpful? Yes No

View build metadata in Extension Management page

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

With the introduction of the Source and Build properties in Business Central 2024 release wave 1, traceability of extensions created as part of DevOps pipelines was increased. It's faster to find the relevant source repository, the commit ID, and build system used to create the extension. With Business Central 2024 release wave 2 and this new release, we've improved this experience by adding extra information that allows for easier identifying and resolving issues, as well as accessing and sharing information about extensions.

Feature details

To help track extensions that are created as part of DevOps pipelines, we introduced the Source and Build properties in the app.json manifest file of extensions in Business Central 2024 release wave 1. This allows you to easily find the relevant source repo, commit ID, and build system used to create the extension. In Business Central 2024 release wave 2, we added the ability to view Source information on the extension card in the Extension Management page. In 2025 release wave 1, we also added the Build information.

The details card page for extensions in the **Extension Management** page now includes the Build information. The Build information is composed of *by* for tracking the build agent and *url*, which is used to specify the URL to the build system invocation where the build can be found.

You can learn more about the Source and Build information at Track source and build metadata on extensions.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas .

Additional resources

JSON files (docs)

Feedback

Was this page helpful? Yes No

E-commerce

Article • 01/23/2025

ⓘ Important

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

In each release of Business Central, we enhance its integration with Shopify based on valuable customer feedback. This integration empowers you to efficiently manage planning, procurement, and product costs, while also gaining control over inventory levels across locations and item variants.

Additionally, it simplifies the process of defining prices and discounts, and managing and reporting taxes to comply with government regulations. Whether you're using Shopify or Shopify Plus, which includes business-to-business capabilities, this integration can help streamline your operations and boost your business efficiency.

Feedback

Was this page helpful? Yes No

Activate sales channels in Shopify Connector

Article • 01/23/2025

ⓘ Important

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

Expand table

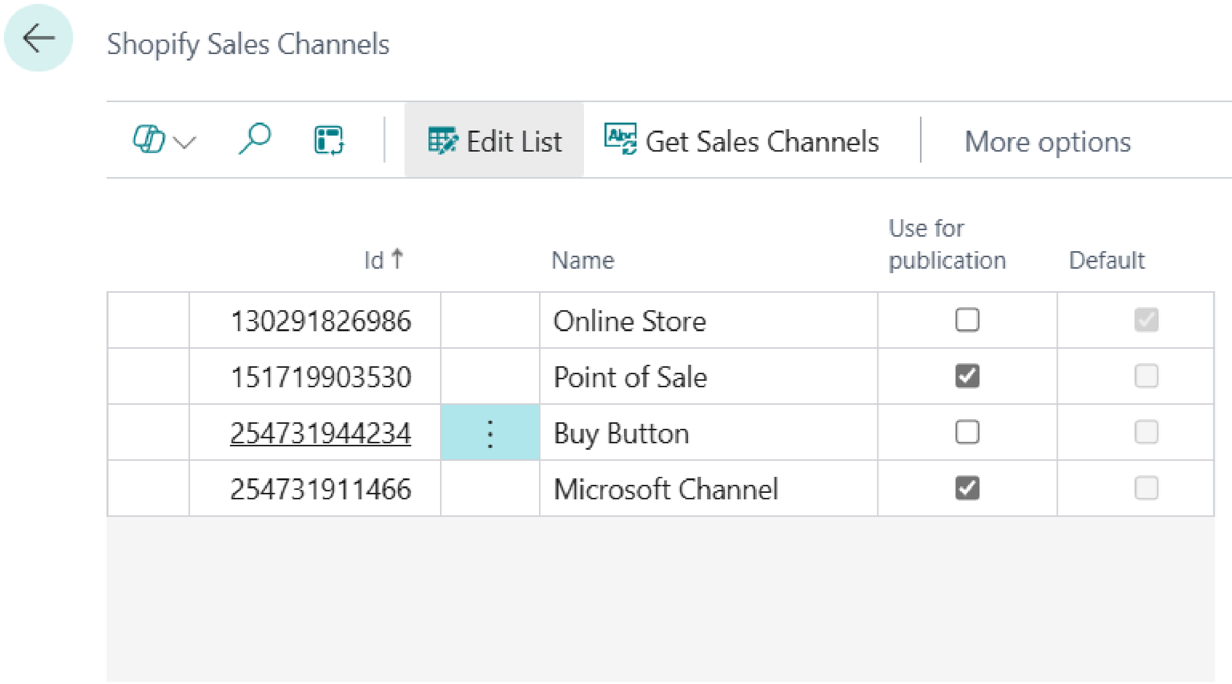
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Apr 2025

Business value

Businesses often sell different products through different sales channels. The ability to activate specific channels simplifies workflows and gives you full control over how you share products across different sales channels.

Feature details

When you publish products from Business Central to Shopify, you can now choose which sales channels to activate directly from the **Shopify Sales Channels** page. On the new **Shopify Sales Channels** page, you can access all available channels in Shopify, just like you would with **Locations** or **Languages**. Just activate the ones you want, and the Shopify Connector handles the rest. If you haven't set up this page yet, don't worry. Your products default to the Online Store.



> ⓘ **Note**
>
> This feature only applies to new products you publish. Products that are already on Shopify aren't affected.

Tell us what you 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

Automate embedded attachments in PEPPOL

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Businesses can boost productivity by using embedded PDFs in the PEPPOL file format, ensuring human-readable formats with e-documents.

Feature details

The introduction of the ability to encode attachments in the PEPPOL file format in Business Central 2024 release wave 2 provided the benefit of additional automation. You can automate the process of embedding sales document attachments in the PEPPOL file format. When you post a document, Business Central creates a PDF file and embeds it in the PEPPOL format, including both the full XML and a human-readable format.

During the purchase process, Business Central can process PEPPOL files with embedded attachments (invoices), decompose the embedded file, add it as an attachment to the e-document record, and make it available on the E-Document page for further processing.

Tell us what you 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

Create e-documents from posted sales invoices

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Electronic documents (e-documents) are documents such as invoices and receipts in both directions, delivery, and receipt. Using e-documents requires some configuration, and sometimes things go wrong. If there was a problem when you posted sales documents and Business Central didn't create e-documents for them, you can generate new e-documents from the posted documents. For example, generating related e-documents can help you stay compliant with local or industry requirements.

Feature details

If there was a problem with your setup for e-documents, and Business Central didn't create a related e-document when you posted a sales invoice, for example, you can quickly create one yourself. To check whether Business Central created an e-document, open the **Posted Sales Invoice** page and select the **Open E-Document** action. If you don't find a related e-document, you can run the **Create New E-Document** action to generate one based on the workflow rules. If a related e-document does exist, you can't use the action.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

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

---

Feedback

Was this page helpful? Yes No

Delete incorrect e-documents and avoid duplicates

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

You can easily discard incorrect or duplicate E-Documents, eliminating the need to retain unprocessed ones.

Feature details

Business Central won't create new incoming e-documents if you import a batch that contains duplicates. Duplicates are documents with the same vendor, external document number, and date.

If a duplicate or incorrect **E-Document** already exists in Business Central, administrators can delete them. However, you can't delete e-documents that are already processed and are connected with purchase 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.

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

Feedback

Was this page helpful? Yes No

Export reminders and finance charges as PEPPOL files

Article • 01/23/2025

ⓘ Important

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

Expand table

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

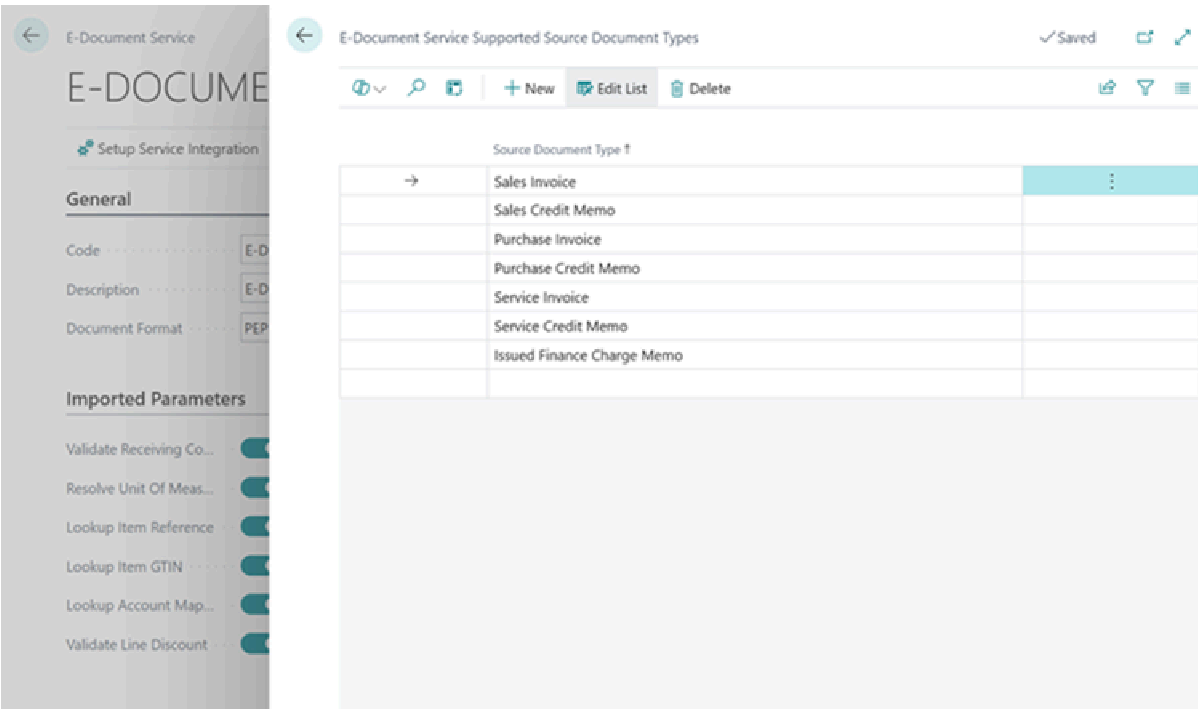
Business value

Business Central supports sending electronic documents in the PEPPOL format, which is a widely used format that the largest document exchange service providers support. We've added more types of documents to the list of those you can export in the PEPPOL format, which can improve your ability to exchange information with your customers and business partners. You can enhance your work with e-documents in Business Central by exporting financial details from reminders and finance charges in the PEPPOL format.

Feature details

Previously, you couldn't create e-documents for reminders and finance charges. Now, the PEPPOL format accepts financial values from issued finance charges and issued reminders.

To activate these types of documents, on the **E-Document Service** page, run the **Supported Document Types** action. Add the finance charge and reminder document types on the **E-Document Service Supported Source Document Types** page. Business Central can then generate a file that's formatted as an invoice and contains the financial values from these documents.



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

Generate multiple incoming e-documents for multiple attachments

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2025	May 2025

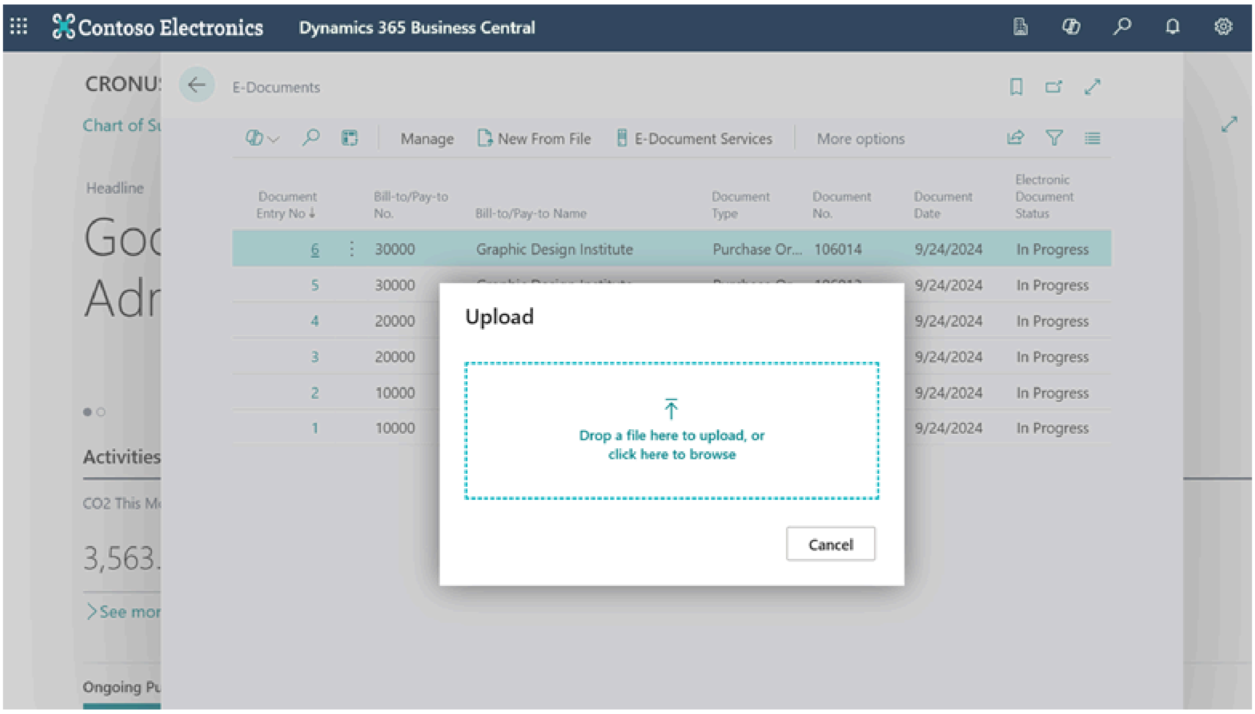
Business value

If you aren't using an external endpoint to receive e-documents, you can save significant time by generating multiple incoming e-documents when you manually upload multiple attachments, rather than one by one.

Feature details

You can generate multiple new incoming e-documents by selecting the **New From File** action on the **E-Documents** page. Choose the appropriate service for the correct **Document Format**, and then upload multiple documents.

Business Central processes all uploaded documents and creates a new incoming **E-Document** for each file if their format matches the chosen **Document Format**.



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

Feedback

Was this page helpful? Yes No

Import and export more data using Shopify metafields

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

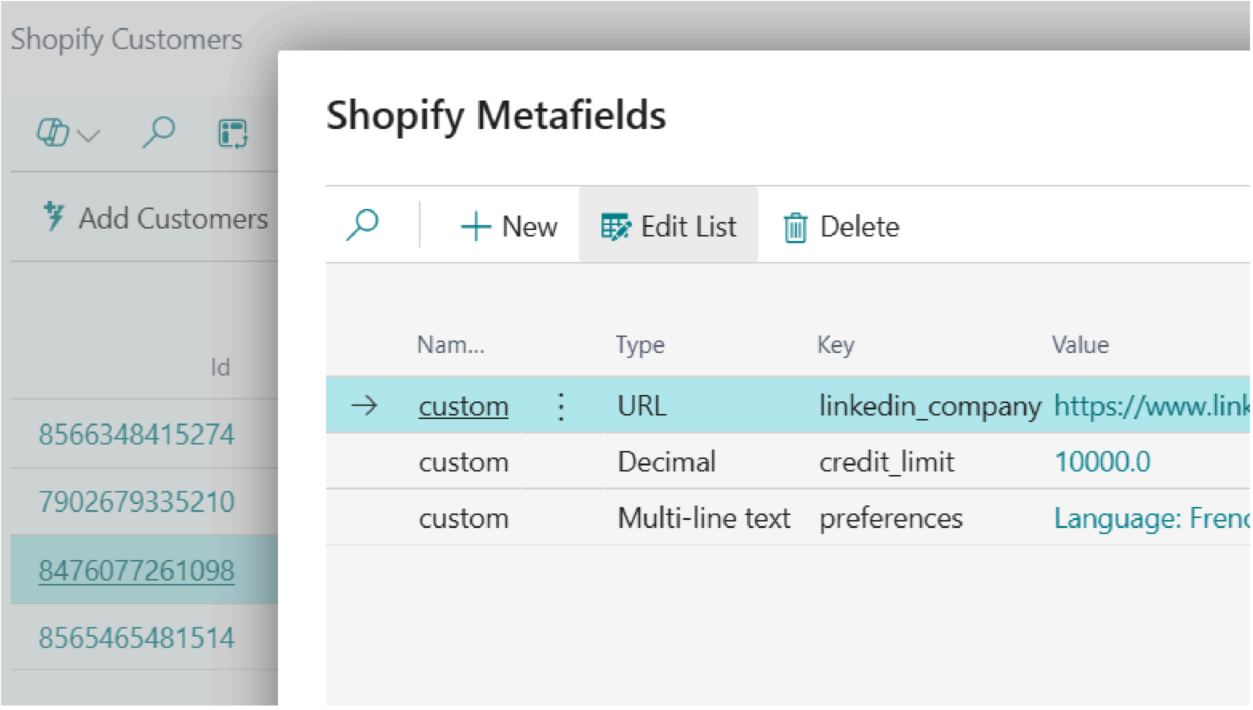
Metafields are a flexible way to add and store additional information about a Shopify resource, such as a customer or company. You can synchronize and manage metafield data from Business Central either using the UI or the extensibility model to map fields or related entries in Business Central to metafields in Shopify.

Feature details

Shopify's platform includes data models for basic commerce concepts. However, commerce is diverse and often requires more complex or specific data models. The custom data platform lets you 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, customer, or company. The additional information stored in metafields can be almost anything related to a resource. Some examples are preferences, credit limit, loyalty program, social media links, or segment information.

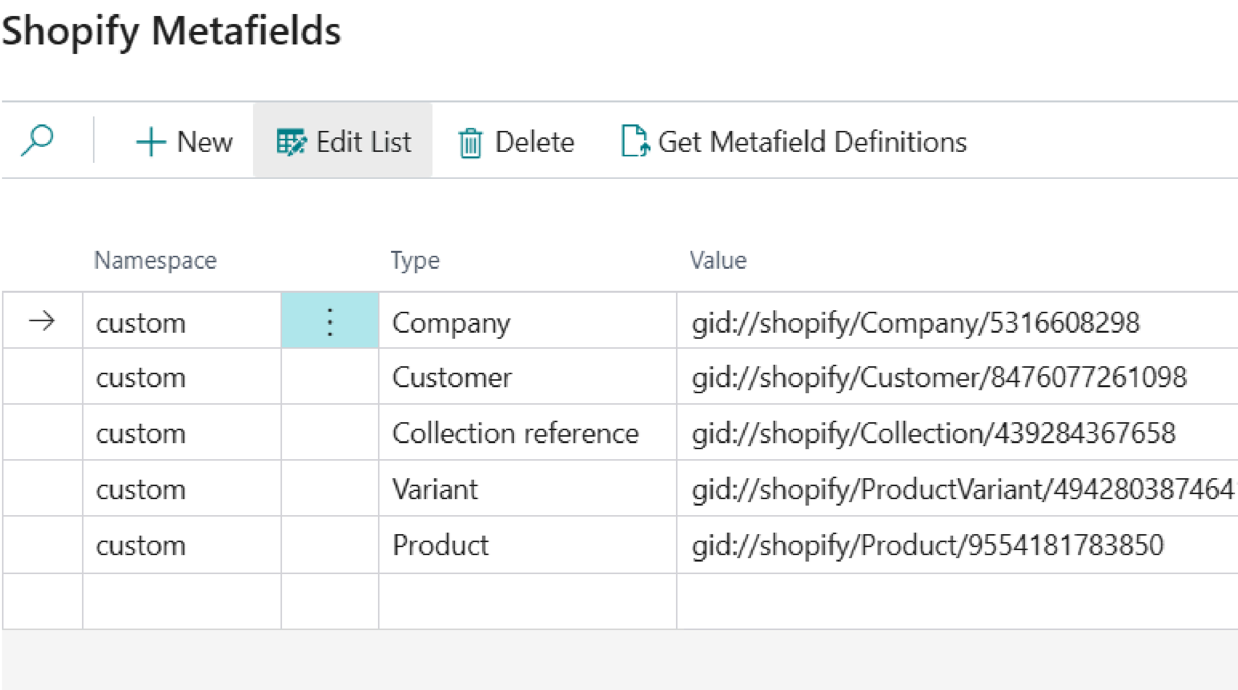
We've added the ability to import and export data stored in metafields into Business Central. Also, there's an extensibility model that allows developers to map standard or custom fields, attributes, or other related entries in Business Central to metafields in Shopify.

You can edit metafields on the **Shopify Metafields** page, which you open from the **Shopify Customers**, **Shopify Customer Card**, **Shopify Companies**, or **Shopify Company Card** pages.



> ⓘ **Note**
>
> You can edit the **Shopify Metafields** page in the following cases:
>
> - For a Shopify customer, if the **Customer Import from Shopify** field is set to **None** or **With Order Import**, and the **Can Update Shopify Customers** toggle is turned on.
> - For a Shopify company, if the **Company Import from Shopify** field is set to **None** or **With Order Import**, and the **Can Update Shopify Companies** toggle is turned on.
>
> When you add a new record, the connector immediately sends a request to Shopify and stores the entry only when it gets a response with the Shopify ID for the metafield. You can't edit types that have AssistEdit functionality defined directly on the line.

Based on feedback, we added various enhancements to Shopify Metafields such as Customer, Companies, Products, and Variants. Content types can now be **Customer** and **Company**.



Namespace	Type	Value
custom	Company	gid://shopify/Company/5316608298
custom	Customer	gid://shopify/Customer/8476077261098
custom	Collection reference	gid://shopify/Collection/439284367658
custom	Variant	gid://shopify/ProductVariant/494280387464
custom	Product	gid://shopify/Product/9554181783850

Also, if standard metafields are defined, you can use the **Get Metafield Definitions** action to get the list from Shopify. All supported metafields are imported. You only need to update the values.

The new **Sync Product/Variant Metafields to Shopify**, **Sync Customer Metafields to Shopify**, and **Sync Company Metafields to Shopify** actions on the **Shopify Shop Card** page let you specify whether to synchronize metafields when you synchronize to or from Shopify. Those settings can be useful for sync performance if you don't rely on metafields but have large product or customer lists.

Tell us what you think

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Feedback

Was this page helpful? Yes No

Preview incoming e-invoices prior to processing

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2025	Jun 2025

Business value

You can enhance the accuracy of your data by previewing the details of incoming e-documents, such as invoices and credit memos, before you process them.

Feature details

When you receive an incoming e-document from an external service or manually upload one, it's typically in XML or similar format that can be difficult, if not impossible, to read. For example, if you aren't technical and don't understand the XML format, it'll be hard to thoroughly review an invoice before you process it. To make it easier for everyone to review incoming e-documents, invoices and credit memos have an **E-invoice Lines** FastTab that displays details from the imported file, such as line and header information, in a way that's easy to understand.

This feature is only available for invoice and credit memo types of incoming e-documents.

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

Feedback

Was this page helpful? Yes No

Process e-documents in two steps

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

In most cases, businesses want to save time by fully automating as many processes as possible. However, there are cases where it's important to pause a process to allow time for a review. Business Central does both. You can configure Business Central to create purchase documents in a fully automated, one-step process, or a two-step process that requires approval. Pausing for review gives enhanced control over how you process e-documents and create purchase documents.

The review provides additional control over the processing of e-documents.

Feature details

You can choose whether to use automatic processing for purchase documents, where Business Central creates new documents right away, or a two-step process that requires explicit confirmation before creating a purchase document. In the two-step process, Business Central creates the e-document, but then you must confirm it before you can take the next step.

To set up the process, on the **E-Documents Service** page, choose one of the following options in the **Processing** field:

- **One-step**: Business Central uses your e-document setup to automatically create a purchase document based on the received e-document.

- **Two-steps**: Business Central creates the e-document, but you must use the **Create Invoice** or **Create Order** actions to create the purchase document. This allows you to review the received document before proceeding.

Tell us what you think

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

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Was this page helpful? Yes No

Send e-documents via a service and email simultaneously

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Business Central offers flexible ways to share documents and information quickly and easily. Document sending profiles let you specify your preferred way to send documents when you post them. For example, you might want to send a document by email or as an electronic document through a service you use. We're adding even more flexibility to the process with the ability to send documents by email and as an electronic document, all in one go.

Feature details

Previously, you could either choose to send e-documents through a connector service or download the file and send it by email. You now have more options for handling e-documents in sales.

If you choose the **Post** action from the **Sales Order**, **Sales Invoice** or **Sales Credit Memo** pages, Business Central posts the document as usual, but it can also trigger a workflow to create an e-document. That requires you to have an e-document workflow configured for the customer. But, if you choose **Post and Send**, Business Central does the same but also sends the e-document via email as an attachment.

Depending on whether you enable the e-documents workflow, you can choose one of the following models for sending documents in the sales process:

- Use the **Post** action from the document and **Service Integration** is enabled on the **E-Document Service** page. The e-document is sent to the configured access point.
- Use the **Post and Send** action from the document and **Service Integration** is enabled in the **E-Document Service** page. The e-document is sent to the configured access point and as an attachment in an email.
- Use the **Post** action from the document and **Service Integration** isn't enabled in the **E-Document Service** page. The e-document is created and ready to download.
- Use the **Post and Send** action from the document and **Service Integration** isn't enabled in the **E-Document Service** page. The e-document is sent by email.

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Was this page helpful? Yes No

Troubleshoot export issues on Shopify Skipped Records page

Article • 01/23/2025

ⓘ Important

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

Expand table

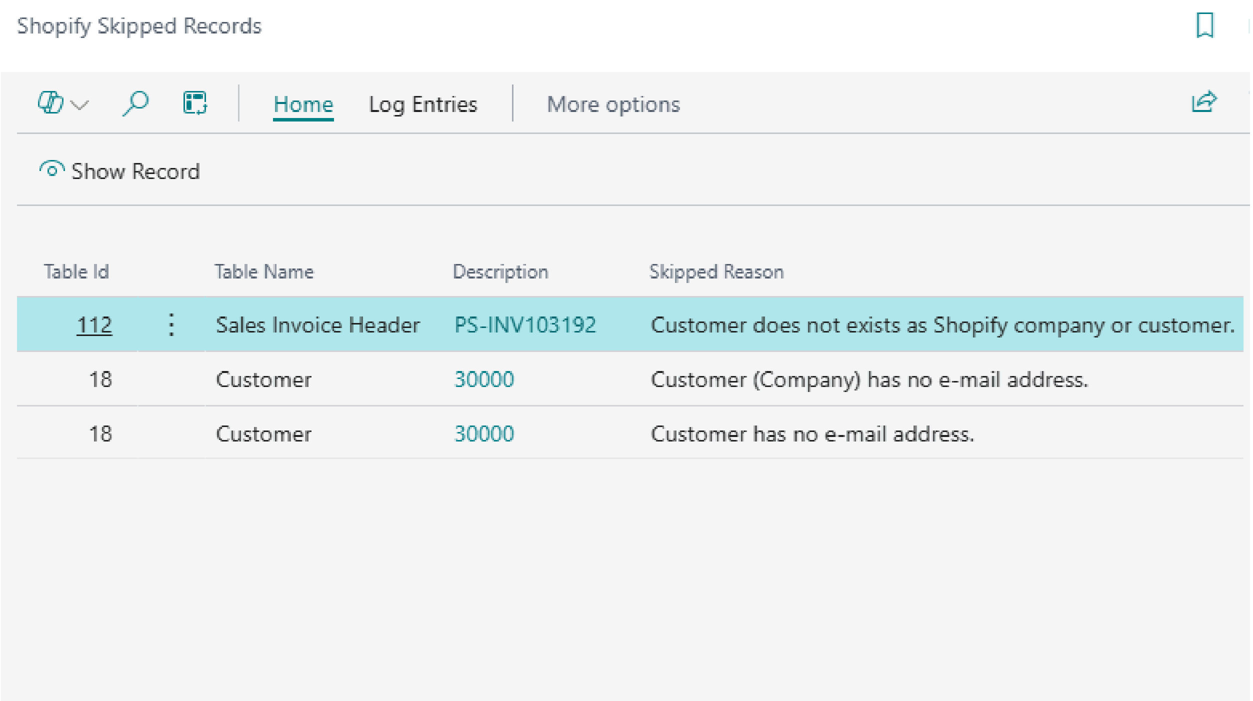
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2025

Business value

When a business experiences a problem with the integration of their front end, Shopify, and their back end, Business Central, it's important to quickly get to the bottom of the issue. Having different levels of logging reduces the time it takes to resolve a problem with your integration between Shopify and Business Central.

Feature details

When you export data to Shopify, the Shopify Connector skips records that Shopify will reject or that aren't valid for export for other reasons. While the behavior is expected, you might be confused if some information wasn't processed as you expected. You can now find those entries on the **Shopify Skipped Records** page, which shows all skipped records and provides the reasons and the date and time the records were skipped.



Cases that the Shopify Connector logs

Customer:

- A customer has an empty email.
- A customer with the same email or phone number exists.

Posted sales invoice:

- Customer doesn't exist in Shopify.
- Payment term mapping is missing.
- Customer number is the default customer number for the Shopify Shop.
- Customer number is used in the Shopify customer template.
- No lines exist in the sales invoice.
- Invalid (negative or fractional) quantity.
- Empty number value.

Product:

- Item is blocked/sales blocked (item variant).
- Item is blocked.
- Item description is empty.

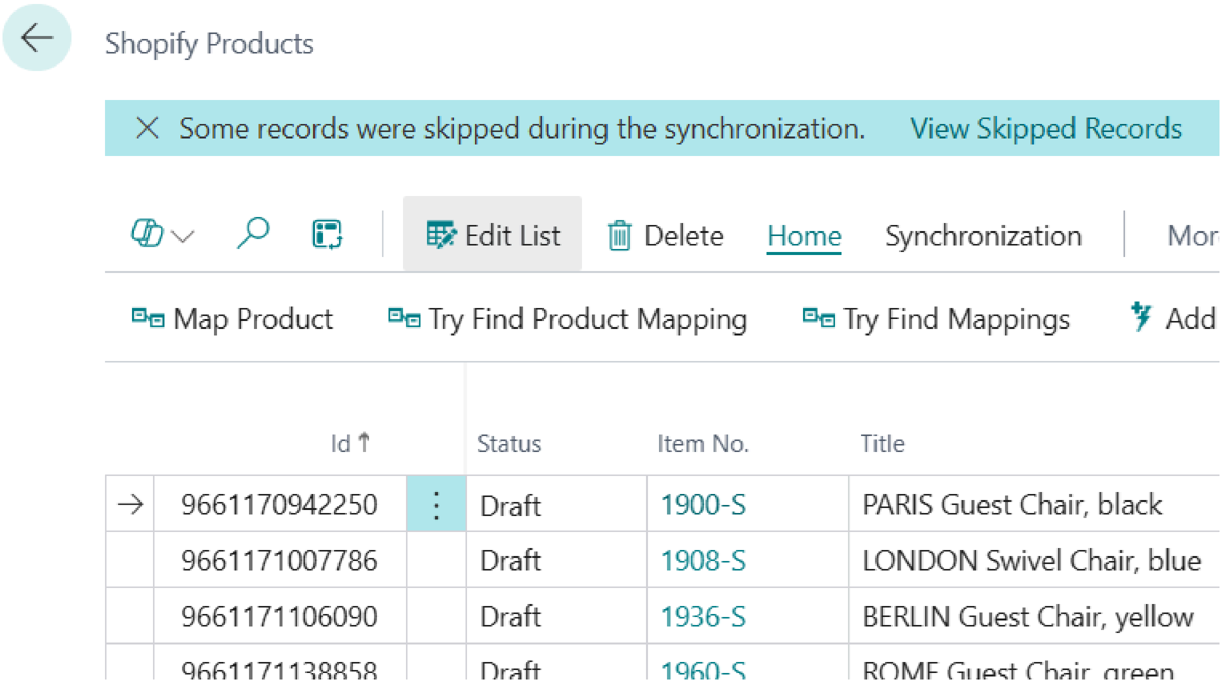
Catalog:

- Price sync if the catalog isn't found in Shopify.

Shipments:

- Related Shopify order doesn't exist.
- No lines in the posted sales shipment are applicable for fulfillment.
- No corresponding fulfillment is found in Shopify.

If you run sync in the foreground you will get a notification if records were skipped. Choose **View Skipped Records** to open the **Shopify Skipped Records** page.



Setup

The **Logging Mode** field controls the content of the **Shopify Skipped Records** page. Note that the **All** option works in the same way as **Error Only** and logs only skipped entries. It won't log entries that were previously skipped.

Retention policy

To help you keep your database size under control, Shopify Skipped Records is included in Define Retention Policies.

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Feedback

Use e-documents to fix unposted purchase credit memos

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Mistakes happen, so it's important to be able to fix them quickly. If you accidentally delete a purchase credit memo and can't link the incoming e-document to the correct one, you can now recreate a new memo based on details in the e-document. Problem solved, and you can go take care of other business.

Feature details

If you accidentally delete a purchase credit memo, you can't proceed with the e-document connection with the regular purchase document in Business Central. To get yourself unstuck, you can run the **Recreate Document** action from the e-document. The action creates an unposted purchase credit memo based on information in the incoming document and the G/L mapping or item references used.

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Was this page helpful? Yes No

Use e-docs with Power Automate and other solutions with APIs

Article • 01/23/2025

ⓘ Important

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

Expand table

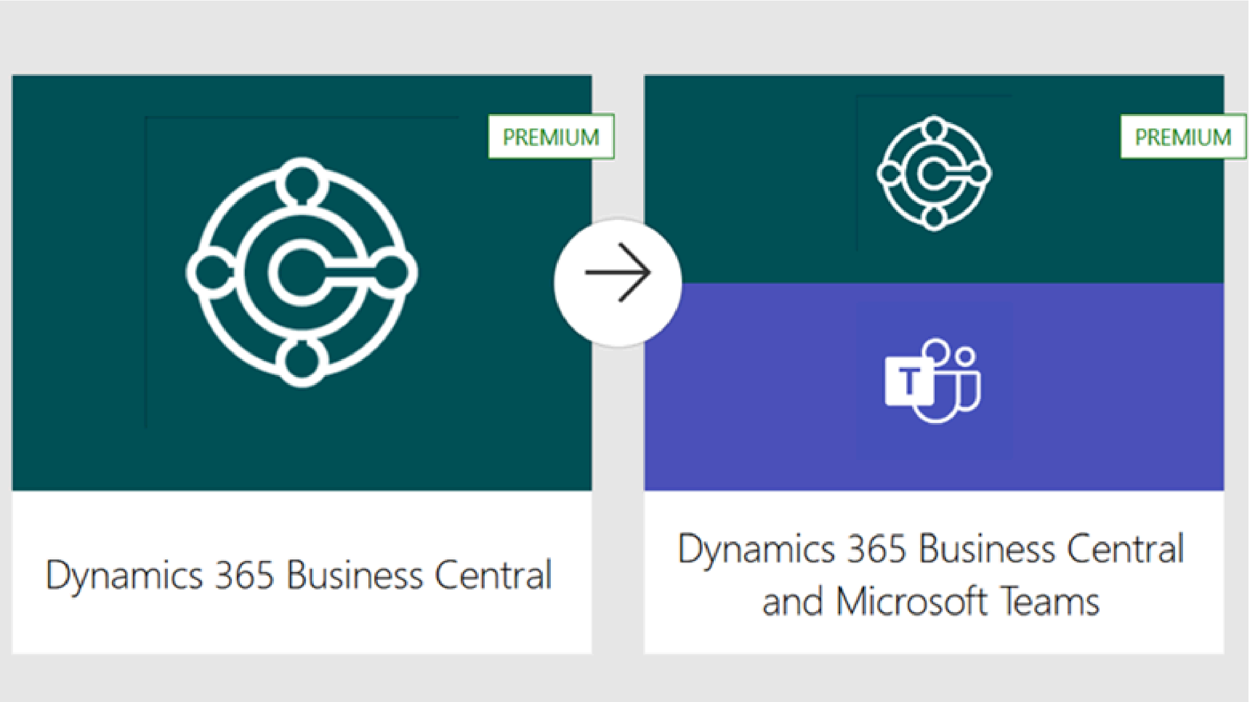
Enabled for	Public preview	General availability
Users, automatically	Jul 2025	Aug 2025

Business value

Because e-documents are essentially the standard these days, modern businesses need flexible and compliant ways to share them with the right people. To that end, you can use APIs for Power Automate to share e-documents with other applications, so that people can access them in their preferred tools. You can also use external sources for receiving e-documents.

Feature details

With enabled APIs, sharing sales electronic documents from Business Central to other applications or services becomes seamless. By integrating the E-Documents app in Business Central with Power Automate, you can connect to Power Platform tools and other systems for enhanced functionality. This setup allows sending e-documents as BLOB files through various communication channels beyond default connectors or email. Additionally, the integration supports automating the receipt of electronic documents in the purchasing process, transferring them to the **E-Documents** tables for further processing within Business Central.



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Was this page helpful? Yes No

Use payments with the E-Document framework

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2025	May 2025

Business value

You can now boost productivity with enhanced tracking of e-documents by quickly identifying whether each document is fully paid, partially paid, or unpaid. This also helps businesses meet legal requirements in certain countries.

Feature details

You can mark whether an e-document is fully paid, partially paid, or unpaid. This information is sent (accounts payable) or received (accounts receivable) through access points based on your e-document configuration. The payment tracking feature in e-documents includes details such as:

- Date of payment collection
- Amount collected, including VAT
- Base amount and VAT amount at the time of payment

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Was this page helpful? Yes No

Governance and administration

Article • 01/23/2025

ⓘ Important

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

We're giving Business Central administrators more tools for managing environments, apps, and data migrations. The goal is to help administrators be self-reliant, able to solve their customer needs, and easily handle a variety of administrative scenarios.

New features in Business Central improve security, flexibility, and partner management for multi-environment customers. Administrators can now easily assign partner access to specific environments, simplifying control and compliance. Customer-managed encryption keys enhance data protection, allowing businesses to align with privacy standards. Extended update windows provide flexibility in scheduling upgrades during convenient times. A unified interface for managing per-tenant extensions (PTEs) alongside AppSource apps streamlines deployment across environments, saving time for administrators. IPv6 supports future-proofs connectivity, ensures seamless service, and enhances data security, preparing businesses for a growing, interconnected world.

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Was this page helpful? Yes No

Add support for MultiSubnetFailover

Article • 01/23/2025

ⓘ Important

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

Expand table

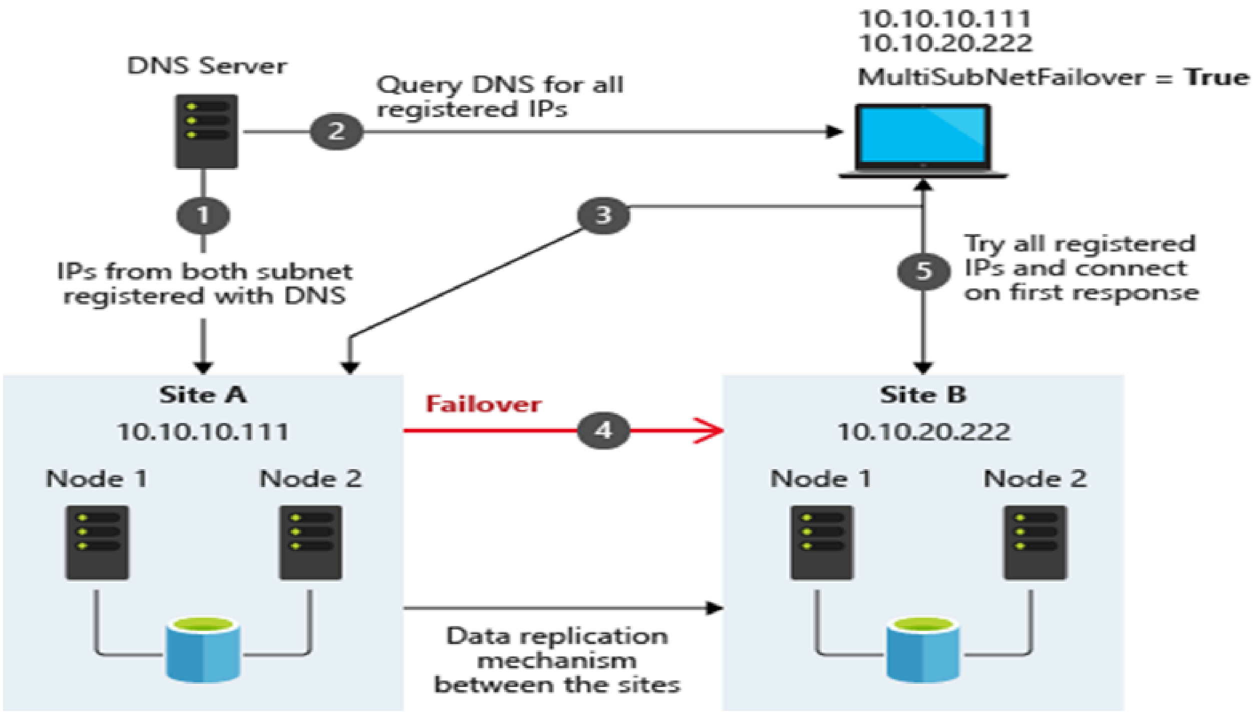
Enabled for	Public preview	General availability
Users, automatically	-	Apr 2025

Business value

For on-premises customers who run the database with high availability features, failover is now faster.

Feature details

MultiSubnetFailover enables faster failover for all Availability Groups (AGs) or Failover Cluster Instances (FCIs) in SQL Server 2012 or later and it significantly reduces failover time for single and multi-subnet Always On topologies.



In this release wave, we added a new server setting **EnableSqlMultiSubnetFailover**. When this is set to true, MultiSubnetFailover is enabled on the connections from the server to the database.

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Was this page helpful? Yes No

Automate environment management with Power Platform connector

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

With the Power Platform connector for the Business Central admin center API, you can automate environment management tasks. This automation reduces your manual effort and minimizes errors, leading to more reliable and efficient operations.

Feature details

The Power Platform connector for the Business Central Admin Center API enables you to automate various environment management tasks using Power Platform products, including Microsoft Copilot Studio. Tasks include:

- Creating environments
- Copying environments
- Scheduling environment updates
- Integrating environments with other systems

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Was this page helpful? Yes No

Update sandbox environments to preview versions

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

This feature allows customers to update their sandbox environments to a preview version during the public preview, enabling them to test updates on their own data and installed extensions. This reduces risks, enhances testing accuracy, and ensures seamless integration of customizations, ultimately leading to better-informed decisions and smoother transitions.

Feature details

For each major Dynamics 365 Business Central update, Microsoft organizes a public preview starting a month before the release of the update to enable customers and partners to test and prepare for the new functionality and other product changes using a sandbox environment. Until now, it wasn't possible to update a sandbox environment to a preview version, which has made it difficult to test the next major version using your own data and extensions.

Starting with the public preview for 2025 release wave 2, it will be possible to update a sandbox environment to the preview version. This way, customers and partners can:

- Identify and address potential issues caused by environment data or installed extensions before the update is made available to their production environments.

- Test new functionality and the update operation itself using their own data, providing a more accurate representation of how the update will perform in their environments.
- Validate that installed apps and integrations will continue to work seamlessly with the new version earlier, allowing for more time to make any required changes before updating production environments.
- Prepare more effectively. Having a preview environment that closely resembles a production environment allows for earlier user readiness activities such as product training and change communication.

Tell us what you think

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Additional resources

Prepare for major updates with preview environments (docs)

Feedback

Was this page helpful? Yes No

View app compatibility with future versions in admin center

Article • 01/23/2025

ⓘ Important

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

Expand table

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

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

Reporting and data analysis

Article • 01/23/2025

ⓘ Important

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

In 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

Access report and request metadata in Word layouts

Article • 01/23/2025

ⓘ Important

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

Expand table

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

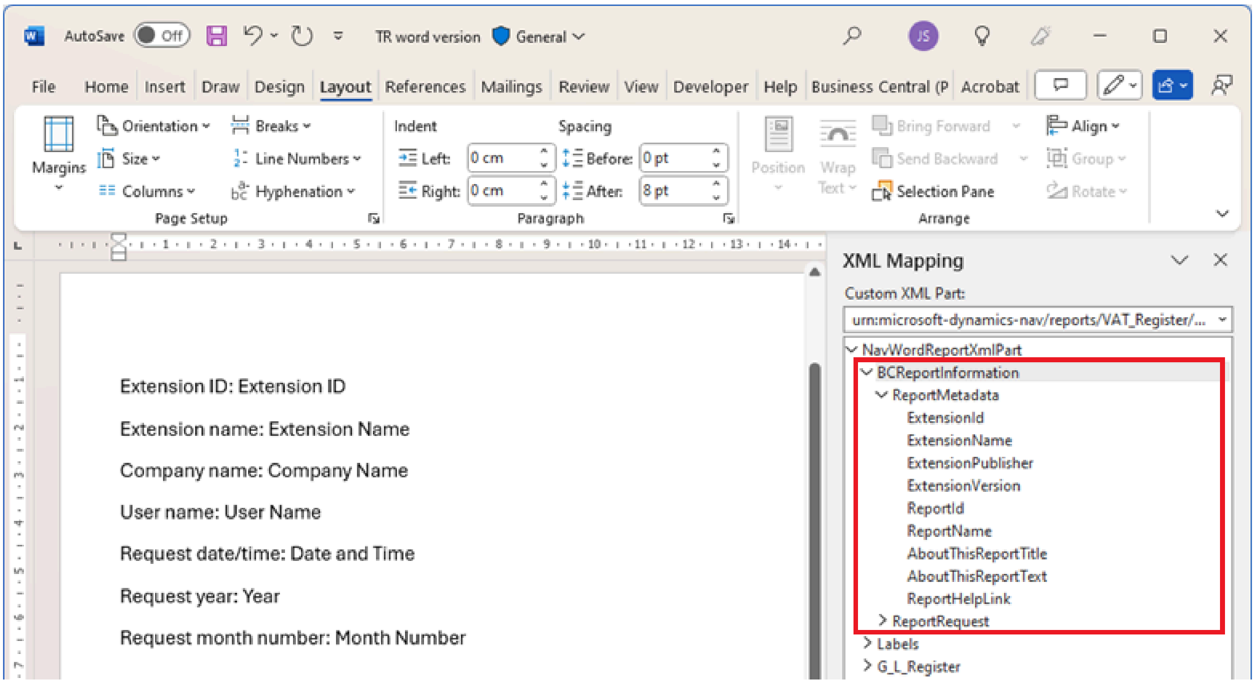
Business value

Similar to Excel layouts, you can now access report and request metadata in a Word layout without the need to encode this information in the report dataset. This enhancement makes report datasets easier to understand and removes tedious work for AL developers who create datasets for reports.

Feature details

There are now two types of metadata available in Word layouts:

- **ReportMetadata**: Provides information from the report object, such as the object ID and report name. This information is always available in the same format and location in the data picker area.
- **ReportRequest**: Contains information about the report request, such as company name, user name, and the date/time of the request.



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Was this page helpful? Yes No

Use enhanced analytics for manufacturing

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

The improvements in reporting and analytics for the manufacturing area will help your business track new KPIs and scenarios in Power BI. Customizable Excel layouts for many reports allow you to tailor them to your needs, while enriched datasets provide more comprehensive analysis. The deprecation of legacy RDLC layouts and the addition of new reports ensure you're using the most up-to-date tools. Comprehensive documentation and teaching tips can help you fully leverage these new features.

Feature details

In this release wave, we've significantly improved reporting and analytics for the manufacturing area.

For most things that you can analyze with existing reports, there are new tools for Power BI, data analysis, and Excel.

- You can track new KPIs and scenarios in the updated Power BI Manufacturing app.
- Many existing analytical reports now have an Excel layout that lets you change the report as needed. The datasets are enriched with fields that report extensions often add. The legacy RDLC layouts are deprecated.
- New reports with Excel layouts are available.

- Many existing list reports now have a Word and a simple Excel layout that lets you change a report as needed. The datasets are enriched with fields that report extensions often add. The legacy RDLC layouts are deprecated.
- Many of the existing analytical reports have been marked as deprecated. (Removal date set to 2027 release wave 1.) For each report, we have specified their replacements.
- All existing reports have teaching tips and are documented, including deprecation and replacement options.
- We also added a new Manufacturing analytics section in the documentation.

Tell us what you think

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Was this page helpful? Yes No

Use enhanced Financial Reporting capabilities

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

The no-code Financial Reporting feature offers significant benefits to finance departments by enabling self-service financial reporting and statements without the need for developer assistance. The enhancements in the release wave boost productivity by allowing report viewers to hide empty rows, and report owners to document usage, write introductory and closing paragraphs, save and run reports using Excel templates, and schedule report runs. Additionally, administrators can see required permissions and access telemetry for report usage and lifecycle events.

Overall, these improvements streamline financial reporting processes, saving time and resources while improving accuracy and accessibility.

Feature details

In this release wave, we've enhanced the Financial Reporting feature with capabilities for report viewers, report authors, and administrators.

Financial report viewers can:

- Choose to hide empty rows when they view a financial report.

Financial report owners can:

- Document the use of the report (using an internal description field).
- Write introduction and closing paragraphs for their reports.
- Save their Excel templates in Business Central.
- Run a financial report using a saved Excel template.
- Schedule when to run a financial report.
- Use a new *Month to Date* column type.
- Find financial reports that use a column or row definition.
- Use an accounting format where negative numbers are formatted with () instead of a minus sign.
- Open financial reporting when they create a new G/L account.

Administrators can:

- Use the documentation to find out which permissions are needed to run or edit financial reports.
- Get telemetry on the use of financial reports and lifecycle events.

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Was this page helpful? Yes No

Supply chain management

Article • 01/23/2025

ⓘ Important

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

Supply chain management in Dynamics 365 Business Central is designed to help businesses streamline their operations and improve overall efficiency. This comprehensive solution offers a range of features that cater to the needs of companies, from procurement and production to distribution and logistics.

Business Central provides tools for managing the entire supply chain process, including inventory management, order processing, and demand forecasting. It allows businesses to create and manage purchase orders, track inventory levels, and ensure that products are delivered to customers on time. The system also supports various supply chain methodologies, giving businesses the flexibility to choose the approach that best suits their operations.

One of the key benefits of using Business Central for supply chain management is its integration with other Microsoft products, such as Power BI and Microsoft Teams. This integration enables businesses to gain deeper insights into their supply chain data, collaborate more effectively, and make informed decisions based on real-time information.

The investments for the supply chain management area are currently focused around the service and manufacturing capabilities.

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Was this page helpful? Yes No

Add more columns to various pages to gain more insight

Article • 01/23/2025

ⓘ Important

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

Expand table

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

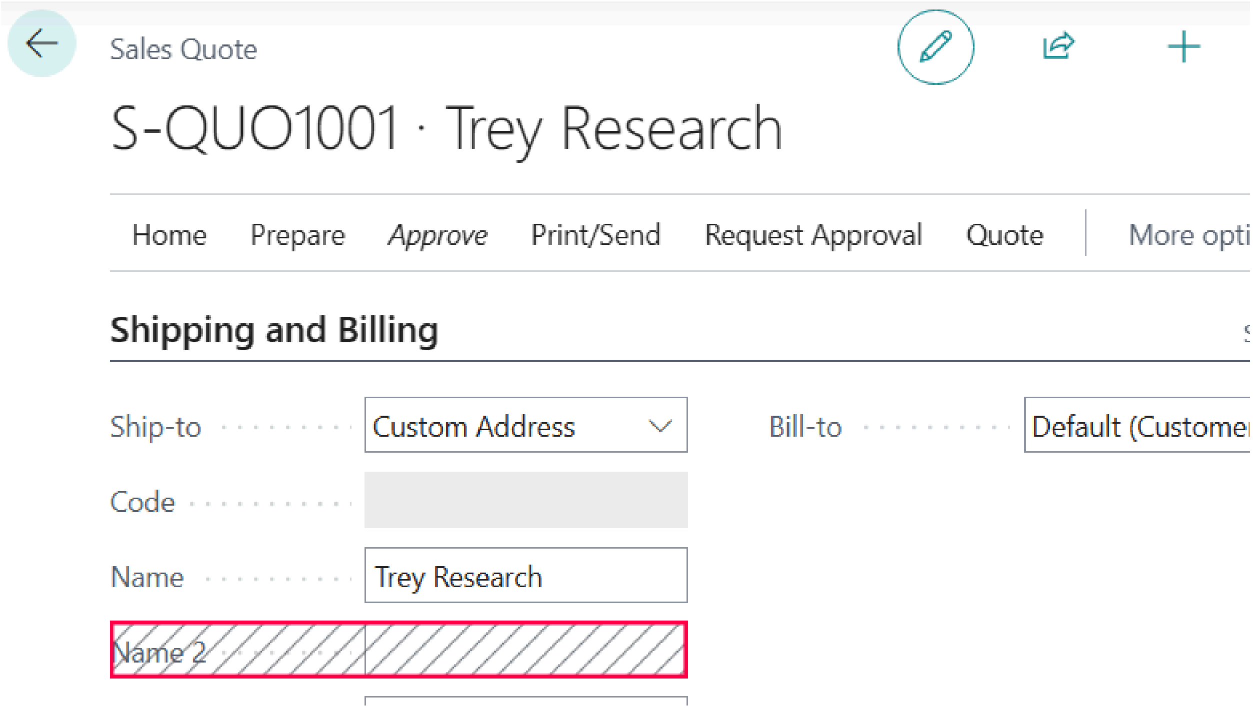
Business value

Different businesses and users need different information to complete business processes. Personalization is a powerful tool that lets people tailor the information that pages contain by dragging fields or columns from a list to the page. Based on feedback from our community, we've added more fields and columns to choose from on several pages.

Feature details

Ship-to Name 2 field

You can add the **Name 2** field to pages for all sales, service, projects, purchase drafts, and posted and archived documents.

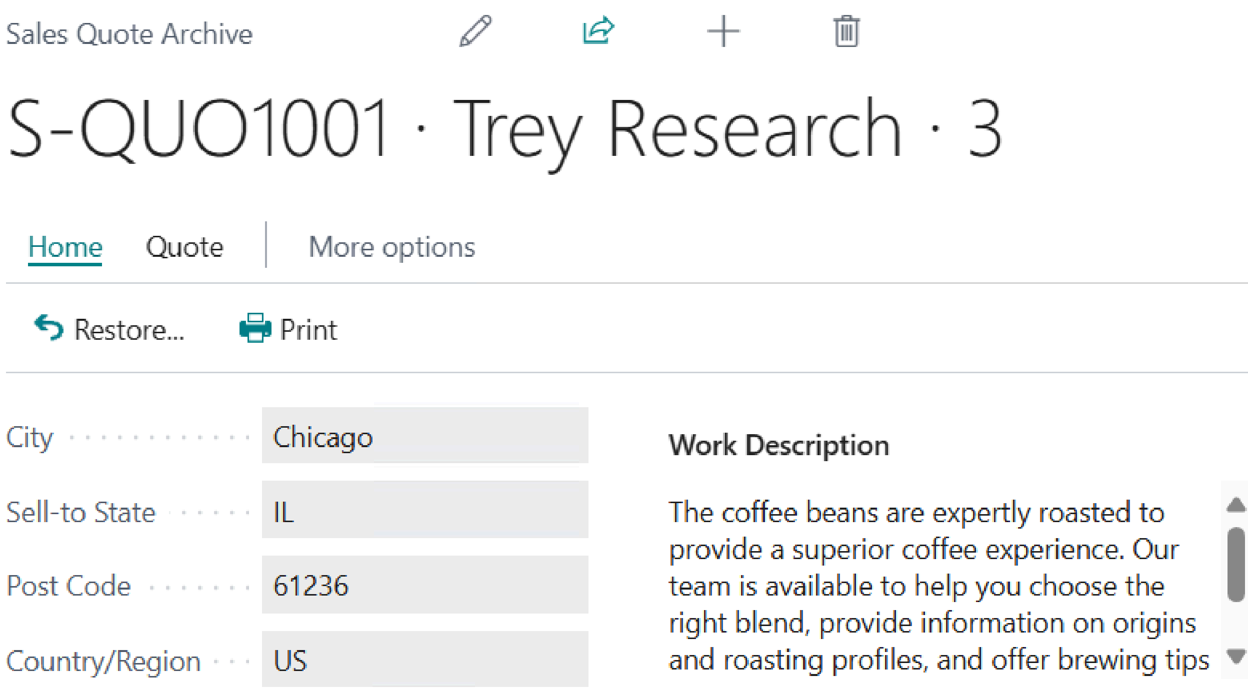


We'd like to thank our community for your valuable contributions to Microsoft's open source BusinessCentralApps repo on GitHub.

Work Description field

The **Work description** field is added to the **Sales Quote Archive** and the **Sales Order Archive** pages. The field displays by default.

The information in the **Work Description** field adheres to both the archive and restore process, and the procedure for copying documents.



We'd like to thank our community for your valuable contributions to Microsoft's open source BusinessCentralApps repo on GitHub.

Description 2 field

You can add the **Description 2** field to simulated, planned, firm planned, released, and finished production orders.

Routing Link Code field

The **Routing Link Code** field is added and visible by default to the **Routing Versions Lines**, **Routing Lines**, and **Prod. Order Component** pages.

Location Code field

The **Location Code** field is visible by default on the **Prod. Order Components** and **Planning Components** pages.

Capacity Ledger Entries page

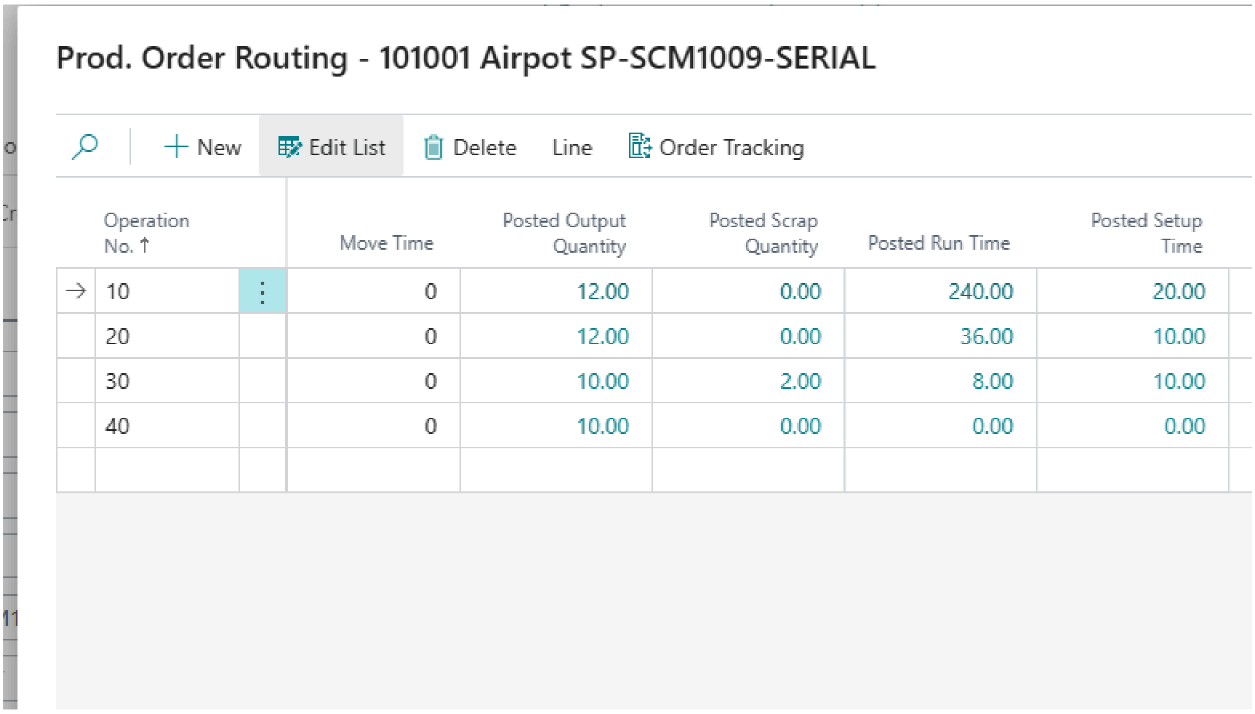
You can add the **Order Line No.** and **Cap. Unit of Measure Code** fields to the **Capacity Ledger Entries** page.

Prod. Order Capacity Need page

You can add the **Concurrent Capacities**, **Status**, **Efficiency**, **Needed Time**, **Needed Time (ms)**, **Operation No.**, **Routing No.**, and **Work Center No.** fields to the **Prod. Order Capacity Need** page.

Prod. Order Routing page

You can add the **Posted Output Quantity**, **Posted Scrap Quantity**, **Posted Run Time**, and **Posted Setup Time** flowfields to the **Prod. Order Routing** page.



Operation No. ↑	Move Time	Posted Output Quantity	Posted Scrap Quantity	Posted Run Time	Posted Setup Time
10	0	12.00	0.00	240.00	20.00
20	0	12.00	0.00	36.00	10.00
30	0	10.00	2.00	8.00	10.00
40	0	10.00	0.00	0.00	0.00

Prod. BOM Version List page

The **Status**, **Unit of Measure Code**, and **Starting Date** fields are added to the **Prod. BOM Version List** page. The fields display by default.

Routing Version List page

The **Status** and **Starting Date** fields are added to the **Routing Version List** page. The fields display by default.

Service Quote Lines page

The **Item Reference No.** is added to the **Service Quote Lines** page. The field displays if at least one item reference exists.

Tell us what you 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

Avoid document number errors when you post project journals

Article • 01/23/2025

ⓘ Important

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Expand table

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

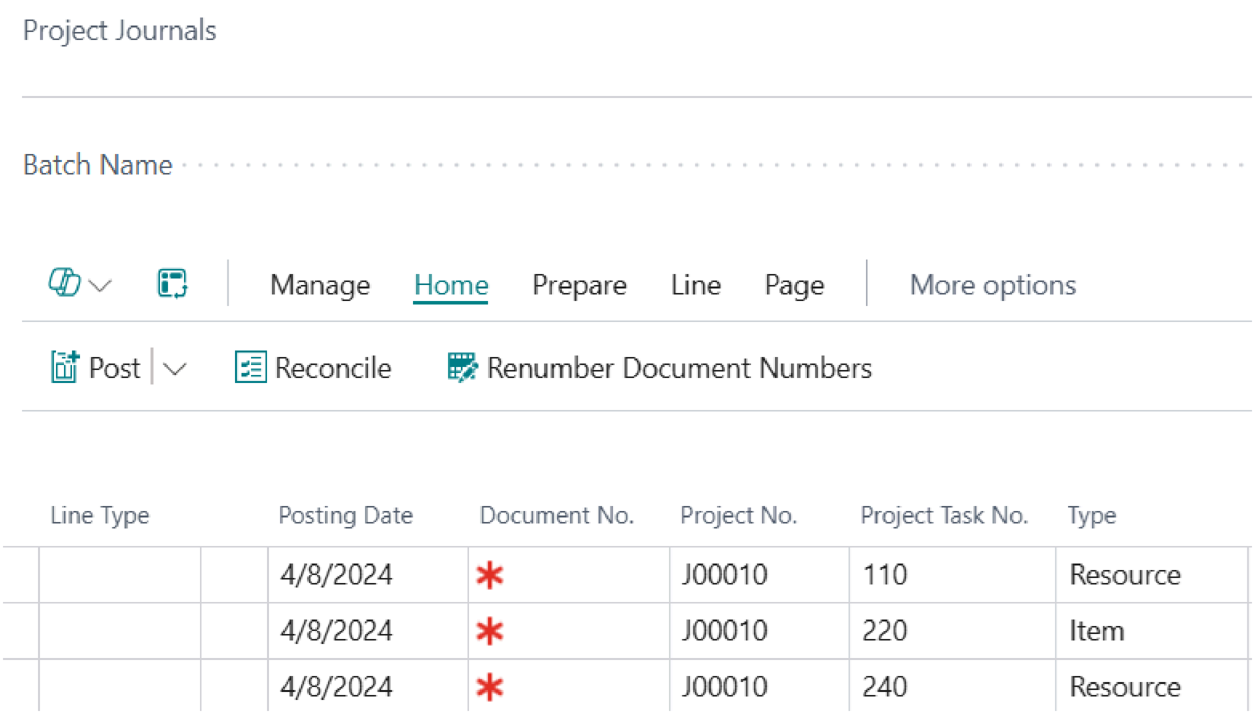
Business value

Business Central helps reduce or eliminate friction when you work with documents and journals. If you use a number series for project journal batches, you won't be able to post the journal if the document numbers aren't in consecutive order. To avoid getting stuck, you can fix errors related to the order of document numbers when you post project journals.

Feature details

On the **Project Journals page**, the **Document No.** field is editable so that you can specify different document numbers for different journal lines, or the same document number for related journal lines.

If a number series is specified in the **No. Series** field on the project journal batch, document numbers for individual or grouped lines must be in sequential order when you post a project journal. If they aren't, you can't post the journal. To avoid getting stuck, you can use the **Renumber Document Numbers** action on the **Project Journals** page before you post the journal. If related journal lines were grouped by document number before you used the action, they'll stay grouped but might be assigned a different document number.



The **Renumber Document Numbers** action also works on filtered views.

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Feedback

Was this page helpful? Yes No

Block items or variants from production output

Article • 01/23/2025

ⓘ Important

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

Expand table

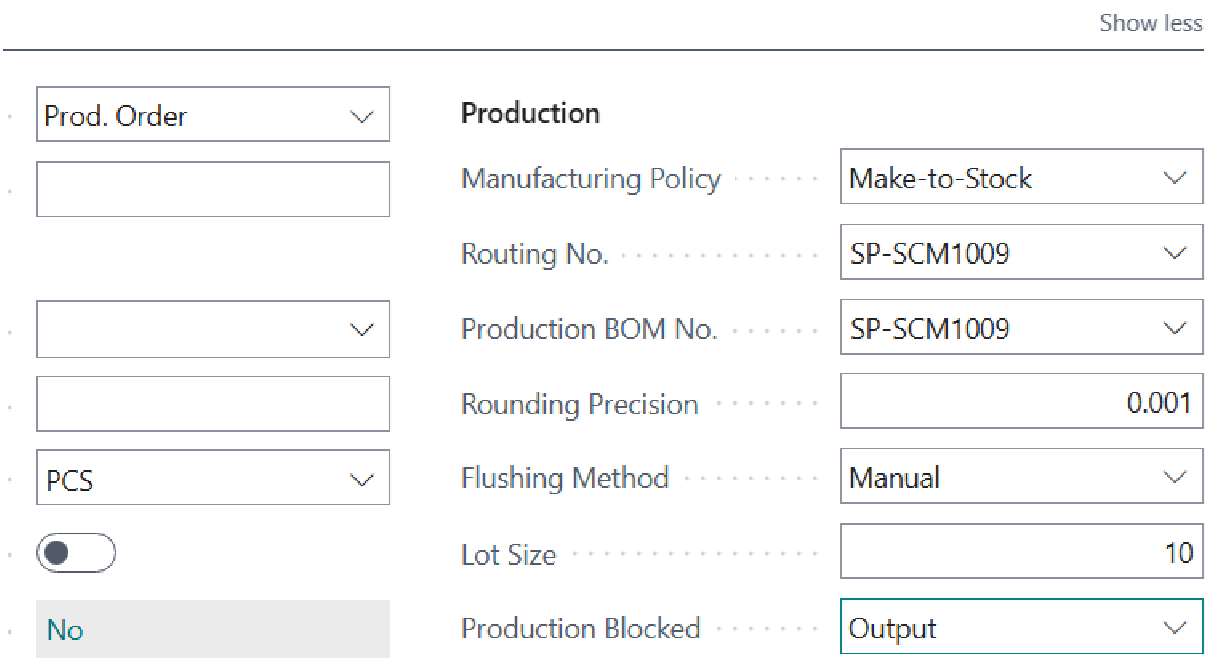
Enabled for	Public preview	General availability
Users, automatically	-	Apr 2025

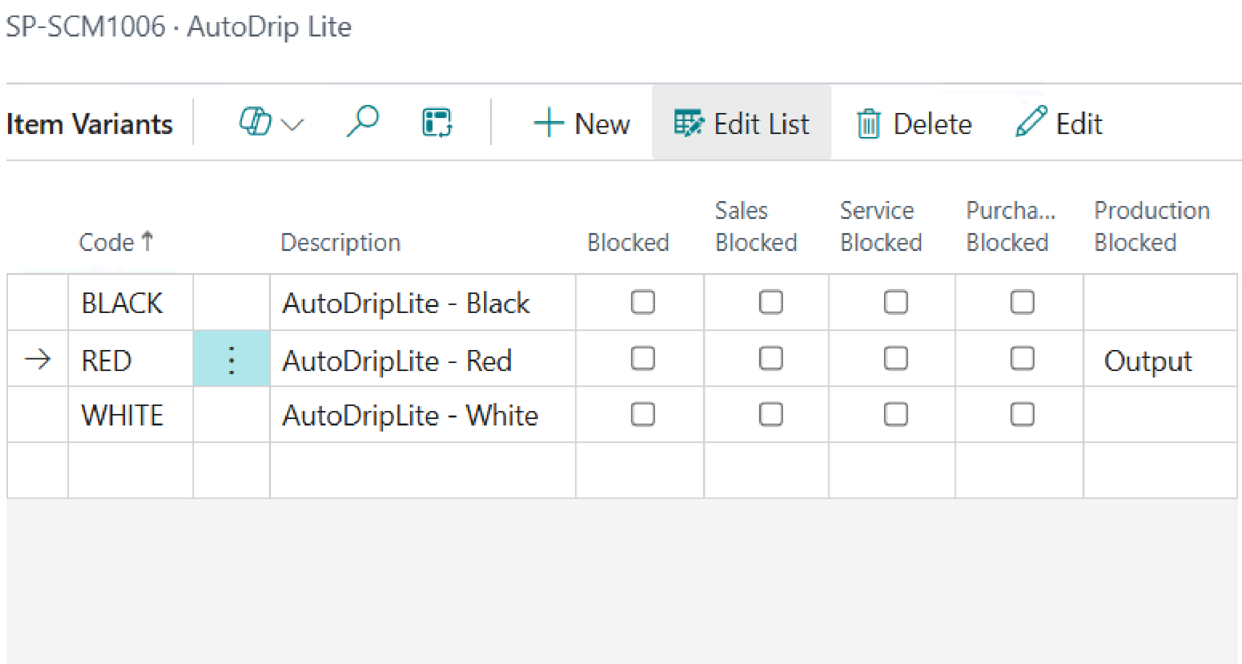
Business value

Business Central gives you full control over the materials you use in production. You can prevent specific items and item variants from being used as production output. For example, blocking items can be useful if you want to restrict replenishment because you've started to produce another model, but want to be able to sell the remaining stock.

Feature details

You can block an item or an item variant from being used for production output. To block an item or variant from production, on the **Item Card**, **Item Variants**, and **Item Variant Card** pages, turn on the **Production Blocked** toggle. You can also set this field on the **Item Template** page, so Business Central copies your setting to new items created from the template.





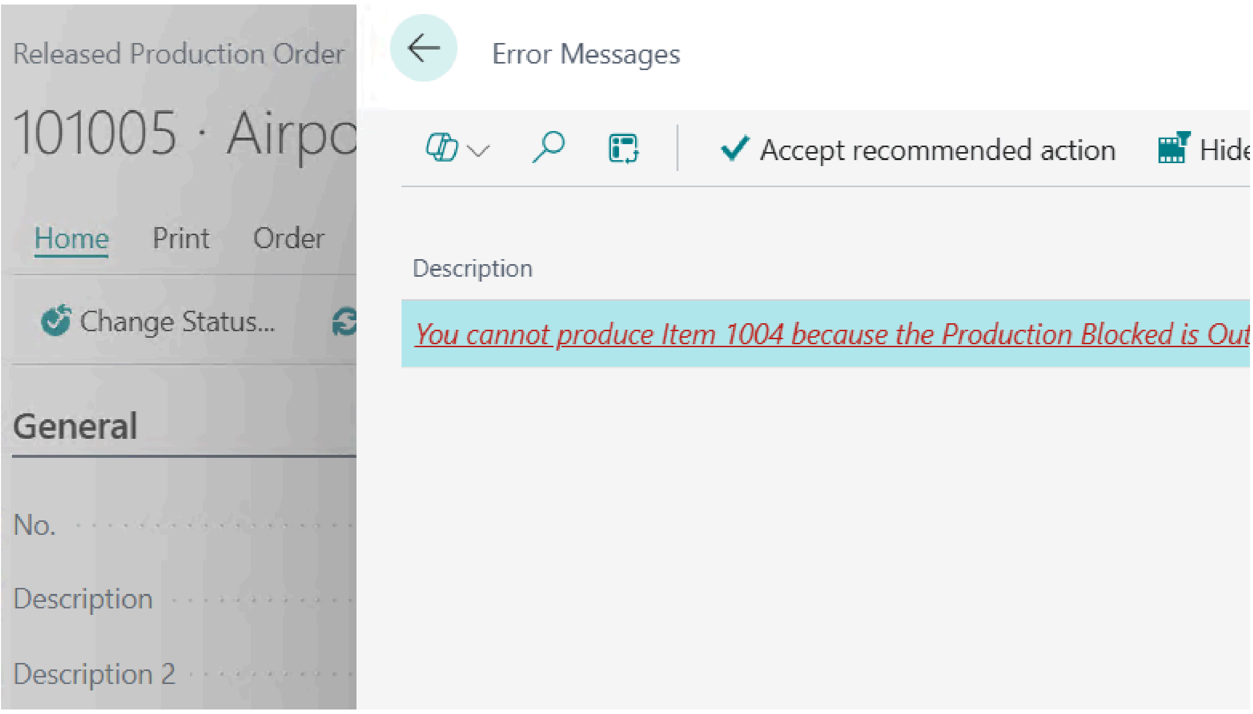
When an item or an item variant is production-blocked, it isn't available for selection on the following pages:

- Production order header (all statuses)
- Production order lines

Additionally, if a production order includes blocked items or item variants, you can't use the following actions:

- Post output in output journal or production journal
- Refresh production order
- Replan production order

- Calculate subcontracts in subcontracting worksheet should skip those items.



> **Note**
>
> You can still have lines in the requisition and planning worksheet, but you won't be able to carry out the action and create the production order. If you production-block an item, consider changing the replenishment method to to exclude the item from planning.

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Feedback

Was this page helpful? Yes No

Handle production output with warehouse put-aways

Article • 01/23/2025

ⓘ Important

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Expand table

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

Business value

In this release, you can use warehouse put-aways for production outputs, which means you can use the same warehouse process for production outputs as you use for other receipts. Using the same process makes things easier because you don't have to switch between different types of document. Also, it's especially valuable for advanced configurations where Directed Put-Away and Pick is enabled because inventory put-away documents aren't available.

Feature details

Set-up instructions

To enable this feature, on the **Location Card** page, in the **Prod Output Whse Handling** field, select **Warehouse Put-away**.

ⓘ Note

For locations where Directed Put-away and Pick is enabled, make the field editable and allow the selection of **No warehouse handling** or **Warehouse put-away**. You can't select the **Inventory Put-away**option.

You won’t be able to activate warehouse put-away if released production orders exist on the selected location.

Use case

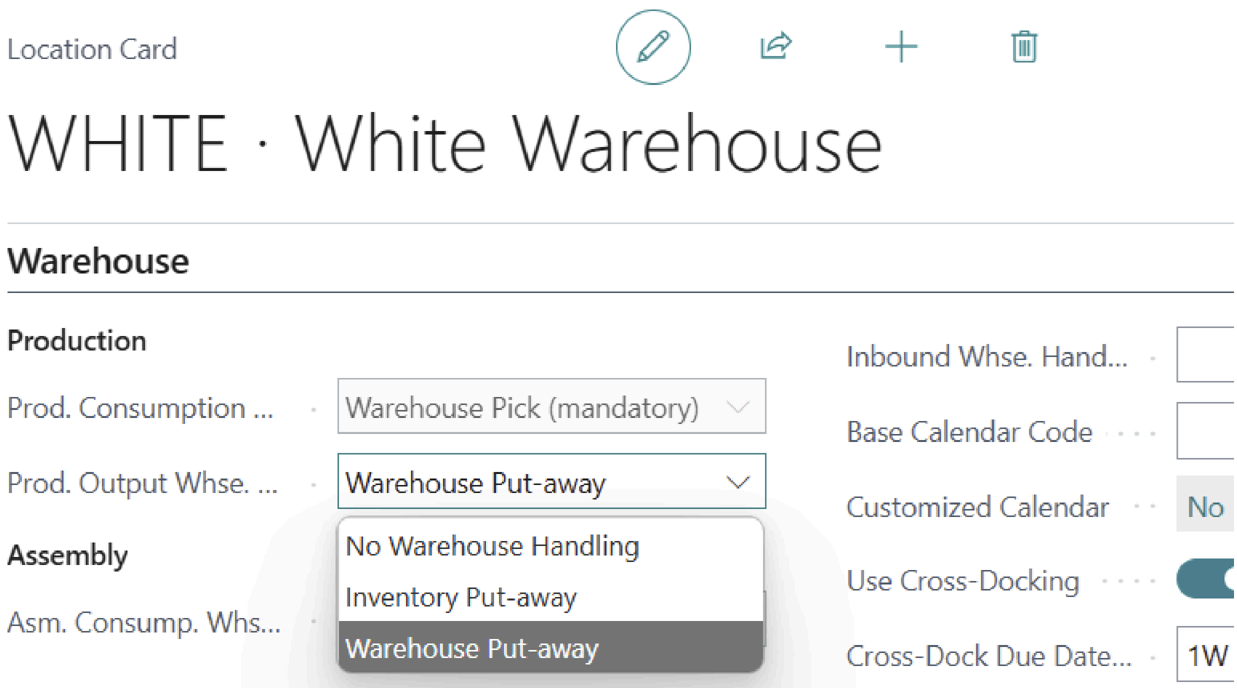
When you post production output for a location where the **Prod Output Whse Handling** field is set to **Warehouse Put-away**, based on the setting in the **Location Card** page, the warehouse put-away document is either created automatically or you'll need to use the **Warehouse Put-Away Worksheet** page.

If you delete a warehouse put-away, you can manually create a new one using the **Create warehouse put-away** action on the **Release Product Order** or **Finished Prod Order** pages.

ⓘ Note

You can't have production order lines with different locations with **Prod Output Whse Handling** set to **Warehouse Put-away**. To resolve this, use different production orders.

You can't cancel output if there are outstanding or completed put-aways.



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Feedback

Was this page helpful? Yes No

Manage document attachments in manufacturing

Article • 01/23/2025

ⓘ Important

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

Expand table

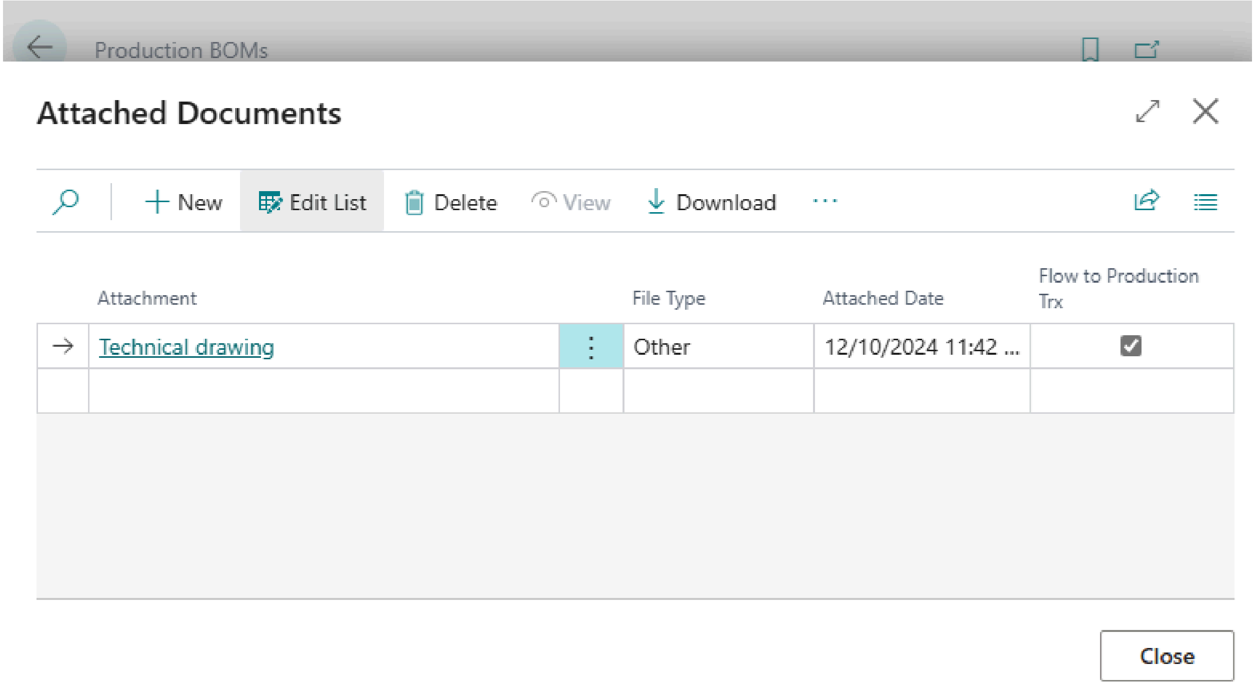
Enabled for	Public preview	General availability
Users, automatically	-	Apr 2025

Business value

Digitalize document management of manufacturing-related documents, such as drawings or inspection reports, by attaching them directly to production bill of materials, routings, and orders. Access important documentation on the go, ensuring an efficient production flow.

Feature details

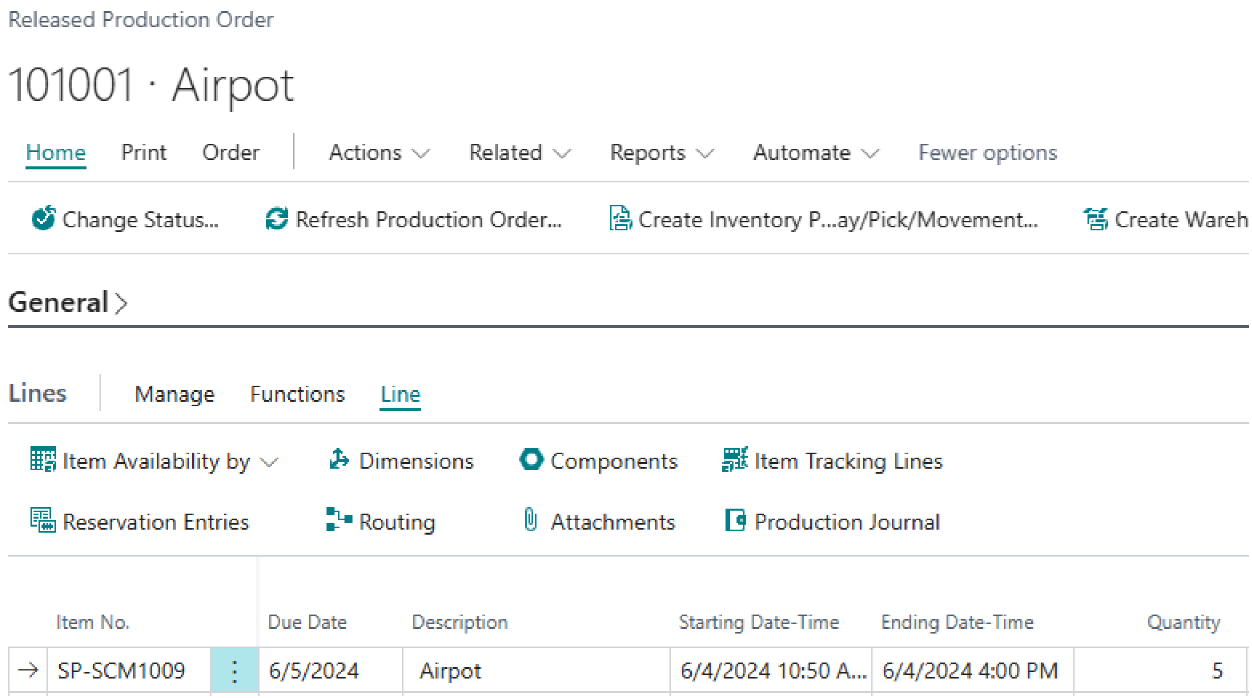
In this release, we've made document attachments available on pages related to manufacturing. The **Document Attachment FactBox** is available in multiple places, such as:



- **Production BOM** (page 99000786)
- **Production BOMs** (page 99000787)
- **Routing** (page 99000766)
- **Routing List** (page 99000764)
- **Simulated Production Order** (page 99000912)
- **Simulated Production Orders** (page 9323)
- **Planned Production Order** (page 99000813)
- **Planned Production Orders** (page 9324)
- **Firm Planned Prod. Order** (page 99000829)
- **Firm Planned Prod. Orders** (page 9325)
- **Released Production Order** (page 99000831)
- **Released Production Orders** (page 9326)
- **Finished Production Order** (page 99000867)
- **Finished Production Orders** (page 9327)
- **Production Order List** (page 99000815)

You can also choose the **Attachment** action to go to document attachments from lines on the following pages:

- **Simulated Prod. Order Lines** (page 99000913)
- **Planned Prod. Order Lines** (page 99000814)
- **Firm Planned Prod. Order Lines** (page 99000830)
- **Released Prod. Order Lines** (page 99000832)
- **Finished Prod. Order Lines** (page 99000868)



Use the new **Flow to Production Trx** toggle in the **Attached Documents** page to control how documents attached to items, production BOMs, or routings flow to production order lines.

> ⓘ **Note**
>
> We don't support attachments on the component level. We also don't support attachments on production BOM versions or routing versions.

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Feedback

Was this page helpful? Yes No

Use enhanced customer document layout for service management

Article • 01/23/2025

ⓘ Important

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Expand table

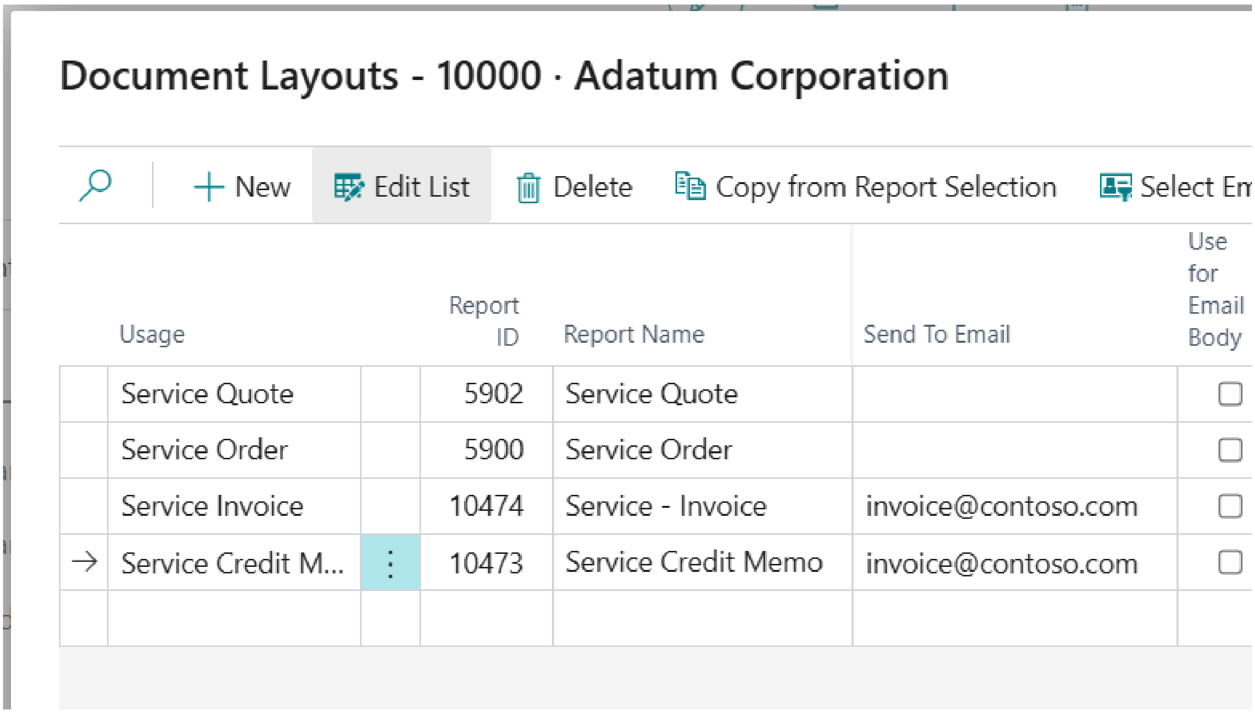
Enabled for	Public preview	General availability
Users, automatically	-	Apr 2025

Business value

Businesses deal with multiple customer and vendor contacts who are responsible for different areas of operation. For example, accountants, purchasers, and warehouse staff. Because their interests typically differ, you'll probably want to generate and send different types of documents to them. You can now save time when you send documents to different customer or vendor contacts by setting up specific contacts to use with specific documents. For example, send service invoices to accountant contacts and service orders to your customers' purchasers.

Feature details

You can now populate the **Document Layouts** page for vendors and customers based on settings on the **Report Selection** page. To send specific documents to specific company contacts, choose the company contacts to use for specific document layouts.



The **Document Layouts** page for a customer now contains additional usage options for service quotes, orders, invoices, and credit memos.

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Feedback

Was this page helpful? Yes No

Use streamlined product design tools in manufacturing

Article • 01/23/2025

ⓘ Important

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Expand table

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

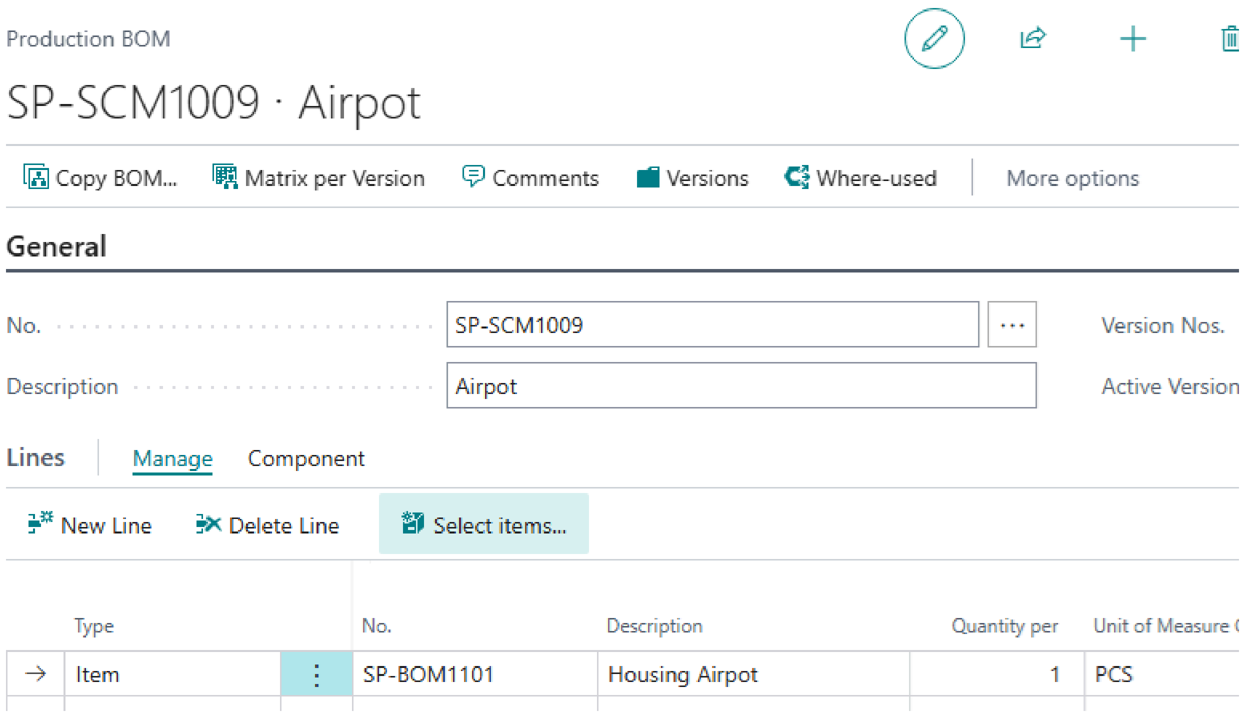
Business value

In the world of manufacturing, product design plays a pivotal role in transforming raw materials into finished goods. Production bill of materials (production BOM) and production routing are key concepts in manufacturing. A production BOM lists all components required to produce a product, ensuring accurate assembly and resource planning. Production routing tells us what to do with those components to get a finished product or subassembly.

Manufacturing is a dynamic environment where changes are inevitable. Whether it's a new component to improve product quality or a shift in supplier, you need to manage updates efficiently to avoid disrupting production. This is where BOM versions come into play. In this release, we added a number of capabilities to improve the product design stage.

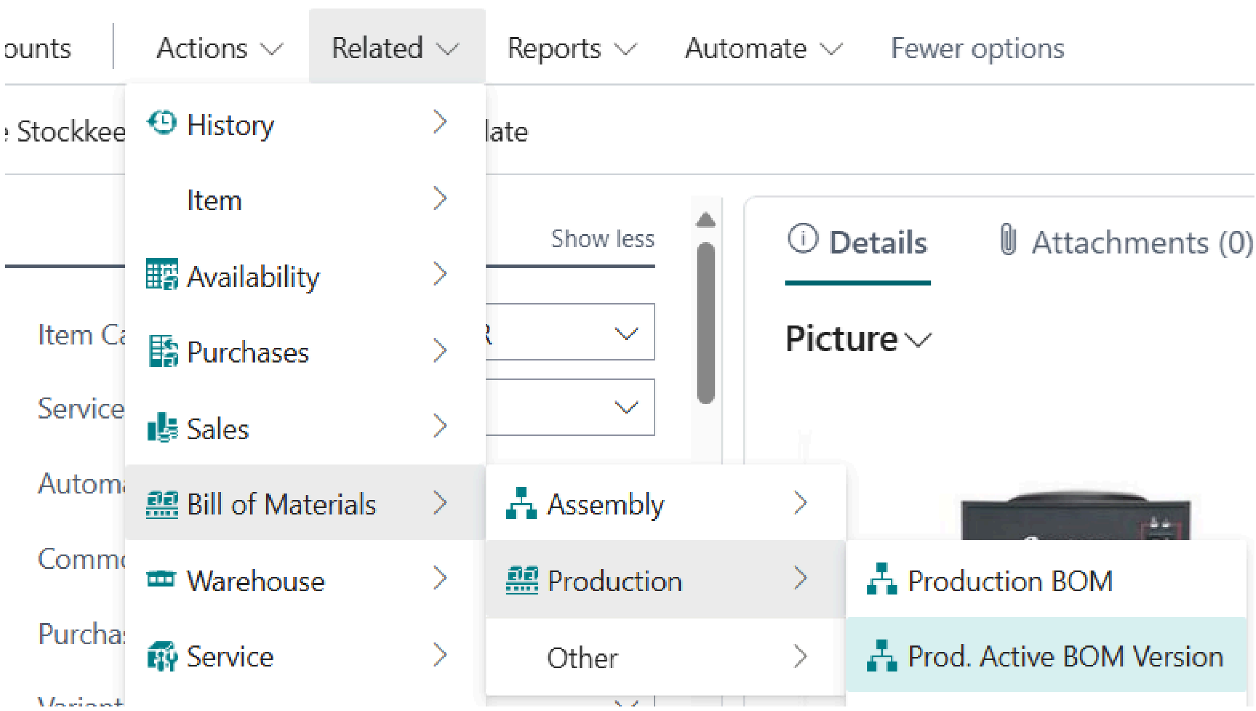
Feature details

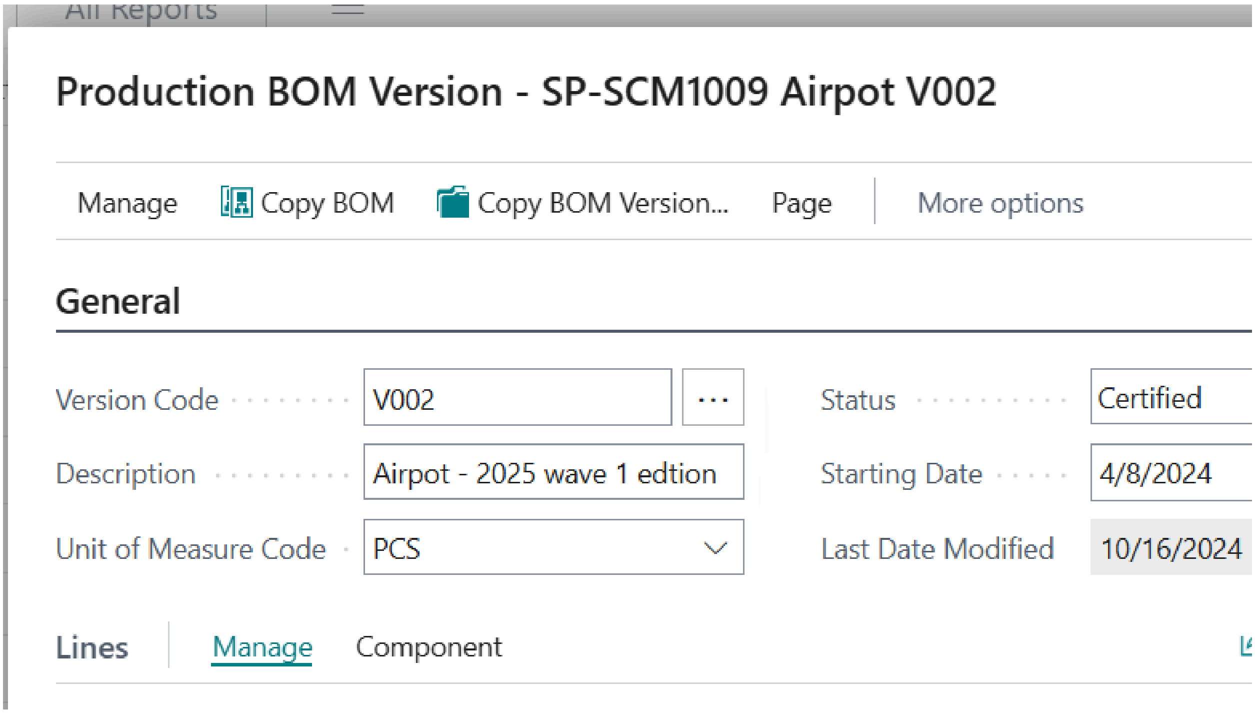
You can save a step by adding multiple items to the production BOM or production order components. When you're working with a production BOM, production BOM version, or editing components in a planning worksheet or production order, you can use the **Select items** action to select and add multiple items.



Go to active production BOM version from Item Card and Item list pages

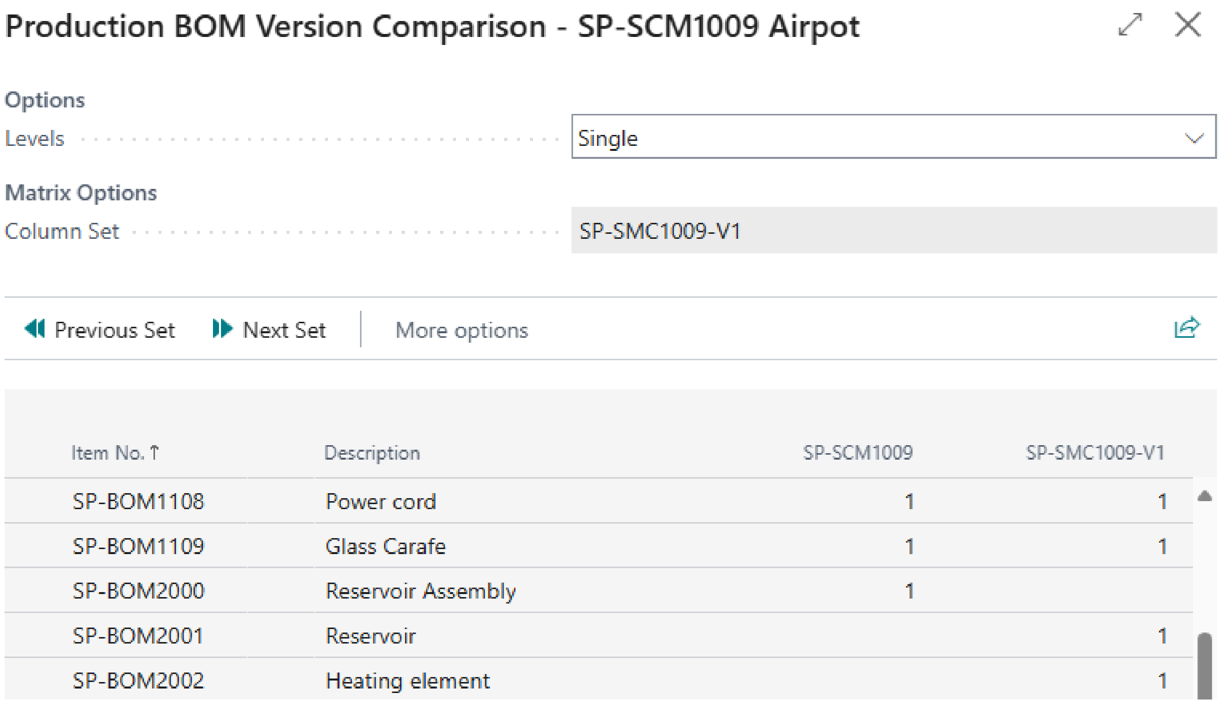
Sometimes companies need to make an adjustment to a production BOM. Rather than create an entirely new production BOM, you can update the current one by creating a version of it. Creating a version lets you keep the original production BOM in case you need it for reference, but use the new version in production. The starting date and status fields define which version to use. In this release, you can easily go to the certified BOM or BOM version that's valid on the work date by choosing the **Prod. Active BOM Version** action.





BOM version matrix page includes original BOM as baseline

Use the **Production BOM Version Comparison** page to view a list of all production BOM versions and items and the quantity used per item. You can use the matrix to compare different production BOM versions concerning the used items per version, including the original BOM as the first column. This functionality ensures clear visibility of all BOM versions and their respective quantities.



The **Production BOM Version Comparison** page provides better usability and replaces the **Prod. BOM Matrix per Version** page.

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Feedback

Was this page helpful? Yes No

Sustainability Management

Article • 01/23/2025

ⓘ Important

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

We're continuing to build out the capabilities in Sustainability Management in response to customer feedback and new regulations. With the Sustainability Management capabilities in Business Central, you can:

- **Collect sustainability information**
  - Use sustainability journals and purchase documents to gather data directly or via formulas. Track emissions per company, country, region, or facility, and purchase carbon credits directly in Business Central.
  - Import emission factors from external sources to ensure accurate calculations using exposed APIs.

- **Track progress**

  Use the modern sustainability Role Center to monitor all sustainability information and various KPIs. Scorecards and goals help you easily track progress against your baselines and targets.

- **Get easy insights and reporting**
  - Leverage standard reports or modern Excel reporting with analysis views for your sustainability entries. Compare your sustainability entries with statistical or GL entries using Financial Reports, and report different greenhouse gases or CO2 equivalents, as well as water and waste management.
  - Customize reports to focus on specific sustainability metrics relevant to your business, ensuring tailored insights for your unique sustainability objectives and reporting requirements.

These capabilities provide comprehensive tools for effective sustainability management, enabling you to track, analyze, and report on your environmental impact efficiently.

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

Feedback

Was this page helpful? Yes No

Capture sustainability data with general journals

Article • 01/23/2025

ⓘ Important

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Expand table

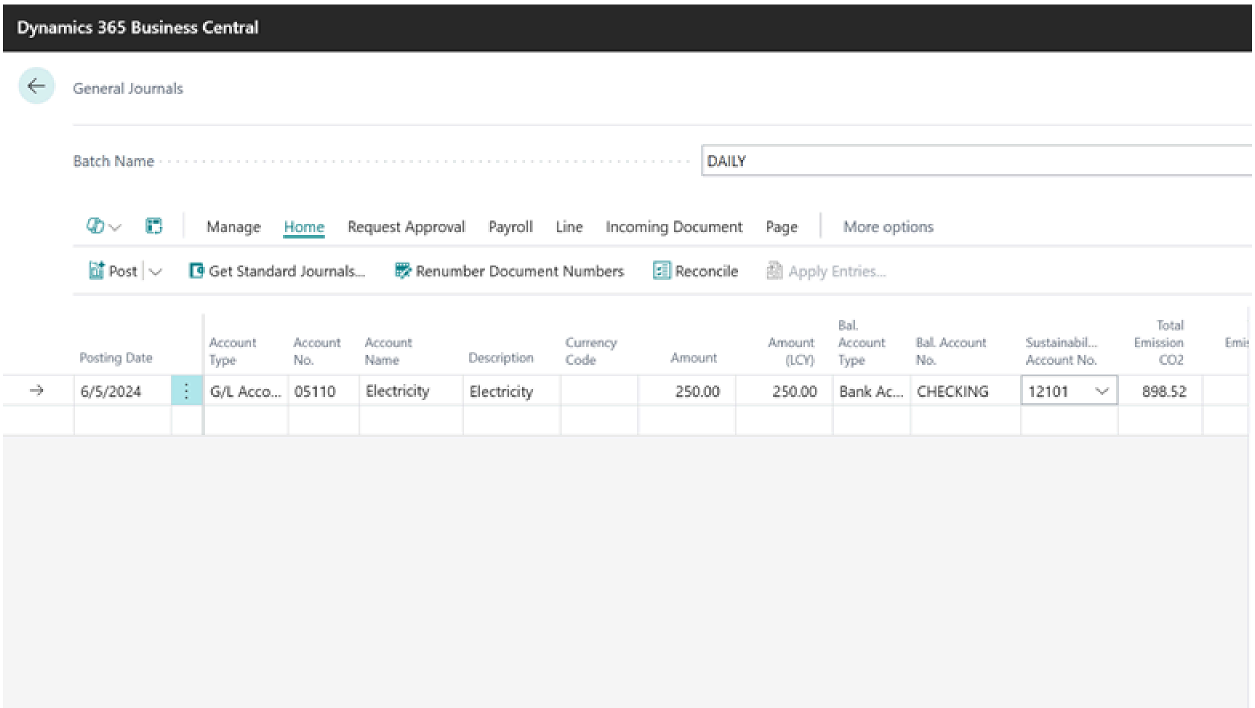
Enabled for	Public preview	General availability
Users, automatically	-	Apr 2025

Business value

Recording greenhouse gases using general journals allows businesses to track and reduce their carbon footprint and use double materiality more effectively. By integrating environmental data with financial records, companies can identify high-emission activities, make informed sustainability decisions, and enhance their corporate responsibility. The proactive approach not only meets regulatory requirements but also attracts eco-conscious customers, strengthens brand reputation, and can lead to cost savings through more efficient resource management.

Feature details

If you have emission details related to your financial data, you can post both types of data in a single line on the **General Journals** page. Just open a general journal and add the usual financial details. Then select the **Sustainability Account**, and enter the emission amounts you track for each account in the **Total Emission CO2**, **Total Emission CH4**, and **Total Emission N2O** fields. On the **General Ledger Entries** page, you can easily find the related **Sustainability Entry** using the **Find entries** action. This information is also available on the **Posted General Journal** page.



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Was this page helpful? Yes No

Enable sustainability Scope 3 value chain for assembly and transfers

Article • 01/23/2025

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2025	Oct 2025

Business value

Sustainability Scope 3 value chain process automation involves standard ERP processes to streamline the collection, calculation, and reporting of indirect emissions data across a company's upstream and downstream value chain. The process improves accuracy, efficiency, and compliance with sustainability goals. Scope 3 is significant for accurate tracking because it represents the majority of emissions, influences business decisions, and aligns with many regulations.

Scope 3 is also probably the most complex for measuring because it requires data from multiple sources, such as vendors, but also information in internal operations such as transfers, manufacturing, and so on. This feature provides more flexibility by enabling you to track emissions in the assembly and transfer processes and automatically calculate new added emissions in both downstream and upstream inventory activities.

Feature details

This feature allows the calculation of CO2e for regular transferred items and for assembly items by using initial emissions data from purchase documents and adding emissions from through transfer or assembly order processes.

To facilitate the calculation, the new **CO2e per Unit** and **Total CO2e** fields are available on the **Transfer Orders** and **Assembly Orders** pages. For **Transfer Orders**, you can increase these values only for transferred items. For **Assembly Orders**, Business Central uses emissions from consumed items and resources to calculate the total emission of CO2e for the assembled item.

The values in these fields are calculated using the **Average** method from the **Sustainability Value Entries** page. With each posting, Business Central adds new values to the **Sustainability Value Entry** related to the specific transaction. These entries don't post to the **Sustainability Ledger Entry**, but only to the **Sustainability Value Entry** to avoid double postings for the same emissions. These entries are related only to the item emission valuation.

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Feedback

Was this page helpful? Yes No

Enable taxonomy elements for ESRS and other standards

Article • 01/23/2025

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2025	Jul 2025

Business value

Businesses can map entries in Business Central with required taxonomies to get their data ready for Corporate Sustainability Reporting Directive (CSRD) reporting.

Business Central helps companies in the European Union to comply with the CSRD by enabling taxonomy elements for the European Sustainability Reporting Standards (ESRS) and other frameworks. This capability helps ensure accurate, transparent, and comprehensive sustainability reporting. Integrating these taxonomy elements simplifies the reporting process, saving you time and reducing the risk of noncompliance.

Feature details

You can set up taxonomies in Business Central using various transactional data sources. The initial setups are prepared for the demo data, but you can adjust them to meet your specific needs. After configuration, you can aggregate existing data based on these taxonomies.

After you aggregate data for a specific reporting period, you can integrate with the ESG Reporting tool to prepare the data for reporting. Because Business Central doesn't contain all the data needed for CSRD reporting, you can switch to the ESG Reporting tool where you'll find a preconfigured CSRD template where you can add any missing metrics so you can generate the reporting file.

In the future, we'll extend this integration to other ESG reporting standards.

Tell us what you think

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

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Was this page helpful? Yes No

Generate a CSRD preparation report

Article • 01/23/2025

ⓘ Important

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Expand table

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

Business value

You can simplify your Corporate Sustainability Reporting Directive (CSRD) reporting by printing reports with prepared data and taxonomies if you don't want to use integration for ESG reporting.

Feature details

You can configure taxonomies in Business Central, drawing from various transactional data sources. The initial setup is prepped for demo data, but you can adjust it to suit specific needs. After configuration, you can aggregate existing data based on the set taxonomies. If there's no integration with a reporting tool, you can generate a report layout to serve as a preparation document for CSRD reporting.

Tell us what you think

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Was this page helpful? Yes No

Provide carbon equivalent data for sales based on Scope 3 automation

Article • 01/23/2025

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2025	Oct 2025

Business value

Sustainability Scope 3 value chain process automation involves using standard ERP processes to streamline the collection, calculation, and reporting of indirect emissions data across the upstream and downstream corporate value chain. The processes improve accuracy, efficiency, and compliance with sustainability goals. Scope 3 is significant for accurate tracking because it represents the majority of emissions, influences business decisions, and aligns with many regulations.

Scope 3 is also probably the most complex for measuring because it requires data from multiple sources. For example, information from vendors but also internal operations such as transfers, manufacturing, and so on. This feature provides flexibility by enabling you to provide accurate emissions information about the items you sell.

Feature details

Business Central can accurately calculate item emissions based on values in **Sustainability Value Entries**, which currently only use the **Average** method. These values are used to add the calculated, read-only **CO2e per Unit** and **Total CO2e** fields on lines on sales documents. Note that this release doesn't extend document reports to include the additional CO2e emission values.

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Was this page helpful? Yes No

Specify default sustainability values for various entities

Article • 01/23/2025

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

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

Business value

You can enhance your sustainability tracking by configuring inbound emissions for each item, resource, and general ledger account, and for internal operations such as work or machine centers and transfer journals. This comprehensive setup helps ensure that you accurately monitor and report on your company's environmental impact.

Feature details

A new **Default Sust. Account** field is available in the following tables:

- G/L Account
- Item
- Item Category
- Resource
- Work Center
- Machine Center

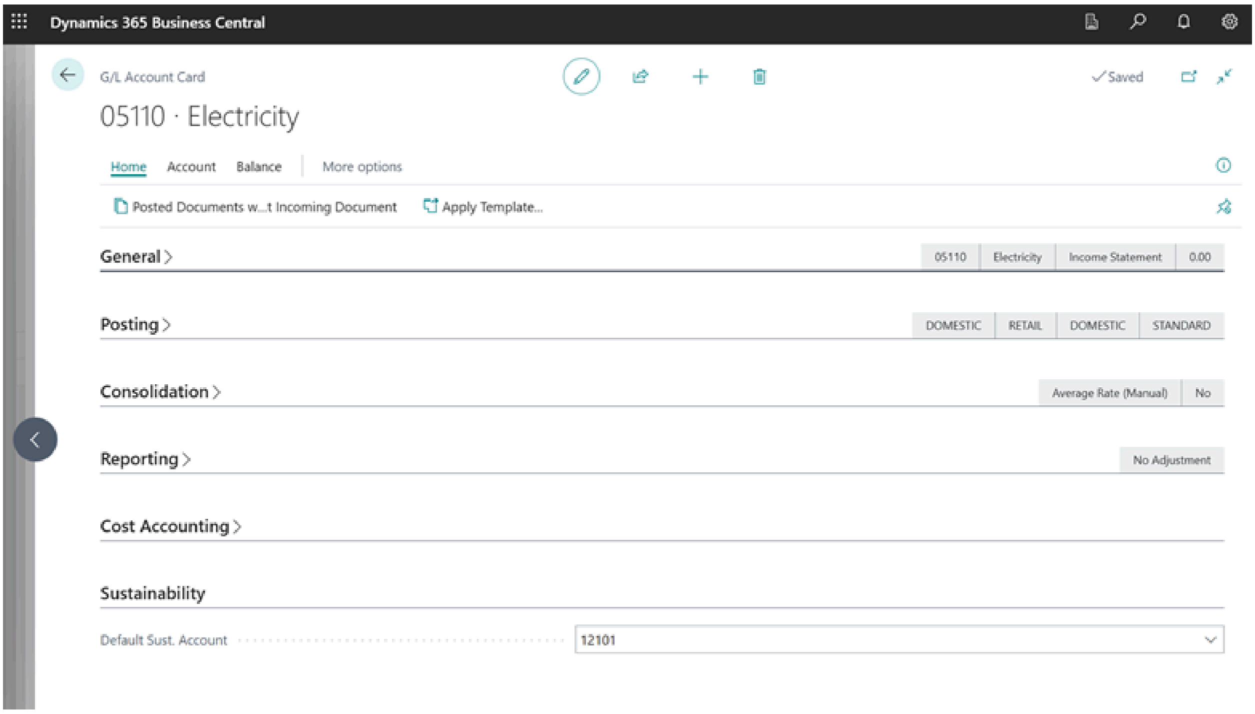
If you fill in the **Default Sust. Account** field in the **Item Category** table, items assigned to the category inherit the value.

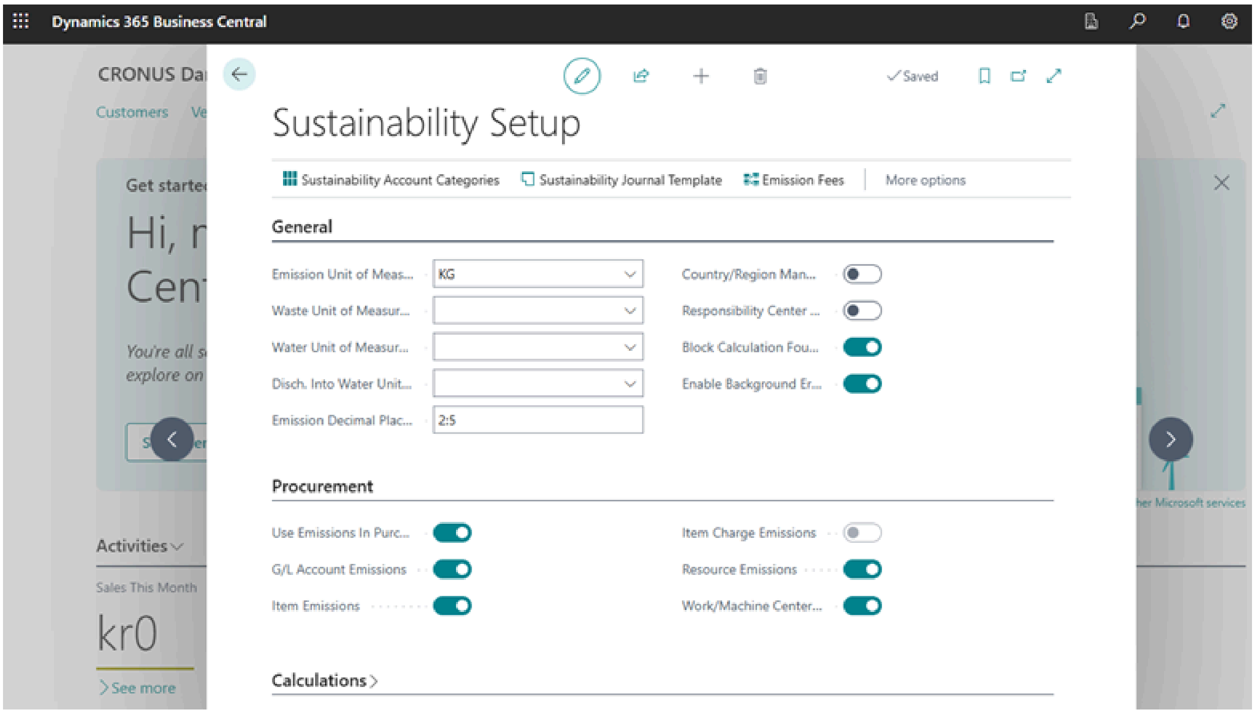
Additionally, there are new **Default CO2 Emission**, **Default CH4 Emission**, and **Default N2O Emission** fields in the **Item**, **Resource**, **Work Center**, and **Machine Center** tables.

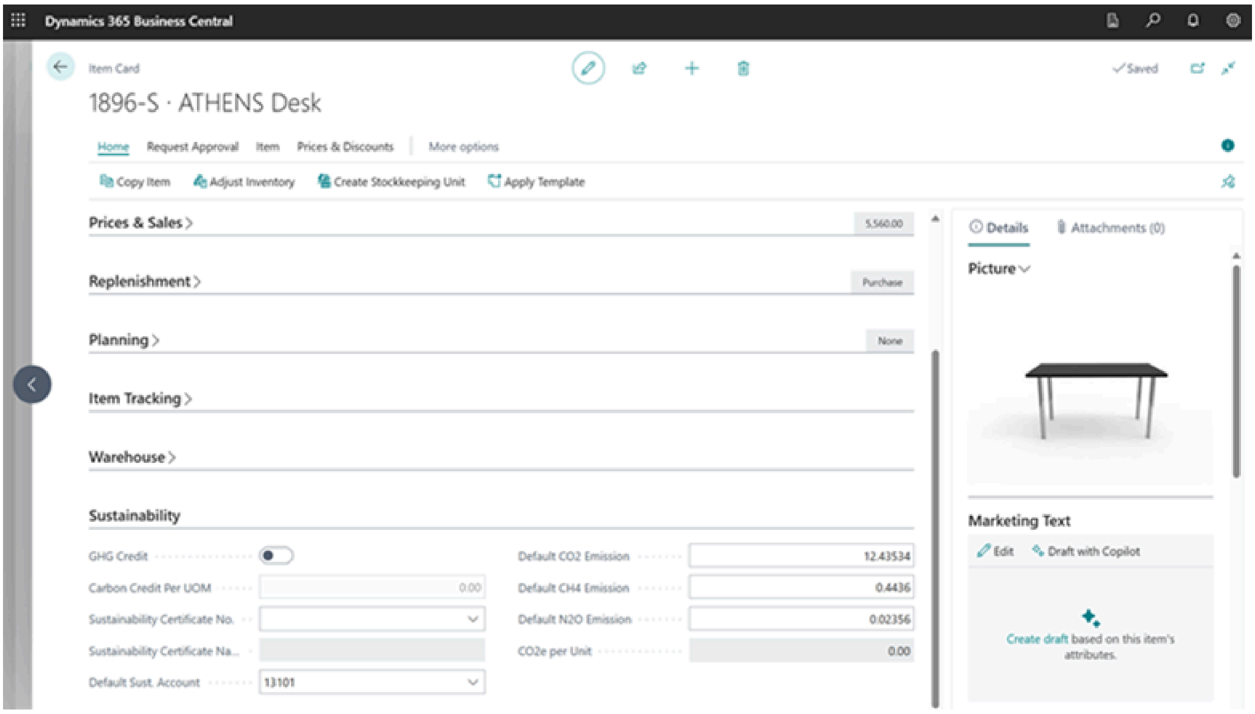
You can edit the values in these fields on the **Item** card if you specify **Purchase** in the **Replenishment System** field for the items. Otherwise, Business Central calculates the values. If these fields have a value and you change the selection in the **Replenishment System** field, a message warns you that the values in the emission fields will be removed.

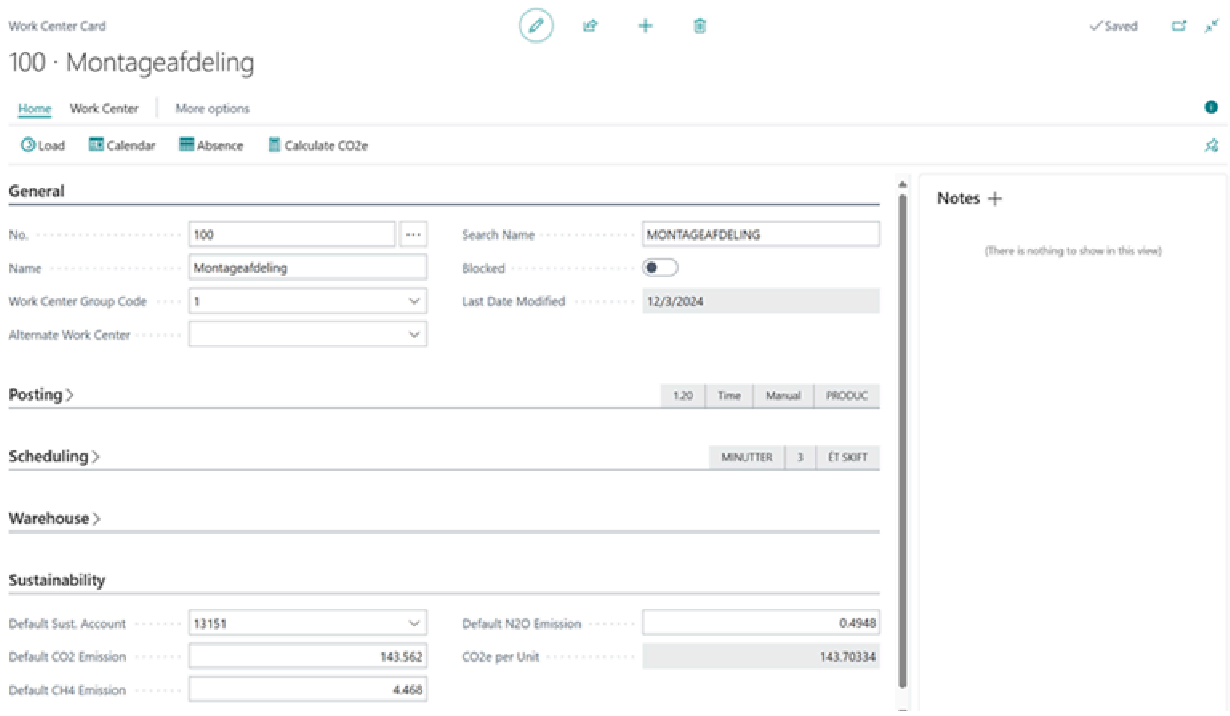
To use these fields, you must enable them on the **Sustainability Setup** page. Requiring configuration means less clutter in the user experience for businesses that don't want to use them.

If you specify a value in the **Default Sust. Account** field, and you work with purchase documents or general journals, the value transfers to the related **Sustainability Account** and **Emission Amount** fields.




Dynamics 365 Business Central
Saved
Sustainability Setup
Sustainability Account Categories
Sustainability Journal Template
Emission Fees
More options
General
Emission Unit of Meas...
KG
Waste Unit of Measur...
Water Unit of Measur...
Disch. Into Water Unit...
Emission Decimal Plac...
2:5
Country/Region Man...
Responsibility Center ...
Block Calculation Fou...
Enable Background Er...
Procurement
Use Emissions In Purc...
G/L Account Emissions
Item Emissions
Item Charge Emissions
Resource Emissions
Work/Machine Center...
Calculations
CRONUS Da
Customers
Get starte
Activities
Sales This Month
kr0
See more


Dynamics 365 Business Central
Item Card
Saved
1896-S · ATHENS Desk
Home
Request Approval
Item
Prices & Discounts
More options
Copy Item
Adjust Inventory
Create Stockkeeping Unit
Apply Template
Prices & Sales
5,560.00
Replenishment
Purchase
Planning
None
Item Tracking
Warehouse
Sustainability
GHG Credit
Carbon Credit Per UOM
0.00
Sustainability Certificate No.
Sustainability Certificate Na...
Default Sust. Account
13101
Default CO2 Emission
12.43534
Default CH4 Emission
0.4436
Default N2O Emission
0.02356
CO2e per Unit
0.00
Details
Attachments (0)
Picture
Marketing Text
Edit
Draft with Copilot
Create draft based on this item's attributes.



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Was this page helpful? Yes No

Start value chain in purchase process for Scope 3 in sustainability

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2025	Oct 2025

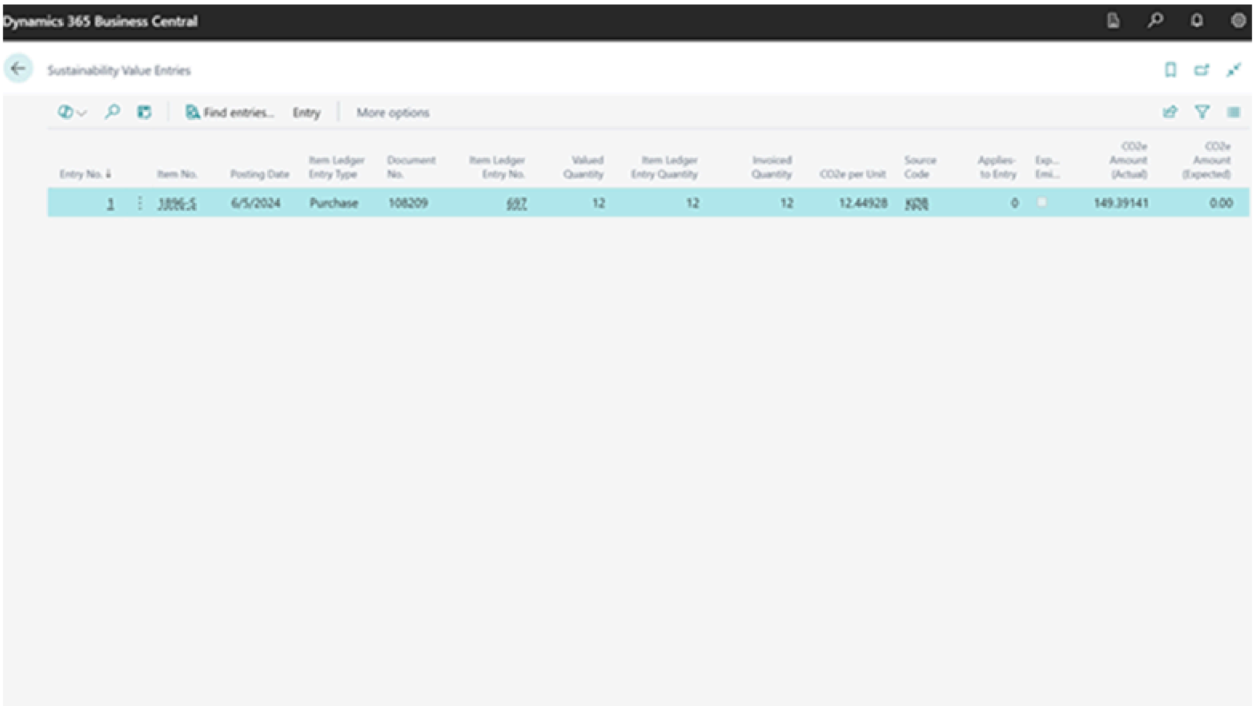
Business value

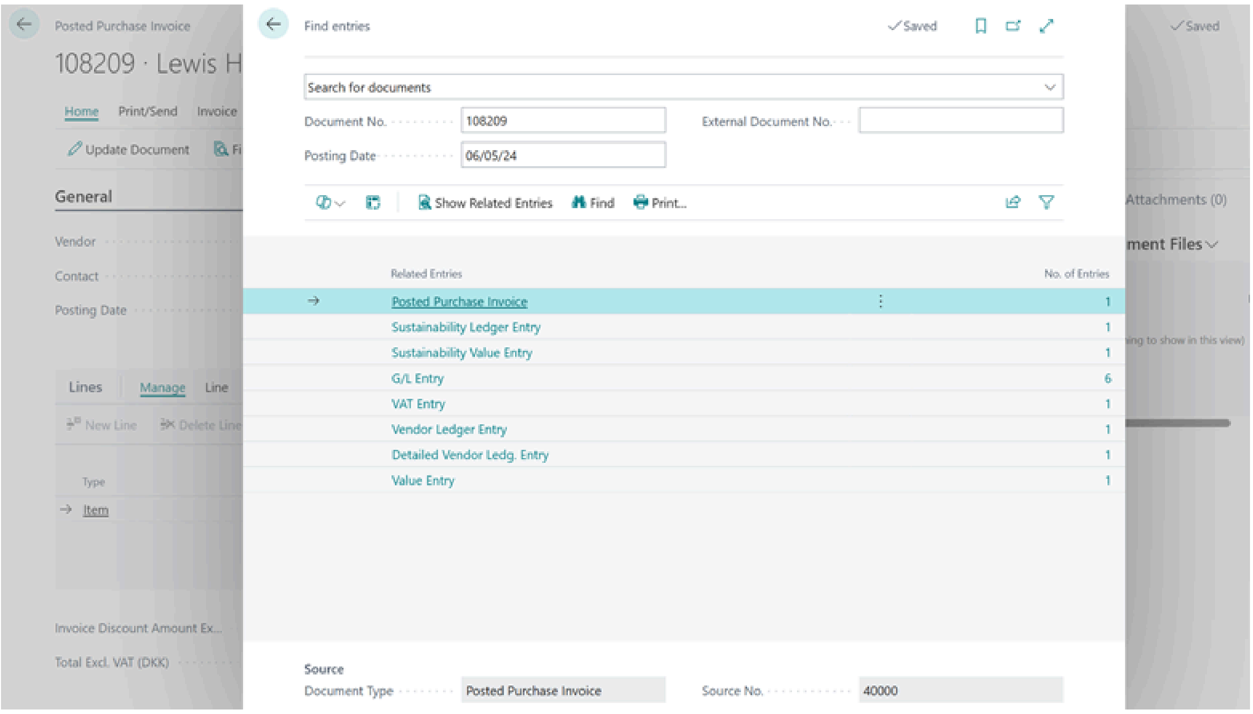
Sustainability Scope 3 value chain process automation involves standard ERP processes to streamline the collection, calculation, and reporting of indirect emissions data across a company's upstream and downstream value chain. The processes improve accuracy, efficiency, and compliance with sustainability goals. This feature provides flexibility by enabling you to track emissions starting with the purchase process, and to start the final emission calculation.

Feature details

Scope 3 is significant for accurate tracking because it represents the majority of emissions, influences business decisions, and aligns with many regulations. Scope 3 is also probably the most complex for measuring because it requires data from multiple sources. For example, from vendors, but also internal operations such as transfers, manufacturing, and so on.

When you post emission values with purchase invoices, Business Central creates a sustainability ledger entry, as usual. It also creates and a new sustainability value entry that references the item ledger entry with the same item ledger entry type, and records details related to the calculated **CO2e Amount**. This marks the beginning of the emission valuation process, where Business Central tracks all emission changes through other processes. This feature in purchase documents currently applies only to items. It doesn't yet support item charges for adding additional emissions. Also, this release supports only the **Average** model of emission calculation.





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Was this page helpful? Yes No

Use ESG Reporting integrated with Business Central

Article • 01/23/2025

ⓘ Important

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

Expand table

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

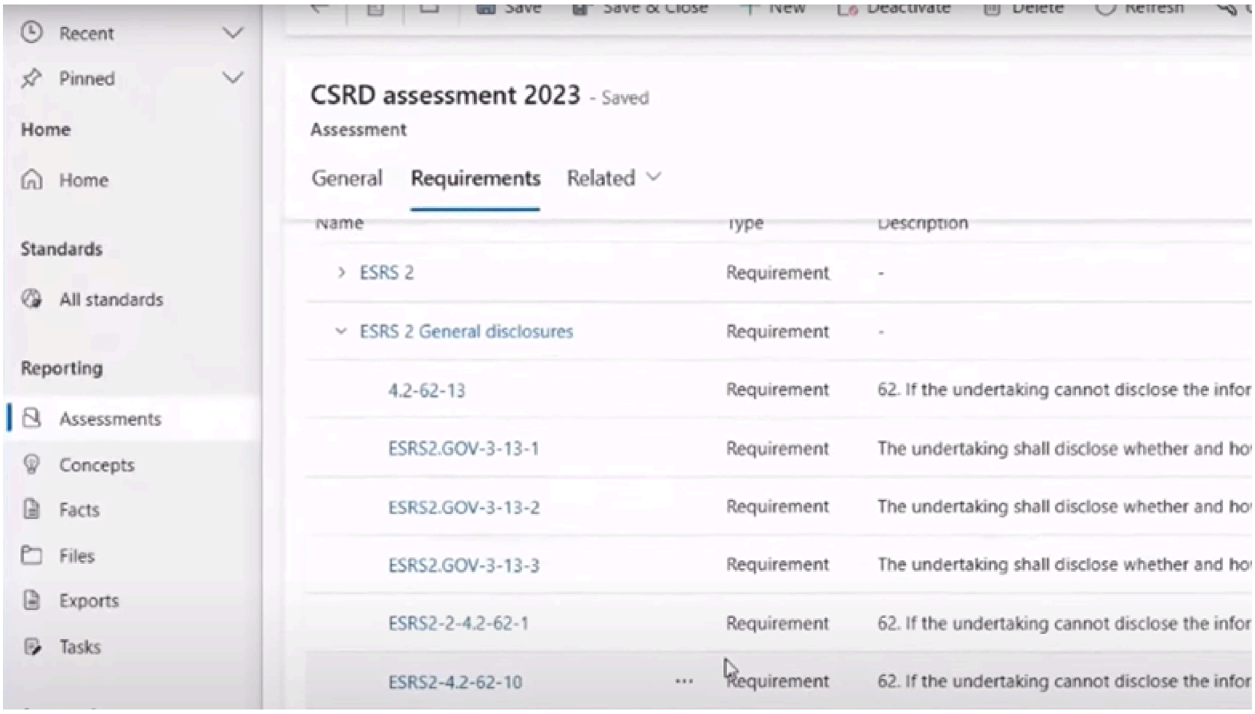
Business value

Business Central users can now seamlessly integrate the Project ESG Reporting app with the Sustainability module for streamlined compliance reporting aligned with standards like CSRD, ASRS, and BRSR, with future expansions planned. This feature eliminates the need for repetitive data entry and lets you manage non-transactional data outside of Business Central. It marks another milestone in Microsoft's commitment to fostering collaboration across business applications, enhancing efficiency and compliance for users.

Feature details

Business Central users can leverage the **Sustainability** module to measure environmental impacts such as greenhouse gas emissions, water usage, and waste intensity while maintaining data required for compliance reporting. You can also use features such as statistical accounts to track and measure social and governance impacts.

This functionality allows you to collect sustainability data and align it with regulatory taxonomies required for reporting under various standards, such as Corporate Sustainability Reporting Directive (CSRD) and Business Responsibility and Sustainability Reporting (BRSR). After you collect and aggregate data in Business Central, you can seamlessly transfer it to the Project ESG Reporting app, where you can add more text or contextual information as needed. The reporting process ends with the generation of regulatory-compliant files for submission, which streamlines the entire sustainability reporting workflow.



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Was this page helpful? Yes No

Use sustainability Scope 3 value chain in manufacturing

Article • 01/23/2025

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2025	Oct 2025

Business value

Sustainability Scope 3 value chain process automation involves standard ERP processes to streamline the collection, calculation, and reporting of indirect emissions data across a company's upstream and downstream value chain, improving accuracy, efficiency, and compliance with sustainability goals. Scope 3 is significant for accurate tracking because it represents a majority of emissions, influences business decisions, and aligns with many regulations.

Scope 3 is also probably the most complex for measuring because it requires data from multiple sources. For example, from vendors, but also internal operations such as transfers, manufacturing, and so on. This feature provides more control by enabling you to track emissions in the manufacturing process and automatically calculate newly added emission in both downstream and upstream activities related to their inventory.

Feature details

This feature allows you to calculate CO_2e for finished goods by using raw material emissions data from purchase documents and adding emissions from manufacturing processes.

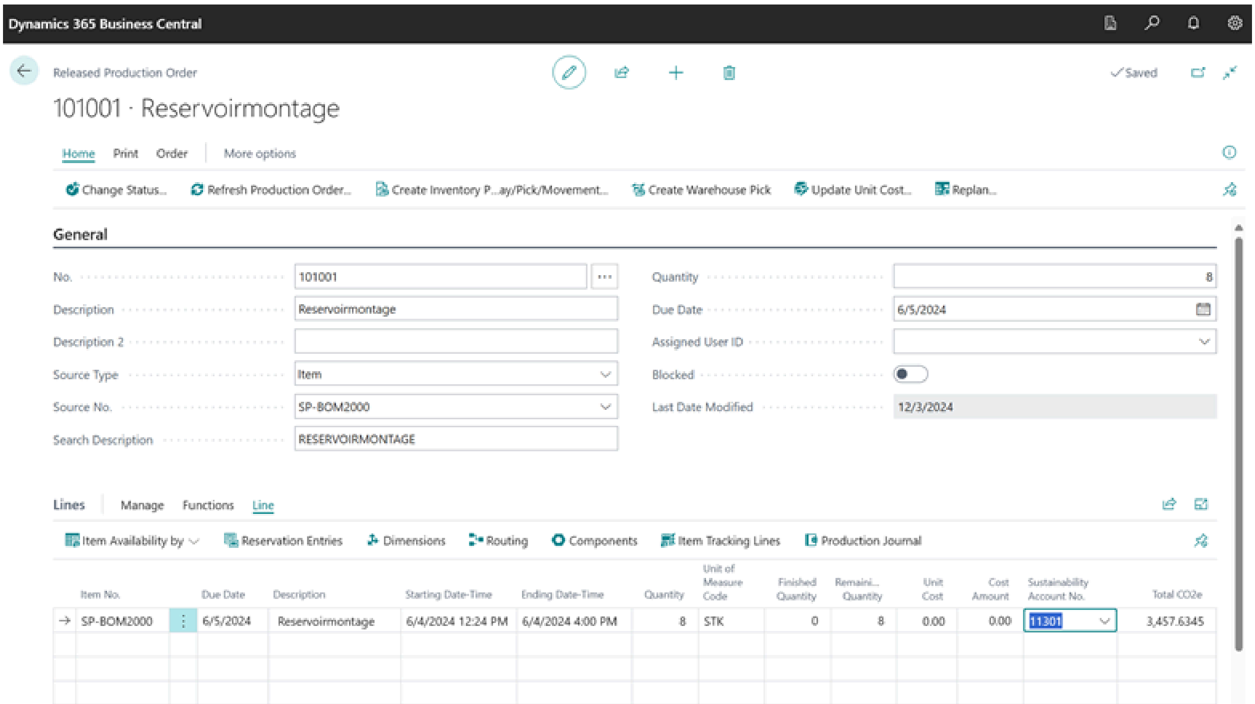
To facilitate this, the new **CO2e per Unit** and **Total CO2e** fields are available on the following pages

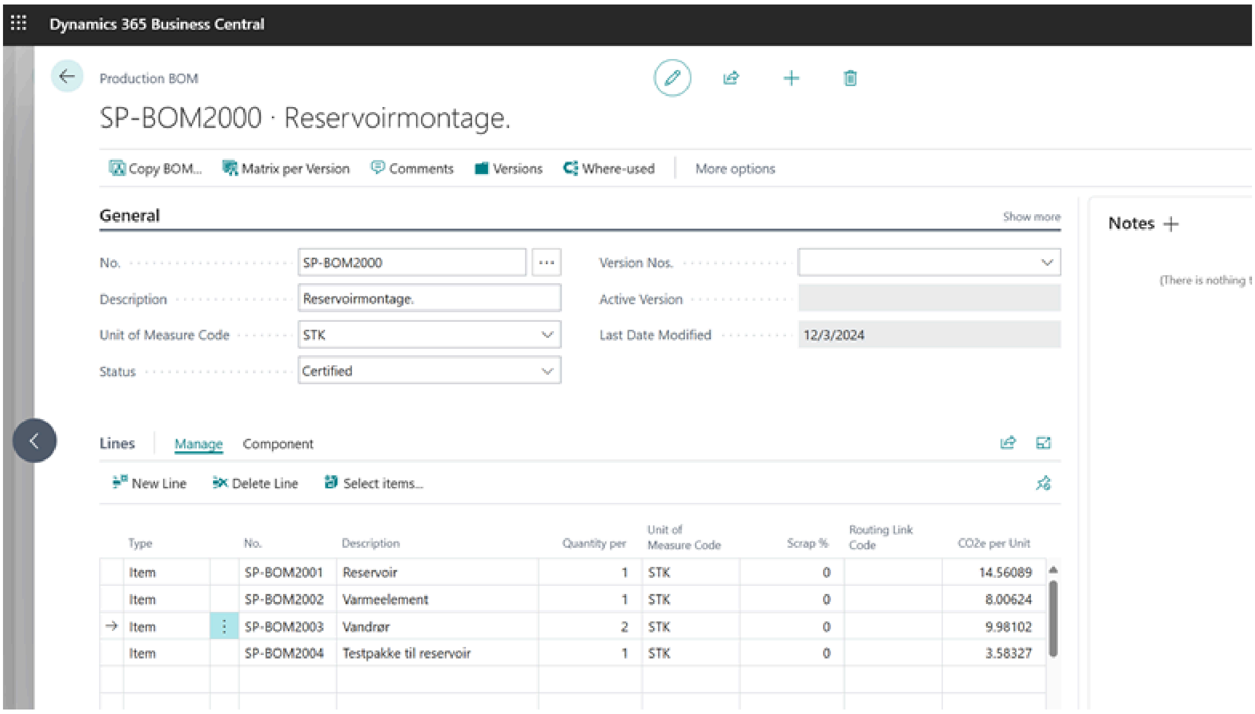
- Production BOM
- Routing
- Components
- Operations
- Production Order Lines
- Consumption
- Output Journals

On the **Production BOM** page, these fields get their values from the emission details of items. On the **Routing** page, they're based on emission details from the **Work** and **Machine Centers** pages.

These fields are calculated using the **Average** method from the **Sustainability Value Entries** page. You can view the calculated values on the production order by running the **Refresh Production Order** action. Each time you post, Business Central adds new values to the **Sustainability Value Entry** page related to the finished goods. The values are based on the consumption of raw materials and the output of operations.

The consumption and output entries create a **Sustainability Value Entry** linked to the **Item Ledger Entry**, with the output entry also connected to the **Capacity Ledger Entry**. To avoid double postings for the same emissions, these entries don't post to the **Sustainability Ledger Entry**, but only to the **Sustainability Value Entry**. These entries are related only to the item emission valuation.





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Was this page helpful? Yes No

Use water and waste management with sustainability

Article • 01/23/2025

ⓘ Important

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

Expand table

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

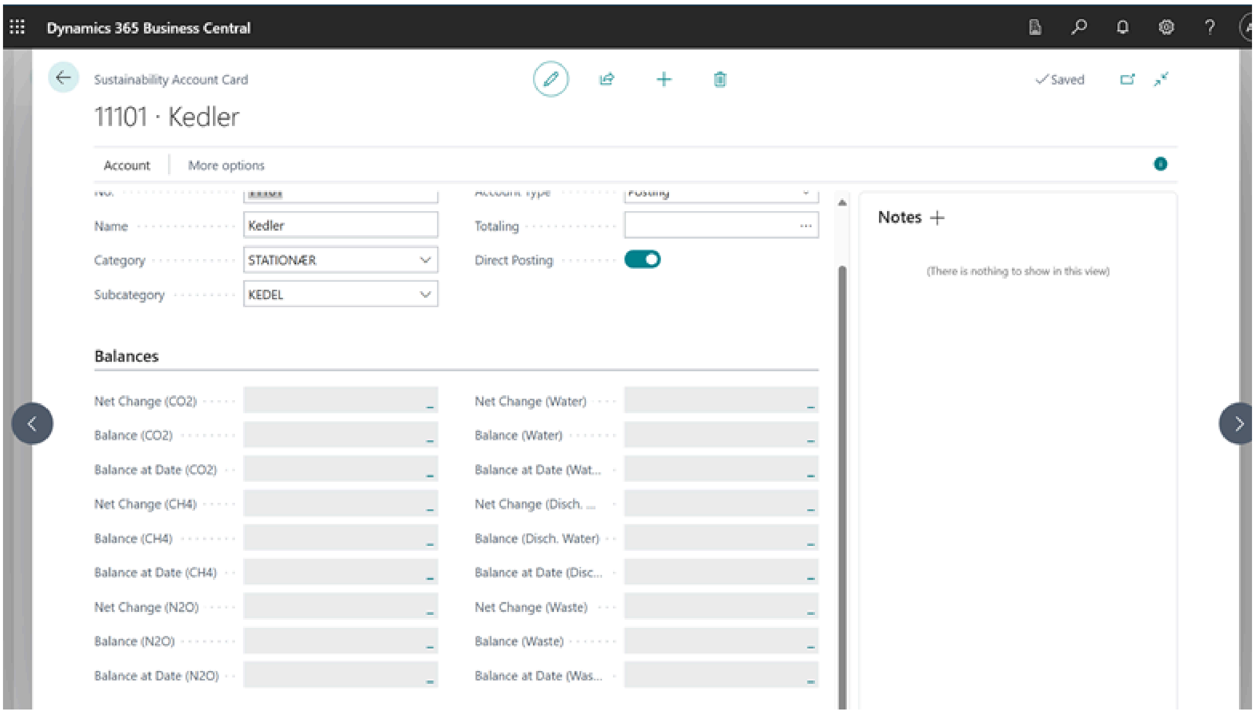
Business value

Enjoy an improved ability to track your company's environmental impacts in Business Central. We're broadening our measurement capabilities to include water and waste, which improves your ability to prepare for compliance reporting about specific areas, particularly for Corporate Sustainability Reporting Directive (CSRD).

Feature details

You can use the **Sustainability Journals** and **Recurring Sustainability Journals** pages to record water and waste intensity data, based on the existing **Chart of Sustainability Accounts**, but using new **Emission Scopes - Water** and **Waste**. You can use different account groups, subgroups, and formulas to make the collection of water and waste intensity as easy as possible. This feature also uses existing **Sustainability Ledger Entries** where data is recorded and used for reporting, so you can report both gas emissions and water and waste from the single source.

You can specifically track **Water Intensity**, **Discharged Into Water**, and **Waste Intensity**, using **Water/Waste Intensity Type** (Withdrawn, Discharged, Consumed, Recycled, Generated, Disposed, Recovered) and **Water Type** (Surface water, Sea water, Ground water, Third party water, Produced water). **Sustainability Goals** are also extended to cover water and waste management features.



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Was this page helpful? Yes No

User experiences

Article • 01/23/2025

ⓘ Important

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

Business Central offers a broad portfolio of user interfaces that enable 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

Optimize screen estate usage on the web

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Work optimally with the Business Central web client on modern devices with large screen sizes or large external monitors. This feature ensures optimal screen usage even when pages are shown in different modes, maximizing your productivity and efficiency in the web client.

Feature details

This feature optimizes screen estate usage in the Business Central web client. It includes:

- Optimized default narrow mode page sizes.
- Optimized sizing and animation of the FactBox pane in narrow mode.
- An option to resize the FactBox pane and remember this choice per page and mode.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

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Feedback

Was this page helpful? Yes No

Preview PDF attachments directly in web client

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

By providing you a smooth and easy way to work with attachments, report outputs, or incoming documents, you remain productive and in the context of your work, which saves time and effort.

Feature details

This feature lets you open PDF attachments directly in the Business Central web client without downloading them first. Files are shown in preview mode in a specialized viewer experience, similar to the print preview feature, and you can always download a PDF file from there.

This feature works automatically across all areas of Business Central, including ISV code. However, it requires an uptake from extension developers because two new AL methods have been added to capture this new behavior, following the pattern of the File.Download method:

- File.ViewFromStream – for Business Central online
- File.View – for Business Central on-premises

This feature is now used in various areas of Business Central, such as document attachments and incoming documents.

Tell us what you think

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Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Customer Insights - Data in 2025 release wave 1

Article • 01/23/2025

ⓘ **Important**

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

Overview

Dynamics 365 Customer Insights - Data unifies customer data from various data sources and enriches it with Microsoft's unique data assets. It creates comprehensive unified profiles, AI-driven predictions, segments, and measures. This enables a deep understanding of each customer by providing a holistic, up-to-date view with unmatched speed to insights. You can activate this data across channels, departments, and devices to deliver personalized customer experiences at every touchpoint.

In this release, our focus is on three key areas:

Copilot and AI innovation: With unified customer insights seamlessly accessible through copilot chat interfaces in Dynamics 365 applications, your sales and service reps can effortlessly personalize customer interactions. Further, your autonomous agents, such as sales qualification agent, built using Microsoft Copilot Studio make smarter decisions, grounded on the knowledge of your customers through a variety of data sources unified with Customer Insights.

Personalized customer experiences: You can now create segments, measures, and predictions using behavioral data from Dynamics 365 Customer Insights - Journeys to increase both targeting precision and personalization across the buyer journey.

Faster time to insights: You can now use Dynamics 365 Customer Insights to unify data from your Azure or Fabric lakehouse. This reduces the need to move or copy data from different systems, while expanding the sources and scenarios you can now light up with Customer Insights—all while getting insights faster than ever.

Our goal is to power your teams, Copilots, and agents with the latest customer insights from all your data sources so they can engage more effectively, make informed decisions, and deliver exceptional, personalized experiences that drive customer satisfaction and business success.

For official product documentation and training for Dynamics 365 Customer Insights - Data, see:

Product overview for Dynamics 365 Customer Insights - Data

Investment areas

Copilot and AI innovation
Unleash the full potential of your data and boost your team's productivity by powering Copilot and autonomous agents with the latest customer insights. Use AI to effortlessly analyze, explore, and receive pertinent insights derived from your data to tailor the customer experience and meet customers' unique needs and preferences.

Faster time to insights
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 raises the likelihood of conversion with better understanding and real-time capabilities.

Personalized customer experiences
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.

Helpful links	Description
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 • 01/23/2025

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

For a list of the previous wave's release plans, go to 2024 release wave 2 plan.

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

Democratize customer insights to your sales, service reps and autonomous agents so they can personalize every customer touchpoint.

Expand table

Feature	Enabled for	Public preview	General availability
Get responses grounded in customer insights when chatting with Copilot	Admins, makers, marketers, or analysts, automatically	Apr 2025	Jul 2025
Increase accuracy of autonomous agents by grounding them	Admins, makers, marketers, or analysts, automatically	Aug 2025	Sep 2025

Faster time to insights

Make informed decisions more rapidly, respond to customer needs in real time, and deliver personalized experiences in the moments that matter.

Expand table

Feature	Enabled for	Public preview	General availability
Use Microsoft OneLake as a data source	Admins, makers, marketers, or analysts, automatically	Jun 2025	-
Accelerate time to insights with data in Delta Lake format	Admins, makers, marketers, or analysts, automatically	Mar 2025	Jun 2025
Sync customer data and insights directly to Fabric OneLake	Admins, makers, marketers, or analysts, automatically	Jul 2025	Sep 2025
Integrate insights faster by choosing tables and data format to sync	Admins, makers, marketers, or analysts, automatically	Aug 2025	Nov 2025

Personalized customer experiences

Grow customer loyalty and eliminate tone-deaf experiences, with every interaction informed by their entire journey across marketing and sales.

Expand table

Feature	Enabled for	Public preview	General availability
Target right audience based on signals from earlier campaigns	Admins, makers, marketers, or analysts, automatically	Mar 2025	Jun 2025

You are able to opt into some features as part of early access on February 3, 2025, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

For 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 • 01/23/2025

ⓘ Important

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Unleash the full potential of your data and boost your team's productivity by powering Copilot and autonomous agents with the latest customer insights. Use AI to effortlessly analyze, explore, and receive pertinent insights derived from your data to tailor the customer experience and meet customers' unique needs and preferences.

Feedback

Was this page helpful? Yes No

Get responses grounded in customer insights when chatting with Copilot

Article • 01/23/2025

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2025	Jul 2025

Business value

Understanding your customers is essential for effective engagement. With this new feature, sales reps, service agents, and chat bots can easily access unified customer insights, such as propensity to buy, customer lifetime value, recent activity, and more, when you chat with Copilot. Previously, accessing these insights in Dynamics 365 was difficult and limited by admin configurations.

Now, these insights are seamlessly integrated into your team's workflow, giving them a 360-degree view of the customer. Key information, like recent transactions and interactions, is just a copilot nudge away, allowing your team to engage more meaningfully and make every customer feel valued. This not only boosts the efficiency of your marketing, sales, and service teams but also helps create loyal customers through personalized, impactful experiences.

Feature details

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

Scenario

Sarah, a sales rep at a large retail company, is preparing for an important meeting with a high-value lead, Mark. Before the meeting, Sarah wants to better understand Mark's purchasing behavior and level of engagement, but she's pressed for time and unsure of what specific data she has access to.

Sara asks Copilot, "What's Mark's predicted lifetime value and propensity to buy?" and Copilot returns insights from Customer Insights - Data. It provides Sarah with Mark's predicted lifetime value, recent purchases, and interactions with the company. Copilot also highlights that Mark has a high propensity to buy but shows a medium risk of churn based on recent inactivity.

Equipped with these insights into the flow of her work, Sarah confidently tailors her meeting approach, focusing on re-engaging Mark with a personalized offer to prevent churn. She's able to engage him more effectively, demonstrating that she understands his needs, leading to a successful meeting and a stronger customer relationship.

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

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Was this page helpful? Yes No

Increase accuracy of autonomous agents by grounding them

Article • 01/23/2025

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2025	Sep 2025

Business value

Autonomous agents equip your marketing, sales, and service teams with essential insights and automate business processes. But they're only as good as their knowledge of your customers and your company.

Now, you can use Customer Insights - Data as a knowledge source in Microsoft Copilot Studio to transform your rich customer data into a powerful business asset. Both default and custom Copilots and autonomous agents can now understand, analyze, and act on these insights, enabling every team member to access tailored information and tools to achieve their goals efficiently.

Feature details

Autonomous agents that understand your unified customer data become your most powerful assets, allowing you to build organizational efficiencies never before possible.

- In Microsoft Copilot Studio, you can now add customer profiles, segments, measures, and other insights from Dataverse as knowledge sources for any custom or customizable autonomous agents.
- When you launch or update the agent, any user of the agent will instantly get access to your key customer insights to get their job done.

- Create agents that can perform autonomous actions or respond to changes in your unified customer insights.

Scenario

Sally is a seller who is evaluating a promising new lead named Joe. Joe recently attended a new product launch event and has an existing relationship with the company. Using data from Customer Insights, agents in Dynamics 365 Sales (such as the sales qualification agent) can now access information about Joe's total spending, his VIP status, and his recent interactions across other touchpoints.

With these insights, the agent can make a more informed decision about Joe's likelihood of purchasing than would have been possible without this data. This way, autonomous agents instantly democratize the key customer insights Sally needs to determine how important Joe is for her prospecting efforts.

Feedback

Was this page helpful? Yes No

Faster time to insights

Article • 01/23/2025

ⓘ Important

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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 raises the likelihood of conversion with better understanding and real-time capabilities.

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Was this page helpful? Yes No

Accelerate time to insights with data in Delta Lake format

Article • 01/23/2025

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2025	Jun 2025

Business value

Your customer data grows constantly with rapidly changing signals like online activities and mobile interactions. As the data set grows, reprocessing of the data takes longer, slowing your ability to respond to changes, and providing increasingly stale insights. With native support for the Delta Lake data format in Customer Insights - Data, you can now accelerate the time to unify customer data by processing just the incremental changes to your data, allowing you to get results quicker and engage customers with the most up-to-date and timely insights.

Feature details

One of the key values of the Delta Lake format is the ability to track changes over time to the data. With native support for the Delta Lake table format in Customer Insights, you can now take advantage of Delta Lake incremental data updates to accelerate processing in Customer Insights - Data.

It's typical for customer profile data to change only by a few percentages each day. Instead of reprocessing the entire data set every day, Customer Insights - Data can process just the changed source data for unification in the Delta format, saving time and getting you results faster. This improvement happens automatically when all the tables are in the Delta format. No configuration or change is required.

Incremental processing of segments, measures, activities, and predictions is planned to be added in the coming months.

> **Note**
>
> In this release, incremental unification requires that all source tables included in the unification process use the Delta format. Tables ingested to Customer Insights - Data using the Delta Lake connector and the Dataverse connector will be in the Delta format.

Feedback

Was this page helpful? Yes No

Synchronize customer data and insights directly to Fabric OneLake

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2025	Sep 2025

Business value

Customer Insights - Data now makes it easy to sync the unified profiles, segments, and measures it generates directly to your Fabric OneLake, powering downstream workloads including analytics, while saving time and reducing costs.

Feature details

Unified profiles and insights are only as powerful as your ability to act on and use that data. If you're using Microsoft Fabric, Customer Insights - Data makes it easier for you to bring valuable unified profiles and insights directly in your OneLake where you can incorporate those insights into your core analytics and downstream processes.

Customer Insights - Data in Fabric OneLake allows you to avoid the data silos created by having data in many storage accounts and brings your unified profiles and insights into the single place for all your analytics data. Improve collaboration and break down business barriers with Microsoft Fabric OneLake and Customer Insights - Data.

Scenario

Northwind has multiple departments with distinct systems and data requirements. Bringing all their data into OneLake has improved their flexibility and ability to collaborate.

Northwind's marketing department implemented Customer Insights - Data and was easily able to write all the unified customer profiles, segments, measures, and other insights generated by Customer Insights - Data directly to the company's OneLake, allowing different divisions across the company to immediately leverage a consistent 360-degree view of the customer created using data from across Northwind.

The enhanced visibility and collaboration from sharing unified customer profiles and insights in OneLake contributed to a virtuous cycle where several other departments took steps to integrate their unique customer data into the unified profile, improving the fidelity and value of the unified profiles.

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

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Feedback

Was this page helpful? Yes No

Integrate insights faster by choosing tables and data format to sync

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Aug 2025	Nov 2025

Business value

Customer Insights - Data now provides more control over how you copy the unified profiles and insights generated by Customer Insights - Data into the private data lake you use to drive analytics and other business processes.

You can now easily select the specific Customer Insights - Data output entities you want to be copied to your data lake. This allows you to get just the data you want in the shortest possible time, saving you time and eliminating storage costs for tables you don’t use.

In addition, you can now choose what data format the data is written in. Landing the data in your preferred format eliminates delays and costs associated with transforming the data.

Feature details

Making your unified customer insights available to your organization from your own Azure Data Lake is now easier and more manageable. Customer Insights - Data allows you to simply check the tables you want to sync to your Azure Data Lake and to select the data format to write the data in. Choose from CSV, Parquet, or Delta Parquet formats. Each time Customer Insights - Data processes your data and updates your customer profiles and insights, the data is quickly and automatically synced to your Data Lake, getting your insights to your business consumers and downstream business processes faster and more efficiently. Settings can be updated, allowing you to change what tables you want synced.

Eliminating synchronization of the tables you don't use means you get the data you're focused on faster. It also means you can save storage costs by eliminating storage of tables you're not interested in. Faster sync times, lower storage costs, and less data format ETL means your organization and analytics teams are more efficient and you realize more value from your investment in Customer Insights - Data.

Scenario

Northwind runs a daily analytics report using customer loyalty data generated by Customer Insights. They've recently switched to using a spark engine to compute these insights and need the loyalty segments and a loyalty score from Customer Insights in the Parquet format. Northwind data wranglers can easily enable this change with just a quick change in Customer Insights, eliminating the costly creation and maintenance of an entire data conversion pipeline process, saving time and compute costs and getting results faster.

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

Use Microsoft OneLake as a data source

Article • 01/23/2025

ⓘ Important

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

Expand table

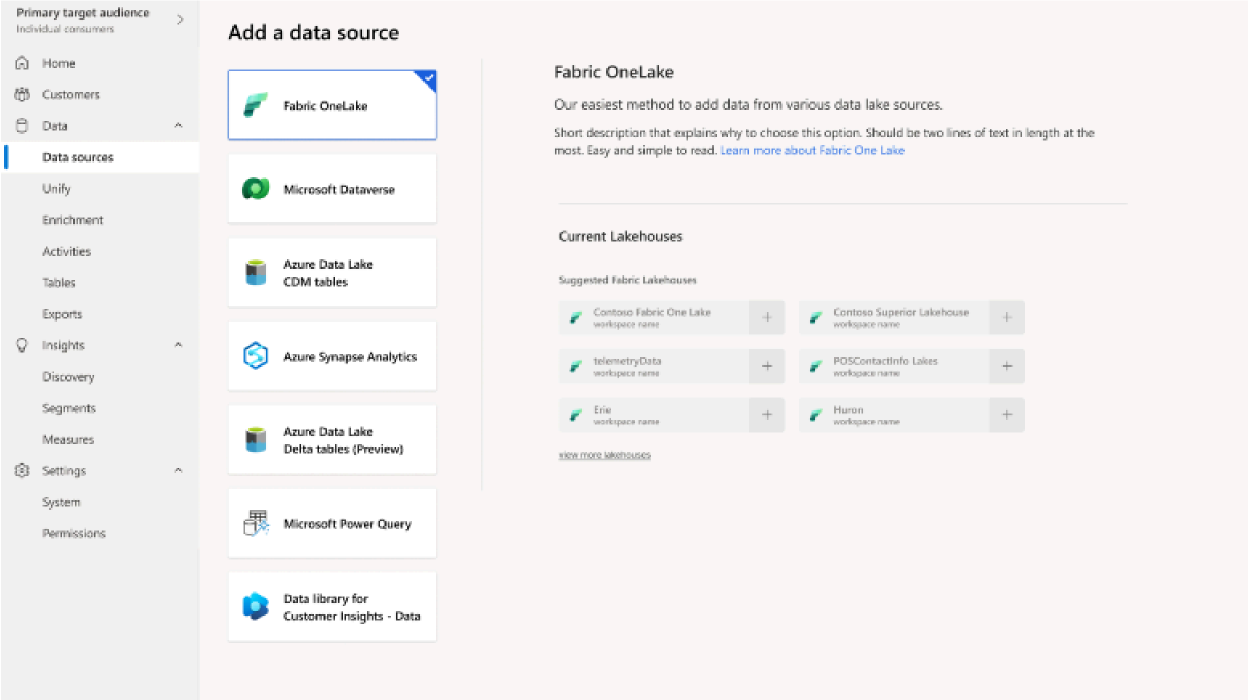
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jun 2025	-

Business value

Dynamics 365 Customer Insights helps generate insights from all of your customer data no matter where it is stored. Directly read your customer data stored in Microsoft Fabric OneLake or in external systems made available through Fabric's mirroring or shortcut capabilities into Customer Insights - Data. Focus on generating the insights you need while reducing the effort, cost, and time needed to move, integrate, and transform your customer data.

Feature details

Easily explore and select customer data stored in your OneLake for processing in Customer Insights - Data. The OneLake data connector attaches directly to your OneLake data, eliminating the need to copy data.



- Accelerate data unification and time to insights with incremental processing of OneLake data. Only the recently changed data is processed, dramatically reducing processing times.
- Use Fabric shortcuts and mirroring to quickly integrate data from different external sources and unify in Customer Insights - Data.

Scenario

Contoso has configured Customer Insights - Data to read in all their customer data from Microsoft Fabric. Because Contoso has shortcuts and mirroring, all their external data as well as their Azure hosted data is available to Customer Insights in their OneLake. Customer Insights - Data reads data directly from OneLake without creating separate copies. Because OneLake uses the Delta format, the unification of their OneLake data only needs to process the changed data, allowing them to get insights faster than ever. Using OneLake as their data source enables Contoso to eliminate their previous slow and expensive ETL operations to move and transform data.

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

Feedback

Was this page helpful? Yes No

Personalized customer experiences

Article • 01/23/2025

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

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

Target right audience based on signals from earlier campaigns

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2025	Jun 2025

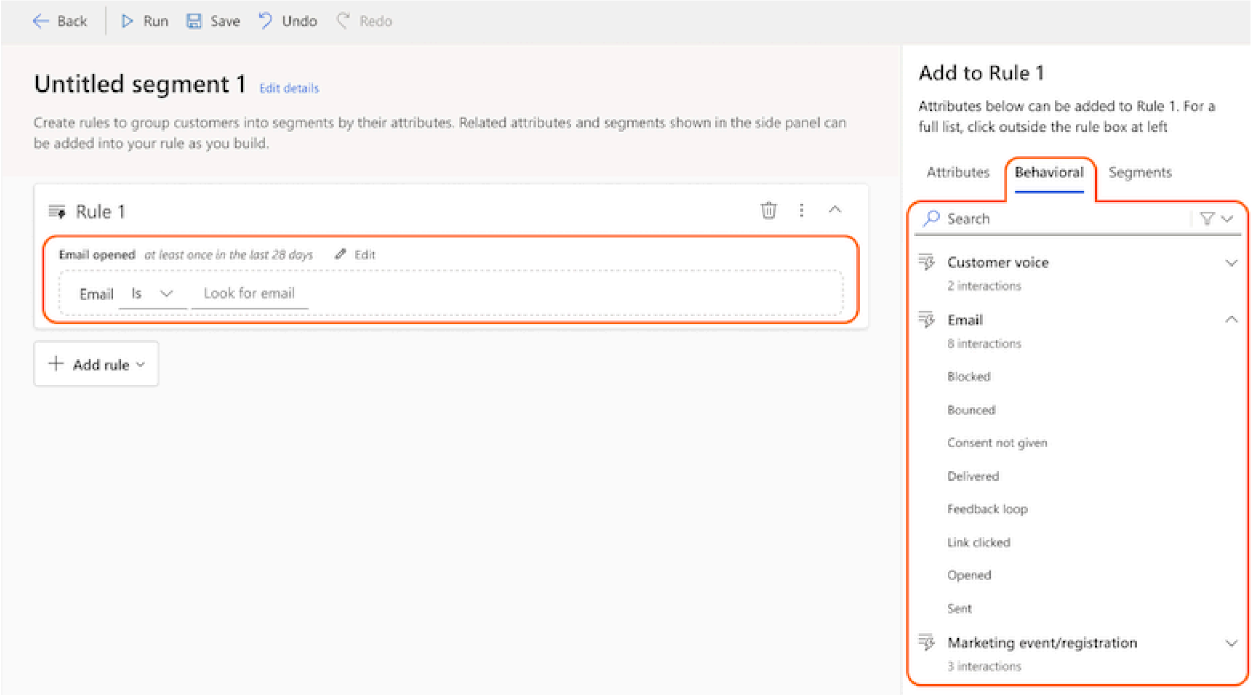
Business value

Understanding how customers interact and engage with your marketing efforts is crucial to refine your strategies. These interactions provide essential clues about how customers respond to your campaigns, allowing you to improve engagement. With Customer Insights, you can enable users to create segments that are based on customer data as well as marketing engagement data with no need to set up data pipelines between your marketing system and your customer data platform.

This enables, for example, marketers to generate a segment of loyal customers, based on high predicted lifetime value scores and a high marketing engagement rate. Similarly, sales representatives can gain more accurate insights into purchase intent based on engagement data from current campaigns. Finally, you can easily accomplish retargeting scenarios, advertising to customers on major platforms if they don't engage with your messages, consequently increasing their conversion rates.

Feature details

Use behavioral data collected by Customer Insights - Journeys in Customer Insights - Data to create segments and measures. Interaction data such as email opened or link clicked is available without any extra steps.



- Easily discover and use marketing interactions while creating segments, enhancing the personalization of engagement strategies.
- Create powerful customer measures with interaction data along with any other data you bring into Customer Insights - Data.
- Identify customers who aren't engaging with emails and create a retargeting strategy.
- Use unification to get a more accurate and complete view of your customers' interactions. Unified customer profiles based on multiple contacts combine their interaction data and give you insights about the person and how you interact with them.

For example, a marketing manager for an online retail store runs an email marketing campaign. Each month, they email customers who spent $100 or more and offer them a 5 percent discount coupon. While the campaign had a high email open rate, only a few customers opened the coupon link. So they want to contact those who opened the email with a more enticing 10 percent discount.

With Customer Insights, the interaction data from your previous campaign flows seamlessly into the platform, allowing you to refine your target audience to only include customers who opened the email. By focusing on those who showed interest, you increase the likelihood of turning that interest into actual purchases.

Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Customer Insights - Journeys in 2025 release wave 1

Article • 01/23/2025

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

Overview

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 expect each interaction to surpass the previous one. This means continuously improving and refining your approach based on evolving customer needs, engaging them on the most relevant channel while acknowledging their uniqueness, and respecting their preferences and privacy.

In this release, our focus is on three key areas:

Copilot and AI innovation: With this release, Copilot introduces new communication channels that enable innovative customer engagement. These channels offer new opportunities and scenarios for your business. From addressing customer inquiries swiftly to delivering more personalized experiences, you can unlock new engagement channels and drive better business outcomes.

Moments that matters: We are bringing in advanced orchestration capabilities to uplevel your customer journeys. So, each of your interactions is not only timely but also empathetic, acknowledging and valuing the unique experiences and needs of each customer. This enables you to build deeper connections, encouraging long-term relationships and customer satisfaction.

Unify sales and marketing: We are unifying sales and marketing by turbocharging lead generation with new forms and event management capabilities so you can attract and engage potential customers more effectively. Our solution enables you to generate, capture, and nurture high-quality leads with greater efficiency, seamlessly handing them over to sales to close deals and drive business growth.

Our goal is to empower your teams to create seamless and cohesive customer journeys across channels, where each touchpoint enhances the overall experience, strengthens the relationship with your customers, and ultimately drives business success.

For official product documentation and training for Dynamics 365 Customer Insights - Journeys, see: Customer Insights - Journeys overview | Microsoft Learn

Investment areas

Copilot and AI innovation
Boost your productivity by harnessing the power of generative AI. As your daily assistants, Copilot and agents in Customer Insights automate manual tasks and bring new communication channels to engage your customers, leading to better business outcomes.

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

Unify sales and marketing
Bring your sales and marketing teams closer so they can stop working in silos, eliminate execution gaps, and remove redundancies by collaborating to effectively drive more revenue together.

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

Check out the release plan

For application administrators

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

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

Get the most out of Customer Insights - Journeys

Expand table

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

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

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Customer Insights - Journeys

Article • 01/23/2025

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

For a list of the previous wave's release plans, go to 2024 release wave 2 plan.

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

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

Copilot and AI innovation

Revolutionize how marketers work and what they can achieve using Copilot, agents, and AI innovation in Customer Insights.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Create journeys by using Copilot to describe them	Admins, makers, marketers, or analysts, automatically	✔ May 31, 2024	-	Apr 2025

Moments that matter

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Export your data to your own storage for custom reporting	Admins, makers, marketers, or analysts, automatically	Feb 2025	-	Apr 2025
Wait on segment membership to trigger next step in a journey	Admins, makers, marketers, or analysts, automatically	Feb 2025	-	Apr 2025
Respect quiet times, engage based on location and time zones	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2025
Pause and resume journeys to handle unplanned events	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2025
Allow individuals to reenter a one-time, dynamic segment journey	Users by admins, makers, or analysts	Feb 2025	-	Apr 2025

Unify sales and marketing

Accelerate revenue and increase lifetime value through seamless experiences that unify sales and marketing.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Maximize event capacity with waitlist registrations	Admins, makers, marketers, or analysts, automatically	Mar 2025	-	May 2025
Set up and execute pre- and post-event communications	Admins, makers, marketers, or analysts, automatically	Apr 2025	-	-
Collect extra customer info without updating your data model	Admins, makers, marketers, or analysts, automatically	Mar 2025	-	May 2025
Create event portals with event and registration details using Power Pages	Admins, makers, marketers, or analysts, automatically	Feb 2025	-	Apr 2025

Feature	Enabled for	Public preview	Early access*	General availability
Automate seamless handoffs between marketing and sales	Admins, makers, marketers, or analysts, automatically	✔ Feb 1, 2023	-	Apr 2025
Create an event portal on your own website	Admins, makers, marketers, or analysts, automatically	Feb 2025	-	Apr 2025

You are able to opt into some features as part of early access on February 3, 2025, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

For 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 • 01/23/2025

ⓘ Important

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

Boost your productivity by harnessing the power of generative AI. As your daily assistants, Copilot and agents in Customer Insights automate manual tasks and bring new communication channels to engage your customers, leading to better business outcomes.

Feedback

Was this page helpful? Yes No

Create journeys by using Copilot to describe them

Article • 01/23/2025

ⓘ Important

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

Expand table

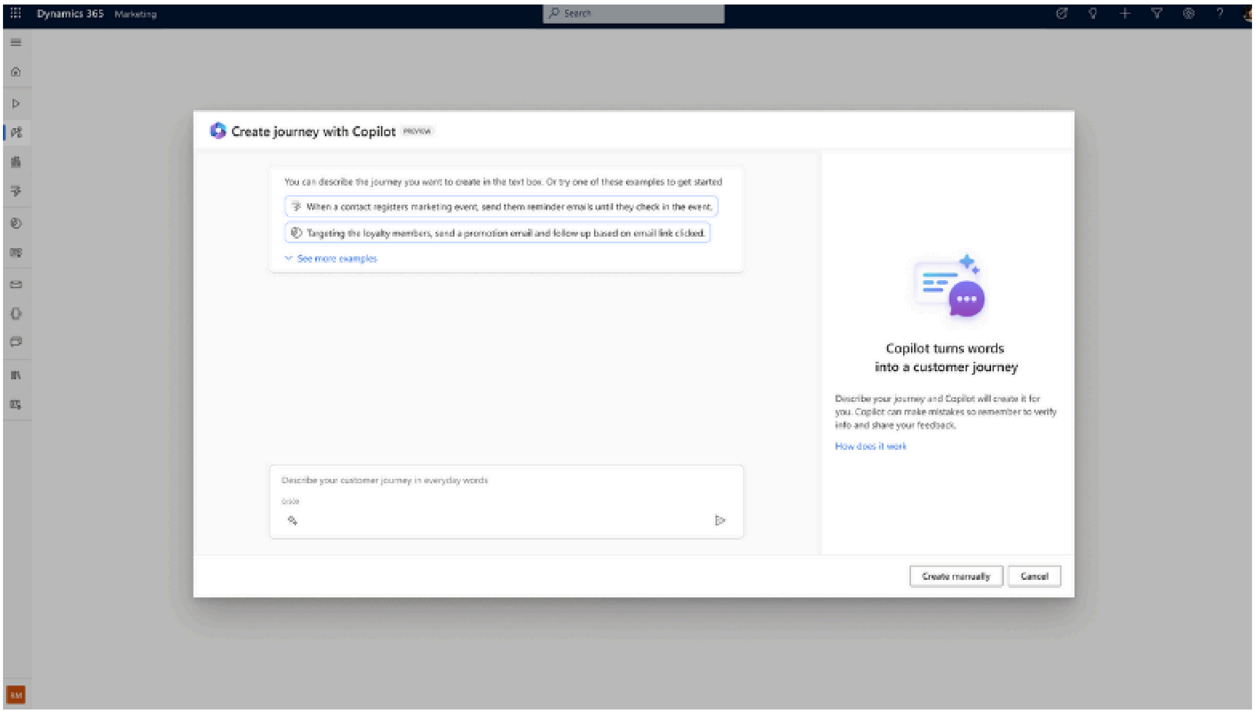
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ May 31, 2024	-	Apr 2025

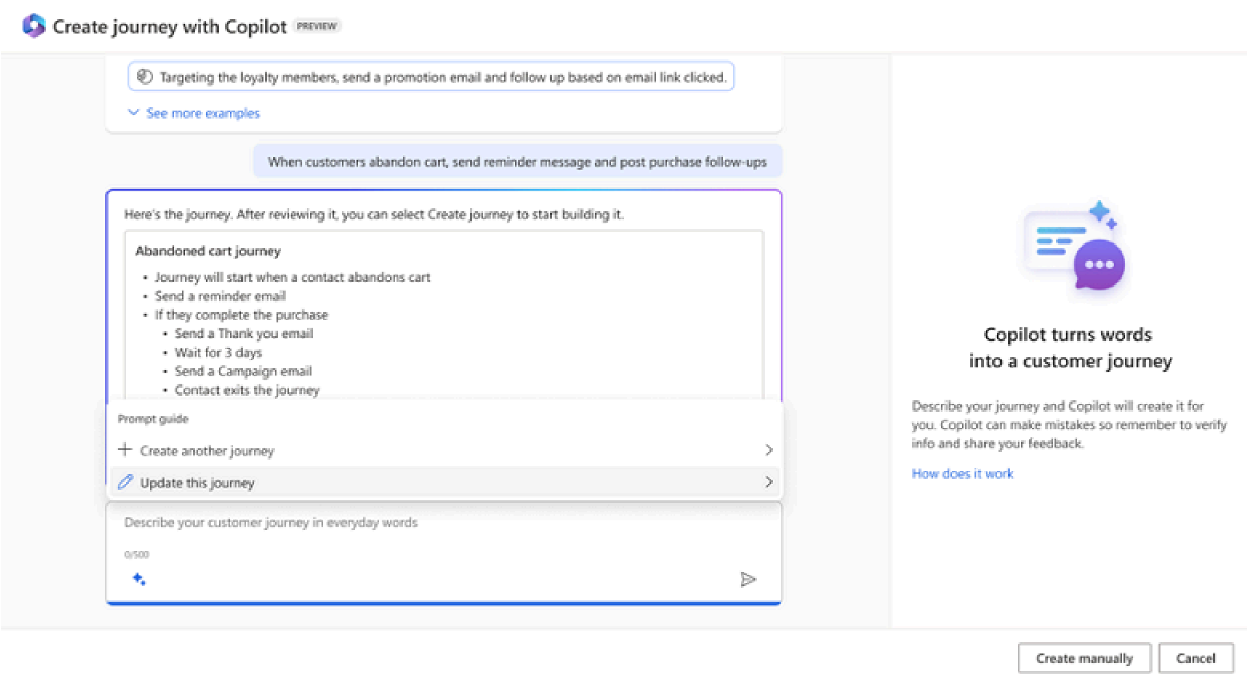
Business value

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

Additional resources

Copilot - Create journeys using AI assistance (docs)

Feedback

Was this page helpful? Yes No

Moments that matter

Article • 01/23/2025

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Allow individuals to reenter a one-time, dynamic segment journey

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Audience members who move between stages of the customer lifecycle may need to repeat a lifecycle-specific state of the journey. For example, if a customer repeats a buying journey for a different product, they may reenter the dynamic segment conditions as they reenter the purchase funnel. As such, they should be allowed to reenter a journey for that dynamic segment when they come back into it.

Feature details

When marketers design a one-time journey, there's now a checkbox they can select if they want audience members to be able to go through the journey more than once if the audience member qualifies for that lifecycle state multiple times.

Prior to this feature, audience members who had been through a one-time journey were deliberately blocked from going through it again. Marketers want the option to allow audience members to repeat a journey if they qualify for its dynamic segment more than once. If a one-time journey specifies that a customer who completes a purchase receives an email receipt, the customer should be able to go through that journey each time they make a new purchase. If, for example, the dynamic segment is based on a purchase completion, each time a customer qualifies for that segment, they should be able to go through the journey again.

Feedback

Was this page helpful? Yes No

Export your data to your own storage for custom reporting

Article • 01/23/2025

ⓘ Important

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

Expand table

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

- Export engagement data, such as email openings, clicks, and bounces from Customer Insights - Journeys.
- Securely export Customer Insights - Journeys interaction data directly to your preferred storage.
- Use the exported data with your existing reporting systems to create custom reports.

Feedback

Was this page helpful? Yes No

Pause and resume journeys to handle unplanned events

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Safeguarding your brand's reputation and customer trust is critical. In the face of unplanned or unforeseen events, such as natural disasters, you may need to pause certain campaigns that might be deemed inappropriate or insensitive. Additionally, you may run into business or operational reasons for stopping a campaign, such as identifying the need to update some content or experiencing an unexpected call center outage. In such scenarios, it's prudent to halt customer outreach until the problem is addressed.

Instead of stopping a campaign and adjusting the audience to exclude previously reached customers, you can now pause and resume journeys, allowing you to manage unplanned situations easily and stress-free.

Feature details

Protect your brand's reputation and maintain customer trust by pausing outreach during unexpected events like natural disasters or periods of national mourning.

- Pause a journey manually to prevent new customers from entering.
- Resume a journey manually so new customers can enter.

- If needed, the paused journey can be stopped.

Scenario example: A national bank is conducting a campaign across the country to contact borrowers who are behind on their mortgage payments and are at risk of foreclosure. When a natural disaster strikes and a state of emergency is declared, continuing this outreach would be seen as insensitive. Previously, the bank had to stop the journey and launch a new journey with an updated audience (to avoid contacting the same customers again) after the situation improved—a process that was both labor-intensive and prone to errors. With the new journey pause capability, the bank can effortlessly pause the outreach and resume it once conditions allow.

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

Feedback

Was this page helpful? Yes No

Respect quiet times, engage based on location and time zones

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

As regulations around customer privacy become more stringent, it's crucial to contact customers at times that are most convenient to them and ensure compliance with local legal requirements.

Now in Customer Insights - Journeys, in addition to setting quiet times based on your journey's time zone, you can align quiet times with your customers' time zones and regions, ensuring that they only receive messages and calls during suitable hours. Aligning interactions with local time allows you to adhere to local regulations and respect cultural norms and preferences, fostering customer trust and enhancing the effectiveness of your outreach strategies.

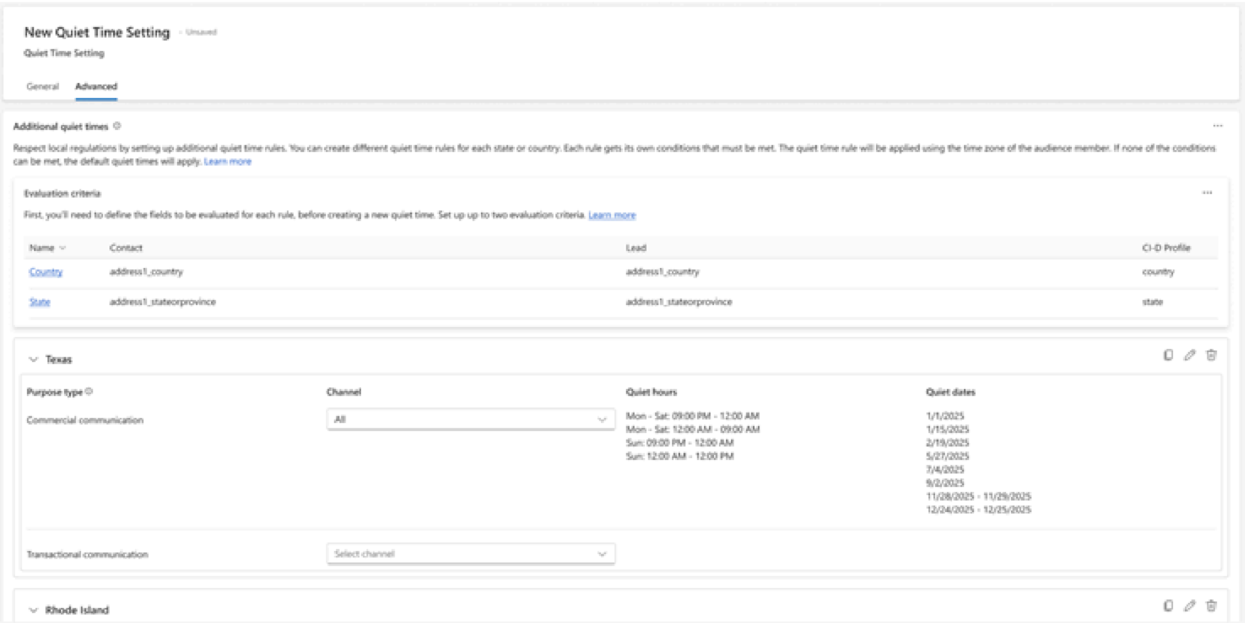
Feature details

With the enhanced quiet time options, you can:

- Ensure adherence to various regulations by establishing quiet time rules for different regions or based on your business operation.
- Set the times, days, and dates when customers shouldn’t be contacted.
- Define the customer’s region and time zone.

- Customize quiet time settings for a particular journey. Upon activation of the journey, interactions are either initiated or queued in accordance with the preset rules and the identified customer's time zone or location.

Scenario example: Consider the case of a global e-commerce company that has customers spread across multiple countries. To respect their customers' time and adhere to regional regulations, they decide to set quiet times based on their customers' locations. They set up different quiet rules for customers in the United States, Europe, and Asia, ensuring they comply with each region's specific communication laws. Once the journey is activated, all promotional interactions are either triggered or queued based on these pre-established rules and the provided customer's time zone. For instance, a customer in New York receives promotional information during their daytime, increasing the chances of engagement.



Feedback

Was this page helpful? Yes No

Wait on segment membership to trigger next step in a journey

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

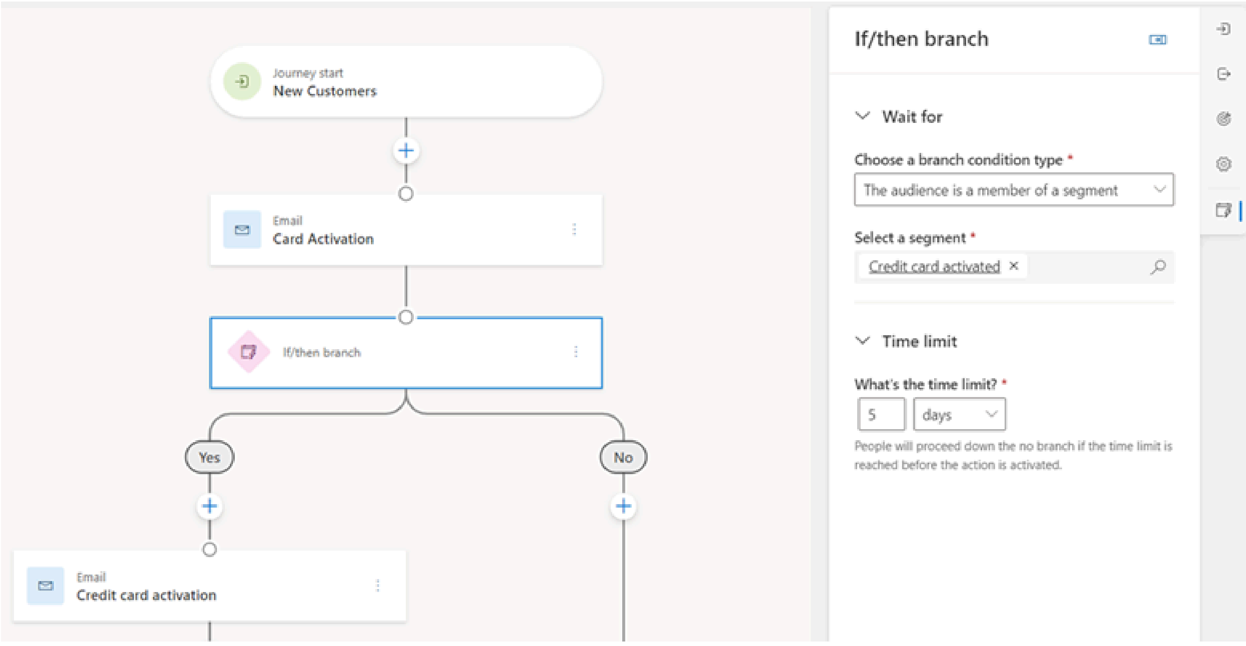
Gain even more control over your customers' experience by waiting for them to become a member of a segment before continuing to the next steps in a journey. This added capability lets you personalize each customer's experience by choosing the correct path and actions relevant to individual customers based on whether they're in a segment. This capability adds to existing if/then capabilities that let you wait for a customer to open an email, click a link, or wait for another trigger to be activated before moving on to the next step in the journey.

For example, let's say you use your journey to send credit card activation emails and you want to wait for the customer to activate their card before sending a welcome email. If the customer doesn't activate their credit card within a few days, you want to send another reminder email. If you have a segment that includes all customers who have activated credit cards, you can use that segment as the condition for the if/then branch to wait for each customer to activate their credit card and send them the right communications.

Feature details

Create journeys that wait until a customer becomes part of a segment before continuing to the next steps in the journey.

- Choose a segment as the condition for an if/then branching step.
- Set the amount of time you want to wait for the customer to become a member of the segment before continuing.
- Choose which actions to take if the customer is or is not a member of the segment.



Feedback

Was this page helpful? Yes No

Unify sales and marketing

Article • 01/23/2025

ⓘ Important

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

Bring your sales and marketing teams closer so they can stop working in silos, eliminate execution gaps, and remove redundancies by collaborating to effectively drive more revenue together.

Feedback

Was this page helpful? Yes No

Automate seamless handoffs between marketing and sales

Article • 01/23/2025

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Feb 1, 2023	-	Apr 2025

Business value

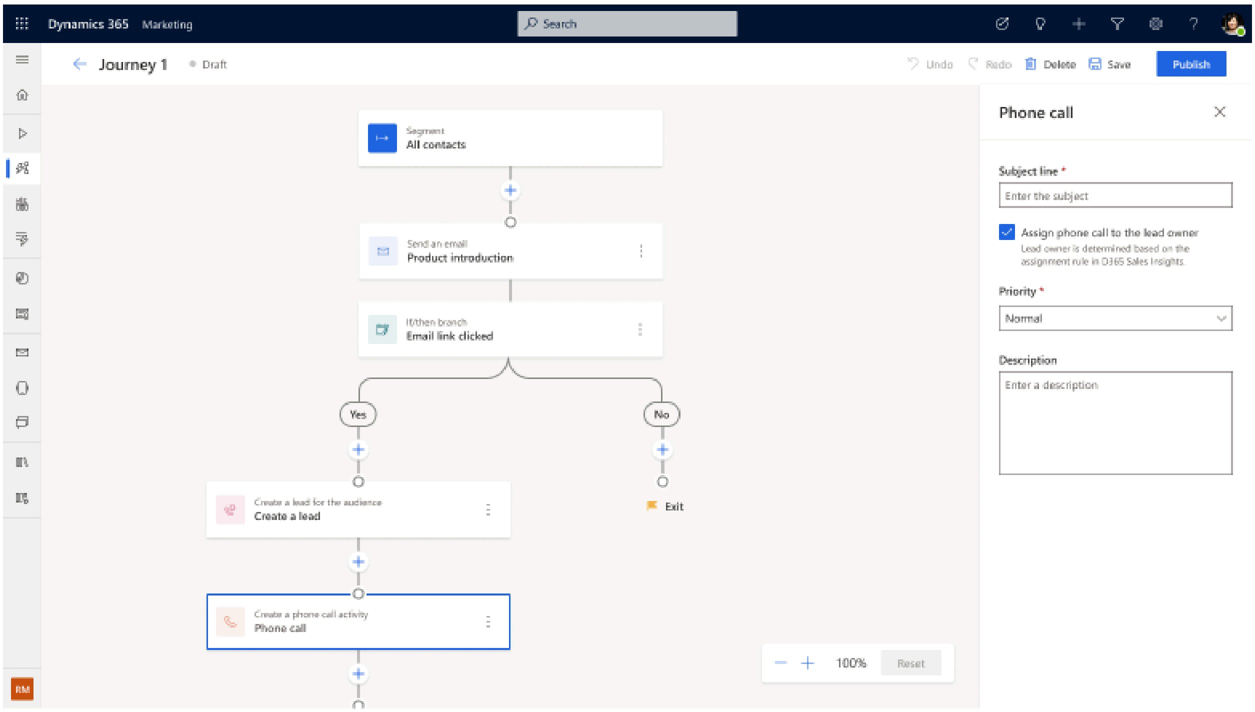
Invite your sales team to engage with qualified leads at the right time and stage of their journey by creating sales activities and records directly from customer journeys.

Real-time journeys are a key part of nurturing and qualifying leads and opportunities. When your customer has sent the right signals through your direct engagement, the next step is often for your sales team to act. You can now create sales activities such as tasks and phone calls directly from journeys so that leads get individualized attention when they're most likely to engage. You can also create lead or opportunity records based on a customer's interaction with your campaign, ensuring that the sales team has the right information to close leads generated from marketing activities.

Feature details

Create sales-related activities and records directly from Customer Insights - Journeys.

- Add sales activities such as phone calls or tasks, or create leads or opportunities in your journeys.
- Respond quickly to incoming leads by routing them directly to sales agents.



Feedback

Was this page helpful? Yes No

Collect extra customer info without updating your data model

Article • 01/23/2025

ⓘ Important

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

Expand table

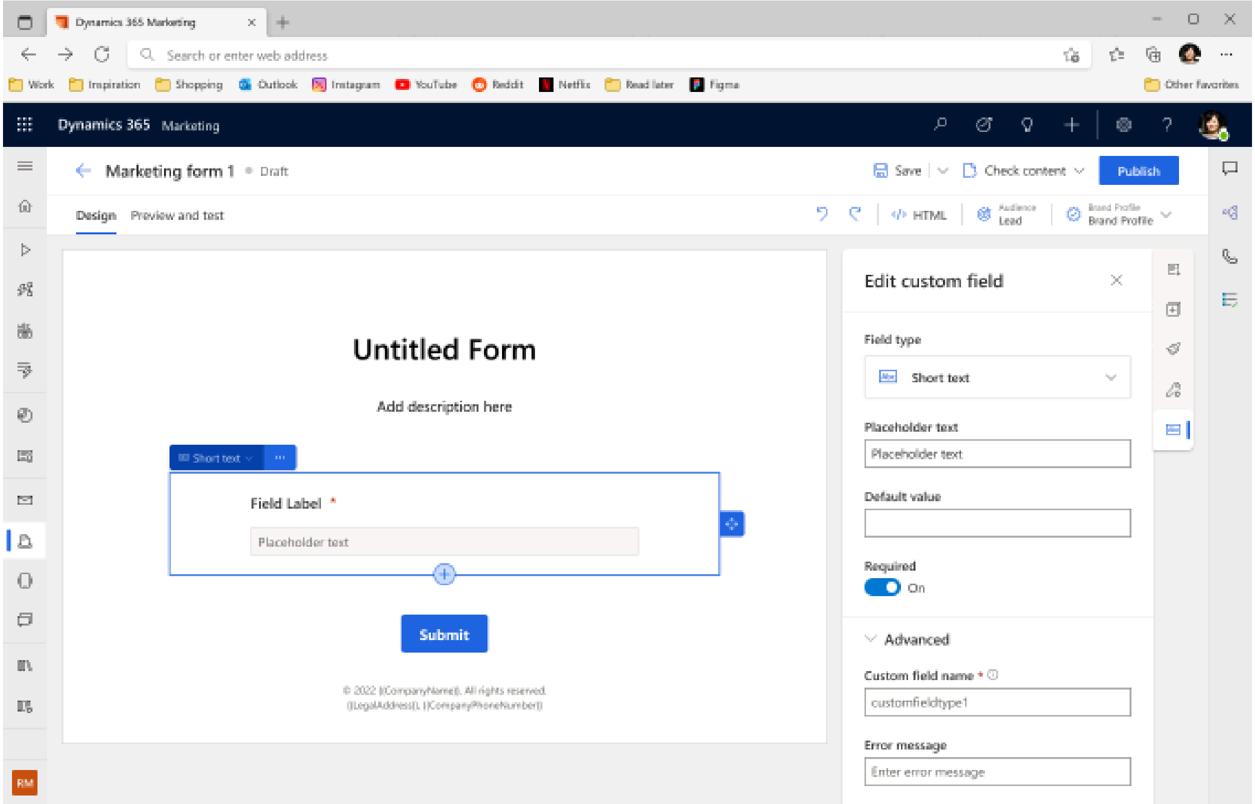
Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	Mar 2025	-	May 2025

Business value

Easily gather additional information about your customers by creating any kind of question directly in the form editor without the need to create new custom attributes for your lead or contact entity. For example, you can create fields to ask, “What is your meal preference?” or create contest questions to increase your customer satisfaction and retention.

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 at any time without polluting your data.



Feedback

Was this page helpful? Yes No

Create an event portal on your own website

Article • 01/23/2025

ⓘ Important

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

Expand table

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

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.

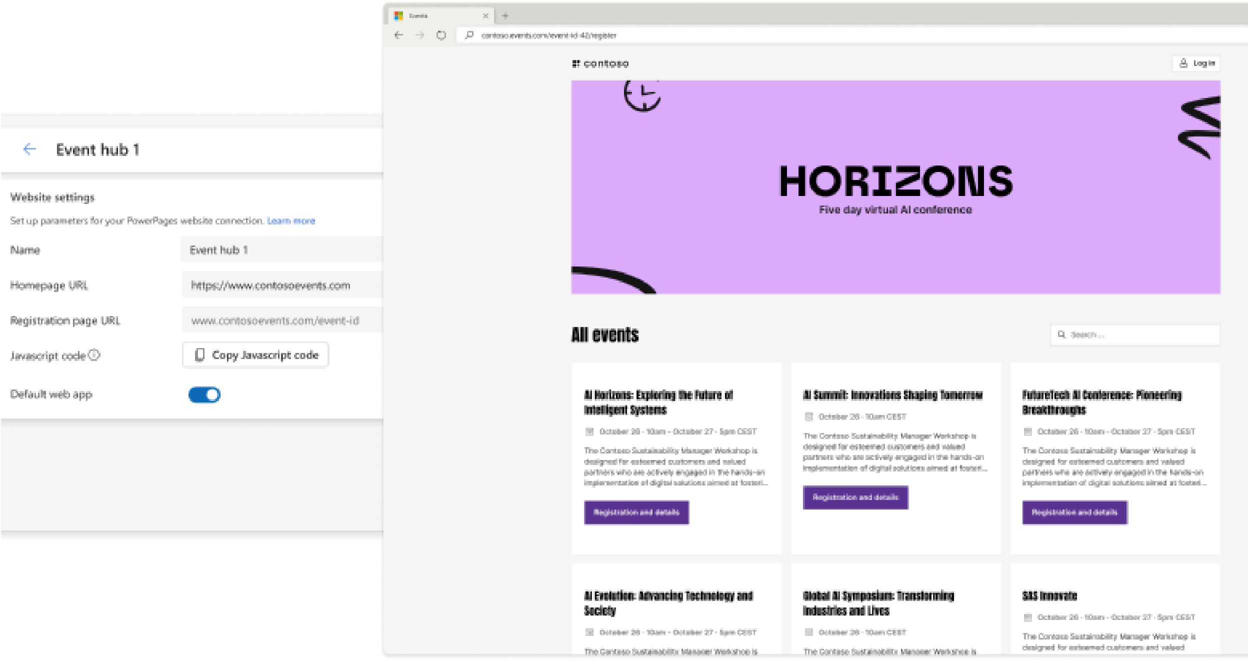
The new event portal allows for the swift creation of a comprehensive hub where customers can access event details, session specifics, and speaker schedules, and conveniently register using the event registration form. The portal can be seamlessly integrated into your existing CMS using a Javascript code snippet or the new event API.

Feature details

Create a comprehensive event portal where prospective attendees can access a list of events, an event details page, and a registration page.

- Easily list upcoming events.
- Provide a detailed summary for each event, including session information, speakers, and a registration form.
- Integrate the event registration experience into any website using a prebuilt web application.

- Customize and extend event management capabilities with rich features using a public API for event management.



Feedback

Was this page helpful? Yes No

Create event portals with event and registration details using Power Pages

Article • 01/23/2025

ⓘ Important

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

Expand table

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

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 that you're organizing.

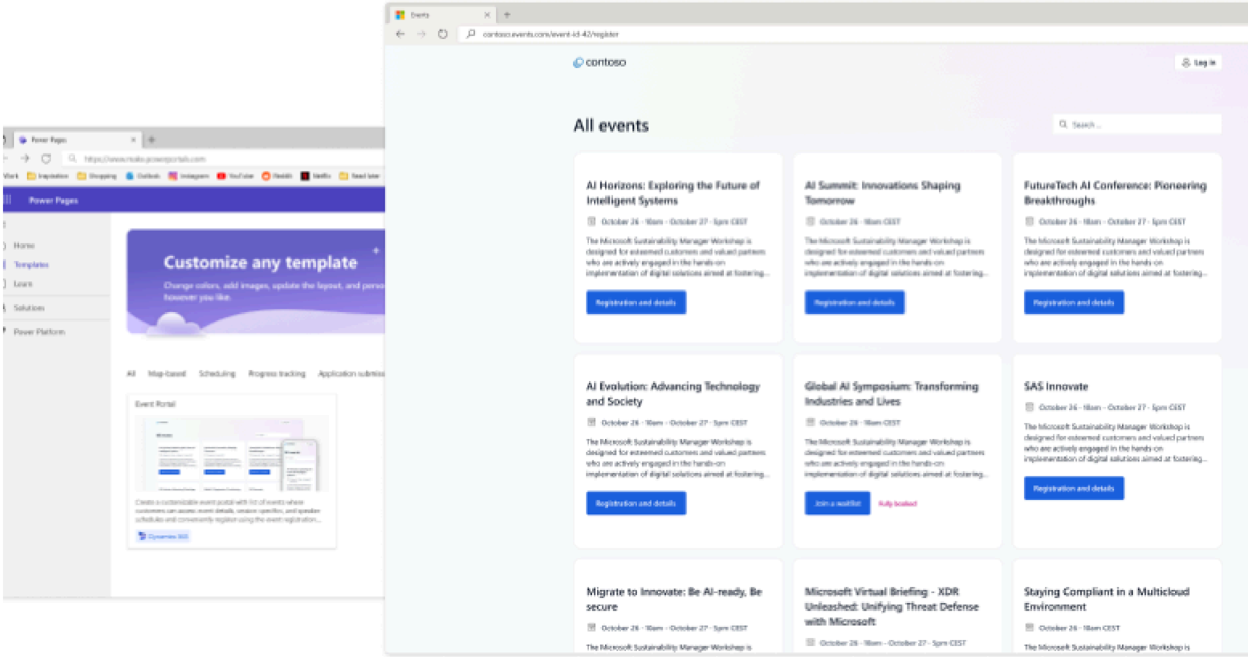
The new event portal allows for the swift creation of a comprehensive hub where customers can access event details, session specifics, and speaker schedules and conveniently register using the event registration form. The portal can be seamlessly deployed through Power Pages, where it can be tailored to align with your brand identity using Power Pages Studio.

Feature details

Create a comprehensive event portal where prospective attendees can access a list of events, an event details page, and a registration page. The portal can be created using Customer Insights and a Power Pages template to speed up the creation process. You can easily edit the portal using Power Pages Studio.

- Leverage an out-of-the-box Power Pages template for quick deployment.
- Use Power Pages Studio to further customize and style your portal.

- Create a list of upcoming events.
- Provide a detailed summary for each event, including session information, speakers, and a registration form.
- Publish the portal using Power Pages hosting capabilities.



Feedback

Was this page helpful? Yes No

Maximize event capacity with waitlist registrations

Article • 01/23/2025

ⓘ Important

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

Expand table

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

Business value

Ensuring marketing events are filled to capacity is crucial for success and return on investment. To encourage a high turnout for marketing events, you can now enable waitlist registrations, which ensures spots are filled when registered attendees cancel.

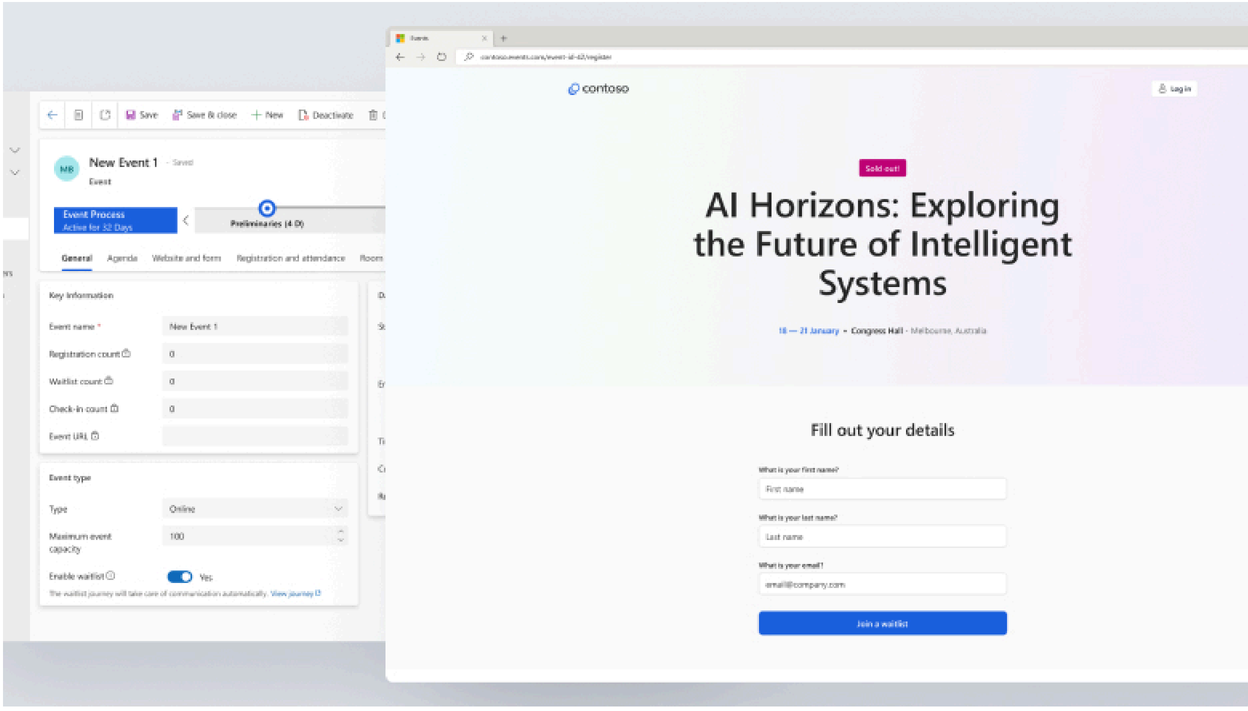
By setting the capacity for events and sessions, prospective attendees are placed on a waitlist when events and sessions are full. Should a slot open, the system automatically registers the individual next on the waitlist. That individual then automatically receives registration confirmation and personalized 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 to your emails to let uninterested attendees release their spot to someone else.



Feedback

Was this page helpful? Yes No

Set up and execute pre- and post-event communications

Article • 01/23/2025

ⓘ Important

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

Expand table

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

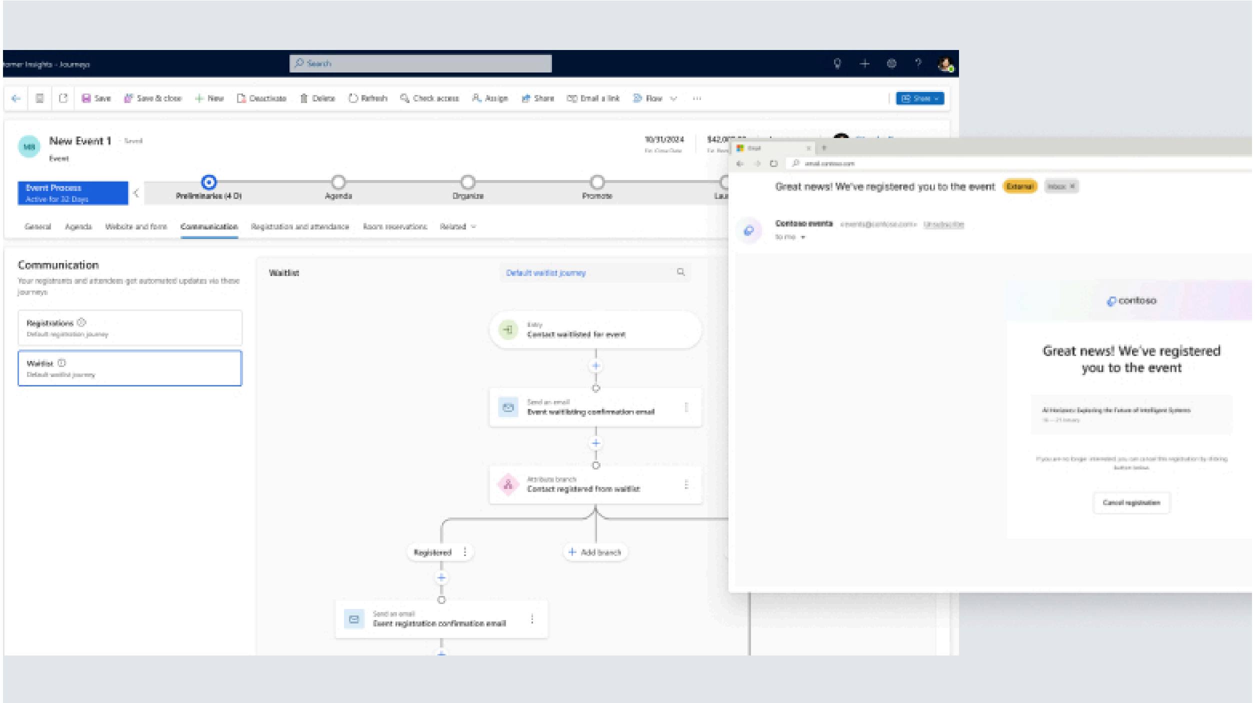
Business value

Crafting event messaging and promotions are important aspects of event planning. With real-time journeys event management, you can attract the right audience, increase registrations, boost ticket revenue, and deliver personalized experiences with out-of-the-box journeys that help you optimize communication before, during, and after your event. This streamlines the event creation process, allowing you to create and manage all the event communication within the event management experience.

Feature details

Pre- and post-event communications include the following options:

- Use segmentation to target the appropriate audience for your event.
- Choose templates tailored for events and use Copilot for more efficient creation of captivating content.
- Enhance engagement before the event and boost attendance with ready-made multichannel journeys.
- Gather valuable feedback and learn from attendees using post-event satisfaction surveys and follow-up emails.



Feedback

Was this page helpful? Yes No

Dynamics 365 Implementation Portal

Article • 01/23/2025

ⓘ **Important**

Some of the functionality described on this release plan has not yet been released. Delivery time may change and projected functionality may not be released (see Microsoft Policy).

ⓘ **Note**

Checkout the what's new in the portal. Share your feedback and help us improve.

Overview

The Implementation Portal is a web-based platform that helps customers and partners accelerate their cloud adoption journey with Microsoft. The portal provides access to resources, tools, best practices, and guidance for planning, deploying, and adopting Microsoft Dynamics workloads and cloud services.

The portal also enables customers and partners to track their progress, manage their tasks, and collaborate with FastTrack engineers and experts.

Planned Enhancements

Improved User Experience and Design

- New designs aligned with the Admin Center an updated User Interface and responsiveness;
- Transition to Power Pages Framework;

Project Functionalities

- Expanded capabilities to improve project analysis and management efficiency;
- Integrated AI in Project context for summarization and next best actions;
- Support for other Microsoft FastTrack program engagements;

Copilots and Agents

- The Copilot in the D365 Implementation Portal will be expanded to cover more Success by Design scenarios and Telemetry insights, helping users during their implementation and live deployments;
- Copilot Agents will be leveraged to improve project onboarding, nomination, and project review processes;
- Extended knowledge base as source for Copilot, getting users more relevant and contextual information
- Enhanced scenarios for Partners and ISVs

Telemetry Insights

- General availability of the feature;
- Provide enhanced team collaboration functionality for Telemetry results;
- Extended product coverage, larger dataset and results export capabilities;
- Enhanced integration with Power Advisor

Power Platform Admin Center Integration

- Link environments to Projects

See also

Dynamics 365 Implementation Portal documentation
Microsoft Dynamics 365 Implementation Guide
Success By Design for Dynamics 365

Feedback

Was this page helpful? Yes No

Deprecations in Dynamics 365 apps

Article • 01/23/2025

A feature or capability that's deprecated is one that we intend to remove in a future release. The feature or capability will continue to work and will be fully supported until it's officially removed. After it's removed, the feature or capability will no longer work. Deprecation notifications can span a few months or years.

We encourage you to use this information, along with the release plans, to prepare for future releases. This notice is intended to give you sufficient time to plan and update your code before a deprecated feature or capability is removed.

- A deprecated feature is not in active development and may be removed in a future update.
- A removed feature is no longer available in the product.

For the current lists of Dynamics 365 deprecations, visit:

- Sales
- Customer Service
- Field Service
- Finance and operations apps
- Universal Resource Scheduling
- Healthcare accelerator
- Financial services accelerator
- Business Central - Base App
- Business Central - Platform - Clients, Server, and Database
- Customer Insights
- Dynamics 365 for Customer Engagement

Other deprecations

For the lists of other deprecations, visit:

- Important changes (deprecations) coming in Power Apps and Power Automate
- Important upcoming changes (deprecations) in canvas apps
- Important upcoming changes and deprecations in Power Pages
- Microsoft Cloud for Financial Services

See also

- Release plans for Dynamics 365, Power Platform, and Cloud for Industry
- Microsoft Lifecycle Policy

Feedback

Was this page helpful? Yes No

Microsoft Power Platform: 2025 release wave 1 plan

Article • 01/23/2025

The Microsoft Power Platform release plan for the 2025 release wave 1 announces the latest updates to customers as features are prepared for release. You can browse the release plan here online (updated throughout the month), view it in the Release planner, or download the document as a PDF file, which is updated with every publish. The plan for 2025 release wave 1 covers new features for Power Platform releasing from **April 2025** through **September 2025**.

Download the 2025 release wave 1 PDF for Power Platform or select the option at the bottom of the table of contents.

The Dynamics 365 features coming in the 2025 release wave 1 have been summarized in a separate release plan and a downloadable PDF.

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

The Microsoft Cloud for Industry features coming in the 2025 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

2025 release wave 1 overview

Microsoft Power Platform enables users and organizations to analyze, act on, and automate the data to digitally transform their businesses. Microsoft Power Platform today comprises of: Power BI, Power Apps, Power Pages, Power Automate, Microsoft Copilot Studio, and AI Builder. The 2025 release wave 1 contains hundreds of new features across Power Platform applications, including Power Apps, Power Pages, Power Automate, Microsoft Copilot Studio, and AI Builder, as well as Microsoft Dataverse and Power Platform capabilities for governance and administration.

Power 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 changes how software solutions are built with the plan designer where makers can provide a business problem, and a set of agents helps them build a Power Platform software. Power Apps are intelligent, powered by a set of extensible agents that support most common tasks like exploring, entering, and summarizing data. Makers can automate common tasks by creating agents from existing apps and deploying them to take care of work autonomously. With integrated ability for users to understand and monitor agent actions, and easy ability to resolve issues when agents hit roadblocks, Power Apps is accelerating the shift to intelligent AI-powered solutions at scale.

Power Pages

Power Pages, part of Microsoft Power Platform, enables businesses to build secure, data-driven portals effortlessly. Recent updates include AI-powered features like Web Agents for multi-platform engagement (email, Teams, WhatsApp), AI-assisted form filling for improved productivity, dynamic list visualizations for better insights, and enhanced governance policies to strengthen security and streamline site deployments.

Power Automate

Power Automate is transforming how enterprises automate complex business processes; through new human in loop experiences, such as advanced approvals, AI native capabilities such as generative actions and intelligent document processing. To manage complex automations at scale, get a comprehensive suite of governance, observability and security controls coming to Automation Center and Power Platform Admin Center.

Microsoft Copilot Studio

Microsoft Copilot Studio brings new autonomous agent capabilities, extension of Microsoft 365 Copilot with Custom Agents, new capabilities for the Copilot Studio embedded builder in Microsoft Copilot including support for actions, new enterprise knowledge sources, and the ability to upgrade a declarative agent to Copilot Studio custom agent to access additional capabilities and new conversational channels for custom agents including WhatsApp and SharePoint.

AI Builder

AI Builder's latest release in Copilot Studio brings the power of advanced automation to routine processes like email handling, document processing, and image management, helping businesses run smarter and more efficiently. AI Builder has multi-modal content processing capability, which allows businesses to handle various data types —including text, document, and images—within a single natural language instruction. Enhanced Prompt builder tools empower makers to customize AI actions with diverse inputs, expanded data sources from Dataverse, and support for generating multiple content types, including documents.

Microsoft Dataverse

Microsoft Dataverse is continuing to extend maker experiences by enriching app and agent building capabilities across the platform. Dataverse ensures seamless connectivity to expanding set of external data sources and convert enterprise data into knowledge to customize and extend agents built in Microsoft Copilot Studio and agent builder in Microsoft 365 Copilot. These investments are aimed at grounding AI-powered experiences with enterprise knowledge across Microsoft Power Platform.

Governance and administration

Governance and administration continues to provide enhanced tools and insights for Admins to get the most from the Power Platform. In this wave we are focusing on Security, easing adoption and governance of Copilot and Agents, and helping enterprises boost the adoption of Power Platform at enterprise scale with a modernized admin center experience and a new admin connector for automating admin tasks.

Key dates for the 2025 release wave 1

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

Here are the key dates for the 2025 release wave 1.

Expand table

Milestone	Date	Description
Release plans available	January 23, 2025	Learn about the new capabilities coming in the 2025 release wave 1 (April 2025 - September 2025) across Microsoft Power Platform, Dynamics 365, Role-based Copilot offerings, and Microsoft Cloud for Industry.

Milestone	Date	Description
Early access available	February 3, 2025	Test and validate new features and capabilities that will be part of 2025 release wave 1, coming in April, before they are enabled automatically for your users. You can view the Microsoft Power Platform 2025 release wave 1 early access features now.
Release plans available in additional languages	February 7, 2025	The Microsoft Power Platform, Dynamics 365, Role-based Copilot offerings, and Microsoft Cloud for Industry release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	April 1, 2025	Production deployment for the 2025 release wave 1 begins. Regional deployments will start on April 1, 2025.

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

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

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

We've done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We're looking forward to engaging with you as you put these new services and capabilities to work, and we're eager to hear your feedback as you dig into the 2025 release wave 1.

Let us know your thoughts. Share your feedback in the Microsoft Power Platform community forum. We'll use your feedback to make improvements.

Feedback

Role-based Copilot offerings: 2025 release wave 1 plan

Article • 01/23/2025

The role-based Copilot offerings release plan for 2025 release wave 1 announces the latest updates to customers as features are prepared for release. You can browse the release plan online (updated throughout the month), view it in the Release planner, or download the information as a PDF file, which is updated with every publish. The plan for 2025 release wave 1 covers new features for role-based Copilot offerings releasing from **April 2025** through **September 2025**.

Download the 2025 release wave 1 PDF for role-based Copilot offerings or select the option at the bottom of the table of contents.

The Dynamics 365 features coming in 2025 release wave 1 have been summarized in a separate release plan and a downloadable PDF.

The Microsoft Power Platform features coming in 2025 release wave 1 have been summarized in a separate release plan and a downloadable PDF.

The Microsoft Cloud for Industry features coming in 2025 release wave 1 have been summarized in a separate release plan and a downloadable PDF.

2025 release wave 1 overview

The 2025 release wave 1 for role-based Copilot offerings brings new innovations that provide you with significant capabilities to transform your business. The release contains new features across Microsoft 365 Copilot for Sales, Microsoft 365 Copilot for Service, and Microsoft 365 Copilot for Finance.

Microsoft 365 Copilot for Sales continues to drive innovation with advanced generative AI capabilities designed specifically for sales-focused roles. In this release, we're enhancing our assistive features by surfacing further CRM insights and recommendations to the sales team across the Microsoft 365 product suite. We're also streamlining SalesChat experiences and driving new agent workflows to put organizations in control of automation experiences and notifications.

Microsoft 365 Copilot for Service continues to deliver and enhance cutting-edge generative AI capabilities for agents within their flow of work. In this release, we will introduce connectivity with any CRM system and inline email summary and drafting.

Microsoft 365 Copilot for Finance enhances efficiency for finance professionals by providing insights that aid strategic decision-making and reduce manual tasks. The 2025 release wave 1 focuses on intelligent automation of variance analysis in Excel, access to external data sources, extending functionalities through Copilot Studio, supporting collections calls in Teams, and leveraging generative AI for summarizing macroeconomic conditions.

Key dates for the 2025 release wave 1

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

Here are the key dates for 2025 release wave 1.

Expand table

Milestone	Date	Description
Release plans available	January 23, 2025	Learn about the new capabilities coming in 2025 release wave 1 (April 2025 - September 2025) across role-based Copilot offerings, Dynamics 365, Microsoft Power Platform, and Microsoft Cloud for Industry.
Release plans available in additional languages	February 7, 2025	The role-based Copilot offerings, Dynamics 365, Microsoft Power Platform, and Microsoft Cloud for Industry release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	April 1, 2025	Production deployment for 2025 release wave 1 begins. Regional deployments will start on April 1, 2025.

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

We've done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We're looking forward to engaging with you as you put these new services and capabilities to work, and we're eager to hear your feedback as you dig in to the 2025 release wave 1 plans.

Feedback

Was this page helpful? Yes No

Microsoft Cloud for Industry: 2025 release wave 1 plan

Article • 01/23/2025

The Microsoft Cloud for Industry release plan for the 2025 release wave 1 announces the latest updates to customers as features are prepared for release. You can browse the release plan online (updated throughout the month) or download the information as a PDF file, which is updated with every publish. The plan for 2025 release wave 1 covers new features for Microsoft Cloud for Industry releasing from **April 2025** through **September 2025**.

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

The Microsoft Power Platform features coming in the 2025 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

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

2025 release wave 1 overview

The 2025 release wave 1 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 Sovereignty, Microsoft Cloud for Retail, Microsoft Cloud for Manufacturing, and Microsoft Cloud for Sustainability.

Microsoft Cloud for Sovereignty

Microsoft Cloud for Sovereignty's Sovereign Landing Zone (SLZ) now provides more configurability and aligns better with the Azure Landing Zone. SLZ on Terraform will move from public preview to become generally available. Several new policy initiatives will augment the existing portfolio. Customers can use these policies to help customize deployments in accordance with established regulatory compliance and government requirements.

Microsoft Cloud for Retail

Microsoft Cloud for Retail is transforming with AI, enhancing customer experiences and operations. Data silos and privacy concerns remain challenges. To mitigate these, investments in security and standardized data solutions are increasing.

Microsoft Cloud for Manufacturing

Microsoft Cloud for Manufacturing brings the best of Microsoft and our partners to jointly accelerate the digital transformation in manufacturing by enabling intelligent factories and helping modernize the shop floor. With the 2025 release wave 1, we're excited to announce the launch of an enhanced manufacturing data solution in Microsoft Fabric with analytics capabilities and the factory operations agent on Azure AI.

Microsoft Cloud for Sustainability

Microsoft Cloud for Sustainability will continue to build on capabilities delivered over past waves by expanding Scope 3 Category 15 calculations for insurance emissions and enabling the ability to ingest and analyze energy data directly in Sustainability Manager. Sustainability Data Solutions in Fabric will support data connections with additional data sources. Copilot in Sustainability Manager will bring richer experiences to automate and recommend actions to bring greater efficiency and accuracy.

Key dates for the 2025 release wave 1

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

Here are the key dates for the 2025 release wave 1.

Expand table

Milestone	Date	Description
Release plans available	January 23, 2025	Learn about the new capabilities coming in the 2025 release wave 1 (April 2025 - September 2025) across Microsoft Cloud for Industry, Dynamics 365, Microsoft Power Platform, and Role-based Copilot offerings.
Release plans available in	February 7, 2025	Microsoft Cloud for Industry, Dynamics 365, Microsoft Power Platform, and Role-based Copilot offerings release plans are published in 11 additional languages: Danish, Dutch, Finnish,

Milestone	Date	Description
additional languages		French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	April 1, 2025	Production deployment for the 2025 release wave 1 begins. Regional deployments will start on April 1, 2025

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We have done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We are looking forward to engaging with you as you put these new services and capabilities to work, and we are eager to hear your feedback as you dig into the 2025 release wave 1.

Feedback

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

Article • 12/20/2024

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

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

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

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

2024 release wave 2 overview

The 2024 release wave 2 for Dynamics 365 brings new innovations that provide you with significant capabilities to transform your business. The release contains hundreds of new features across Dynamics 365 applications, including Sales, Customer Service, Contact Center, Field Service, Finance, Supply Chain Management, Project Operations, finance and operations cross-app capabilities, Human Resources, Commerce, Business Central, 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 365 Copilot for Sales continues to deliver and enhance cutting-edge generative AI capabilities for sellers by enriching Copilot in Microsoft 365 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 365 Copilot for Service is now generally available, bringing new capabilities to enhance user experiences. These features will be integrated across Outlook, Teams, Microsoft 365 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-the-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 365 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 the 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.

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.

Milestone	Date	Description
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