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Dynamics 365: 2024 release wave 1 plan

Article • 03/06/2024

The Dynamics 365 release plan for the 2024 release wave 1 announces the latest updates to customers as features are prepared for release. You can browse the release plan online (updated throughout the month), view it in the Release planner, or download the information as a PDF file, which is updated with every publish. The plan for 2024 release wave 1 covers new features for Dynamics 365 releasing from **April 2024** through **September 2024**.

Download the 2024 release wave 1 PDF for Dynamics 365 or select the option at the bottom of the table of contents.

The Microsoft Power Platform features coming in the 2024 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

The Microsoft Cloud for Industry features coming in the 2024 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

2024 release wave 1 overview

The 2024 release wave 1 for Dynamics 365 brings new innovations that provide you with significant capabilities to transform your business. The release contains hundreds of new features across Dynamics 365 applications, including Sales, Customer Service, Field Service, Finance, Supply Chain Management, Project Operations, finance and operations cross-app capabilities, Human Resources, Commerce, Business Central, Guides, Customer Insights - Data, and Customer Insights - Journeys.

Sales

Dynamics 365 Sales, the leading sales application, enhances customer understanding and boosts sales through data, intelligence, and user-friendly experiences. The 2024 release wave 1 focuses on providing sellers timely customer information, expediting deals with actionable insights, improving productivity, and empowering organizations through open configurability and expanded generative AI leadership.

Microsoft Copilot for Sales continues to deliver and enhance cutting-edge generative AI capabilities for sellers by enriching the Copilot in Microsoft 365 capabilities with sales-specific skills, data, and actions. Additionally, the team will focus on assisting sellers on the go within the Outlook and Teams mobile apps.

Service

Dynamics 365 Customer Service will continue to empower agents to work more efficiently through Copilot filtering response verification, diagnostic tools for admins and agents, and usability improvements to multisession apps. Additionally, we are making enhancements to the voice channel, and improving unified routing assignment accuracy and prioritization.

Dynamics 365 Field Service is a field service management application that allows companies to transform their service operations with processes and experiences to manage, schedule, and perform. In the 2024 release wave 1, we are introducing the next generation of Copilot capabilities, modern experiences, Microsoft 365 integrations, vendor management, and finance and operations integration.

Finance and Supply Chain

Dynamics 365 Finance continues on its journey of autonomous finance, building intelligence, automation, and analytics around every business process, to increase user productivity and business agility. This release focuses on enhancing business performance planning and analytics, adding AI-powered experiences, easing setup of financial dimension defaulting with AI rules guidance, increasing automation in bank reconciliation, netting, expanding country coverage, tax automation, and scalability.

Microsoft Copilot for Finance will be available as a public preview for finance professionals using productivity applications such as Microsoft Excel and Outlook to complete financial tasks. The new capabilities will provide users with financial insights directly in Outlook and Excel and help craft timely and accurate email responses and store communication summaries in the central location. Users will also get support while reconciling financial data from two data sources in Excel, with Copilot-guided prompts when comparing the data and troubleshooting the discrepancies.

Dynamics 365 Supply Chain Management enhances business processes for increased insight and agility. Copilot skills improve user experiences, while demand planning transforms the forecast process, and warehouse processes are optimized for greater efficiency and accuracy.

Dynamics 365 Project Operations is focused on enhancing usability, performance, and scalability in key areas such as project planning, invoicing, time entry, and core transaction processing. The spotlight is on core functionality improvements, including support for discounts and fees, enhanced resource reconciliation, journals, approvals, and contract management, with added mobile capabilities to handle larger projects and invoices at an increased scale.

Finance and operations cross-app capabilities continues to invest in capabilities that apply to all finance and operations apps, including Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations, infusing Copilot experiences across applications, and bringing additional value and insights to finance and operations apps data.

Dynamics 365 Human Resources will continue to improve recruiting experiences with functionality to integrate with external job portals and talent pools. We will continue to expand our HCM ecosystem to include additional payroll partners and build better-together experiences that span the gamut of what Microsoft can offer to improve employee experiences in corporations of any size and scale across the globe.

Commerce

Dynamics 365 Commerce continues to invest in omnichannel retail experiences through advancements in mobile point of sale (MPOS) experiences like Tap to Pay for iOS and offline capabilities for Store Commerce on Android. The B2B buying experience is enhanced with new capabilities and a streamlined order management solution for buyers who work across multiple organizations.

SMB

Dynamics 365 Business Central is delivering substantial enhancements, with a central emphasis on harnessing the power of Copilot. Available in over 160 countries, the team is focused on Copilot-driven capabilities to streamline and enhance productivity through enhanced reporting and data analysis capabilities, elevated project and financial management, and simplified workflow automation. We've also upgraded our development and governance tools and introduced improvements in managing data privacy and compliance.

Guides

Dynamics 365 Guides is bringing several new capabilities and enhancements including high-detail 3D model support through Azure Remote Rendering and greatly improved web content support that enables customers to build mixed-reality workflows that are integrated with their business data. Additionally, support for Guides content on mobile will be generally available in the coming wave through a seamless integration with Dynamics 365 Field Service mobile application.

Customer Insights

Dynamics 365 Customer Insights - Data empowers every organization to unify and enhance customer data, leveraging it for insightful analysis and intelligent actions. With this release we are making it easier and faster to ingest and manage your data. AI enables quick insights and democratized access to analytics. Real-time data ingestion, creation, and updates further enable the optimization of experiences in the moments that matter.

Dynamics 365 Customer Insights - Journeys brings the power of AI to revolutionize how marketers work, enabling businesses to optimize every interaction with their customers with end-to-end journeys across departments and channels. With this release we empower marketers with a deeper customer understanding, we enable them to create new experiences within minutes, reach customers in more ways, and continuously optimize results. Thanks to granular lead qualification, we continue to boost the synergy between sales and marketing to achieve superior business outcomes.

Key dates for the 2024 release wave 1

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

Here are the key dates for the 2024 release wave 1.

Expand table

Milestone	Date	Description
Release plans available	January 25, 2024	Learn about the new capabilities coming in the 2024 release wave 1 (April 2024 - September 2024) across Dynamics 365, Microsoft Power Platform, and Microsoft Cloud for Industry.
Early access available	February 5, 2024	Test and validate new features and capabilities that will be part of 2024 release wave 1, coming in April, before they are enabled automatically for your users. You can view the Dynamics 365 **2024 release wave 1 early access features now**.
Release plans available in additional languages	February 19, 2024	The Microsoft Power Platform and Dynamics 365 release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish. Microsoft Cloud for Industry release plans are published in 4 additional languages: French, German, Dutch and Spanish.
General availability	April 1, 2024	Production deployment for the 2024 release wave 1 begins. Regional deployments will start on April 1, 2024.

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

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

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

We've done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We're looking forward to engaging with you as you put these new services and capabilities to work, and we're eager to hear your feedback as you dig in to the 2024 release wave 1 plans.

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

Feedback

Was this page helpful? Yes No

Get started with this release wave

Article • 01/25/2024

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

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

2024 release wave 1

April 2024 – September 2024

Sales

See what's new and planned
Watch latest videos

Microsoft Copilot for Sales

See what's new and planned

Customer Service

See what's new and planned
Watch latest videos

Field Service

See what's new and planned
Watch latest videos

Finance

See what's new and planned
Watch latest videos

Supply Chain Management

See what's new and planned
Watch latest videos

Project Operations

See what's new and planned
Watch latest videos

Human Resources

See what's new and planned
Watch latest videos

Commerce

See what's new and planned

Business Central

See what's new and planned

Guides

See what's new and planned

Customer Insights Data

See what's new and planned
Watch latest videos

Customer Insights Journeys

See what's new and planned
Watch latest videos

Feedback

Change history

Article • 03/06/2024

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

Dynamics 365 Sales

Features removed from release plan

Expand table

Feature	Reason	Date removed
Get real-time insights with Copilot on the home page	Moved to the previous release wave.	Jan 29, 2024

Dynamics 365 Customer Insights - Data

Features added to release plan

Expand table

Feature	Date added
Accelerate time to insights with data in Delta Lake format	Jan 31, 2024

Release date changed

Expand table

Feature	Change	Date updated
Increase control when attaching to data in Dataverse	Public preview date updated to Apr 2024 General availability date moved to Jul 2024	Feb 22, 2024

Dynamics 365 Customer Insights - Journeys

Features added to release plan

Expand table

Feature	Date added
Take campaigns from concept to launch using Copilot	Feb 09, 2024

Release date changed

Expand table

Feature	Change	Date updated
Engage customers with personalized messages based on website interactions	Public preview date updated to Apr 2024	Feb 12, 2024
Boost customer confidence with branded links for email and content	Public preview date moved to Jul 2024	Feb 12, 2024
Improve engagement and compliance with double opt-in	Public preview date moved to Jun 2024 General availability date moved to Sep 2024	Feb 06, 2024
Split your audience into groups to deliver unique customer experiences	Public preview date updated to Jul 2024 General availability date moved to Sep 2024	Feb 05, 2024
Collect extra customer information without creating custom attributes	Public preview date moved to Aug 2024	Feb 05, 2024
Improve reliability of insights with advanced bot protection	Public preview date moved to May 2024 General availability date moved to Aug 2024	Jan 30, 2024

Dynamics 365 Finance

Features added to release plan

Expand table

Feature	Date added
Prepayment sales invoice	Feb 17, 2024
Correct receipt matching error in vendor invoices with Copilot	Feb 08, 2024

Release date changed

Expand table

Feature	Change	Date updated
Add efficiency with enhanced bank reconciliation report		Feb 20, 2024
Save time with autonomous cash application		Feb 20, 2024
Matching rule enhancement in advanced bank reconciliation		Feb 20, 2024

Dynamics 365 Supply Chain Management

Features added to release plan

Expand table

Feature	Date added
Enable quality control for goods-in-transit orders	Jan 26, 2024

Dynamics 365 Business Central

Features added to release plan

Expand table

Feature	Date added
Find a matching record in a Power Automate flow	Feb 15, 2024
Add table and field mappings to existing integration tables	Feb 12, 2024

Feature	Date added
Use in-client page scripting tool for acceptance testing	Feb 06, 2024
Copy companies with Dataverse integration safely	Jan 26, 2024
Use the OData V4 IN operator in web service queries	Jan 16, 2024
Define extension objects in same app as their base object	Jan 10, 2024

Release date changed

Expand table

Feature	Change	Date updated
Start creating Power Automate flows with Copilot	Public preview date moved to May 2024	Feb 26, 2024

Feedback

Was this page helpful? Yes No

2024 release wave 1 features available for early access

Article • 01/25/2024

This topic lists the features that can be enabled for testing in your environment beginning **February 5, 2024**.

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

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

The features from these apps update the existing user experiences. You can opt in early to enable these features in your environment. This will allow you to test these features and then adopt them across your environments. For information on how to enable these features, go to Opt in to 2024 release wave 1 updates.

> ⓘ **Important**
>
> Other early access features may impact your users. To learn more about these features visit:
>
> - **Power Platform 2024 release wave 1 features available for early access**

Dynamics 365 Sales

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

Expand table

Feature	Enabled for	Early access	General availability
Get real-time insights with Copilot on the home page	Users, automatically	Feb 2024	Apr 2024
Plan and perform assigned tasks with preview of sequence steps	Users, automatically	Feb 2024	Apr 2024
Guide sellers to work simultaneously using multiple sequences	Users, automatically	Feb 2024	Apr 2024
Experience the new look with a refreshed styling	Users, automatically	Feb 2024	Apr 2024
Analyze opportunities better by grouping them and aggregating their values	Users, automatically	Feb 2024	Apr 2024
Customize lead qualification process for a seamless experience	Users, automatically	Feb 2024	Apr 2024
Work efficiently on lead entity with the enhanced focused mode as default view	Users, automatically	Feb 2024	Apr 2024

Dynamics 365 Commerce

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

Expand table

Feature	Enabled for	Early access	General availability
Enable purchase order orchestration	Users, automatically	✔ Oct 16, 2023	Apr 2024

Dynamics 365 Customer Service

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

Expand table

Feature	Enabled for	Early access	General availability
Use enhanced attachment experience while composing email	Users, automatically	Feb 2024	Apr 2024
Use skills to find agents for consult, transfer scenarios	Users, automatically	Feb 2024	Apr 2024
Explore enhancements to outbound dialing	Users, automatically	Feb 2024	Apr 2024
Get FedRAMP certified for new features	Users, automatically	Feb 2024	Apr 2024
Rate call quality and provide feedback on improvements	Users, automatically	Feb 2024	Apr 2024
Test call, microphone, speakers before and during calls	Users, automatically	Feb 2024	Apr 2024

Dynamics 365 Field Service

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

Expand table

Feature	Enabled for	Early access	General availability
Optimize schedule board navigation patterns	Users, automatically	Feb 2024	Jun 2024

Dynamics 365 Finance

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

Expand table

Feature	Enabled for	Early access	General availability
Check out new AP clerk	Users by admins, makers, or	Jan 2024	Jul 2024

Feature	Enabled for	Early access	General availability
workspace capabilities	analysts		
AI powers collections workspace timeline summary	Users by admins, makers, or analysts	✔ Jun 15, 2023	Apr 2024
Archive general ledger posted data	Admins, makers, marketers, or analysts, automatically	Feb 2024	Jul 2024
Explore customer and vendor balance netting	Users by admins, makers, or analysts	✔ Nov 2, 2023	Jul 2024
Expand localization for LATAM countries - Colombia	Users by admins, makers, or analysts	✔ Dec 22, 2023	Jul 2024
Expand localization for LATAM countries - Paraguay	Users by admins, makers, or analysts	✔ Dec 22, 2023	Jul 2024
Expand localization for LATAM countries - Uruguay	Users by admins, makers, or analysts	✔ Dec 22, 2023	Jul 2024
Expand localization for LATAM countries - Guatemala	Users by admins, makers, or analysts	✔ Dec 22, 2023	Jul 2024

Dynamics 365 Supply Chain Management

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

Expand table

Feature	Enabled for	Early access	General availability
Forecast with intelligence for validated demand plans	Users by admins, makers, or analysts	✔ Oct 31, 2023	Apr 2024
Manage compliance with export control restrictions	Users by admins, makers, or analysts	✔ Jul 31, 2023	Apr 2024
Implement warehouse management only mode enhancements	Users by admins, makers, or analysts	✔ Sep 1, 2023	Sep 2024

Dynamics 365 Business Central

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

Expand table

Feature	Enabled for	Early access	General availability
Complete bank account reconciliation faster with Copilot	Users by admins, makers, or analysts	✔ Nov 10, 2023	Apr 2024

Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Sales in 2024 release wave 1

Article • 01/25/2024

> ⓘ **Important**
>
> The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Sales**.

Overview

https://aka.ms/ReleaseHighlight/2024W1/CustomerExperience

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

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

For 2024 release wave 1, we continue to use data and AI to help sellers understand customers and accelerate deals while staying in the flow of work. Copilot in Dynamics 365 Sales helps sellers make the most of their customer engagements by providing recommendations, summarizing data, retrieving information, and performing actions in context and within the flow of work.

For 2024 release wave 1, we are focused on enabling sales organizations to:

- **Understand their customers** by providing sellers with information about customers when they need it and where they need it.
- **Accelerate deals** with insights and action on how to move deals forward along with ROI calculations.
- **Stay in the flow of work** by making sellers more productive, which is at the center of transforming how sellers work.
- **Configure and extend** by opening Copilot in Sales to first and third parties, allowing customers and partners to extend and enrich experiences with their own data and insights.
- **Empower sales leadership**, expanding our generative AI leadership to a broader surface area beyond seller productivity and toward the transformation of sales leadership roles.

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

Investment areas

Copilot and AI innovation

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

Sales engagement

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

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

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

Sales execution and sales force automation

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

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

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

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

Seller experiences

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

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

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

Check out the release plan

For application administrators

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

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

Get the most out of Sales

Expand table

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

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Sales

Article • 01/25/2024

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

For a list of the previous wave's release plans, go to 2023 release wave 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

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Elevate your sales pitch using Copilot email assistance	Users by admins, makers, or analysts	✔ Jun 16, 2023	-	Apr 2024
Use Copilot to get answers from your sales documents	Users by admins, makers, or analysts	Feb 2024	-	Apr 2024
Maximize sales success with AI-suggested past successful deals	Users by admins, makers, or analysts	Mar 2024	-	Apr 2024
Get a 360-degree view of your account with AI-generated account summary	Users by admins, makers, or analysts	-	-	Jun 2024
Get real-time insights with Copilot on the home page	Users, automatically	-	Feb 2024	Apr 2024

Feature	Enabled for	Public preview	Early access*	General availability
Summarize lengthy emails using Copilot in Dynamics 365 Sales	Users by admins, makers, or analysts	✔ Aug 11, 2023	-	Apr 2024
Boost your sales with product content recommendations	Users by admins, makers, or analysts	Feb 2024	-	Apr 2024

Sales engagement

New sales engagement capabilities help sellers stay efficient and successful.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Plan and perform assigned tasks with preview of sequence steps	Users, automatically	-	Feb 2024	Apr 2024
Improve customer engagement with sequence preview	Admins, makers, marketers, or analysts, automatically	✔ Jun 16, 2023	-	Apr 2024
Guide sellers to work simultaneously using multiple sequences	Users, automatically	-	Feb 2024	Apr 2024

Sales execution and sales force automation

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Notify sellers and sales managers after assignment rule execution	Users by admins, makers, or analysts	-	-	Aug 2024
Assign leads, opportunities to sellers based on	Admins, makers, marketers, or analysts,	-	-	Sep 2024

Feature	Enabled for	Public preview	Early access*	General availability
individual capacity	automatically			

Seller experiences

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Experience the new look with a refreshed styling	Users, automatically	-	Feb 2024	Apr 2024
Analyze opportunities better by grouping them and aggregating their values	Users, automatically	-	Feb 2024	Apr 2024
Customize lead qualification process for a seamless experience	Users, automatically	-	Feb 2024	Apr 2024
Work efficiently on lead entity with the enhanced focused mode as default view	Users, automatically	-	Feb 2024	Apr 2024

- You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Feedback

Was this page helpful? Yes No

Copilot and AI innovation

Article • 01/25/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Boost your sales with product content recommendations

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

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

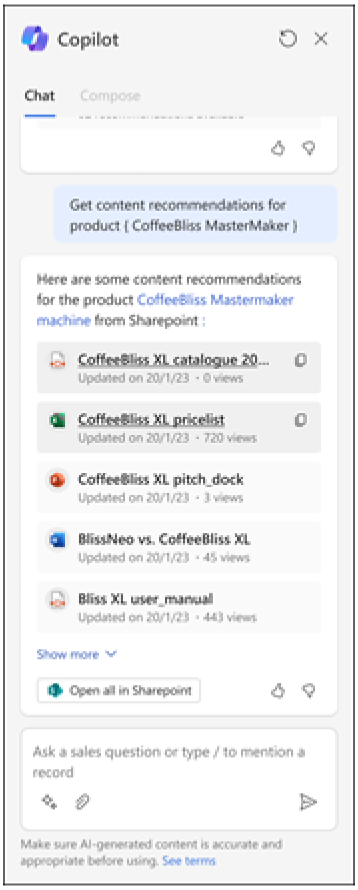
Feature details

As an admin, you can:

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

As a seller, you can:

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



Feedback

Was this page helpful? Yes No

Elevate your sales pitch using Copilot email assistance

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

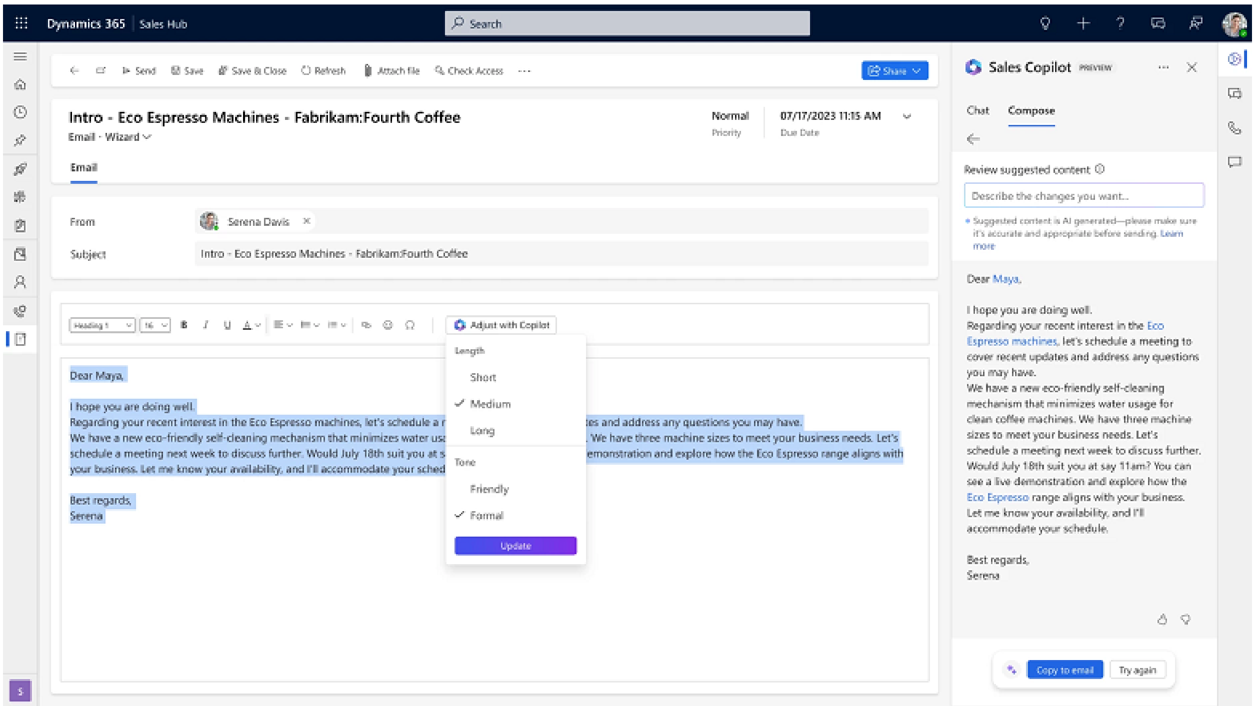
As a seller, you often struggle with writing effective emails to communicate with your customers. You may face challenges such as not knowing how to structure their emails, which information to include or exclude, or how to strike the right tone. This can lead to poor customer engagement, lost sales,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

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

Feature details

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

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



Geographic areas

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

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

- China

See also

Compose and send email messages using Copilot (docs)

Feedback

Was this page helpful? Yes No

Improve productivity by using Copilot in Dynamics 365

Article • 03/06/2024

ⓘ Important

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

Business value

Copilot in Dynamics 365 Sales is an AI assistant for sellers who want to leverage insights and streamlined workflows to effectively manage their sales activities, nurture customer relationships, and achieve sales success. With this feature, sellers can use Copilot to make use of the sales skills available for improving their productivity.

Feature details

As a seller, you can instruct Copilot to:

- Summarize lead and opportunities records.
- List recent changes to lead and opportunity records.
- Prepare you for a meeting.
- Provide email assistance.
- Get the latest news about a customer.

For more information, see Copilot overview.

While this feature is currently accessible to all our customers, this release will automatically activate it for organizations that have provided consent for data movement and organizations that don't require a consent. For information about whether your organization needs consent, see How data movement across regions works.

Administrators will have the option to disable it through the settings page.

There are no changes for North America (NAM) customers.

Geographic areas

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

- Germany
- Norway
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- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
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- Canada
- India
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- France
- Korea
- China

Feedback

Was this page helpful? Yes No

Know your account better with AI-generated account summary

Article • 03/06/2024

ⓘ Important

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

Business value

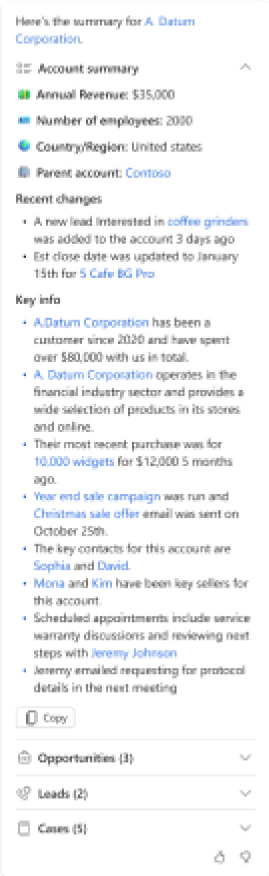
In the fast-paced world of sales, sellers often work on multiple accounts simultaneously. It can be challenging to stay on top of all the accounts and gather relevant information efficiently. With the account summary feature, sellers can now access a consolidated summary of vital customer data, including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

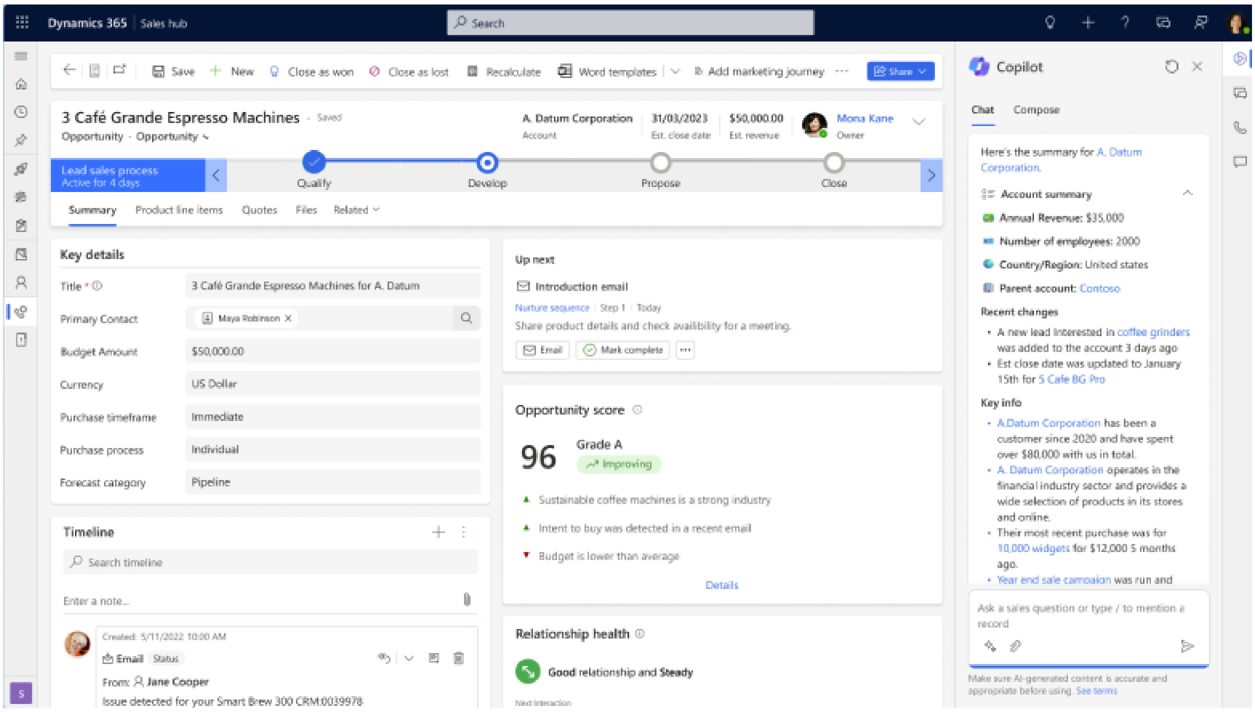
Sellers no longer need to spend excessive time sifting through scattered information or manually compiling account details. They can now quickly access a comprehensive overview of each account, enabling them to prioritize their work effectively and engage with customers in a more personalized and targeted manner.

Feature details

With these enhancements, sellers can:

- Get an overview of the account and quickly understand the key information.
- View a summary of associated opportunities.
- View a summary of associated leads.
- Learn the latest news about an account.


Here's the summary for A. Datum Corporation.
Account summary
Annual Revenue: $35,000
Number of employees: 2000
Country/Region: United states
Parent account: Contoso
Recent changes
A new lead Interested in coffee grinders was added to the account 3 days ago
Est close date was updated to January 15th for 5 Cafe BG Pro
Key info
A.Datum Corporation has been a customer since 2020 and have spent over $80,000 with us in total.
A. Datum Corporation operates in the financial industry sector and provides a wide selection of products in its stores and online.
Their most recent purchase was for 10,000 widgets for $12,000 5 months ago.
Year end sale campaign was run and Christmas sale offer email was sent on October 25th.
The key contacts for this account are Sophia and David.
Mona and Kim have been key sellers for this account.
Scheduled appointments include service warranty discussions and reviewing next steps with Jeremy Johnson
Jeremy emailed requesting for protocol details in the next meeting
Copy
Opportunities (3)
Leads (2)
Cases (5)


Dynamics 365
Sales hub
Search
Save
New
Close as won
Close as lost
Recalculate
Word templates
Add marketing journey
Share
3 Café Grande Espresso Machines
Saved
Opportunity · Opportunity
A. Datum Corporation
Account
31/03/2023
Est. close date
$50,000.00
Est. revenue
Mona Kane
Owner
Lead sales process
Active for 4 days
Qualify
Develop
Propose
Close
Summary
Product line items
Quotes
Files
Related
Key details
Title
3 Café Grande Espresso Machines for A. Datum
Primary Contact
Maya Robinson
Budget Amount
$50,000.00
Currency
US Dollar
Purchase timeframe
Immediate
Purchase process
Individual
Forecast category
Pipeline
Timeline
Search timeline
Enter a note...
Created: 5/11/2022 10:00 AM
Email
Status
From: Jane Cooper
Issue detected for your Smart Brew 300 CRM:0039978
Up next
Introduction email
Nurture sequence
Step 1
Today
Share product details and check availibility for a meeting.
Email
Mark complete
Opportunity score
96
Grade A
Improving
Sustainable coffee machines is a strong industry
Intent to buy was detected in a recent email
Budget is lower than average
Details
Relationship health
Good relationship and Steady
Copilot
Chat
Compose
Here's the summary for A. Datum Corporation.
Account summary
Annual Revenue: $35,000
Number of employees: 2000
Country/Region: United states
Parent account: Contoso
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A new lead Interested in coffee grinders was added to the account 3 days ago
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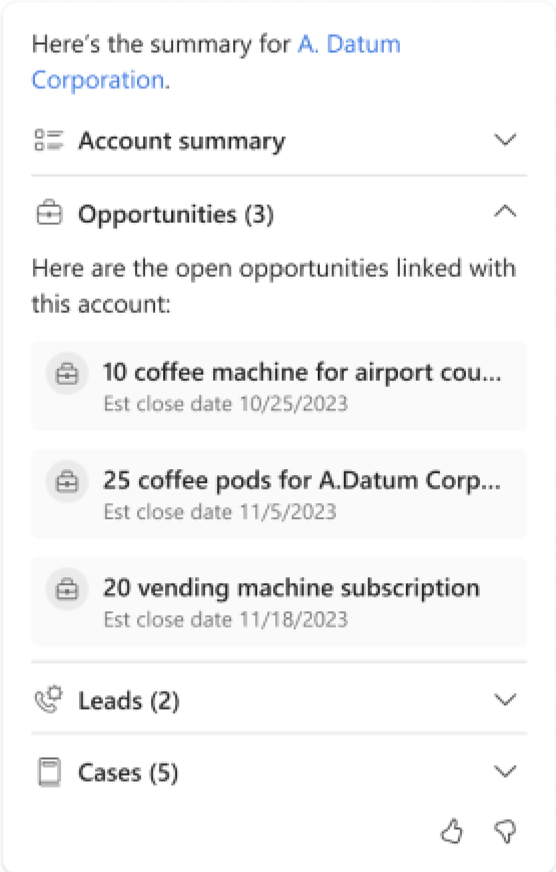
A.Datum Corporation has been a customer since 2020 and have spent over $80,000 with us in total.
A. Datum Corporation operates in the financial industry sector and provides a wide selection of products in its stores and online.
Their most recent purchase was for 10,000 widgets for $12,000 5 months ago.
Year end sale campaign was run and
Ask a sales question or type / to mention a record
Make sure AI-generated content is accurate and appropriate before using. See terms



Geographic areas

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

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- Japan
- France
- Korea
- China

Feedback

Was this page helpful? Yes No

Maximize sales success with AI-suggested past successful deals

Article • 01/25/2024

ⓘ Important

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

Expand table

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

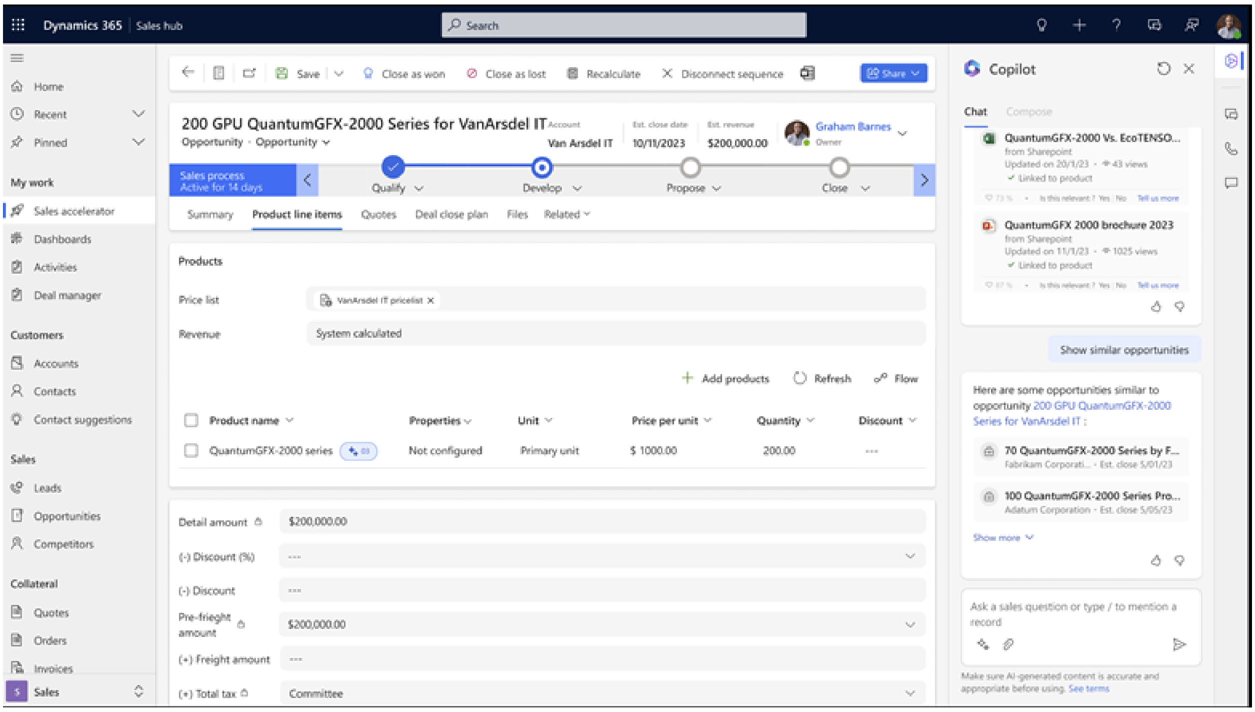
Business value

As a seller, you can tap into the collective intelligence of past successful deals. By suggesting similar opportunities, this feature streamlines the decision-making process and enhances the chances of closing deals swiftly. You can gain valuable insights from your own successes, harness industry-specific knowledge, and make informed decisions, ultimately boosting sales effectiveness. By leveraging AI suggestions, you can enhance your strategic approach, increase efficiency, and boost their win rates.

Feature details

As a seller, you can:

- View AI-driven opportunity suggestions based on industry, product, account, and geography.
- Leverage past successful deals to enhance sales effectiveness and revenue growth.



Feedback

Was this page helpful? Yes No

Summarize lengthy emails using Copilot in Dynamics 365 Sales

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

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

Geographic areas

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

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

See also

View and copy email summary (docs)

Feedback

Was this page helpful? Yes No

Use Copilot to get answers from your sales documents

Article • 01/25/2024

ⓘ Important

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

Expand table

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

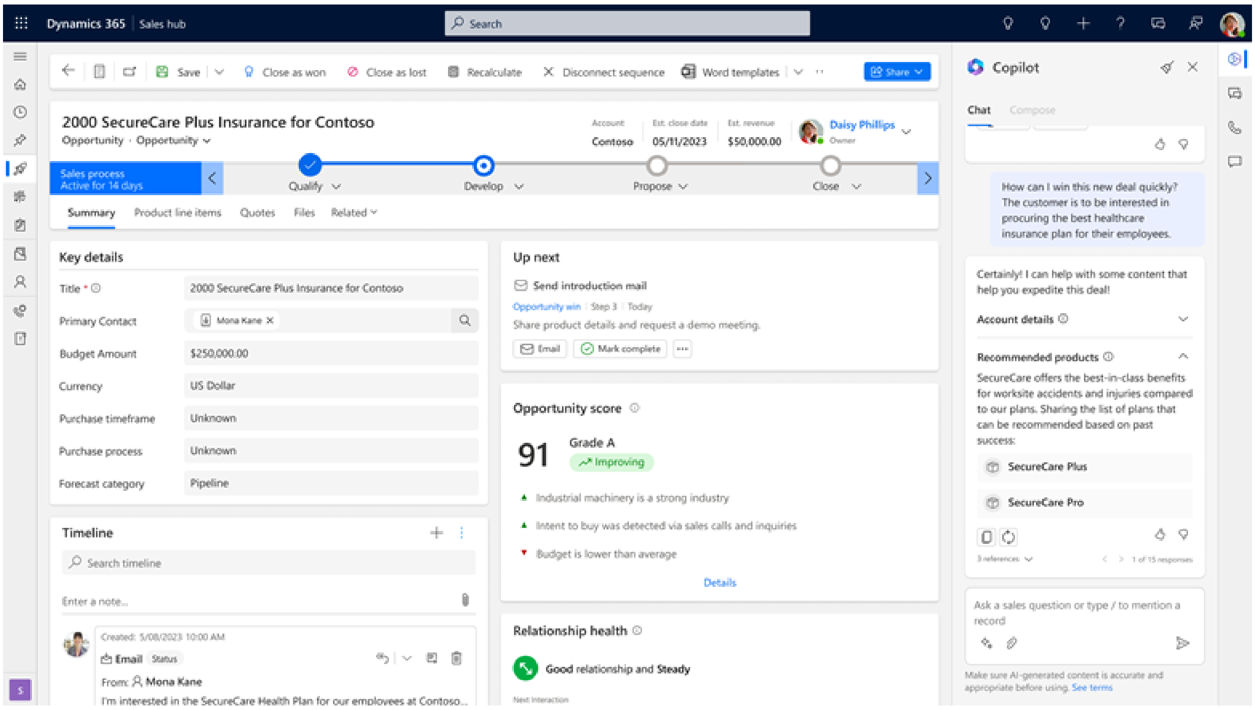
Business value

You spend a lot of time responding to questions that come your way, either via emails or chats or any other channels. You often find yourself buried under heaps of sales documents and literature, struggling to find quick answers to these questions.

This innovative CRM feature significantly boosts your productivity and knowledge retention. By harnessing the power of AI, you can get quick answers based on the information and documents stored in SharePoint by simply chatting with Copilot in Dynamics 365 Sales. This feature enables quicker decision-making, reduces response times, and enhances customer interactions. With streamlined access to critical information, you can engage clients more effectively, leading to increased sales, improved customer satisfaction, and ultimately, higher revenue generation for your business.

Feature details

As an admin, you can configure the sources that you want Copilot to use for fetching and summarizing the sales information. As a seller, you can access relevant sales information from SharePoint through the Copilot chat interface in Dynamics 365 Sales.



Feedback

Was this page helpful? Yes No

Sales engagement

Article • 01/25/2024

ⓘ Important

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

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

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

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

Feedback

Guide sellers to work simultaneously using multiple sequences

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

As a seller, you work with other sellers on the same account or opportunity, and those sellers follow a different yet coordinated set of actions to win a deal. You need to know which other team members are working on that account or opportunity, the activities they are doing, and the sequences attached to that record. You need to be aware of the changes happening to their accounts.

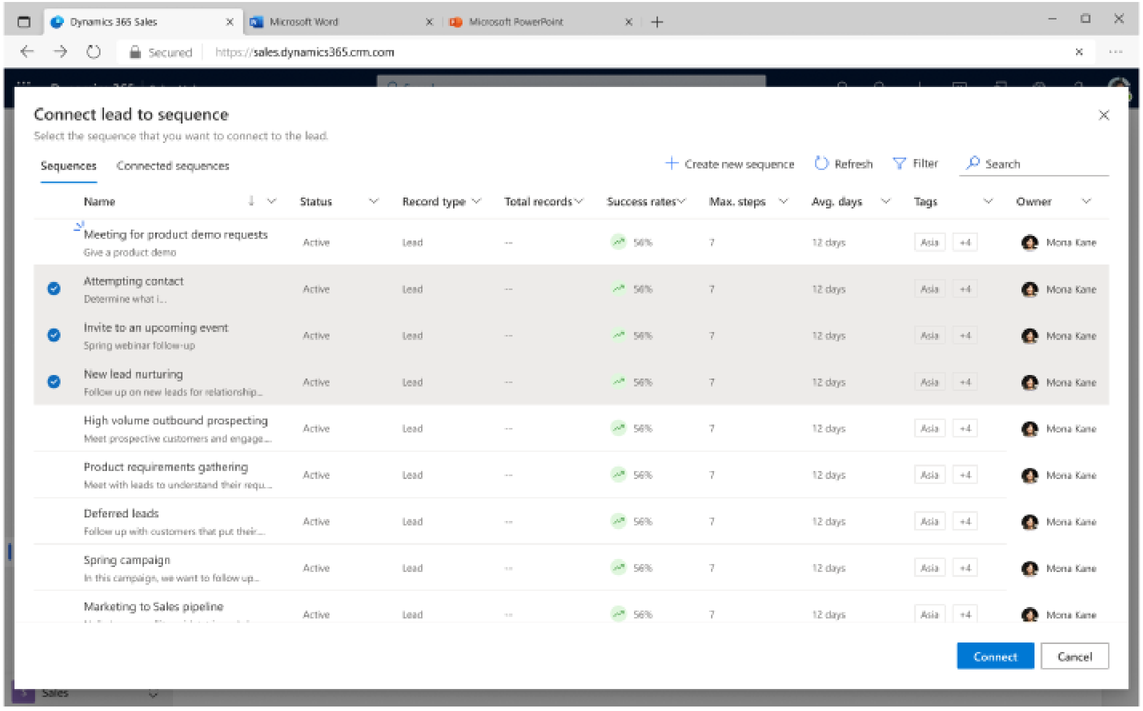
With this change, you can now assign different sequences to different sellers for a particular record at the same time. You can guide multiple sellers to work together and win a deal. For example, assign one sequence to an account executive and another sequence to a solution architect while they both work on a target account simultaneously. Sales team members can attach a sequence to a record even if they are not the owner of that record, and can easily view details of any sequence.

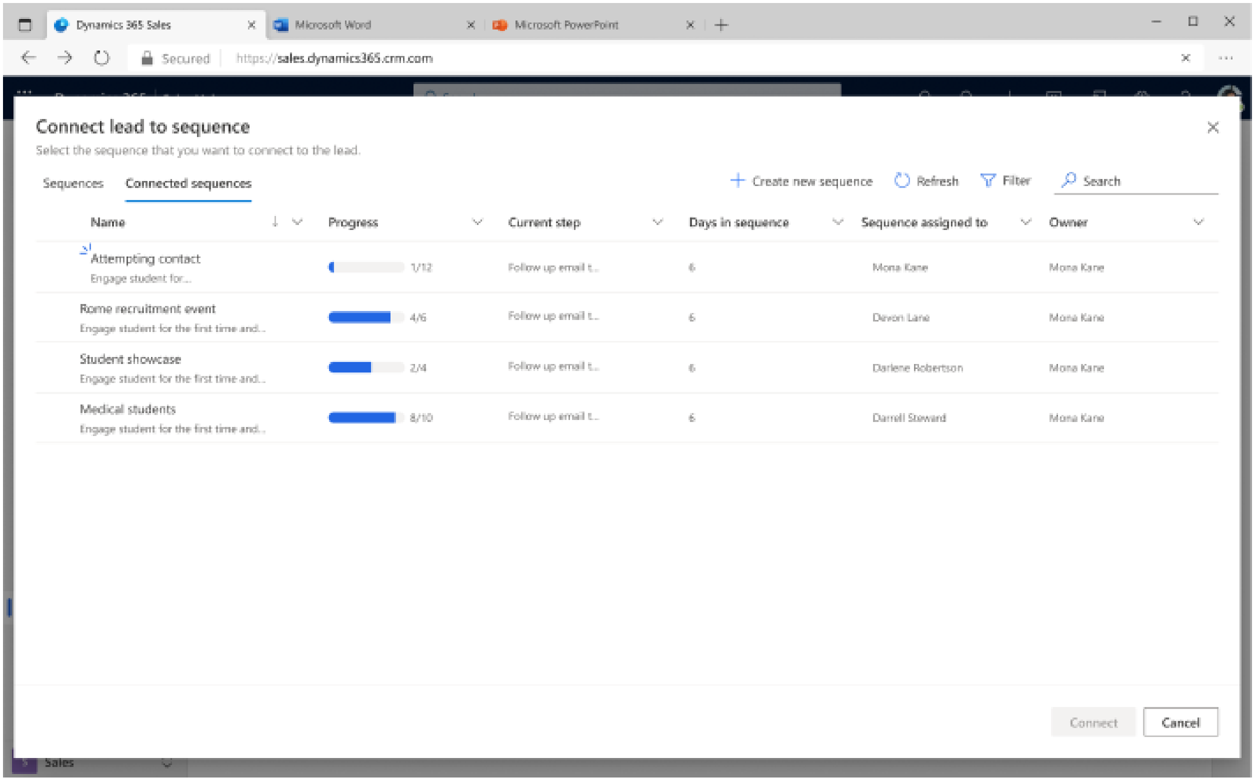
Feature details

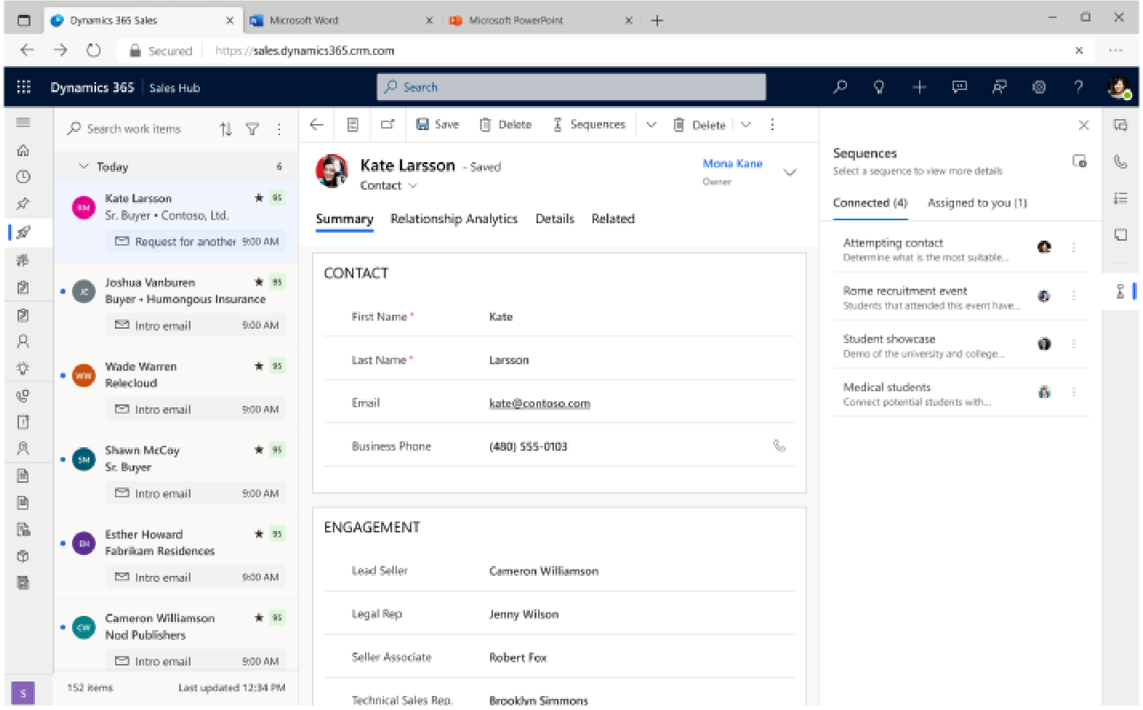
With this enhancement, as a sales manager or the operations team, you can assign multiple sellers to work on different sequences for a particular record at the same time. This will enable sellers to:

- View team members who are also using sequence on a record.

- Attach additional sequences to a record that already has sequences attached.
- View details of a sequence and find a list of completed and upcoming activities.







Feedback

Was this page helpful? Yes No

Improve customer engagement with sequence preview

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Admins, makers, marketers, or analysts, automatically	✔ Jun 16, 2023	-	Apr 2024

Business value

As a seller, you use sequences to follow activities and perform actions. You can connect an existing sequence to a record or create their own personalized sequence. Digital selling is a team activity wherein multiple sales team members work together to win a deal. For example, an account executive working on proposals and a solution architect helping with the implementation.

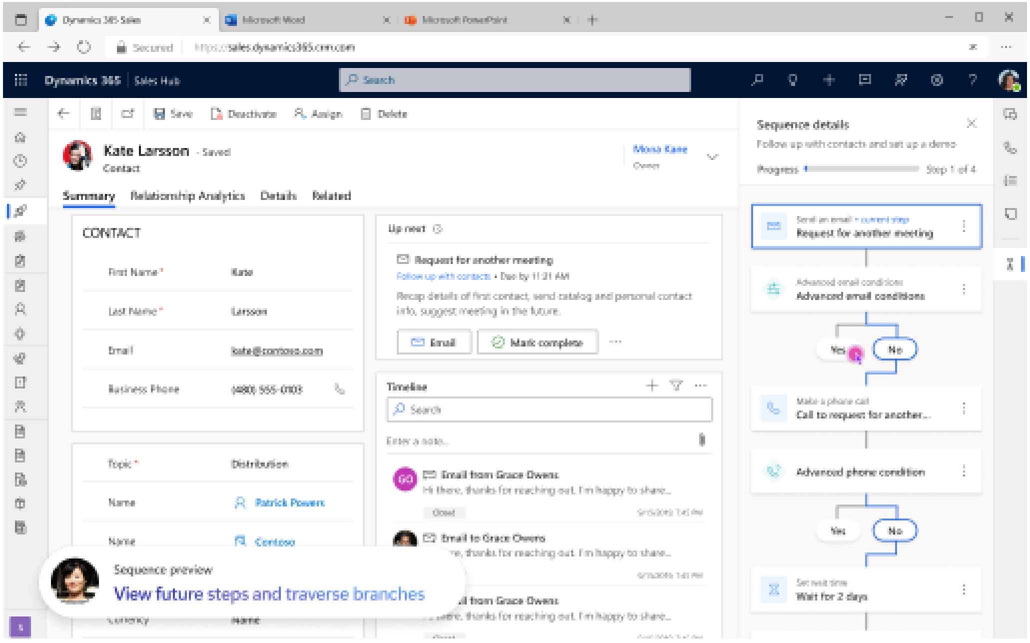
This feature helps you to preview a sequence and get an overview of sequence steps. The preview is required when you want to use or connect a sequence to a record. It enables team members to effectively work together and get details of sequences other team members follow for a shared account or opportunity.

Feature details

With this enhancement, you can:

- Get an overview of the sequence that shows the total number of steps, the number of days spent, the time required for completion, and other details.
- Find which team members completed different steps and who would work on future actions.

- View steps and activities that are completed or upcoming.
- View completion and due dates of sequence steps.



Feedback

Was this page helpful? Yes No

Plan and perform assigned tasks with preview of sequence steps

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

As a sales professional, you use the Up next widget for key interactive components present within entity forms, which captures the set of steps that you need to execute as part of any sequence workflow. This plays a critical role in guiding toward the successful conclusion of a sales process.

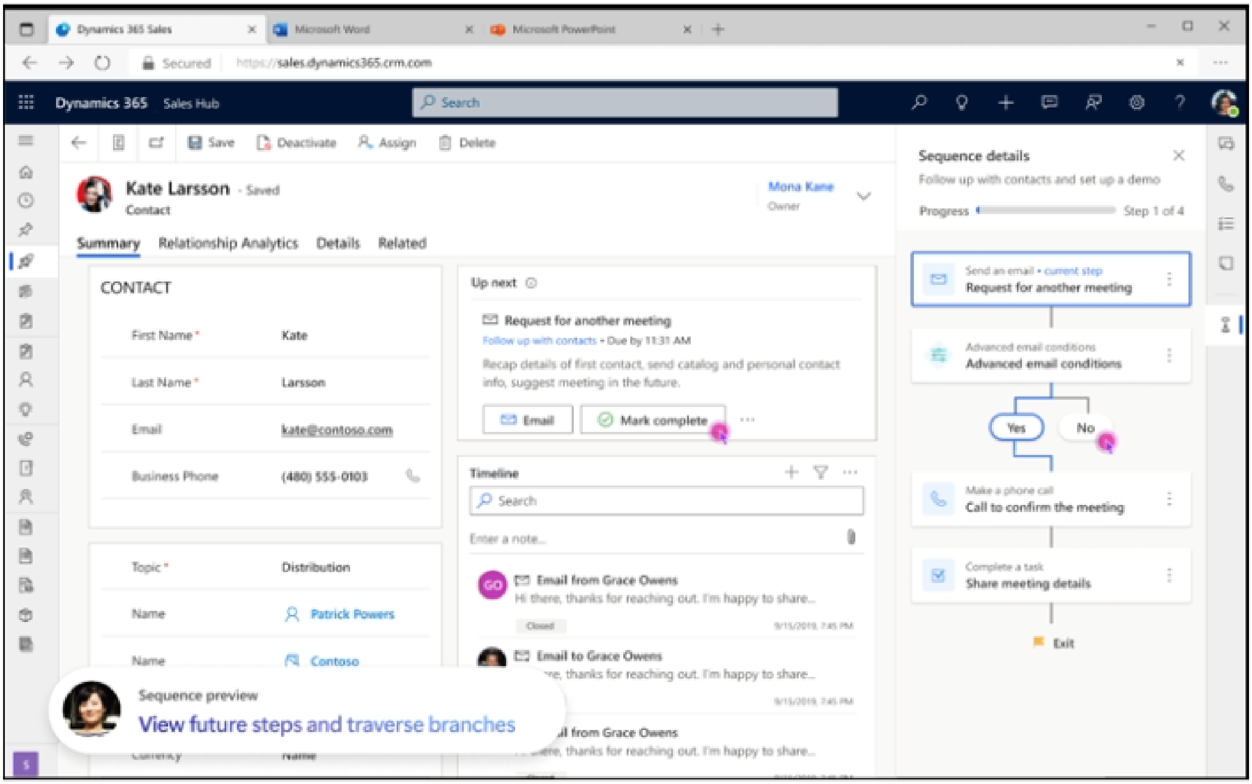
The scope of the sequence category is expanding to include multiple sequences in order to bring in more flexibility and allow multiple members of your team to work on a record simultaneously. The revamped Up next widget is geared toward ensuring a consistent and seamless user experience by providing you with the capability to view all the steps for an associated sequence in context of a particular entity record. This will include both single and multiple sequences, thus allowing you to plan and execute the tasks in an effective manner.

Feature details

As a part of this capability, you will be able to:

- Get a preview of all sequence steps for both single and multiple sequences associated with a record.

- Have a consistent experience to associate and execute manual activities for single and multiple sequences.



Feedback

Was this page helpful? Yes No

Sales execution and sales force automation

Article • 01/25/2024

ⓘ Important

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

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

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

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

Feedback

Was this page helpful? Yes No

Assign leads, opportunities to sellers based on individual capacity

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

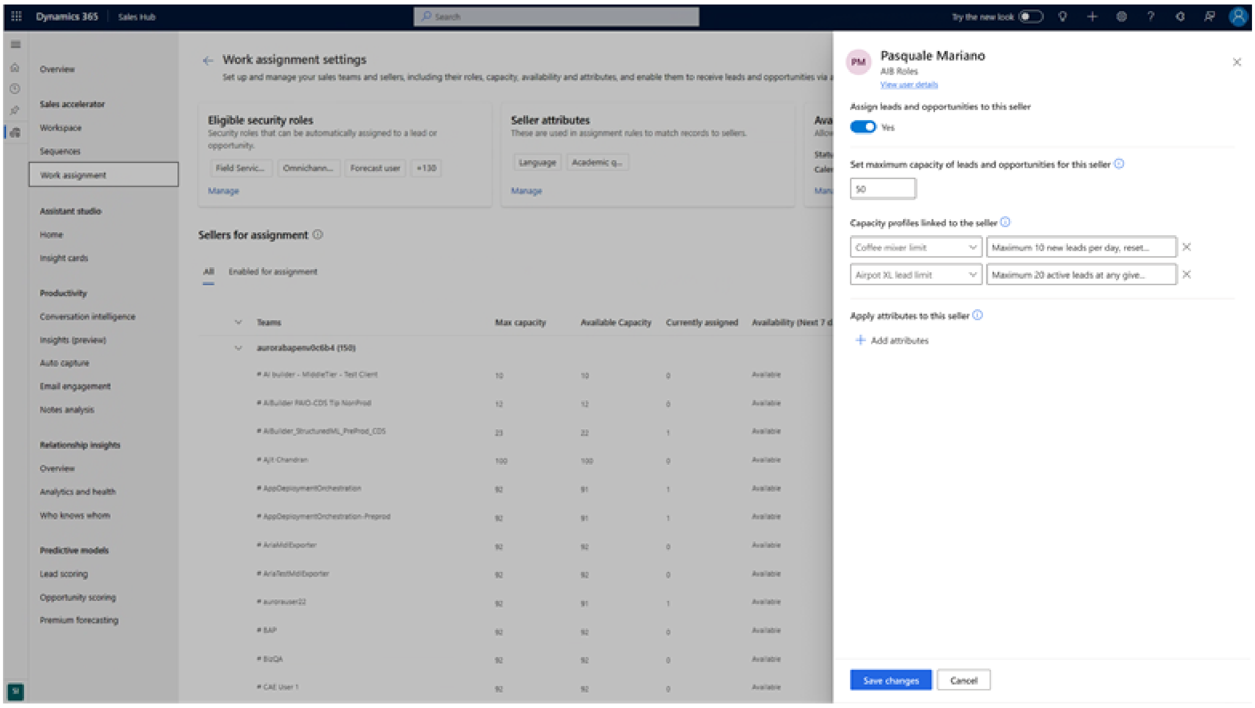
As a sales manager, you can ensure that your sellers are always working on the top-priority leads by enforcing their capacity limits as per business needs. With this feature, you can:

- Implement sales strategy effectively by automatically assigning the most important leads to your sellers.
- Maximize seller productivity by limiting the number of low-priority leads that can be owned by a seller.

Feature details

As an administrator or sales manager, you can:

- Define different capacity profiles based on any lead attributes.
- Apply capacity limits to sellers.
- Configure assignment rules to honor capacity limits or ignore based on your business need.
- Monitor unassigned leads due to lack of seller capacity and take necessary action.



Feedback

Was this page helpful? Yes No

Notify sellers and sales managers after assignment rule execution

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

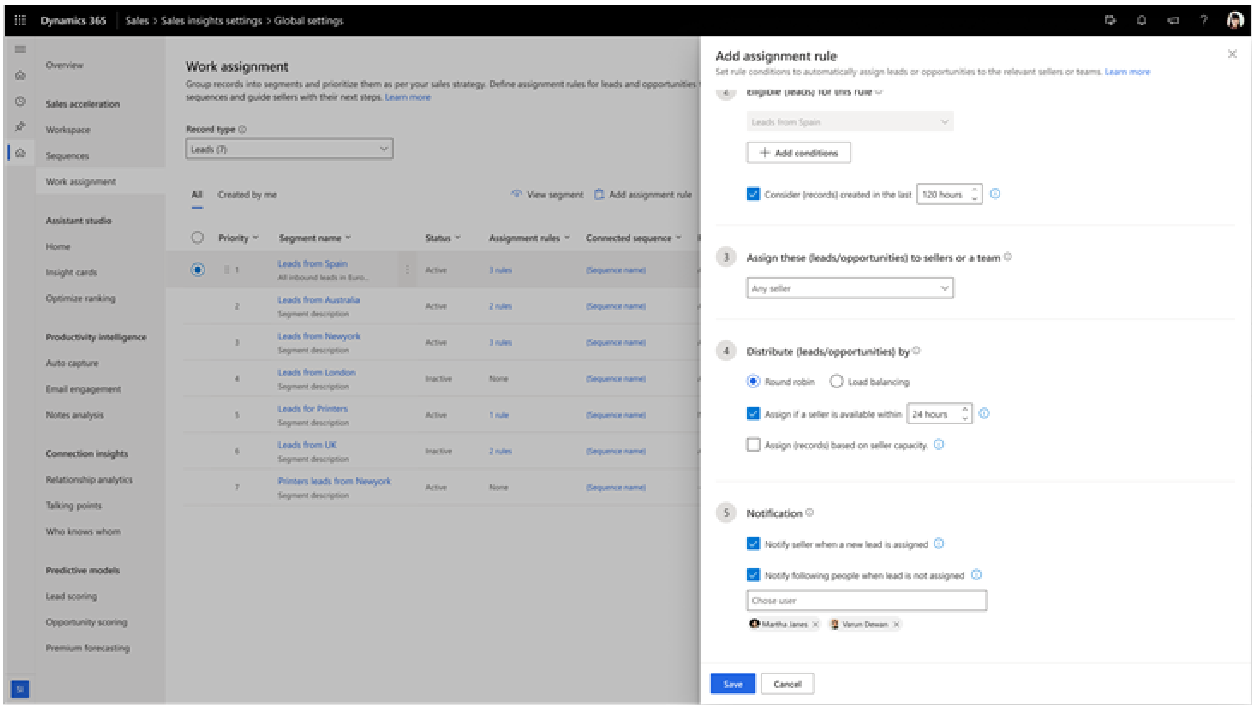
When a lead or an opportunity is unassigned, it introduces a delay in the sales process and may result in business loss. If you are a sales manager or admin, these notifications will allow you to quickly notice failures in seller assignments and take necessary action to find an eligible seller. The notification also guides you to troubleshoot reasons for failure and improve the effectiveness of automation.

If you are a seller who is busy working on existing leads and opportunities, then this notification will ensure you notice the new incoming lead or opportunity as soon as it is assigned to you. It allows you to prioritize the work accordingly.

Feature details

As a sales manager or admin, you can configure notification settings as:

- A global setting to enable seller notification on successful assignment.
- A rule-level configuration to send notifications and regular notifications to specific users about assignment failures.
- A rule-level configuration to notify sellers on successful assignment.



Feedback

Was this page helpful? Yes No

Seller experiences

Article • 01/25/2024

ⓘ Important

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

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

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

Feedback

Analyze opportunities better by grouping them and aggregating their values

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

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

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

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

Feature details

As a seller, you can:

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

Feedback

Was this page helpful? Yes No

Customize lead qualification process for a seamless experience

Article • 01/25/2024

ⓘ Important

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Expand table

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

Business value

Streamlined lead qualification in Dynamics 365 Sales empowers you to fine-tune the qualification process, aligning it precisely with your organization's unique needs and sales criteria. This agile configuration not only eliminates back-and-forth interactions but also saves valuable time, promoting swift, informed lead evaluation.

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

Feature details

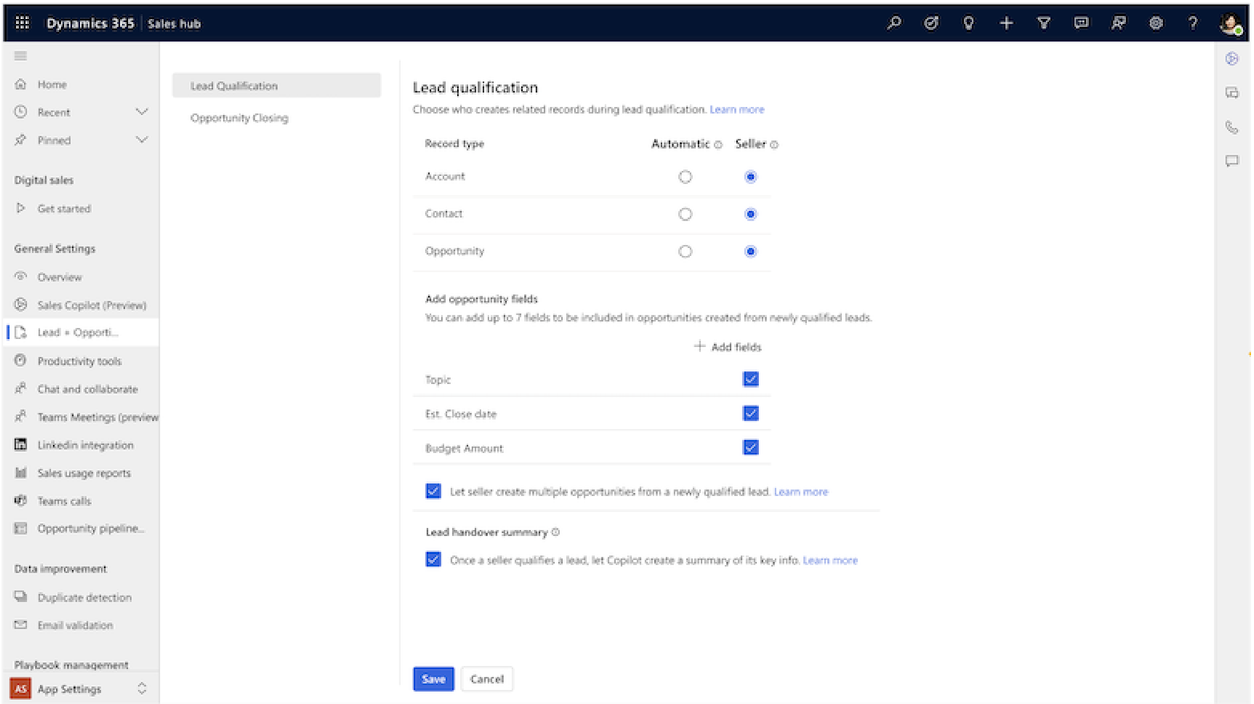
As an administrator, you can:

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

- Configure the creation of multiple opportunities from a single lead.
- Configure the fields to be prepopulated in the opportunity record based on the information in the lead.

As a seller, you can:

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



Feedback

Was this page helpful? Yes No

Experience the new look with a refreshed styling

Article • 01/25/2024

ⓘ Important

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Expand table

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

Business value

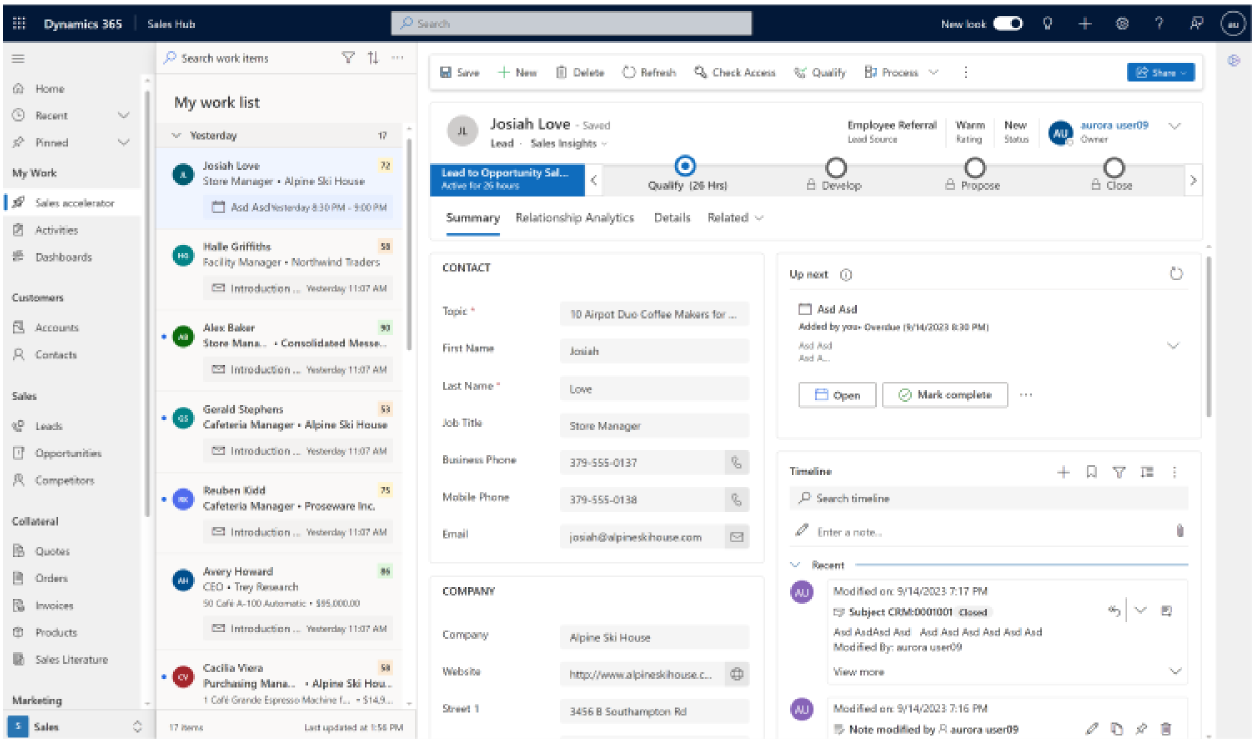
The new and refreshed look is aimed at enhancing your user experience. It includes updated styling, including drop shadows and brighter background colors to improve the look and usability of the system, resulting in increased user engagement and productivity. With the new fluent-based controls in forms, business process flows, and dialogs, you can work more efficiently and effectively within the system, enabling you to achieve better results in less time.

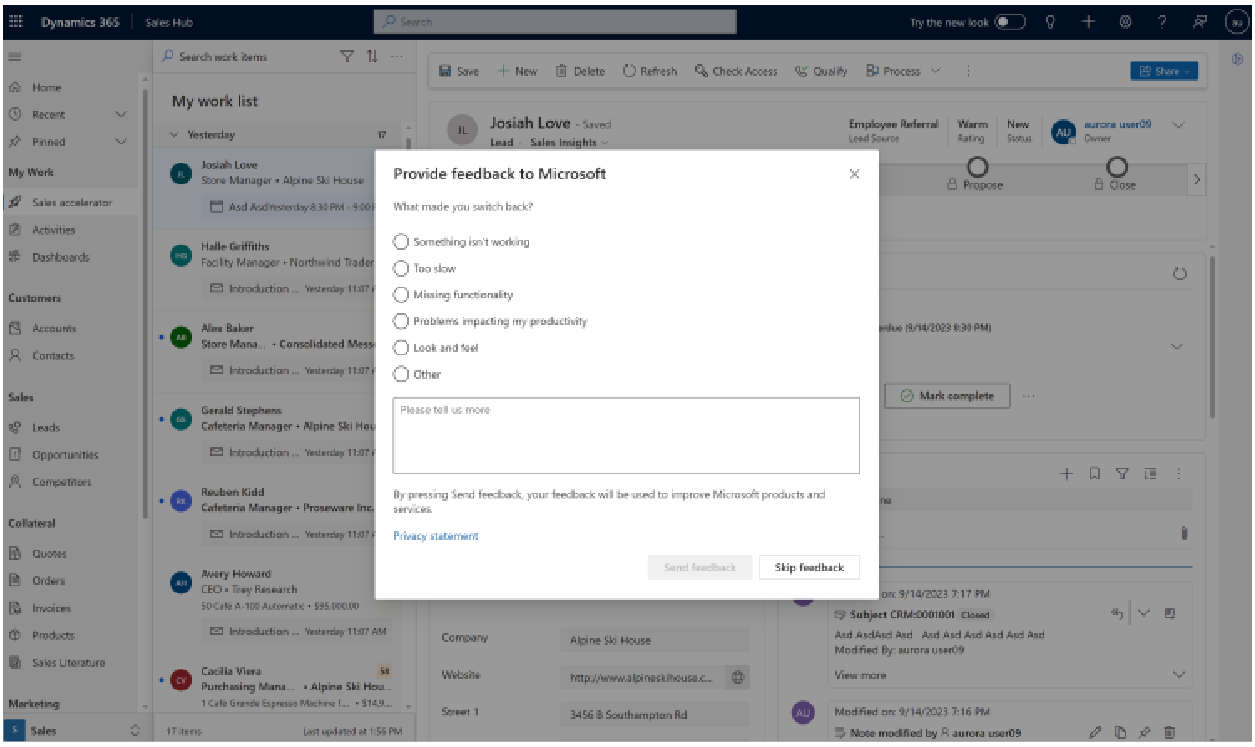
The new look will now be auto-enabled for existing apps. However, you'll have an option to turn that off if required. Overall, the new and refreshed user experience delivers better user experience with improved productivity, increased user satisfaction, and better decision-making. This results in significant benefits for businesses, including increased profitability and growth.

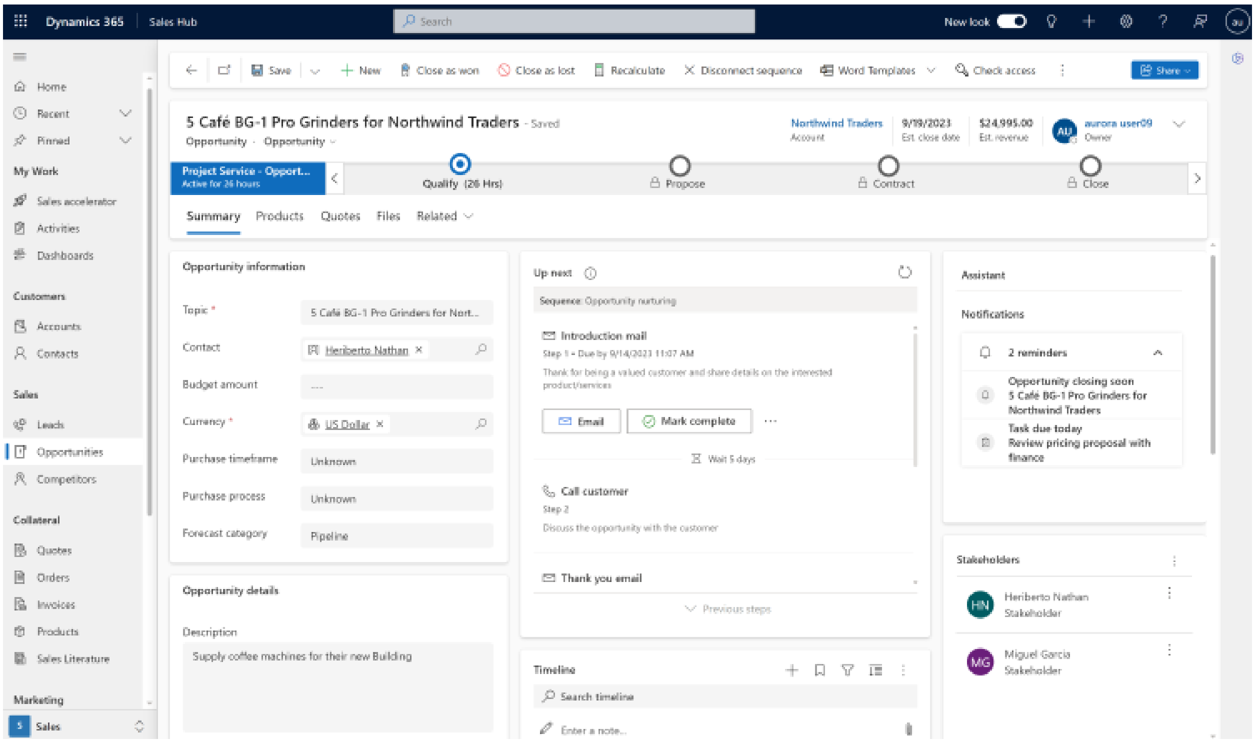
Feature details

As a sales professional, you can experience the new look by default as it'll be auto-enabled. You can turn it off to go back to the classic view. The following enhancements are available to you in the new look:

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






Dynamics 365
Sales Hub
5 Café BG-1 Pro Grinders for Northwind Traders - Saved
Opportunity · Opportunity
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Qualify (26 Hrs)
Propose
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Close
Summary
Products
Quotes
Files
Related
Opportunity information
Up next
Assistant
Stakeholders
Heriberto Nathan
Miguel Garcia
Timeline

Work efficiently on lead entity with the enhanced focused mode as default view

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

The focused view feature in Dynamics 365 Sales has generated significant interest within the community, as demonstrated by high adoption rates and positive feedback. Our primary objective is to enable users to complete their tasks efficiently without the need for frequent switching across various views.

With the latest update, focused view will include a command bar with essential functionalities and remember the user's preference, eliminating the need for repetitive selection of focused view. This allows you to complete your planned tasks without the need for multiple context switches.

Also, we are making focused view as the default view for the lead entity. This enables sellers to quickly navigate between records, conduct prospecting calls, update records, and convert leads with ease.

Feature details

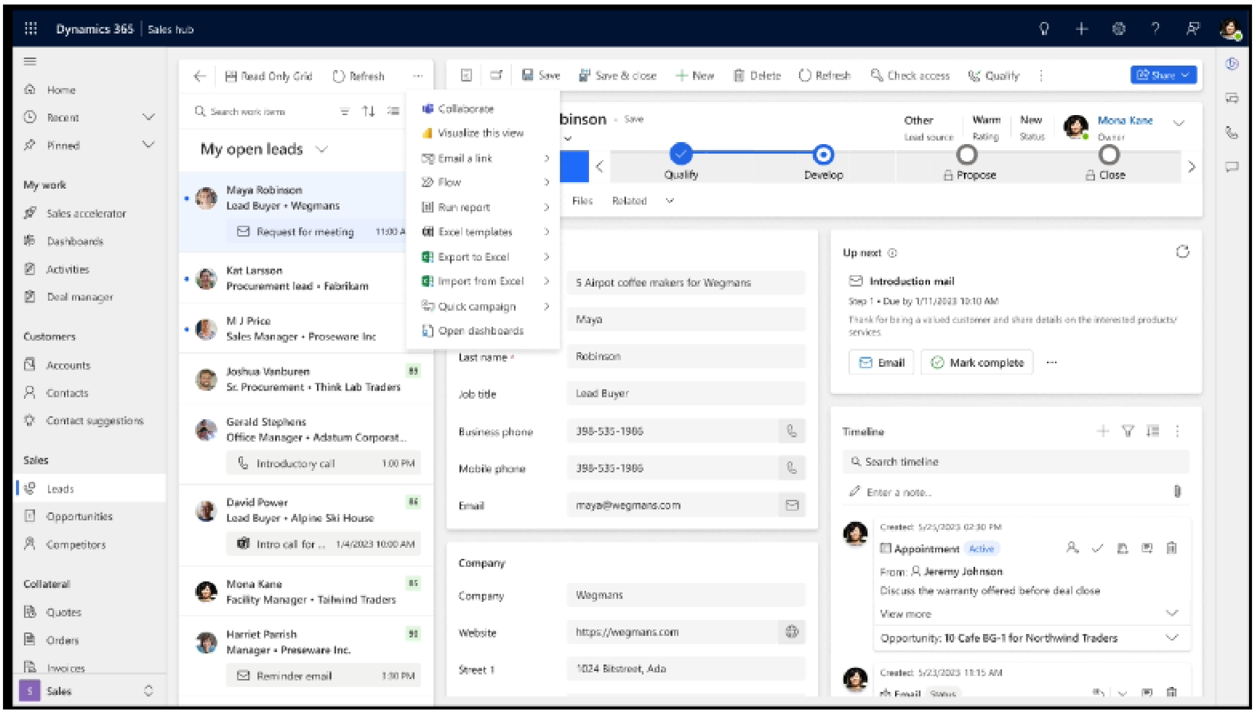
As a part of this update, sellers will be able to achieve the following:

- Use focused view as the default view for the lead entity.
- Select multiple records.
- Execute actions for both single and multiple records using the command bar.

- Remember user preference while using the focused view control.

As an admin, you will be able to:

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



Feedback

Was this page helpful? Yes No

Plan and prepare for Microsoft Copilot for Sales in 2024 release wave 1

Article • 01/25/2024

> ⓘ **Important**
>
> The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. In this article, you'll find the product overview and what's new and planned for **Microsoft Copilot for Sales**.

Overview

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

Investment areas

Cross-app experiences

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

Microsoft Outlook experiences

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

Microsoft Teams experiences

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

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

Check out the release plan

For application administrators

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

Features that must be enabled by application administrators
This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the

complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.

Get the most out of Microsoft Copilot for Sales

Expand table

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

Feedback

Was this page helpful? Yes No

What's new and planned for Microsoft Copilot for Sales

Article • 01/25/2024

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

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

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

Cross-app experiences

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

Expand table

Feature	Enabled for	Public preview	General availability
Highlight sales information such as budget and stakeholders in customer interactions	Users, automatically	Apr 2024	Apr 2024
Highlight buying intent and provide relevant next steps	Users, automatically	Apr 2024	Apr 2024
Suggest updates to CRM opportunity	Users, automatically	Apr 2024	May 2024
Detect customer asks and suggest responses	Users, automatically	May 2024	Jun 2024
Highlight customer issues and provide relevant next steps	Users, automatically	May 2024	Jun 2024
Highlight key insights about the situation of the deal	Users, automatically	Aug 2024	Sep 2024

Feature	Enabled for	Public preview	General availability
Generate profiles of key stakeholders	Users, automatically	Aug 2024	Sep 2024
Extract customer information to understand deal context	Users, automatically	Jun 2024	Jul 2024
Analyze aggregated sales activities	Users, automatically	Apr 2024	Apr 2024
Integrate Copilot for Sales with Copilot in Microsoft Word	Users, automatically	Apr 2024	Apr 2024
Extend Microsoft Copilot for Sales	Users, automatically	Apr 2024	Jun 2024

Microsoft Outlook experiences

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

Expand table

Feature	Enabled for	Public preview	General availability
Integrate Copilot for Sales with Outlook email drafts	Users, automatically	Apr 2024	Apr 2024
Integrate Copilot for Sales with Outlook email summaries	Users, automatically	Apr 2024	Apr 2024

Microsoft Teams experiences

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

Expand table

Feature	Enabled for	Public preview	General availability
Integrate Copilot for Sales with Copilot in	Users,	Apr 2024	Apr 2024

Feature	Enabled for	Public preview	General availability
Microsoft Teams chat experience	automatically		
Integrate Copilot for Sales with Teams meeting summaries	Users, automatically	Apr 2024	Apr 2024
Collaborate with sales team from Microsoft Teams group chats	Users, automatically	Apr 2024	Jun 2024
Collaborate with sales teams using AI-powered planner tasks	Users, automatically	Feb 2024	Apr 2024

You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ .

Description of **Enabled for** column values:

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

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

Feedback

Was this page helpful? Yes No

Cross-app experiences

Article • 01/25/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Analyze aggregated sales activities

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

This capability offers sellers and sales managers analysis and access to customer conversation and email data. This empowers you to make informed decisions, optimize sales processes, efficiently coach team members, and manage pipelines more effectively. It enhances customer relationship management, provides a competitive edge, tracks performance, optimizes resource allocation, ensures compliance, and fosters a data-driven culture, ultimately driving revenue growth and customer satisfaction.

Feature details

Introducing an enhanced feature seamlessly integrated into Microsoft 365 chat, Copilot for Sales add-in in Outlook, and Copilot for Sales app in Teams. To leverage this functionality, ensure Copilot for Sales and Copilot for Microsoft 365 are enabled. This update focuses on addressing users' inquiries arising from customer conversations, encompassing trending topics, areas with negative sentiment, and providing a comprehensive overview of budget discussions from past interactions. Elevate your customer engagement by gaining valuable insights and fostering informed decision-making with this latest release.

Feedback

Was this page helpful? Yes No

Detect customer asks and suggest responses

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	May 2024	Jun 2024

Business value

Copilot for Sales leverages AI to identify disparities between what customers are requesting in emails, meetings, or documents and what is documented in CRM and other data sources. This capability enables your sales and customer service teams to bridge these gaps more effectively, ensuring that customer expectations are met or exceeded. By proactively addressing customer needs and aligning resources, businesses can enhance customer satisfaction, improve communication, and increase the likelihood of successful sales and service interactions. This, in turn, contributes to customer loyalty, revenue growth, and a stronger competitive edge in the market.

Feature details

Customer asks are automatically detected from emails and conversations you had with your customers and corresponding responses are suggested based on analysis done using internal sources such as CRM and SharePoint folders.

Suggested responses to customer asks are displayed in Microsoft 365 chat, Copilot for Sales add-in in Outlook, and Copilot for Sales app in Teams. You must enable Copilot for Sales and Copilot for Microsoft 365 in your environment to use this feature.

Feedback

Was this page helpful? Yes No

Extend Microsoft Copilot for Sales

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2024	Jun 2024

Business value

As a customer, you can extend Copilot for Sales to meet your unique sales organization needs. As a partner, you can extend Copilot for Sales aligned with the broader Microsoft Copilot extensibility story, meaning that you can build skills or plug-ins once and your efforts can be leveraged by customers across all Copilot surfaces both in Dynamics 365 and Microsoft 365.

Feature details

As a customer and partner, you can extend additional Copilot for Sales experiences in Outlook and Teams through Power Platform connectors allowing data and actions to be integrated into Copilot for Sales experiences like the Outlook side pane, Teams side pane during meetings, and adaptive cards.

This capability is enabled in Microsoft Teams, Microsoft Outlook, and Microsoft Copilot for Microsoft 365.

Feedback

Was this page helpful? Yes No

Extract customer information to understand deal context

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

This capability equips you with a deep understanding of the customer's situation, enabling them to make informed decisions and tailor their sales strategies effectively. By offering valuable insights into the customer's strengths, weaknesses, opportunities, and threats, you can optimize their approach, mitigate risks, and capitalize on opportunities, ultimately leading to improved sales performance, higher conversion rates, and enhanced customer relationships. This feature supports better decision-making and contributes to revenue growth and customer satisfaction.

Feature details

Copilot for Sales uses data open sources as well as internal sources such as CRM system to perform company analysis. It intelligently focuses on the relevant solution for the company and provides you with concise and to-the-point information that helps you in gaining effective direction during customer activities.

This feature is displayed in Microsoft 365 chat, Copilot for Sales add-in in Outlook, and Copilot for Sales app in Teams. You must enable Copilot for Sales and Copilot for Microsoft 365 in your environment to use this feature.

Feedback

Was this page helpful? Yes No

Generate profiles of key stakeholders

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Aug 2024	Sep 2024

Business value

This functionality empowers you and your sales teams with a comprehensive understanding of their customers, including their roles, preferences, and pain points. By profiling stakeholders, you can engage in more personalized and effective interactions, tailor your messaging, and build stronger relationships. This feature enhances communication, fosters trust, and ultimately contributes to higher conversion rates, increased customer satisfaction, and improved sales success, which in turn drives revenue growth and long-term customer loyalty.

Feature details

Copilot for Sales generates a concise profile of key stakeholders in customer activities based on public data sources and internal data sources such as CRM and SharePoint folders.

This feature is displayed in Microsoft 365 chat, Copilot for Sales add-in in Outlook, and Copilot for Sales app in Teams. You must enable Copilot for Sales and Copilot for Microsoft 365 in your environment to use this feature.

Feedback

Highlight buying intent and provide relevant next steps

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

This capability streamlines the sales process, allowing you and your teams to promptly respond with tailored information, quotes, or product details when customers express interest. As a result, it enhances sales efficiency, boosts conversion rates, and improves customer satisfaction by providing more personalized and timely interactions, ultimately driving revenue growth and fostering stronger client relationships.

Feature details

Meeting and email summaries highlight buying intentions mentioned by your customers and provide relevant next steps. The generated email content suggests that you solicit the customer for relevant information in case it’s missing.

Meeting and email summaries are displayed in Microsoft 365 chat, Copilot for Sales add-in in Outlook, and Copilot for Sales app in Teams.

You must enable Copilot for Sales and Copilot for Microsoft 365 in your environment to see meeting and email summaries.

Feedback

Highlight customer issues and provide relevant next steps

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	May 2024	Jun 2024

Business value

This capability enables businesses to swiftly identify and address customer concerns, ensuring a proactive approach to customer support. By promptly resolving issues and providing solutions, you and your team can enhance customer satisfaction, reduce churn, and build trust, ultimately leading to improved brand reputation and long-term customer loyalty, which in turn can positively impact revenue and profitability.

Feature details

Customer issues are automatically detected, and relevant action items are suggested for you based on analysis done using internal sources such as CRM and SharePoint folders.

This feature is displayed in Microsoft 365 chat, Copilot for Sales add-in in Outlook, and Copilot for Sales app in Teams. You must enable Copilot for Sales and Copilot for Microsoft 365 in your environment to use this feature.

Feedback

Was this page helpful? Yes No

Highlight key insights about the situation of the deal

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Aug 2024	Sep 2024

Business value

This capability empowers you and your teams with a deeper understanding of the customer's needs and pain points, allowing for more targeted and effective sales strategies. By highlighting critical deal insights, you can tailor your approach, address customer concerns more precisely, and ultimately increase the likelihood of closing deals. This feature contributes to improved sales efficiency, higher conversion rates, and enhanced customer satisfaction, driving overall revenue growth and sales success.

Feature details

Copilot for Sales provides key insights about the state of the deal and helps you with suggestions regarding what information you should bring to the customer.

This feature is displayed in Microsoft 365 chat, Copilot for Sales add-in in Outlook, and Copilot for Sales app in Teams. You must enable Copilot for Sales and Copilot for Microsoft 365 in your environment to use this feature.

Feedback

Highlight sales information such as budget and stakeholders in customer interactions

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

This capability streamlines the process of understanding client requirements and project constraints, enabling you and your teams to respond with precise next steps and tailored solutions. It enhances communication, reduces misunderstandings, and promotes more efficient project planning and execution, ultimately leading to improved client satisfaction, stronger client relationships, and increased project success rates, all of which contribute to business growth and reputation.

Feature details

Meeting and email summaries highlight budget, stakeholders, customer needs, and timeline mentioned by your customer and provide relevant next steps. The generated email content suggests that you solicit the customer for relevant information in case it's missing.

Meeting and email summaries are displayed in Microsoft 365 chat, Copilot for Sales add-in in Outlook, and Copilot for Sales app in Teams.

You must enable Copilot for Sales and Copilot for Microsoft 365 in your environment to see meeting and email summaries.

Feedback

Was this page helpful? Yes No

Integrate Copilot for Sales with Copilot in Microsoft Word

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

This capability seamlessly integrates Copilot for Sales insights into the meeting preparation process. By auto-generating meeting preparation documents with sections for participant and stakeholder information, opportunity summaries, relevant email summaries, previous meeting summaries, open tasks, and open cases, this feature optimizes the preparation phase for you.

This deep integration with Copilot in Microsoft Word ensures that you have quick and easy access to all the necessary information, streamlining your pre-meeting efforts and enabling you to engage more effectively with clients. As a result, this feature enhances productivity, improves customer interactions, and ultimately drives better sales outcomes, reinforcing the role of Copilot for Sales as an indispensable tool in the Copilot in Microsoft Word experience.

Feature details

You can use Copilot in Microsoft Word, powered by Copilot for Sales, to generate a sales meeting preparation document containing following sections:

- Participants and other stakeholders' information
- Opportunity summary

- Relevant email summaries
- Previous meeting summary
- Open tasks for relevant opportunity
- Open cases for relevant account

To use this capability, Copilot for Sales must be enabled in your environment, and you must have a Microsoft 365 license.

Feedback

Was this page helpful? Yes No

Suggest updates to CRM opportunity

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2024	May 2024

Business value

Copilot for Sales harnesses the power of AI to detect and recommend the relevant updates to opportunity records, including stage, close date, and estimated revenue, directly from emails or meetings. This functionality empowers you and your sales teams with guidance, ensuring that the CRM data remains accurate and up to date. By streamlining the opportunity management process, it enhances sales efficiency, improves forecasting accuracy, and increases the likelihood of closing deals. Ultimately, this feature leads to higher sales effectiveness, revenue growth, and a more streamlined and data-driven sales operation.

Feature details

Suggested updates to the CRM opportunity are displayed based on emails or conversations you had with your customers. The suggested updates help you keep the CRM up to date with information such as opportunity estimated closed date, estimated revenue, and stage.

The suggested updates are displayed in Microsoft 365 chat, Copilot for Sales add-in in Outlook, and Copilot for Sales app in Teams. You must enable Copilot for Sales and Copilot for Microsoft 365 in your environment to see suggested updates.

Feedback

Was this page helpful? Yes No

Microsoft Outlook experiences

Article • 01/25/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Integrate Copilot for Sales with Outlook email drafts

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

This capability seamlessly integrates Copilot for Sales into Copilot in Microsoft Outlook to provide dynamic, context-aware replies. This integration not only streamlines your email communication process but also adds significant sales value. By detecting sales situations and suggesting replies that solicit essential information critical to advancing the deal, this feature helps you enhance sales productivity and efficiency. It ensures that you engage in more targeted and effective conversations, ultimately increasing the likelihood of closing deals and driving revenue growth.

The deep integration with Copilot in Microsoft Outlook enhances the user experience and reinforces the value of Copilot for Sales as an indispensable tool for sales teams, helping them achieve better results and improved customer relationships.

Feature details

You can use Copilot in Microsoft Outlook, powered by Copilot for Sales, to generate email content using sales information from the CRM system and considering the specific sales situation that was detected. To use this capability, Copilot for Sales must be enabled in your environment, and you must have a Microsoft 365 license.

Feedback

Was this page helpful? Yes No

Integrate Copilot for Sales with Outlook email summaries

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

This feature holds substantial business value by enriching email summaries with critical sales insights like BANT (Budget, Authority, Need, Timing), issue detection, buying intent signals, and the ability to save valuable information directly to CRM systems. This integration empowers you with a comprehensive view of your email communications, enabling you to quickly identify high-potential leads, prioritize actions, and seamlessly transfer vital data to CRM for further nurturing.

It streamlines the sales process, increases efficiency, and ensures that you have the information you need at your fingertips to make informed decisions and drive successful deals. The deep integration with Copilot in Microsoft Outlook enhances user adoption and underscores the indispensable role of Copilot for Sales in delivering tangible sales outcomes and improved customer relationships.

Feature details

You can use Copilot in Microsoft Outlook, powered by Copilot for Sales, to summarize long email threads using sales information from the CRM system and considering the specific sales situation that was detected. To use this capability, Copilot for Sales must be enabled in your environment, and you must have a Microsoft 365 license.

Feedback

Was this page helpful? Yes No

Microsoft Teams experiences

Article • 01/25/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Collaborate with sales team from Microsoft Teams group chats

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2024	Jun 2024

Business value

As a seller, you engage with your colleagues in group chats and channels depending on the type of conversation—opting for channels for formal discussions and group chats for more casual interactions.

Regardless of the mode of communication, your ultimate goal remains constant. You seek to bring the right people and information into one place to jump-start collaboration.

With this experience, we enable you to effortlessly share sales-specific CRM information, email summaries, and opportunity summaries within group chats. This ensures that all team members have access to the necessary information to collaborate effectively.

Feature details

As a seller, you can:

- Share sales-specific information such as email summaries and CRM information from Outlook in group chats.
- Use the Copilot for Sales bot to generate opportunity summaries that have the latest opportunity information.

Feedback

Was this page helpful? Yes No

Integrate Copilot for Sales with Copilot in Microsoft Teams chat experience

Article • 01/25/2024

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

Expand table

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

Business value

Being deeply integrated into Copilot in Microsoft Teams, this feature delivers substantial business value by enhancing collaboration during meetings. It allows you to effortlessly access opportunity summaries and competitor information through both free text prompts and proactive pills. The real-time detection of brand mentions further adds to its value by ensuring that competitor insights are surfaced precisely when needed.

This integration empowers sales and collaboration teams to have more productive and informed discussions, enabling them to seize opportunities and tackle competition effectively. By providing immediate access to critical data within the Teams environment, it streamlines decision-making, enhances teamwork, and ultimately contributes to improved sales performance, revenue growth, and a more seamless user experience with Copilot for Sales as a pivotal tool in the Teams ecosystem.

Feature details

You can use Copilot in Microsoft Teams, powered by Copilot for Sales, to access opportunity summaries and competitor information through both free text prompts and proactive suggested prompts that are displayed automatically when a relevant name is detected in real time. To use this capability, Copilot for Sales must be enabled in your environment, and you must have a Microsoft 365 license.

Feedback

Was this page helpful? Yes No

Integrate Copilot for Sales with Teams meeting summaries

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Being deeply integrated into the Teams meeting recap experience, this feature offers significant business value by enriching post-meeting summaries. By including action items with direct task creation in CRM systems, Copilot for Sales streamlines follow-up and task management, ensuring that important leads and opportunities are not overlooked. Additionally, the integration of sales conversational KPIs, keywords, and speaker sentiments provides valuable insights into meeting dynamics, enabling you and your teams to evaluate engagement, identify key points, and adapt strategies accordingly.

This deep integration with the Teams meeting recap experience enhances collaboration, drives better decision-making, and ultimately leads to improved sales performance, stronger customer relationships, and a more efficient use of Copilot for Sales as an essential tool within the Teams ecosystem.

Feature details

You can access the following capabilities from the Teams meeting summary page:

- Action items and task creation in CRM
- Sales conversational KPI for all participants

- Sales keywords and questions
- Speaker's sentiments

To use this capability, Copilot for Sales must be enabled in your environment, and you must have a Microsoft Teams premium license.

Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Customer Service in 2024 release wave 1

Article • 01/25/2024

ⓘ **Important**

The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Service**.

Overview

https://aka.ms/ReleaseHighlight/2024W1/Service

Dynamics 365 Customer Service is a cloud-based solution that uses generative AI across the service journey to help businesses deliver fast, personalized, and consistent service across multiple channels. Advanced routing, case management, knowledge management, Copilot, and embedded Microsoft Teams capabilities maximize agent productivity, while simplified administration and integrated analytics optimize contact center operations. The omnichannel capabilities enable organizations to provide an omnichannel experience to their customers with chat, voice, social, and business messaging channels.

In 2024 release wave 1, we're focused on the following:

- Infusing generative AI into customer, agent, and supervisor experiences.
- Enhancing voice, messaging, and email channels.
- Extending Copilot capabilities.

Investment areas

Administrator experiences

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

Agent experiences

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

Copilot and AI innovation

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

Omnichannel

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

Unified routing

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

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

Check out the release plan

For application administrators

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

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

Get the most out of Customer Service

Expand table

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

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Customer Service

Article • 01/25/2024

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

- For a list of the previous wave's release plans, go to 2023 release wave 2 plan.

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

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

Administrator experiences

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Check configuration health in admin center	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2024
Create multiple cases from email sent to multiple boxes	Users by admins, makers, or analysts	-	-	Apr 2024

Agent experiences

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Use enhanced attachment experience while composing email	Users, automatically	-	Feb 2024	Apr 2024
Forecast case volumes daily and at 15-minute intervals	Users by admins, makers, or analysts	✔ Apr 28, 2023	-	Jun 2024

Copilot and AI innovation

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Get relevant results with filters for Copilot	Users by admins, makers, or analysts	Apr 2024	-	To be announced
Validate Copilot responses faster with more transparency	Users by admins, makers, or analysts	Apr 2024	-	To be announced
Get automatic prompts from Copilot	Users by admins, makers, or analysts	Apr 2024	-	To be announced

Omnichannel

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
See enhancements in call transfers to external numbers	Users by admins, makers, or analysts	-	-	Apr 2024

Feature	Enabled for	Public preview	Early access*	General availability
Use skills to find agents for consult, transfer scenarios	Users, automatically	-	Feb 2024	Apr 2024
Explore enhancements to outbound dialing	Users, automatically	-	Feb 2024	Apr 2024
Support voice channel in Government Community Cloud Moderate	Users by admins, makers, or analysts	Apr 2024	-	Apr 2024
Mask sensitive data and prevent unauthorized access	Users by admins, makers, or analysts	Apr 2024	-	Sep 2024
Get FedRAMP certified for new features	Users, automatically	-	Feb 2024	Apr 2024
Rate call quality and provide feedback on improvements	Users, automatically	-	Feb 2024	Apr 2024
Test call, microphone, speakers before and during calls	Users, automatically	-	Feb 2024	Apr 2024
Improve productivity by converting voicemail to case	Users by admins, makers, or analysts	-	-	May 2024
Transfer calls to Teams users through VOIP	Users by admins, makers, or analysts	-	-	Apr 2024

Unified routing

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Add up to 200 route-to-queue rules in a workstream	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2024
Use overflow for lengthy wait times for work items	Admins, makers, marketers, or analysts, automatically	Feb 2024	-	Apr 2024

Feature	Enabled for	Public preview	Early access*	General availability
Update queue memberships for agents in real time	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2024
Prioritize existing conversations in asynchronous channels	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2024
Use first-in-first-out order in custom prioritization	Admins, makers, marketers, or analysts, automatically	-	-	Jul 2024

- You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Feedback

Was this page helpful? Yes No

Administrator experiences

Article • 01/25/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Check configuration health in admin center

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

Released in the last wave, the contact center health check allows administrators to run a comprehensive check on their configurations and identify any issues or gaps. In this release, we're adding more checks for channels, bots, service level agreements, and automatic record creation. These checks help administrators optimize their contact center performance and increase customer satisfaction.

Feedback

Create multiple cases from email sent to multiple boxes

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Creating corresponding cases for all mailboxes to which an email is sent helps agents have full visibility into customer issues. The appropriate team gets the full context and can independently respond to customers' issues, without having to transfer the case to the relevant queue. This avoids delays in sending a first response to customers, improves average case handling time, and avoids service level agreement violations.

Feature details

Here are the key capabilities of this feature:

- Email sent to multiple queue-enabled mailboxes (irrespective of To, Cc, Bcc) gets converted into multiple cases (one case corresponding to each queue enabled mailbox).
- Email gets associated to each case and is shown on the case timeline.
- Agents belonging to any of the queues (to which the email was sent to) can respond to the customer independently from any case using the case timeline.
- Any reply from the customer to the original email gets associated to the case created in response to the original email, instead of creating a new case.
- If a customer replies to the original email while adding a new queue-enabled mailbox, a case gets created for the new mailbox and the replied email gets

associated with the new case in addition to the existing cases.

Feedback

Was this page helpful? Yes No

Agent experiences

Article • 01/25/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Use enhanced attachment experience while composing email

Article • 01/25/2024

ⓘ Important

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

Expand table

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

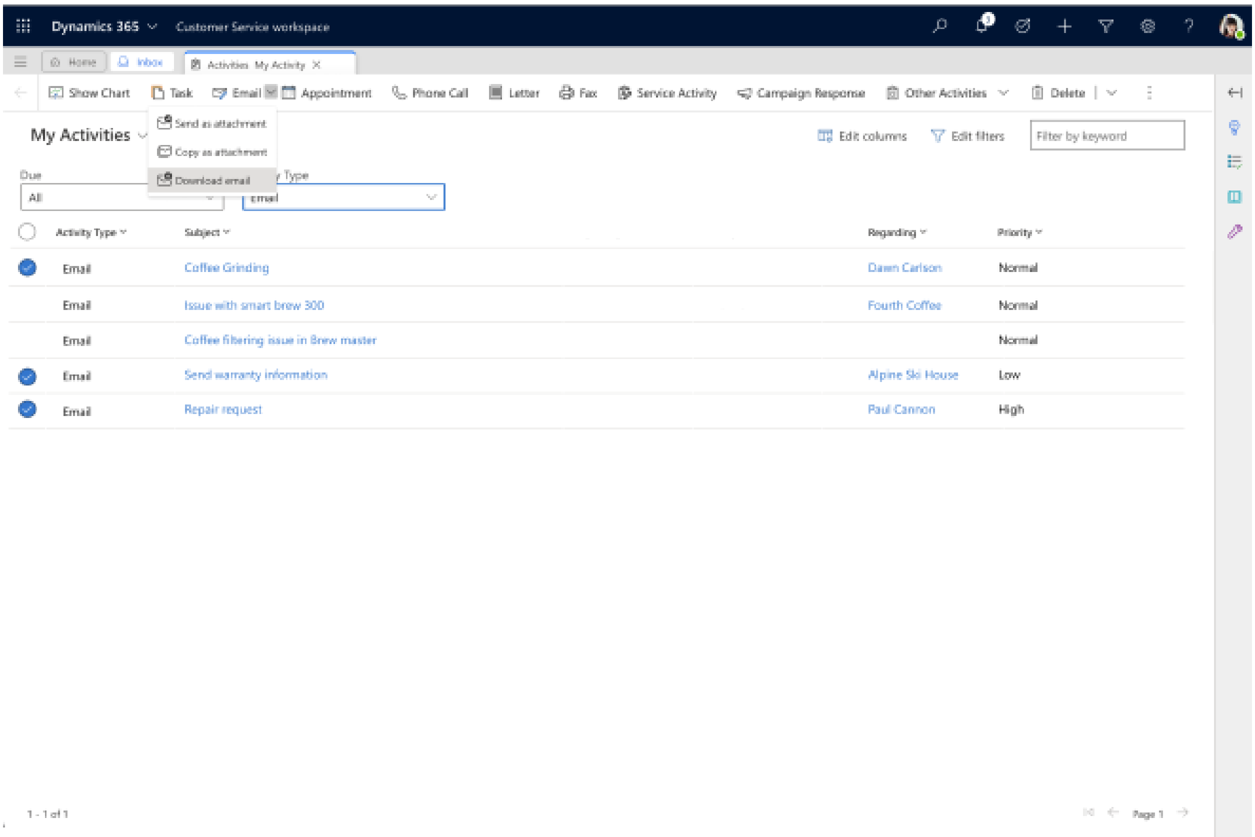
Business value

The enhanced attachment experience allows agents to drag and drop attachments in emails, saving time and increasing their productivity. A reminder is sent to agents if they forget to include an attachment mentioned in the email. Agents can copy attachments from one email to another, allowing them to reuse attachments from older emails. The improved user experience allows agents to perform bulk actions easily. Attachment sizes are also displayed in the nearest appropriate units.

Feature details

The key enhancements to the attachment experience are as follows:

- Add attachments by dragging and dropping them to the email.
- Copy attachments from one or more emails to and paste it another email.
- Bulk download and deletion of attachments.
- Attachment size displayed in the appropriate units.
- Toggle between the tile and grid views.
- Export attachments details to Excel.
- Reminder to add attachments if agents miss attaching files but have mentioned it in their email.
- Add attachments before saving an email.



Feedback

Was this page helpful? Yes No

Enhancements in email composition experience for agents

Article • 03/06/2024

ⓘ Important

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

Business value

The enhanced recipient experience allows agents to search for customers with any part of their name, saving time and increasing agent productivity. The new experience also offers improved user experience where recipients can be configured to display email addresses along with how their names appear in records.

Feature details

When agents compose emails, the following key capabilities are now available:

- Drag and drop recipients between To, CC, and BCC fields.
- Show recipient's email address along with names.
- Easily resolve email addresses to Dynamics 365 records.
- See the out-of-office status that's set by recipients.

Feedback

Was this page helpful? Yes No

Forecast case volumes daily and at 15-minute intervals

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Apr 28, 2023	-	Jun 2024

Business value

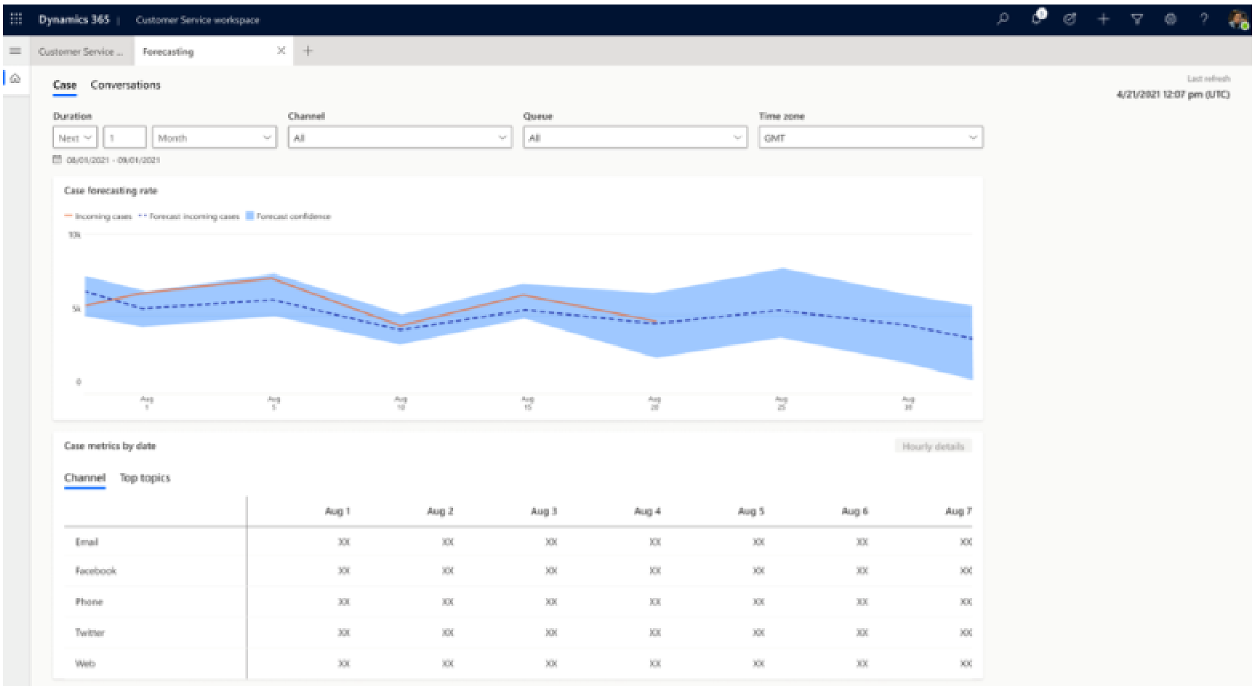
Customer service managers must ensure they have enough agents available to resolve customer cases. Overcapacity results in higher costs, while undercapacity results in longer customer wait times, which can reduce customer satisfaction. In addition to daily case volume forecasting, we now provide more granular forecasting at 15-minute intervals so that managers can perform agent planning and scheduling with higher precision.

Feature details

Case volume forecasting was released with the following set of capabilities:

- Forecast case volumes daily.
- Visualize forecasted volumes daily, weekly, and monthly basis, for up to six months.
- Slice forecasted volumes by channel and queue.
- Automatically detect seasonality from historical traffic to help customer service managers accurately predict case volumes during special, seasonal events.

Now, customer service managers can also forecast case volumes at 15-minute intervals from historical data.



Geographic areas

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

- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
- South America
- Canada
- India
- Japan
- France
- Korea
- China
- US DoD

See also

Forecast agent, case, and conversation volumes (docs)

Feedback

Was this page helpful? Yes No

Forecast volume, agent demand for customer interactions

Article • 03/06/2024

ⓘ Important

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

Business value

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

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

Feature details

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

Agents for conversations (voice and digital channels):

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

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

Volume forecasting:

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

See also

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

Feedback

Was this page helpful? Yes No

Copilot and AI innovation

Article • 01/25/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Get relevant results with filters for Copilot

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Filtering for Copilot in Dynamics 365 Customer Service ensures your customer service representatives get the best, most relevant results, saving agents time and improving customer satisfaction. When you use the filtering, your agents will receive the most useful and pertinent information.

Feature details

Filtering results based on knowledge for the appropriate business lines or customer information ensures that Copilot generates relevant and precise responses. This saves agents time and improves customer satisfaction.

Feedback

Was this page helpful? Yes No

Omnichannel

Article • 01/25/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Explore enhancements to outbound dialing

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Placing a call has become even easier with the ability to search for a customer in the outbound dialer, select a default outbound profile, and open customer and conversation records right from the call history.

Feature details

The enhanced outbound dialing experience enables you to:

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

Feedback

Was this page helpful? Yes No

Get FedRAMP certified for new features

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Dynamics 365 Customer Service is an existing product portfolio that is already Federal Risk and Authorization Management Program (FedRAMP) authorized for Government Community Cloud (GCC) Moderate, in addition to meeting many other compliance standards. When a service that is already FedRAMP authorized makes architectural changes, it again goes through the process of evidence collection, auditing, and incremental reauthorization.

Feature details

We are submitting FedRAMP certifications for the internal and external components that are added in the end-to-end omnichannel stack in Dynamics 365 Customer Service. The FedRAMP compliance will allow customers in government community clouds to use the newly integrated features. This will be FedRAMP High certification on GCC Moderate.

Feedback

Was this page helpful? Yes No

Mask sensitive data and prevent unauthorized access

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

To safeguard sensitive data isn't just a necessity, but a mandate for contact centers. As the custodians of customer trust, contact centers are pioneering the use of cutting-edge methods to protect customer data at every stage—acquisition, transmission, and storage. Digital Contact Center Platform steps up to this challenge with its sensitive data masking feature.

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

Feature details

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

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

Feedback

Was this page helpful? Yes No

Rate call quality and provide feedback on improvements

Article • 01/25/2024

ⓘ Important

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

Expand table

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

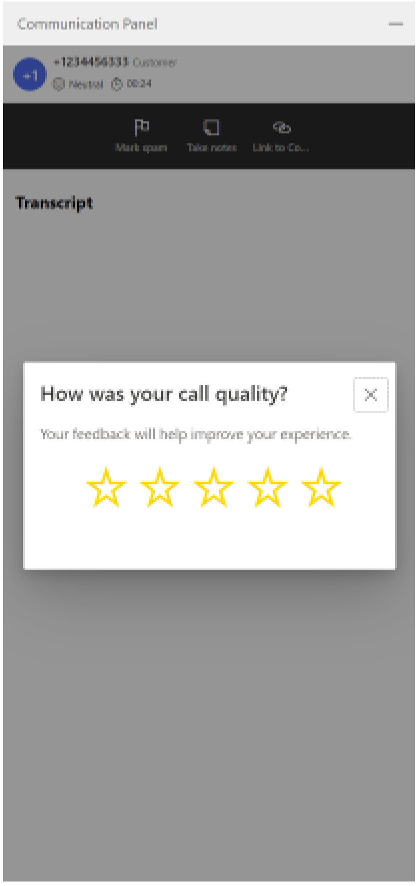
Business value

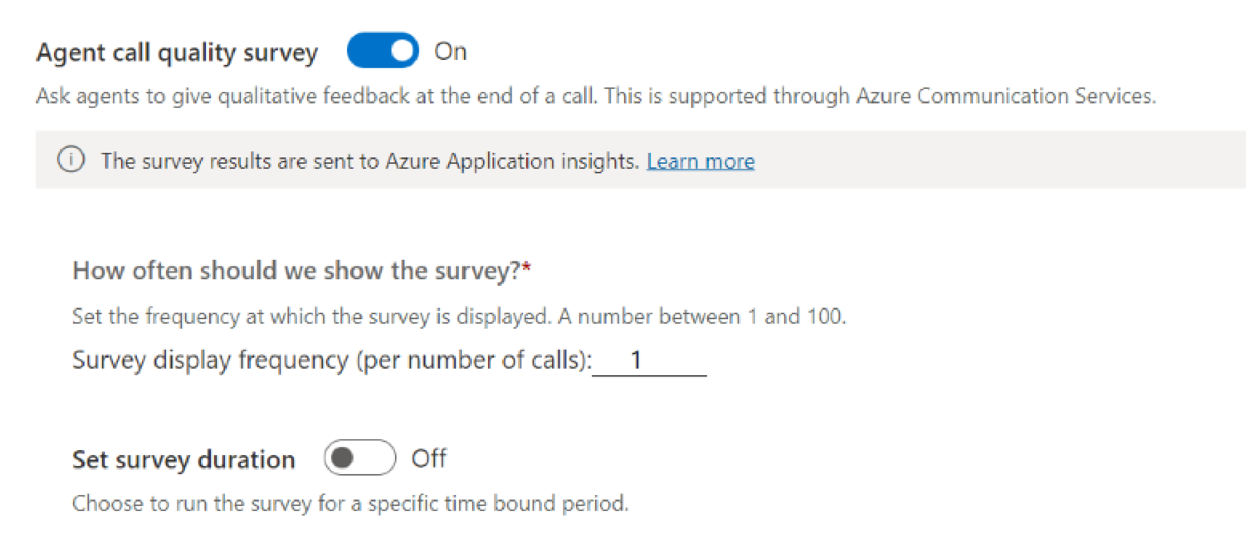
Feedback on call quality is automatically triggered after a configurable percentage of calls and solicits user feedback. This mechanism empowers you to identify and rectify any issues affecting customer experience that might be overlooked by traditional service metrics. By addressing potential pain points promptly, you can elevate call quality, bolster customer satisfaction, and enhance your overall business performance.

Feature details

The end of call rating will enable you to:

- Leave a star rating at the end of a configurable percentage of calls, where 5 is considered excellent, 4 is good, 3 is okay, 2 is poor, and 1 is bad.
- For ratings of 4 and below, you can share what could have been better.
- Admins can choose to configure this rating to show up after every 1 call to 100 calls.
- Admins can also choose to run this survey for a specific time bound period.





Feedback

Was this page helpful? Yes No

See enhancements in call transfers to external numbers

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

For business compliance, the call transfer to an external number is now a one-step operation and recording and transcription will stop immediately after the call is transferred.

Feature details

In this release, the following enhancements will be available for call transfers to external numbers:

- Transfers will always be done in one step. Agents will be dropped from the call immediately.
- Transfers will have the option to be bridged or blind. Bridged is in the product now, and blind means recording and transcription will automatically stop.
- Agents can specify a call forwarding number for their direct inward dialing assigned numbers.

Feedback

Support voice channel in Government Community Cloud Moderate

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Customers in the Microsoft US in Government Community Cloud (GCC) Moderate can now access all features that are a part of the voice channel in Omnichannel for Customer Service. The GCC is a set of environments built to meet specific needs of US Government agencies and this release supports the voice channel to be a part of it.

Feature details

In this release, the voice channel in Omnichannel for Customer Service will be available for GCC customers. With this support, customers in government clouds will now have access to all features that are a part of the voice channel.

View the complete set of the voice feature capabilities here.

Feedback

Was this page helpful? Yes No

Test call, microphone, speakers before and during calls

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

You can minimize disruptions and enhance the overall customer experience by ensuring that communication tools are in optimal working condition. This proactive approach not only boosts agent confidence but also safeguards you against potential technical issues that could adversely impact customer interactions. It helps maintain a seamless and professional communication process, strengthening customer relationships, and increasing operational efficiency.

Feature details

With this feature, agents can:

- Test the microphone and speaker anytime - before calls, during calls, and after calls.
- Place a test call to ensure that the microphone and speaker are working and to familiarize themselves with the in-call experience.

Feedback

Was this page helpful? Yes No

Transfer calls to Teams users through VOIP

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

You can now take full advantage of all experts you may have on Teams, with or without phone numbers. You'll also pay less to have them on the call.

Feature details

Consult and transfer calls to any Teams user in your organization, regardless of whether they have a phone number assigned to them.

- Use your Teams investments in your contact center.
- Use the Voice over Internet Protocol (VOIP) to contact Teams subject matter experts in your organization.
- Teams users are no longer required to have a phone number.

Feedback

Was this page helpful? Yes No

Unified routing

Article • 01/25/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Add up to 200 route-to-queue rules in a workstream

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Organizations will be able to author up to 200 route-to-queue rules in a workstream, up from 100. This will enable organizations to have a higher level of granularity in determining the right queue for a work item and have greater flexibility in their routing setup.

Feature details

Administrators can now add up to 200 route-to-queue rules in a workstream, allowing for more specific routing conditions. This ensures work items are directed to the most suitable queue, enhancing efficiency in complex customer service environments.

Feedback

Was this page helpful? Yes No

Prioritize existing conversations in asynchronous channels

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Messaging channels like persistent chat, Facebook, and WhatsApp provide the flexibility of a single conversation thread that can be asynchronously accessed by users and agents. Supervisors managing these channels want to 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 interactions on an existing conversation, they will be prioritized based on the time the conversation was resumed instead of the time the conversation was initiated. Customers who resumed their conversations will now have a shorter wait.

Feature details

The first-in-first-out prioritization for live channels is based on the conversation start time. However, conversations that come from asynchronous messaging channels like persistent chat, Facebook, WhatsApp, and SMS can be paused or kept in the waiting state allowing the customer to respond on their own schedule while preserving the conversation continuity. This enhancement will prioritize conversations in asynchronous channels by the latest interaction time. This means that for new conversations, the conversation start time is considered to be the interaction time while the resume time will be considered the interaction time for conversations that are revived from the waiting state. This will be applicable to the default first-in-first-out prioritization in the out-of-box assignment strategies, which are highest capacity.

Feedback

Was this page helpful? Yes No

Use overflow for lengthy wait times for work items

Article • 03/06/2024

ⓘ Important

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

Expand table

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

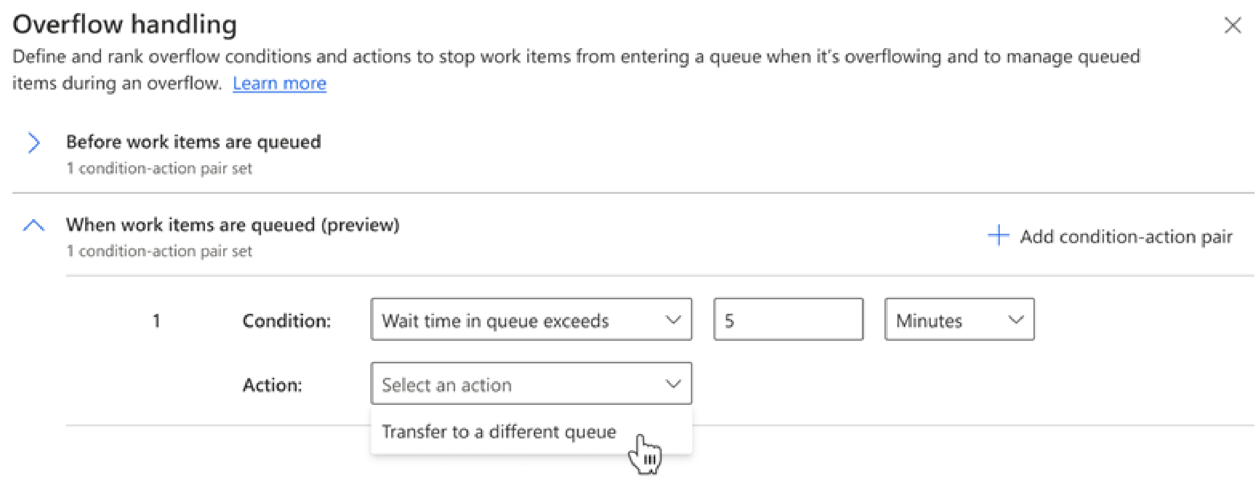
Business value

When contact centers face sudden spikes in customer queries in queues, agents might not be available to respond quickly. To improve customer satisfaction, overflow handling helps customers who wait for a long time by taking actions like automatically transferring work items to other queues.

Feature details

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

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



Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Field Service in 2024 release wave 1

Article • 01/25/2024

> **Important**
>
> The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Field Service**.

Overview

https://aka.ms/ReleaseHighlight/2024W1/Service

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

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

In the 2024 release wave 1, we bring the next generation of Copilot-first, modern, task-oriented experiences to general availability, new work order experiences for service managers and frontline workers, and experiences integrated into Microsoft Teams and Outlook using the power of AI with Copilot.

In addition to modernizing our experiences and infusing them with AI, we also enable organizations to more effectively manage operations with seamless vendor management, native integration with finance and operations apps, and new capabilities for resource scheduling.

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

Investment areas

Copilot in Field Service

Enable frontline workers and service managers to create, view, and manage work orders using the power of generative AI. Copilot capabilities within the Microsoft 365 integrations and the Field Service core application support users with assisted work order creation, management, and scheduling recommendations resulting in increased frontline productivity.

Empower frontline workers

Service technicians and frontline workers are the essence of any field service organization. They're the vanguard of providing excellent customer service by fixing the customers' issues. It's critical that frontline workers have the best digital tools that enable them to engage with their peers, 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.

We're transforming the core user experience within the Field Service mobile application using new mobile-first experiences and controls. This includes a new booking and work order management experience, including navigation updates, improved touch targets, and familiar swipe gestures to accomplish tasks within the app. Makers decide if they want to enable this new user experience through an admin toggle.

In addition, we're adding new features to the mobile app:

- Compress image uploads to reduce bandwidth and capacity consumption.
- Offline sync settings for frontline workers to control their sync experience.

Microsoft 365 integrations for Field Service

Frontline workers and managers can create, view, and manage work orders within Microsoft 365 applications, including Microsoft Teams and Outlook. A Viva Connections dashboard in Teams allows frontline workers to get an at-a-glance view of their workday and frontline managers to view and create work orders. Additionally, an Outlook add-in allows frontline managers to view and create work orders in Outlook, so they can quickly respond to service requests and questions. Users can also access the Remote Assist app in one click from their Viva Connections dashboard.

Optimize service operations

Optimizing service operations is all about enabling organizations, admins, and service managers to increase productivity and streamline field service operations.

Our brand-new work order user experience with embedded copilot capabilities and enhanced work order lifecycle management makes it easier than ever for service managers to manage work orders and ensure customer requirements are met on time. We're also improving client management and location capabilities and enable a seamless quote to work order process, making it simple for service managers to manage clients and locations. Additionally, service managers can use enhanced characteristics to define skills of resources.

Get ready to experience the power of Field Service and take your service processes to the next level.

Resource scheduling

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

In this release wave, the legacy schedule board will be fully retired, and the new schedule board will get another set of enhancements:

- Easy ways to break down long-lasting or complex requirements with key improvements to specify patterns.
- Enable scrolling shortcuts to quickly zoom in and out on the schedule board to adjust the date/time granularity.
- Change bookings on the daily, weekly, and monthly views on the schedule board so that they are displayed proportional to their durations to quickly determine resource availability and utilization.

Additionally, the Resource Schedule Optimization add-in received updates for schedule optimizations:

- Include new bookings to improve resource utilization for single-resource optimization.

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

Check out the release plan

For application administrators

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

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

Get the most out of Field Service

Expand table

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

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Field Service

Article • 01/25/2024

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

For a list of the previous wave's release plans, go to 2023 release wave 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 Field Service

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Generate custom responses and summaries in Outlook with AI	Users by admins, makers, or analysts	-	-	Apr 2024
Create work orders in Teams using AI	Users by admins, makers, or analysts	-	-	Apr 2024
Get insights for technicians from Copilot	Users by admins, makers, or analysts	-	-	Apr 2024
Update work orders with Copilot in new mobile experience	Users by admins, makers, or analysts	✔ Dec 15, 2023	-	Jun 2024
Summarize work orders with Copilot in new mobile	Users by admins, makers, or analysts	✔ Dec 15, 2023	-	Jun 2024

Feature	Enabled for	Public preview	Early access*	General availability
experience				

Empower frontline workers

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Offline sync settings for frontline workers	Users by admins, makers, or analysts	✔ Nov 17, 2023	-	Apr 2024
New and intuitive user experience for Field Service mobile	Users by admins, makers, or analysts	✔ Aug 9, 2023	-	Jun 2024
See bookings in the agenda view in new mobile experience	Users by admins, makers, or analysts	-	-	Jun 2024
Configure list view in the new mobile experience	Users by admins, makers, or analysts	✔ Dec 4, 2023	-	Jun 2024
Embedded guides in Field Service mobile	Users by admins, makers, or analysts	✔ Aug 9, 2023	-	Jun 2024

Microsoft 365 integrations for Field Service

Manage work orders for frontline workforce within Microsoft 365 apps.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Preview work orders in Teams with link unfurling	Admins, makers, marketers, or analysts, automatically	Apr 2024	-	-

Optimize service operations

Dynamics 365 Field Service features allow admins and service managers to get tasks done quickly with new simplified workflows.

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Manage vendors with advanced contractor management	Users by admins, makers, or analysts	Apr 2024	-	Sep 2024
Integrate Field Service with Business Central	Users by admins, makers, or analysts	-	-	Apr 2024
Integrate financial and inventory management	Users by admins, makers, or analysts	✓ Nov 15, 2023	-	Apr 2024
Manage postal codes globally	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2024
Get updates when they are available	Admins, makers, marketers, or analysts, automatically	-	-	Apr 2024

Resource scheduling

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

Expand table

Feature	Enabled for	Public preview	Early access*	General availability
Improve usability and performance of the schedule board	Users by admins, makers, or analysts	Apr 2024	-	Jul 2024
Optimize schedule board navigation patterns	Users, automatically	-	Feb 2024	Jun 2024

- You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Copilot in Field Service

Article • 01/25/2024

ⓘ Important

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

Enable frontline workers and service managers to create, view, and manage work orders using the power of generative AI. Copilot capabilities within the Microsoft 365 integrations and the Field Service core application support users with assisted work order creation, management, and scheduling recommendations, resulting in increased frontline productivity.

Feedback

Was this page helpful? Yes No

Create work orders in Teams using AI

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Work order creation can be a lengthy process with many required fields. Copilot for Field Service can fill in the work order information, saving service managers time and effort.

Feature details

Frontline workers and managers can create, view, and manage work orders within Microsoft 365 applications, including Microsoft Teams, by harnessing the power of generative AI for assisted work order creation.

With this feature, users can now get assistance for work order creation and scheduling with Copilot in Microsoft Teams. The AI-based copilot can assist with extracting relevant details from conversations and filling in details of the work order form based on the text.

Geographic areas

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

- Germany
- Norway
- Singapore
- South Africa

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

Feedback

Was this page helpful? Yes No

Generate custom responses and summaries in Outlook with AI

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Increase productivity with AI-generated summaries and responses in Outlook.

Feature details

Frontline managers and dispatchers can get an AI-generated response or summary to share with customers within Microsoft 365 applications, including Microsoft Teams and Outlook. Harnessing the power of generative AI can lead to increased frontline productivity.

Business value

Increase productivity with AI-generated summaries and responses in Outlook.

Feature details

Frontline managers and dispatchers can get an AI-generated response or summary to share with customers within Microsoft 365 applications, including Microsoft Teams and Outlook. Harnessing the power of generative AI can lead to increased frontline productivity.

Geographic areas

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

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

Feedback

Get insights for technicians from Copilot

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

First-time fix rate is a key metric for frontline workers and having the right information at the right time is crucial to drive successful issue resolution. In this release wave, Copilot helps technicians find relevant information like work instructions and assists them while they work on jobs. Copilot generates insights about the work order or asset, using knowledge articles or manuals, helping the technician resolve the issue at hand faster.

Feature details

With this feature, technicians can use Teams on mobile devices to ask questions and get insightful answers from Copilot regarding their work orders, bookings, assets, and other Field Service-related data.

Geographic areas

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

- Germany
- Norway
- Singapore
- South Africa

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

Feedback

Was this page helpful? Yes No

Update work orders with Copilot in new mobile experience

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Our reimagined technician experience enables frontline workers to use Copilot to update work orders. Technicians can speak to Copilot and describe the work they have performed, such as completed service tasks, used parts, or services they performed. Copilot suggests updates for the booking and work order data based on the technician's description. After revising and accepting those suggestions, Copilot updates the form, reducing the administrative burden on technicians to track and update the various activities manually. Technicians can be more productive and focus on providing excellent customer service.

Feature details

With this feature, technicians get the ability to update various details regarding the booking and work order using a speech-first Copilot experience. When a technician narrates the work that they have performed, Copilot shows suggestions to update the following values:

- Mark service tasks as completed.
- Mark products and services as used and update their quantity.
- Update the status of the booking based on the work performed.
- Update other fields on the booking, such as start time and end time.

See also

AI-powered work order update (docs)

Feedback

Was this page helpful? Yes No

Empower frontline workers

Article • 01/25/2024

ⓘ Important

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

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.

We're transforming the core user experience within the Field Service mobile application using new mobile-first experiences and controls. This includes a new booking and work order management experience, including navigation updates, improved touch targets, and familiar swipe gestures to accomplish tasks within the app. Makers decide if they want to enable this new user experience through an admin toggle.

In addition, we're adding new features to the mobile app:

- Compress image uploads to reduce bandwidth and capacity consumption.
- Offline sync settings for frontline workers to control their sync experience.

Feedback

Was this page helpful? Yes No

Configure list view in the new mobile experience

Article • 03/06/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✔ Dec 4, 2023	-	Jul 2024

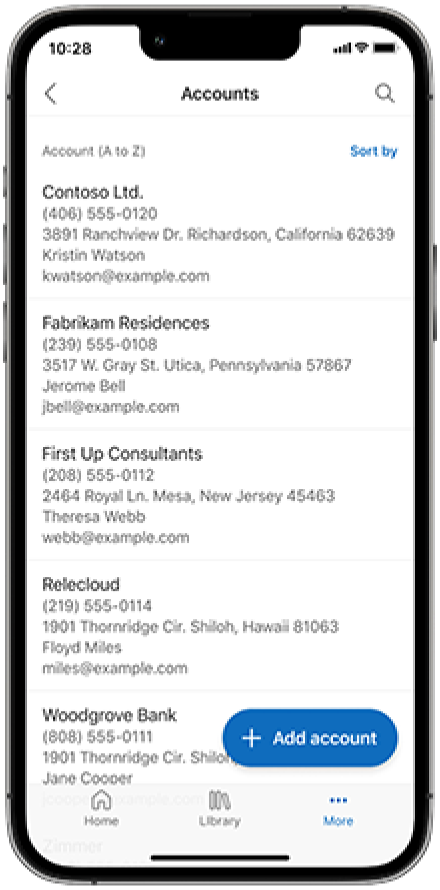
Business value

With the configurable list view in Field Service mobile, makers can optimize list views on various tables such as assets, work orders or customer accounts, to display the relevant columns for that table. With better usage of the mobile screen space and ability to configure up to five columns per row, technicians will have increased ability to get information from the view, without having to click into the record, saving time spent in the app. This new list view also has smoother scrolling and is more performant on mobile devices, further enhancing ease of use.

Feature details

With the configurable list view:

- Makers can choose up to five columns per table to display in the mobile list view.
- The icon in the list view is removed, saving the limited mobile screen real estate.
- List view has smoother scrolling and is more performant with in-built lazy load.



See also

Do and record your work (docs)

Feedback

Was this page helpful? Yes No

Embedded guides in Field Service mobile

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

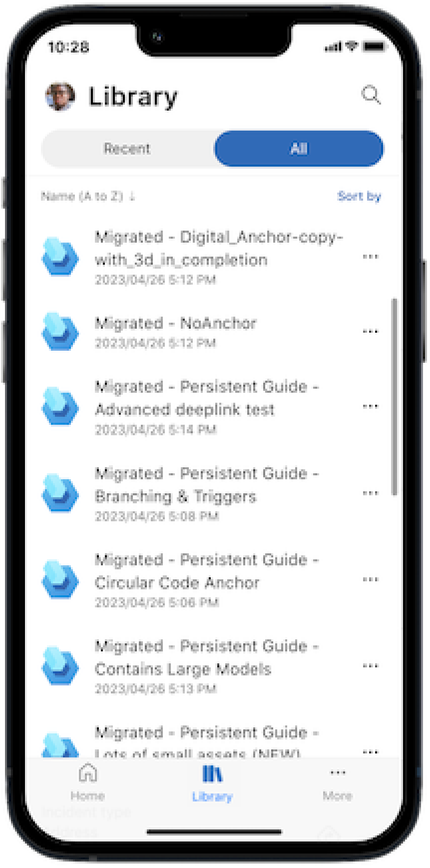
Field Service mobile users can now use their Dynamics 365 Guides from within the Field Service mobile app. While working on a work order, users can launch a guide associated with a work order service task, which gives them step-by-step instructions. These instructions support the service technician, helping them resolve the issue quickly for a high first-time fix rate. Organizations can use the same guides that they have created for HoloLens and reuse existing procedures.

Feature details

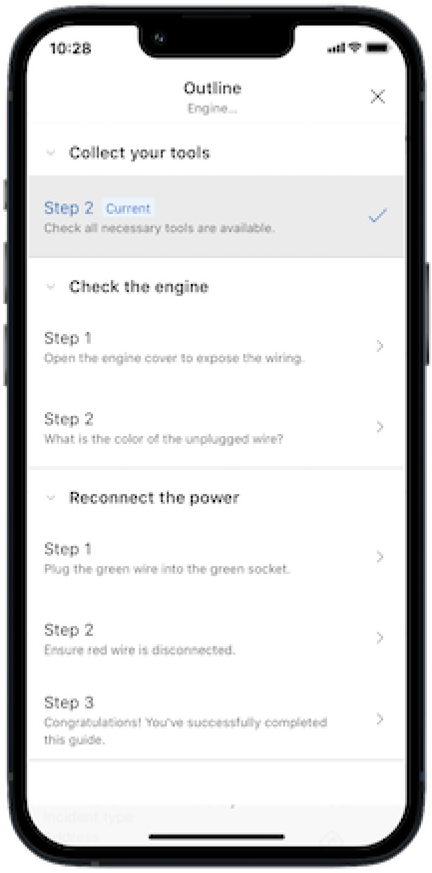
As part of this feature:

- Users can access their list of guides from the bottom navigation bar in the mobile app. In the list view, users can see "all" or "recently used" guides.
- Users can search through the list of guides.
- Users can launch a guide directly from the Work Order Service Task if it is associated with a guide.
- Within a guide, users see an outline view showing a list of all the steps within a guide.
- A step in a guide can have images, as well as branching based on the option selected by the user.

- Users can progress through the guide.
- In this version of the feature, mixed-reality features don't work on mobile devices.



For embedded guides to be available within the mobile app, Dynamics 365 Guides must be installed in the same organization as Field Service.



See also

Set up embedded Guides in Field Service Dynamics 365 Mobile (docs)

Feedback

Was this page helpful? Yes No

New and intuitive user experience for Field Service mobile

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

A high first-time fix rate for service technicians is a key metric for service-based organizations, both for efficiency and customer satisfaction purposes. A mobile app providing key job-related information to the service technicians is a must in digitizing the frontline worker flow and completing the digital feedback loop. Having a delightful, intuitive, and modern user experience is critical to get user buy-in, reduce time to adoption, and create happy users.

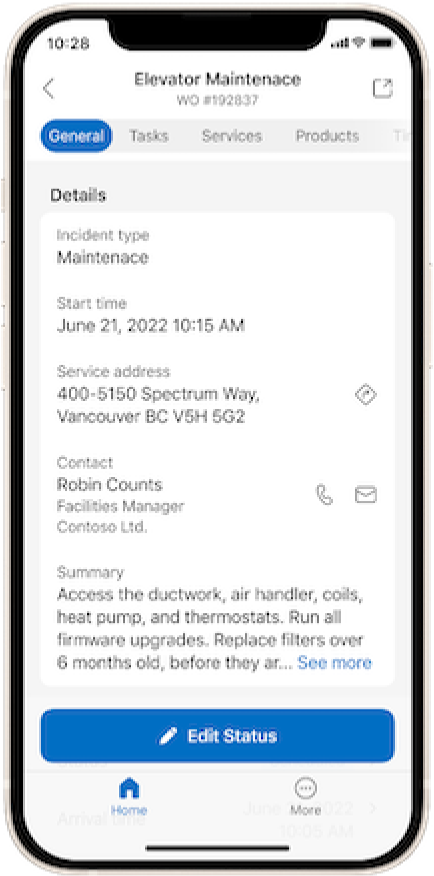
With this modern app, users get their most critical job information, such as bookings, customer details, service tasks, products, and notes, in a brand-new mobile-centric experience. They can quickly enter data and perform key operations such as changing booking status through swipe gestures, reducing the number of clicks and time spent in the app and letting the technician focus on the job at hand.

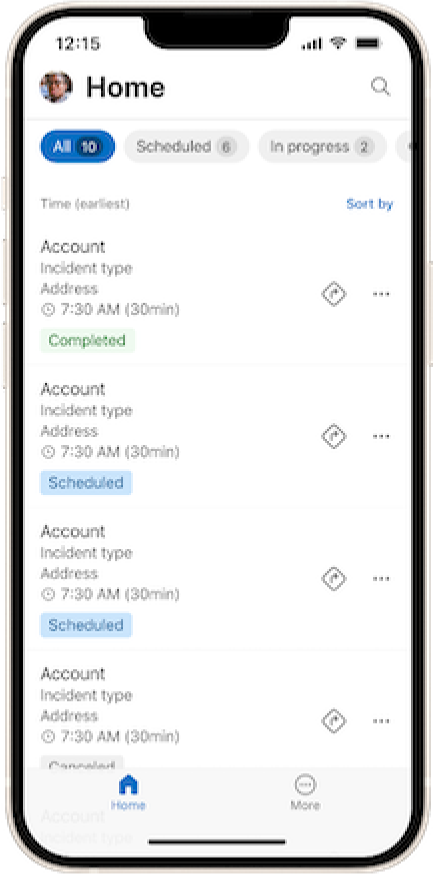
Feature details

With the new native mobile user experience, users get:

- Modern look and feel in the home page, booking details, and other aspects of work order management.

- Refreshed user experience, bottom navigation bar, left navigation, and settings area.
- Large touch targets for ease of use and accessibility.
- Ability to quickly filter booking list with common status-related filters.
- Simplified booking list experience, with the ability to change status with swipe gestures and quickly get directions.
- Embedded guides for step-by-step instructions with embedded pictures and branching flows.
- Smooth tab switching through swipe gestures in booking details.
- Easily check-off work order service tasks with a new task management experience.
- Quickly add products, change their line status by tapping on large visible badges, and update quantity.
- Easily add notes with text, image, video, voice, or file attachments to the booking—which show up on the timeline for other users.
- Still have access to the unified interface extensions or customizations made by you in the app through a simple transition experience.





See also

New mobile user experience (docs)

Feedback

Was this page helpful? Yes No

Offline sync settings for frontline workers

Article • 01/25/2024

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

Expand table

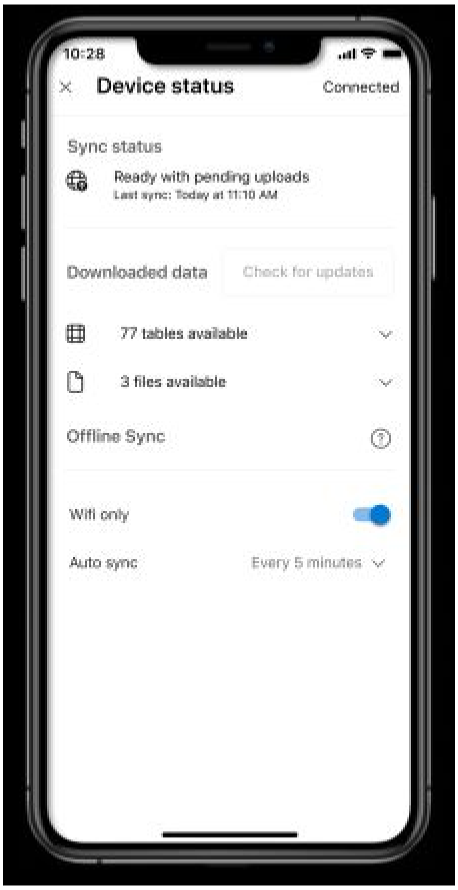
Enabled for	Public preview	Early access	General availability
Users by admins, makers, or analysts	✓ Nov 17, 2023	-	Apr 2024

Business value

Frontline workers get more control over their offline experience with new sync settings. These new sync settings help save on cellular data usage and device battery life.

Feature details

Field Service mobile app users get two new settings in their Offline Status Page. These settings let them control the automatic sync intervals and the connection type.



- **Sync interval**: Adjust the sync interval to sync more or less frequently depending on individual needs. Users can also choose to not automatically sync at any interval if they only want to sync on demand.
- **Sync on Wi-Fi**: Lets users choose if their automatic sync happens on cellular networks and Wi-Fi connections or only when connected to a Wi-Fi network.

See also

Offline sync settings (docs)

Feedback

Was this page helpful? Yes No

See bookings in the agenda view in new mobile experience

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

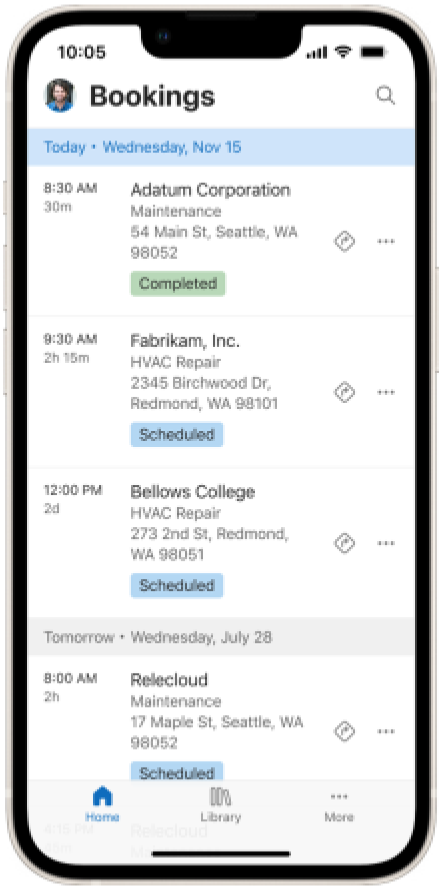
With the agenda view in the new user experience for the Field Service mobile app, technicians can quickly see an overview of their scheduled bookings over several days. They can easily scroll in both directions to find past and future bookings, and get an at-a-glance view of pertinent details such as customer name, current booking status, start time, and more. An organization can customize and add additional relevant columns to enhance usability for their technicians, reducing the need for them to open the booking to find details.

Feature details

Agenda view includes:

- Scroll to see bookings across multiple days from 90 days in the past to 90 days in the future.
- Usability enhancements for easy visibility, such as large colored labels for booking status and day separators.
- Swipe gestures for quick actions like changing booking status.
- Shortcuts such as the "Get Directions" icon to start navigation to a booking from within the agenda view.

- Visible out-of-the-box columns, such as booking name, booking start time, duration, and customer name, to enable technicians to see an overview of the booking without opening its details.
- Customization options for organizations to match their business scenarios with the agenda view by editing existing columns or adding new columns.



Feedback

Was this page helpful? Yes No

Microsoft 365 integrations for Field Service

Article • 01/25/2024

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

Frontline workers and managers can create, view, and manage work orders within Microsoft 365 applications, including Microsoft Teams and Outlook. A Viva Connections dashboard in Teams allows frontline workers to get an at-a-glance view of their workday and frontline managers to view and create work orders. Additionally, an Outlook add-in allows frontline managers to view and create work orders in Outlook, so they can quickly respond to service requests and questions. Users can also access the Remote Assist app in one click from their Viva Connections dashboard.

Feedback

Was this page helpful? Yes No

Preview work orders in Teams with link unfurling

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

View unfurled Field Service links and create or edit work orders in Teams chats to eliminate the need for context switching and get rich content within the communication and collaboration flow.

Feature details

You get a preview of the work order in a Teams conversation when posting a link. Showing a link preview, also known as an unfurled link, eliminates the need to switch context between the chat conversation and the Field Service application. You can create and edit work orders in context, stay in your workflow, and save time. This feature also improves collaboration and increases productivity for frontline workers and managers, especially during critical moments that need immediate assistance and guidance.

Geographic areas

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

- Germany

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

Feedback

Was this page helpful? Yes No

Optimize service operations

Article • 01/25/2024

ⓘ Important

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

Optimizing service operations is all about enabling organizations, admins, and service managers to increase productivity and streamline field service operations.

Our brand-new work order user experience with embedded copilot capabilities and enhanced work order lifecycle management makes it easier than ever for service managers to manage work orders and ensure customer requirements are met on time. We're also improving client management and location capabilities and enabling a seamless quote-to-work order process, making it simple for service managers to manage clients and locations. Additionally, service managers can use enhanced characteristics to define skills of resources.

Get ready to experience the power of Field Service and take your service processes to the next level.

Feedback

Was this page helpful? Yes No

Enable new work order experience by default for all organizations

Article • 03/06/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	Early access	General availability
Users, automatically	-	✔ Feb 5, 2024	Apr 2024

Business value

Our new work order enhancements are designed to make your life easier. With reduced time and effort required to understand the current state of work orders, you can provide quick updates to customers, ensure that frontline workers have the information they need for service on site, and easily track high-priority work. Our dynamic card feature lets you take action and move work orders through each stage seamlessly, while our redesigned tasks experience and reference tab streamline the knowledge-sharing process for everyone involved.

Feature details

In the previous release wave, we launched the new work order experience in Field Service for all users. Now, this experience becomes the standard options for all organizations, both new or existing. The new experience has a modern design and matches the common daily tasks. It also reduces unnecessary information, saves clicks, and simplifies the user experience for service managers.

Learn more about the new experience, including ways to change defaults.

Feedback

Get updates when they are available

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

End users receive some new and improved features as they are ready instead of waiting until a twice-yearly release.

Feature details

The Dynamics 365 Field Service app changes to use a monthly channel instead of semi-annual channel. The change allows some of the user-impacting features to ship each month instead of waiting for the next twice-yearly release.

The model-driven apps release channel has three values to choose from: Auto, Monthly, and Semi-annual.

The "Auto" value for the app release channel defines the behavior if no explicit selection of "Monthly" or "Semi-annual" was made. With 2024 release wave 1, the app release channel value for Dynamics 365 Field Service apps changes from "Auto" to "Monthly". To continue using the semi-annual channel, makers can change the app release channel to "Semi-annual" before the 2024 release wave 1 to ensure the release channel behavior doesn't change. Every existing Dynamics 365 custom app has to be changed, but with 2024 release wave 2, the "Auto" setting will change to use the monthly channel.

More information can be found at Release Channel Overview.

Feedback

Was this page helpful? Yes No

Improved license monitoring with enhanced reporting

Article • 03/06/2024

ⓘ Important

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

Business value

Improved license monitoring enables administrators and makers to proactively prevent potential license compliance issues before they occur, enhancing their organization's license management process.

Feature details

As an administrator or maker, you now have the capability to proactively manage your organization's license compliance with Power Apps Solution Checker. With the Power Apps Solution Checker, makers can now assess Dynamics 365 Field Service entities, operations, and controls both before and after deploying solutions. This enhanced functionality checks for the presence of all Field Service-related entities, operations, and controls that require a Dynamics 365 license, regardless of whether you currently own the license or not.

Feedback

Was this page helpful? Yes No

Integrate Field Service with Business Central

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Service organizations require a front-to-back application in which financials, inventory, and procurement are tightly coupled with service delivery. Field Service organizations generate financial data with every transaction of their system. Every work order represents cost and revenue. Every resource generates profit and loss. Every customer interaction adds entries on the general ledger. The integration between Dynamics 365 Business Central and Field Service greatly reduces the effort required to connect the two apps.

Service organizations can now seamlessly integrate work order-related financial and inventory data without additional effort, cost, or complexity.

Feature details

In this release wave, Field Service releases an integration with Dynamics 365 Business Central. This integration streamlines the end-to-end process of managing service operations and ensures a smooth flow of information between the two systems.

Users can easily create and manage work orders in Field Service, tracking the progress of service tasks, assigning resources, and capturing consumption details. Once the work order is completed, the integration enables the smooth transfer of data to Business Central for further processing.

The integration also facilitates the invoicing and fulfillment of work orders in Business Central. Users can generate accurate invoices based on the service activities performed and the consumption recorded in Field Service. This ensures timely and accurate billing, improving financial management and customer satisfaction.

By integrating Business Central with Field Service, users can benefit from a unified and efficient workflow. The integration eliminates the need for manual data entry or duplication, reducing errors and saving valuable time. It also provides users with a comprehensive view of service operations and financials, enabling better decision-making and improved operational efficiency.

Feedback

Integrate financial and inventory management

Article • 03/06/2024

ⓘ Important

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

Expand table

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

Business value

Service organizations require a front-to-back application in which financials, inventory, and procurement are tightly coupled with service delivery. Field Service organizations generate financial data with every transaction of their system. Every work order represents cost and revenue. Every resource generates profit and loss. Every customer interaction adds entries on the general ledger. The integration between finance and operations apps and Field Service greatly reduces the effort required to connect the apps.

Service organizations can now seamlessly integrate work order-related financial and inventory data without additional effort, cost, or complexity.

Feature details

This feature enables the seamless integration between Dynamics 365 Field Service, Dynamics 365 Finance, and Dynamics 365 Supply Chain Management by simply enabling a toggle.

We aim to provide an end-to-end service that organizations can use to digitally transform their entire operation. Most Field Service organizations require robust financial capabilities for billing, payments, and accounting scenarios. This integration offers a unified experience between Field Service and finance and operations apps.

- Sync real-time pricing and costing information from work orders into finance and operations apps.
- Automatically update finance and operations apps as work orders are executed for real-time financial and inventory integration.
- Take advantage of all that finance and operations apps have to offer for invoicing, accounting, inventory management, and more.

See also

Field Service integration with finance and operations applications (docs)

Feedback

Was this page helpful? Yes No

Manage postal codes globally

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Territory management is a critical tool for managing service operations. Now, with global postal code support, territory management is easier than ever.

Feature details

Global organizations service areas in which postal codes are identical in different countries. Add a country code to your postal code table and the territory automatically matches based on both country code and postal code.

Feedback

Was this page helpful? Yes No

Manage vendors with advanced contractor management

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

We're evolving Field Service to improve collaboration with subcontractors and streamline your operations. You can easily manage vendor organizations, track progress in real time, and expand your reach to new clients, all while reducing costs and delivering exceptional service to your customers.

Feature details

Field Service organizations often leverage subcontractors to provide exceptional service and stay competitive in the market. Dynamics 365 Field Service is investing to streamline operations and improve collaboration with subcontractors, whether you're using a staff augmentation model or delegating service to the contractor.

In this release wave, you can easily add and remove contractors in the system, capture their capacity and compliance information, and deactivate their access when you aren't working together for extended periods of time. In addition, you can delegate contractors to onboard and manage their own staff's access, freeing up your staff to focus on what matters the most.

These new capabilities help you manage vendor organizations, improve productivity and collaboration, and expand your reach to new clients.

Thank you for your idea

Thank you for submitting this idea:

- Field service 3rd party technicians or vendors

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

Resource scheduling

Article • 01/25/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Improve usability and performance of the schedule board

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

- **Enhanced user experience**: The improved schedule board architecture allows 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.

Feedback

Was this page helpful? Yes No

Plan and prepare for Microsoft Copilot for Service in 2024 release wave 1

Article • 03/06/2024

> **Important**
>
> The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. In this article, you'll find the product overview and what's new and planned for **Microsoft Copilot for Service**.

Overview

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

Learn more about Microsoft Copilot for Service:

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

Investment areas

Administrator experience

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

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

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

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

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

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

Check out the release plan

For application administrators

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

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

Get the most out of Microsoft Copilot for Service

Expand table

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

Feedback

Was this page helpful? Yes No

What's new and planned for Microsoft Copilot for Service

Article • 03/06/2024

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

For a list of the previous wave's release plans, go to 2023 release wave 2 plan.

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

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

Administrator experience

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

Expand table

Feature	Enabled for	Public preview	General availability
Deploy Copilot for Service app to Outlook and Teams	Users by admins, makers, or analysts	Feb 2024	Apr 2024
Configure copilot features and customize settings	Users by admins, makers, or analysts	Feb 2024	Apr 2024

Agent experiences in Microsoft Teams

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

Expand table

Feature	Enabled for	Public preview	General availability
Provide meeting summary and follow-ups to create CRM tasks	Users by admins, makers, or analysts	Mar 2024	Apr 2024
Browse and update CRM records during Teams meetings	Users by admins, makers, or analysts	Feb 2024	Apr 2024

Agent experiences in Outlook

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

Expand table

Feature	Enabled for	Public preview	General availability
Generate email drafts and replies using generative AI	Users by admins, makers, or analysts	Feb 2024	Apr 2024
Generate summaries of emails and save to your CRM system	Users by admins, makers, or analysts	Feb 2024	Apr 2024
Provide case summary to agents working on customer emails	Users by admins, makers, or analysts	Feb 2024	Apr 2024
Prepare for customer meetings	Users by admins, makers, or analysts	Feb 2024	Apr 2024
Provide recommended CRM updates to agents in Outlook	Users by admins, makers, or analysts	Feb 2024	Jul 2024

- You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ .

Description of **Enabled for** column values:

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

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

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

Feedback

Was this page helpful? Yes No

Administrator experience

Article • 03/06/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Deploy Copilot for Service app to Outlook and Teams

Article • 03/06/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

Geographic areas

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

- United States

Feedback

Configure copilot features and customize settings

Article • 03/06/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

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

Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Agent experiences in Microsoft Teams

Article • 03/06/2024

ⓘ Important

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

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

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

Feedback

Was this page helpful? Yes No

Provide meeting summary and follow-ups to create CRM tasks

Article • 03/06/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

Capabilities that will be enabled through this feature:

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

Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Browse and update CRM records during Teams meetings

Article • 03/06/2024

ⓘ Important

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

Expand table

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

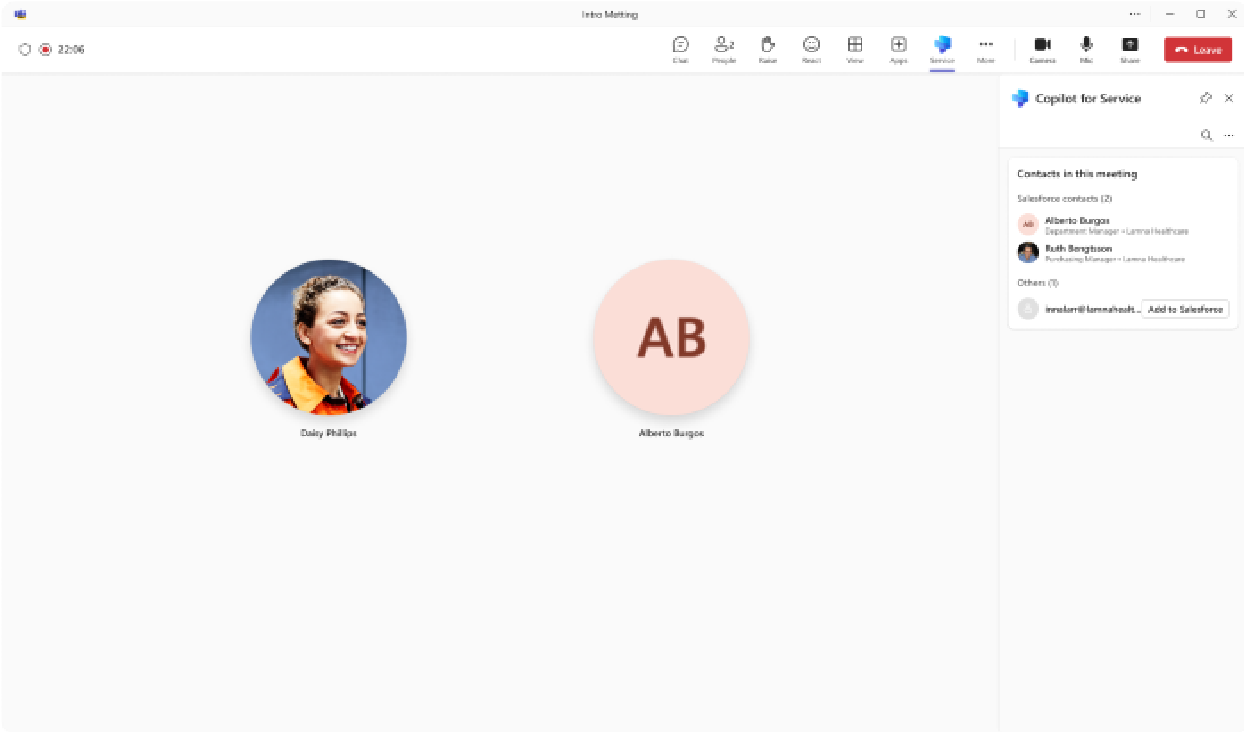
Business value

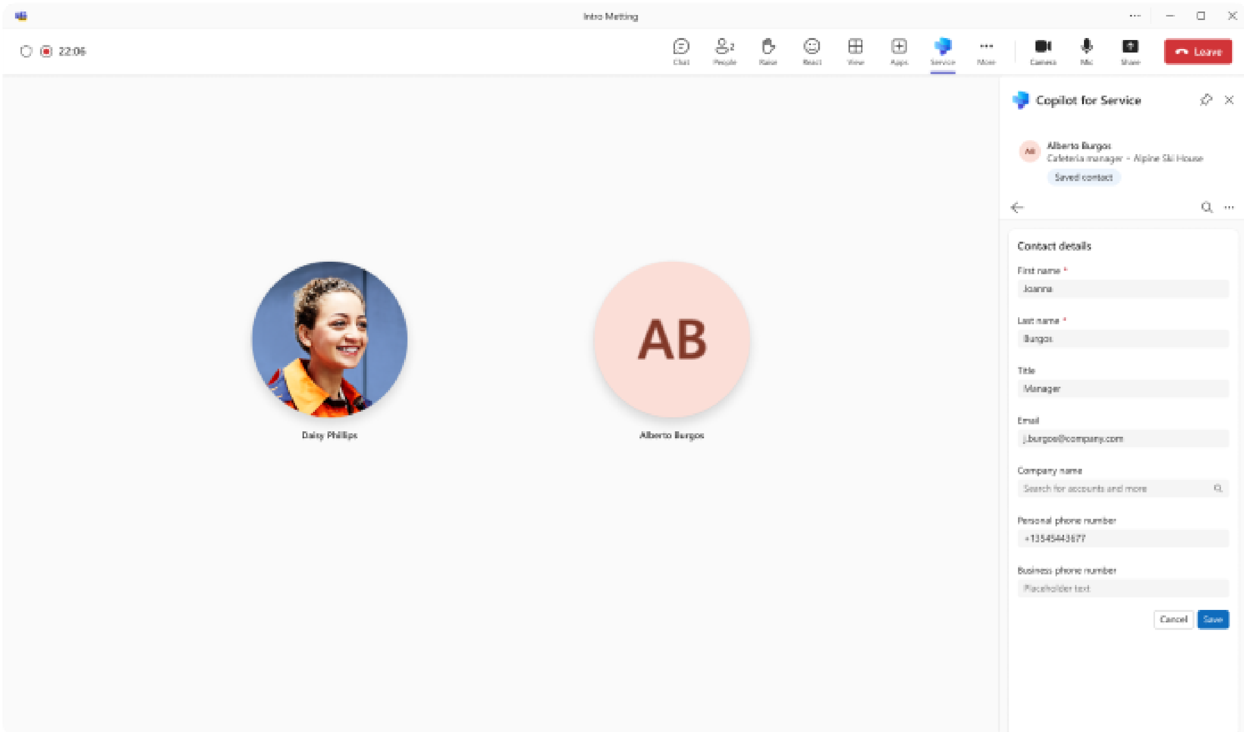
When agents talk to customers, having access to all the information about the customer makes it easy to serve them.

Feature details

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

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





Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Agent experiences in Outlook

Article • 03/06/2024

ⓘ Important

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

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

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

Feedback

Was this page helpful? Yes No

Generate email drafts and replies using generative AI

Article • 03/06/2024

ⓘ Important

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

Expand table

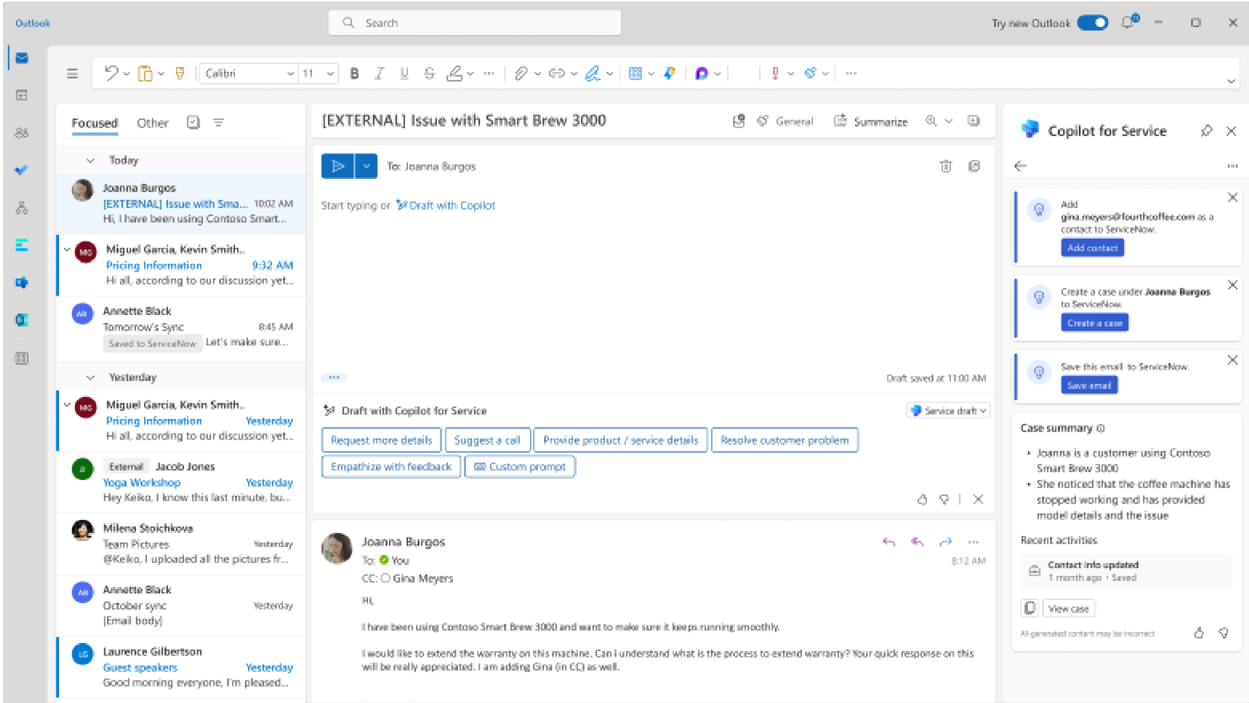
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2024	Apr 2024

Business value

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

Feature details

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



Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Generate summaries of emails and save to your CRM system

Article • 03/06/2024

ⓘ Important

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

Expand table

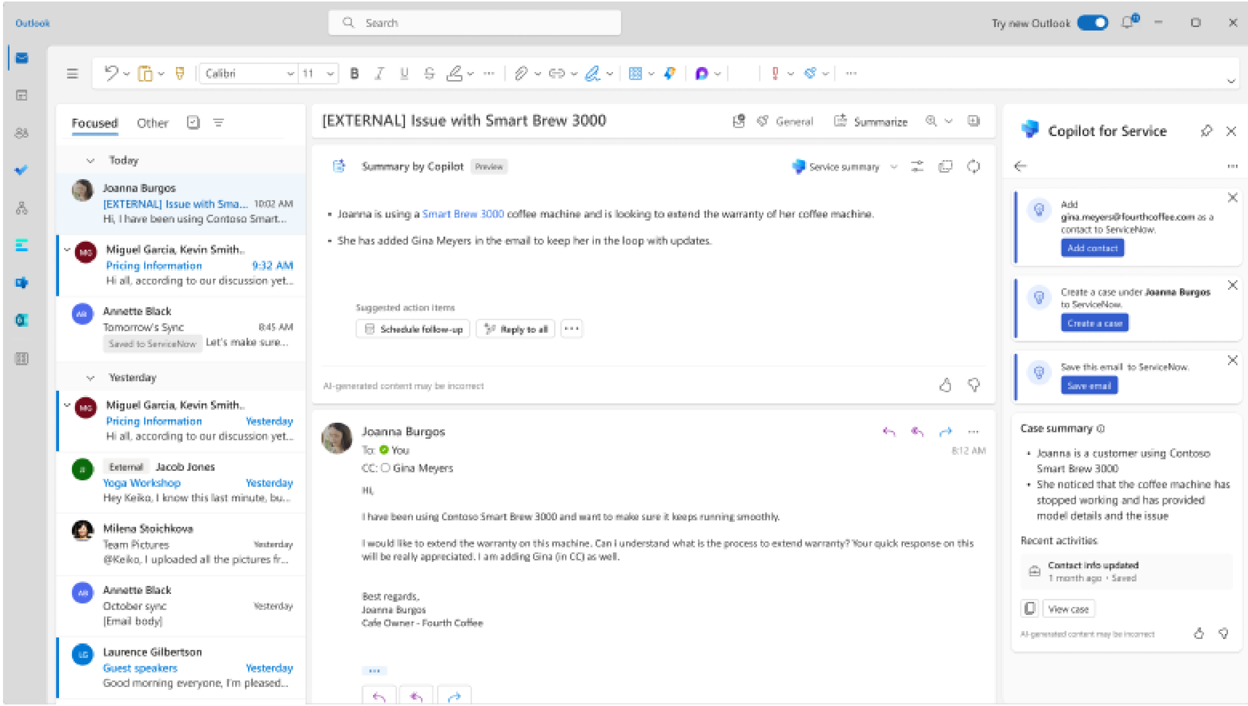
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Feb 2024	Apr 2024

Business value

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

Feature details

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



Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Provide case summary to agents working on customer emails

Article • 03/06/2024

ⓘ Important

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

Expand table

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

Business value

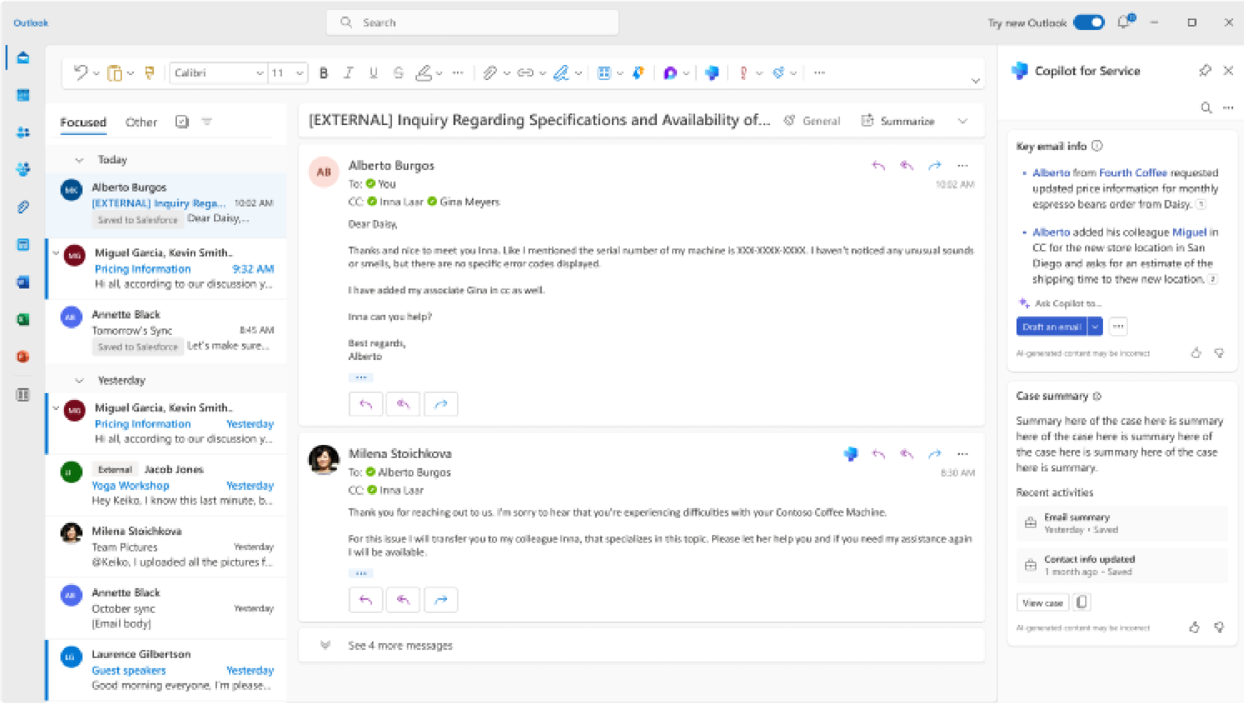
Accessing the case summary as they work on emails from customers helps agents catch up to the case and customer issues.

Feature details

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

Through Copilot for Service, agents can:

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



Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Prepare for customer meetings

Article • 03/06/2024

ⓘ Important

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

Expand table

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

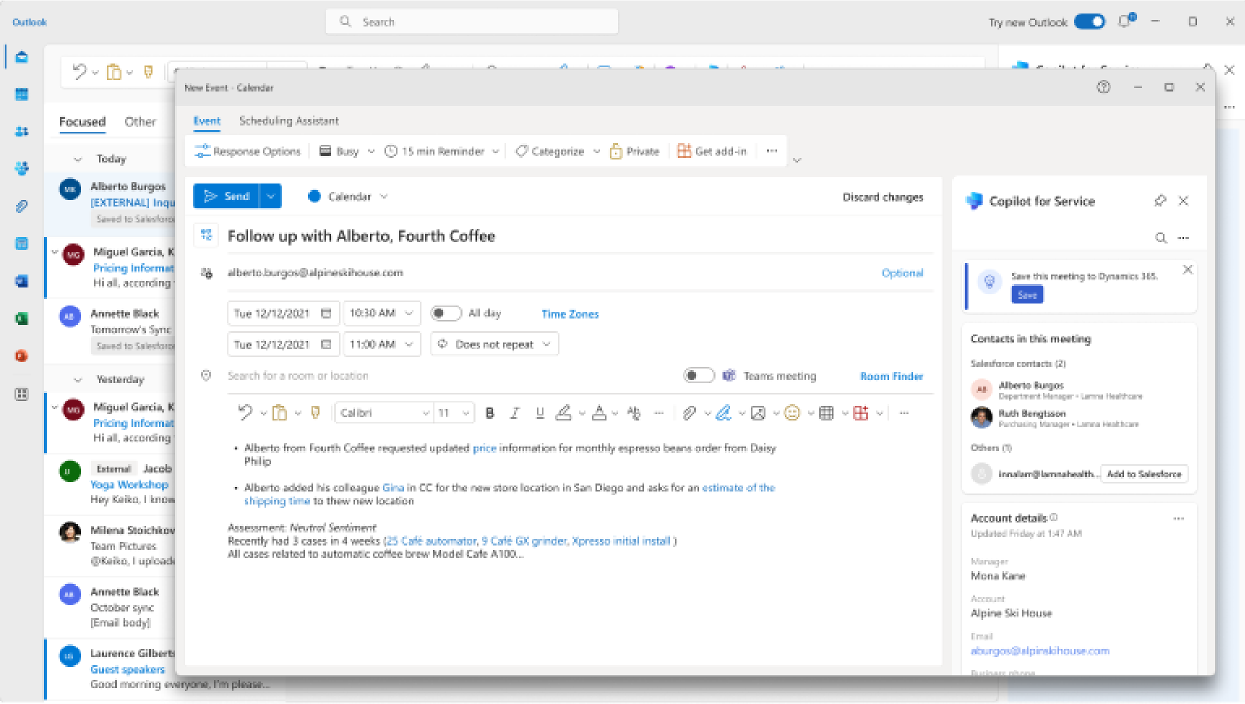
Business value

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

Feature details

This feature offers the following capabilities:

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



Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Provide recommended CRM updates to agents in Outlook

Article • 03/06/2024

ⓘ Important

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

Expand table

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

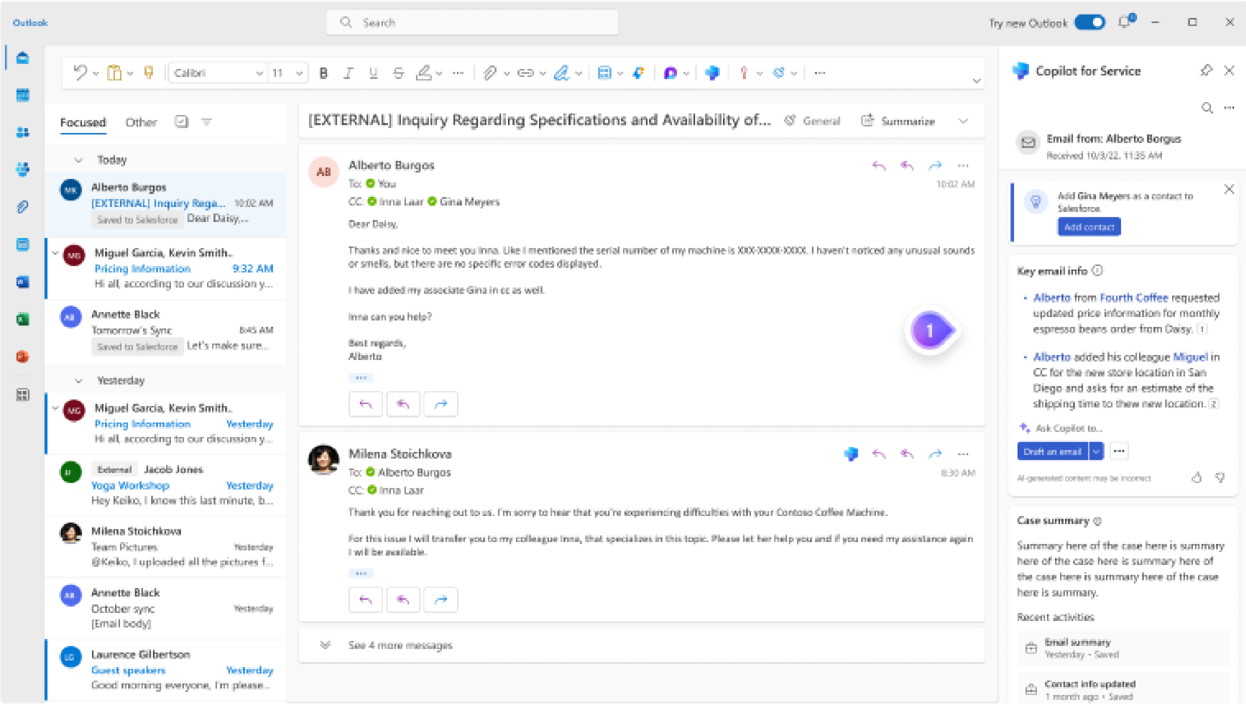
Business value

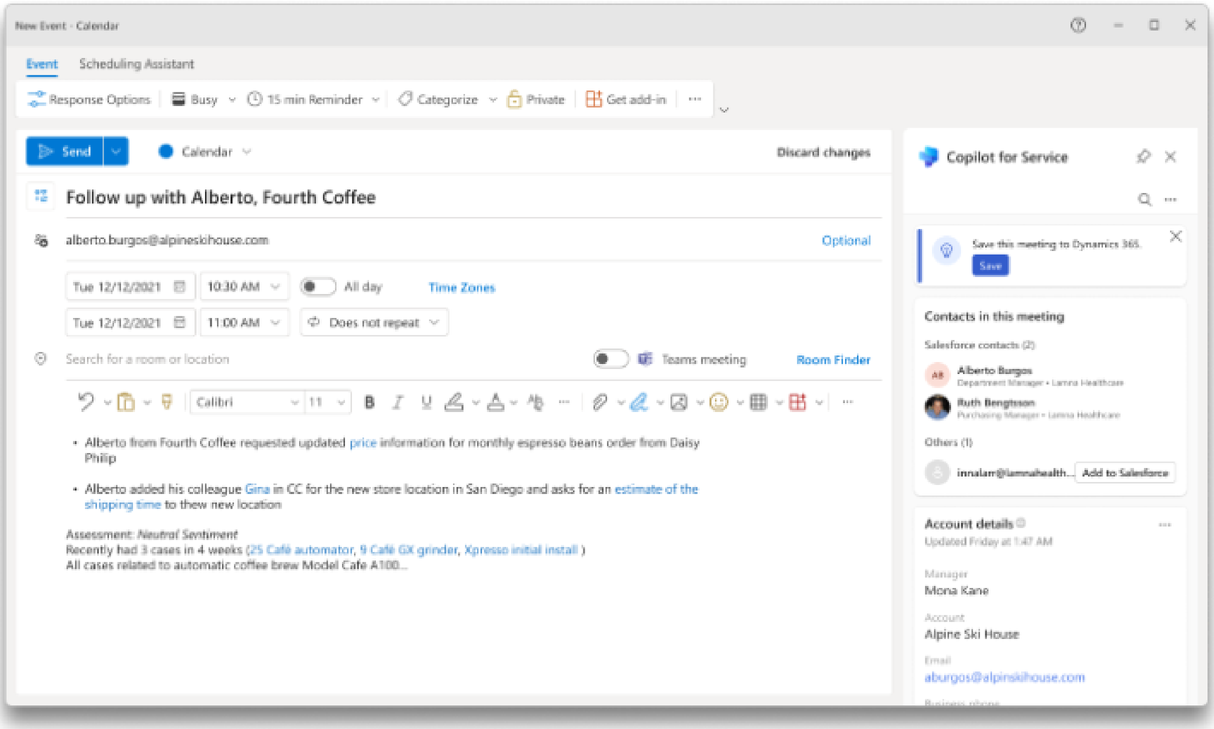
As agents work through multiple emails and customers, it's important to make sure that all their CRM records are up to date. With Copilot for Service, agents can get recommended CRM updates to help them keep everything updated in a timely fashion.

Feature details

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

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





Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Finance in 2024 release wave 1

Article • 01/25/2024

ⓘ **Important**

The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Finance**.

Overview

https://aka.ms/ReleaseHighlight/2024W1/ERP

Business agility is critical for organizations. They need the ability to differentiate their products and services from competition, and to manage rapidly changing economic conditions. Our definition of autonomous finance is a system of intelligence, automation, and recommendations that allow financial professionals to add the human value where critical decisions are needed. Yet the path to autonomous finance is riddled with barriers such as data silos, skills challenges, security, change management, complex processes, offline tools, and time-consuming financial close.

This release of Dynamics 365 Finance focuses on continuing to add enhancements and AI-powered experiences to business performance planning, easing setup of financial dimension defaulting with AI rules guidance, increasing automation in bank reconciliation, netting, expanding country coverage, tax automation, and scalability.

Investment areas

Business performance

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

Core financials

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

Globalization Studio

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

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

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

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

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

Check out the release plan

For application administrators

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

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

Get the most out of Finance

Expand table

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

Helpful links	Description
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 • 01/25/2024

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

For a list of the previous wave's release plans, go to 2023 release wave 2 plan.

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

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

Business performance

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

Expand table

Feature	Enabled for	Public preview	General availability
Put planning into action by automating approved recommended actions	Users, automatically	Jul 2024	-
Manage administrative tasks, find information, and create reports with generative AI	Users by admins, makers, or analysts	Feb 2024	Sep 2024
Drive additional operational visibility with expanded data models	Users, automatically	Apr 2024	Sep 2024
Choose the business process that is important to you	Users, automatically	Apr 2024	Sep 2024
Complete, analyze, and run what-if scenarios in Excel and Copilot for planning	Users, automatically	-	Apr 2024

Feature	Enabled for	Public preview	General availability
Quickstart templates in planning for Dynamics 365 Finance	Users, automatically	-	Jul 2024
Set up security for multiple users in business performance planning	Users by admins, makers, or analysts	-	Apr 2024
Create a restricted list of values for a dimension in business performance planning	Users by admins, makers, or analysts	-	Apr 2024
Set up data flows in the business application planning app	Users by admins, makers, or analysts	-	Apr 2024
Edit dimensions and dimension values in grid for business performance planning	Users by admins, makers, or analysts	-	Apr 2024
Dimension and cube creation copilot in planning	Users, automatically	Jul 2024	-

Core financials

Automation, AI, and enhancements to core financials.

Expand table

Feature	Enabled for	Public preview	General availability
Check out new AP clerk workspace capabilities	Users by admins, makers, or analysts	Jan 2024	Jul 2024
Updated AI Collections coordinator workspace plus a new overview page for assigned customers	Users by admins, makers, or analysts	-	Apr 2024
AI powers collections workspace timeline summary	Users by admins, makers, or analysts	✔ Jun 15, 2023	Apr 2024
Archive general ledger posted data	Admins, makers, marketers, or analysts, automatically	Feb 2024	Jul 2024
Financial tags support added to more journals and documents	Users, automatically	-	Jul 2024

Feature	Enabled for	Public preview	General availability
Defaulting engine for Financial tags powered by AI-recommended rules	Users by admins, makers, or analysts	-	Jul 2024
Financial tags added to accounting distributions	Users, automatically	-	Jul 2024
Enhanced bank reconciliation statement report	Admins, makers, marketers, or analysts, automatically	Jul 2024	Sep 2024
Additional exchange rate type for bank foreign currency revaluation	Admins, makers, marketers, or analysts, automatically	-	Apr 2024
Bank account lifecycle management	Users by admins, makers, or analysts	Jul 2024	-
Additional exchange rate type for foreign currency revaluation	Admins, makers, marketers, or analysts, automatically	-	Apr 2024
Automatic clear bridged transactions in advanced bank reconciliation	Admins, makers, marketers, or analysts, automatically	-	Apr 2024
Explore customer and vendor balance netting	Users by admins, makers, or analysts	✔ Nov 2, 2023	Jul 2024
Matching rule enhancement in advanced bank reconciliation	Admins, makers, marketers, or analysts, automatically	Apr 2024	Sep 2024
Autonomous cash application in advanced bank reconciliation	Admins, makers, marketers, or analysts, automatically	Apr 2024	Sep 2024
Archive tax transactions	Users by admins, makers, or analysts	Apr 2024	-

Globalization Studio

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

Expand table

Feature	Enabled for	Public preview	General availability
Expand localization for LATAM countries - Ecuador	Users by admins, makers, or analysts	-	Aug 2024
Expand localization for LATAM countries - Bolivia	Users by admins, makers, or analysts	-	Aug 2024
Expand localization for LATAM countries - Dominican Republic	Users by admins, makers, or analysts	-	Aug 2024
Expand localization for LATAM countries - Peru	Users by admins, makers, or analysts	-	Aug 2024
Expand localization for LATAM countries - Venezuela	Users by admins, makers, or analysts	-	Aug 2024
Electronic invoicing introduction in Malaysia	Users by admins, makers, or analysts	-	Jun 2024
Electronic invoicing and the French e-reporting system	Users by admins, makers, or analysts	-	Apr 2024
Expand localization for LATAM countries - Colombia	Users by admins, makers, or analysts	✔ Dec 22, 2023	Jul 2024
Expand localization for LATAM countries - Paraguay	Users by admins, makers, or analysts	✔ Dec 22, 2023	Jul 2024
Expand localization for LATAM countries - Uruguay	Users by admins, makers, or analysts	✔ Dec 22, 2023	Jul 2024
Expand localization for LATAM countries - Guatemala	Users by admins, makers, or analysts	✔ Dec 22, 2023	Jul 2024
Merge regulatory configuration service into Finance as Globalization Studio	Admins, makers, marketers, or analysts, automatically	-	Apr 2024

- You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.

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

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

Feedback

Was this page helpful? Yes No

Business performance

Article • 01/25/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Choose the business process that is important to you

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2024	Sep 2024

Business value

Every business is unique, with different needs and priorities. By enabling organization composability, you can align tools and processes with your specific goals, ensuring that the provided solutions match your requirements closely. It also simplifies your usage, which can result in cost savings.

Feature details

When you have access to reports and data that cater directly to your needs, you can make more informed decisions. This improves strategy, resource allocation, and overall performance. By enabling you to focus only on processes and data relevant to your needs, you can work more efficiently, leading to enhanced productivity.

This feature provides the ability to choose which business processes and reports are important to your business and restrict access to them. It will also allow you to choose the refresh frequency and how many years of data for each value chain you choose to use.

Feedback

Was this page helpful? Yes No

Complete, analyze, and run what-if scenarios in Excel and Copilot for planning

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Users can complete their plans in Excel using an experience they know, reducing the efforts to learn a new tool for budgeting.

Feature details

Although the budgeting and forecasting process is becoming more continuous in organizations, users are still not completing activities daily. When they must learn yet another tool for completing their plans and forecasts, it leads to lack of adoption, user frustration, or completing the activity offline in Excel, thus taking more time.

By introducing the ability to complete their plans in Excel, users will immediately understand what to do and be able to do it online in a single step, versus exporting data, calculating things offline, and then manually entering numbers. This feature allows users to complete budgets and analyze in data with Excel, also powered by copilot. Being able to manage your continuous planning process by using Excel, users can choose the experience they prefer, while taking advantage of natural language questions for trends, information, ad-hoc analysis, and visualizations. This leads to faster and more accurate forecasting so organizations can make agile business decisions.

Feedback

Was this page helpful? Yes No

Create a restricted list of values for a dimension in business performance planning

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Prevent users from entering ad-hoc or incorrect dimension values when entering budgets, by creating a list of values with linked columns in business performance planning.

Feature details

To enhance the budget contributor experience and accuracy, users should be able to pick from a list of dimensions values, rather than entering in ad-hoc information. For example, if the user is entering a type of item, they can be limited to a specific item category when creating a plan. This provides data consistency and governance to the budgeting process. By being able to link columns across dimensions, users will be able to only select values from the linked column.

Feedback

Was this page helpful? Yes No

Create drivers and formulas in planning app

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (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 2024

Business value

Provides an additional capability to add calculation logic and methods for driver-based planning.

Feature details

Users want the flexibility to model out their key drivers and the impact on downstream budgets. Today, calculation and modeling is handled in Power BI. This feature provides calculation logic and methods within the application. This eliminates the need for the manual setup of calculations in Power BI and streamlines planning by leveraging key drivers across multiple scenarios.

Feedback

Was this page helpful? Yes No

Detect data changes, spot errors, and simplify reporting

Article • 03/06/2024

ⓘ Important

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

Expand table

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

Business value

Using snapshots and AI-powered comparison to monitor and analyze changes in data and reports offers you a competitive edge in an increasingly data-driven landscape. This approach allows for efficient oversight of operations, rapid anomaly detection, and more informed decision-making, translating to substantial time and cost savings.

Feature details

By automating the laborious task of data comparison, you can swiftly identify deviations, leverage insights for proactive strategies, and enhance their reporting processes, ensuring timely and relevant information dissemination to stakeholders. This not only mitigates potential risks but also positions businesses to capitalize on emerging opportunities through data-driven insights.

This functionality provides the ability to create snapshots of reports over a period of time and leverage AI to track and analyze the changes in the reports. You'll also be able to share these snapshots and collaborate with the rest of your organization.

Feedback

Was this page helpful? Yes No

Dimension and cube creation copilot in planning

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

By pointing to existing spreadsheets used for planning, organizations can reduce implementation time by receiving guided experience for setting up their dimensions and cubes for planning, decreasing implementation or trial time.

Feature details

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.

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

Drive additional operational visibility with expanded data models

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2024	Sep 2024

Business value

By integrating project operations, supply chain, and other data, you get a comprehensive view of your entire operational process. This allows you to understand where bottlenecks exist, how resources are being used, and where there are opportunities for improvement.

Feature details

With a holistic view of operations and supply chain metrics, you can make informed choices. Whether it's to reallocate resources, prioritize specific projects, or renegotiate with suppliers, having detailed data provides the insights needed to make strategic decisions.

This functionality provides you with an intuitive dimensional model for supply chain and project operations business processes along with a set of default reports that align with these value chains. It also provides the ability to extend the data models and reports to include external data.

Feedback

Edit dimensions and dimension values in grid for business performance planning

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Update or add dimension values within the application.

Feature details

Planning often has dimension values that may be different than actual data. This is to model different scenarios, whether it's a new division, product, or service. Currently, the user would need to edit these values in Excel. An editable grid will be added so the user can edit or add dimension values directly within the planning app, without having to launch Excel.

Feedback

Was this page helpful? Yes No

Manage tasks and create reports with generative AI

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (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 2024	Jul 2024

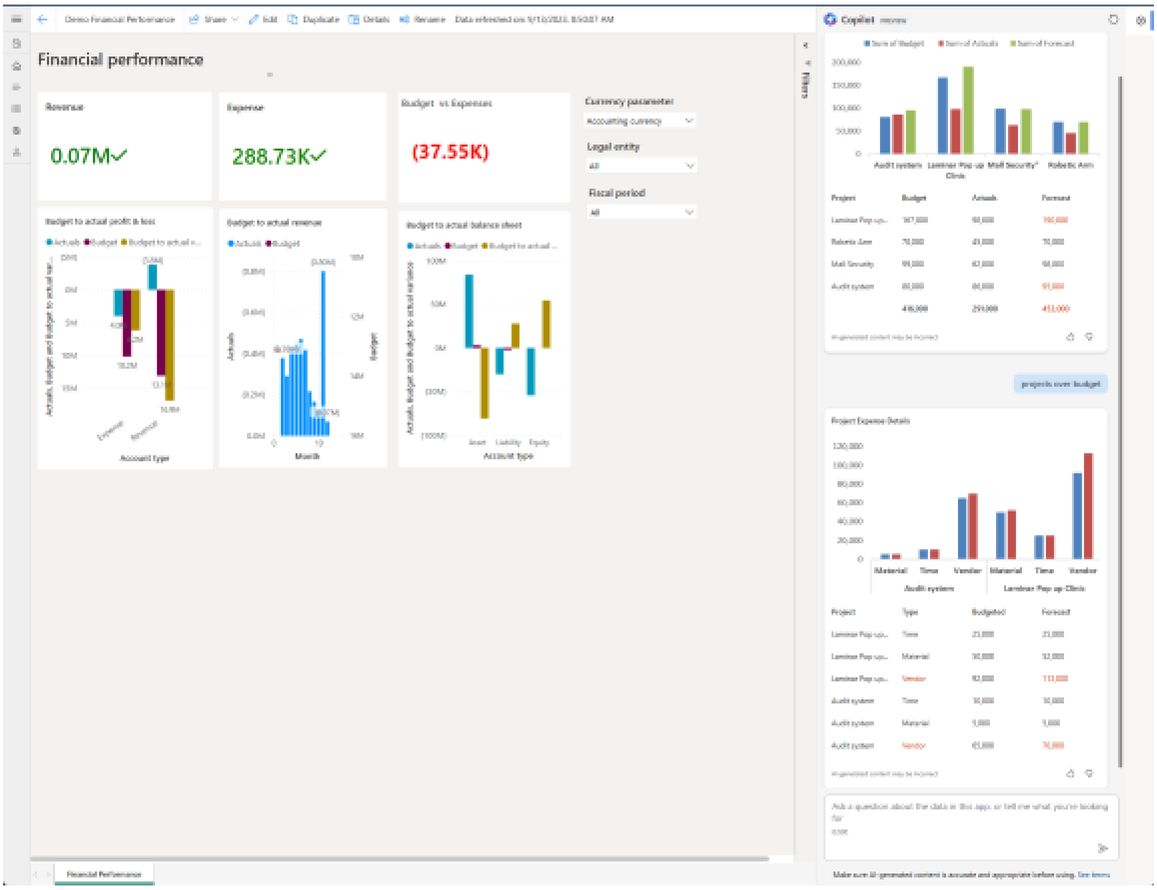
Business value

Traditional administrative tasks, data gathering, and report writing can be time-consuming, error-prone, and inconsistent. By leveraging generative AI, you can save significant time, ensure accuracy and consistency, and lower costs, allowing employees to focus on higher-value tasks and strategic planning.

Feature details

Leveraging generative AI in administrative tasks and report generation offers businesses a competitive edge in terms of efficiency, cost-saving, and strategic advantage. It can reduce the cognitive load on your employees, enabling them to focus on creative, strategic, and more complex problem-solving tasks.

This functionality will provide users the ability to use conversational language to complete tasks such as setting up security, organizing and searching for reports, and creating new reports and visuals.



Feedback

Was this page helpful? Yes No

Put planning into action by automating approved recommended actions

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

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

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

- Purchase new assets

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

Feedback

Was this page helpful? Yes No

Quickstart templates in planning for Dynamics 365 Finance

Article • 01/25/2024

ⓘ Important

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

Expand table

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

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. Quickstart templates provide this experience in minutes versus days.

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

Feedback

Was this page helpful? Yes No

Set up data flows in the business application planning app

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Embedding data flows into the business application planning app unifies the setup and data integration experience in a single place, resulting in fewer steps and higher usability.

Feature details

Data flows are the integration component to bring in data to planning. Today, this is done through a separate administrator experience in Power Platform. By bringing this experience into the application, users can complete their entire planning setup in a single application, reducing complexity and number of steps.

Feedback

Was this page helpful? Yes No

Set up security for multiple users in business performance planning

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Administrators save time and have better visibility into the users and permissions in business performance planning.

Feature details

Administrators set up security user by user, which is manual and time-consuming. With security enhancements, administrators have a visual overview of access to the cubes and dimensions by user and groups, as well as the ability to mass-assign dimension and cube access for a user or group of users.

Feedback

Was this page helpful? Yes No

Copilot

Article • 03/06/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Speed results with collections coordinator summary

Article • 03/06/2024

ⓘ Important

Some of the 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/p/?linkid=2216434)). Learn more: [What's new and planned](https://learn.microsoft.com/en-us/dynamics365/release-plans/)

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jun 15, 2023	Apr 2024

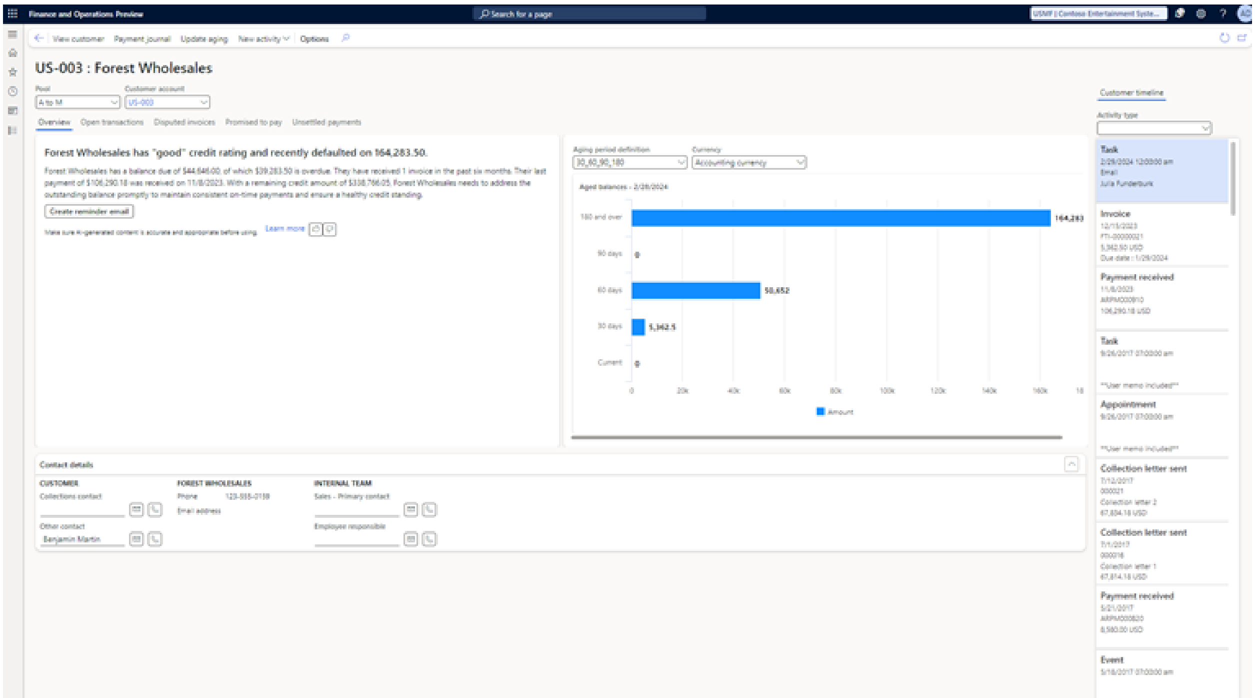
Business value

When a collections agent views a customer record, a lot of information is needed from credit ratings, payment history, and communication history. This process can take anywhere from 15-30 minutes to search and find in Dynamics 365 Finance. With the new workspace page, the collections agent will have a summary of past activities and the most relevant information in one place. Personalized emails can save them even more time when sending reminder letters to customers.

Feature details

Timely payment and healthy cash flow are increasingly important in times of economic uncertainty. With Copilot in Dynamics 365 Finance, collections managers have quick access to credit and payment history. They can prioritize and personalize customer communications with AI-tailored content, increasing successful collection rates and proactively keeping customers in good standing.

The summary information, driven by AI summarization, gathers the relevant data and presents it on one page. If the collections agent wants to view the details, a new timeline view is available that will gather past activities, payment history, and communications with the customer. Aging details and account information are clearly presented so the magnitude of the account is easily found.



Geographic areas

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

- Switzerland
- United States
- United Kingdom
- Australia
- India

See also

Collections coordinator workspace (docs)

Feedback

Was this page helpful? Yes No

Core financials

Article • 01/25/2024

ⓘ Important

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

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

Additional exchange rate type for bank foreign currency revaluation

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Foreign currency revaluation helps companies remain compliant with accounting standards and maintain accurate records of their financial position.

Feature details

Dynamics 365 Finance supports revaluating open bank transaction amounts into a company's accounting currency and reporting currency using the exchange rate type defined on ledger setup. However, users can't use exchange rate types other than the ones defined on ledger setup.

This feature provides multiple options of exchange rate types for bank foreign currency revaluation.

The following options are available in this feature:

- Use default exchange rate type on ledger setup.
- Use an additional exchange rate type on cash and bank management parameters.
- Use an additional exchange rate type on bank account.

Feedback

Was this page helpful? Yes No

Additional exchange rate type for foreign currency revaluation

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Foreign currency revaluation helps companies remain compliant with accounting standards and maintain accurate records of their financial position.

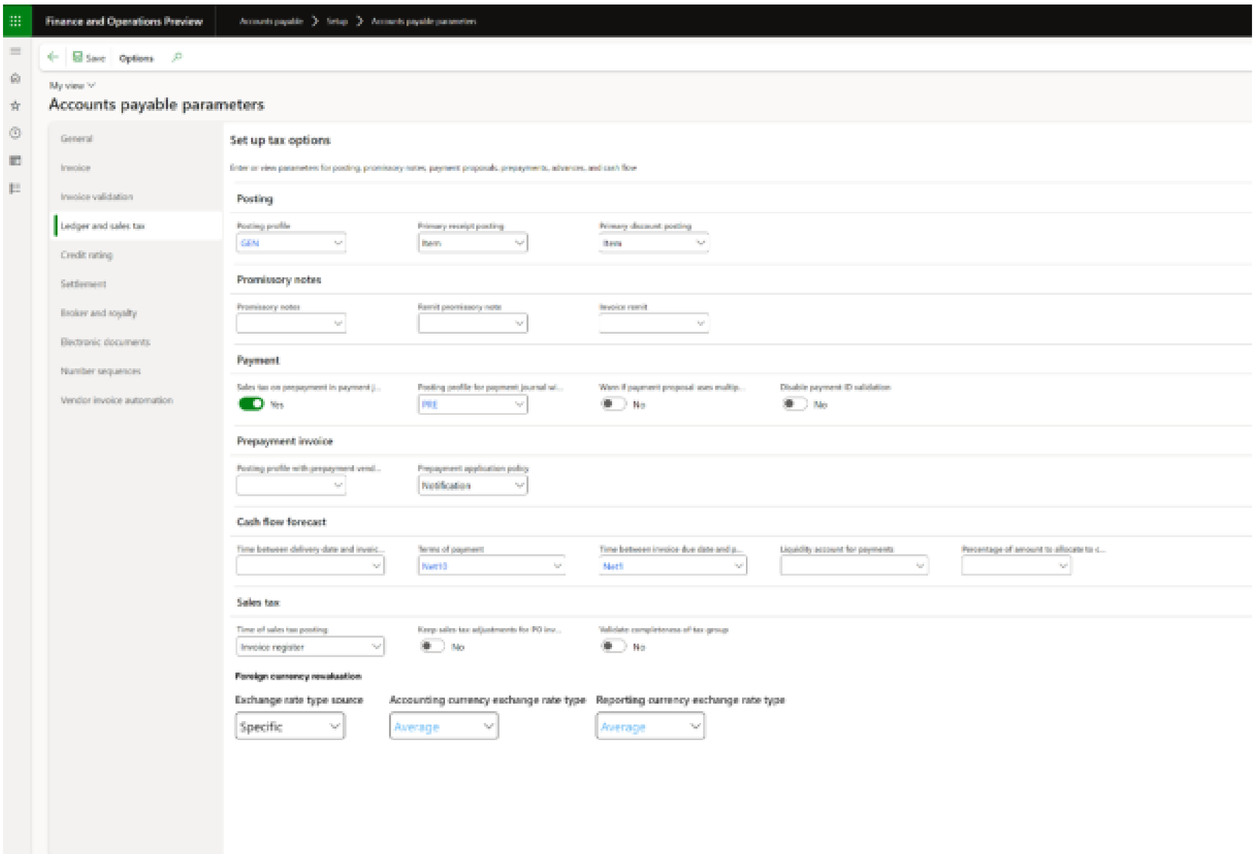
Feature details

Dynamics 365 Finance supports revaluating open vendor invoices amount and open customer invoices amount into a company's accounting currency and reporting currency using the exchange rate type defined on ledger setup. However, users can't use exchange rate types other than the ones defined on ledger setup.

This feature provides multiple options of exchange rate types for accounts payable and accounts receivable foreign currency revaluation.

The following options are available in this feature:

- Use a default exchange rate type on ledger setup.
- Use an additional exchange rate type on accounts payable parameters and accounts receivables parameters.
- Use an additional exchange rate type on customer group and vendor group.



Thank you for your ideas

Thank you for submitting these ideas:

- To be able to perform foreign currency revaluations from any other currency exchange rate type apart from the one selected in Main Ledger Accounting Currency Exchange Rate Type field.
- Add Ability to apply a specific exchange rate type for AR and AP foreign currency revaluation processes
- Exchange rate type for AP/AR foreign currency revaluation
- Allow different exchange rate types for AP/AR FX revaluation

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

Feedback

Was this page helpful? Yes No

Archive data

Article • 03/06/2024

ⓘ Important

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

Expand table

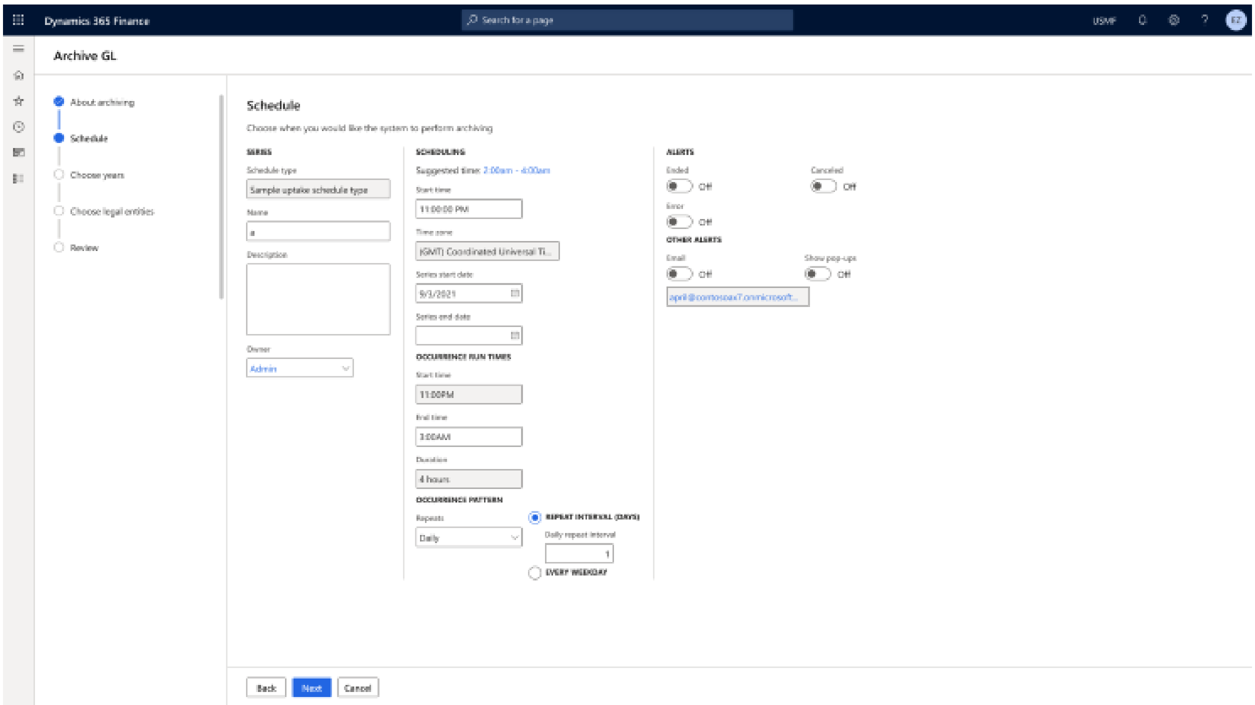
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jul 2024	-

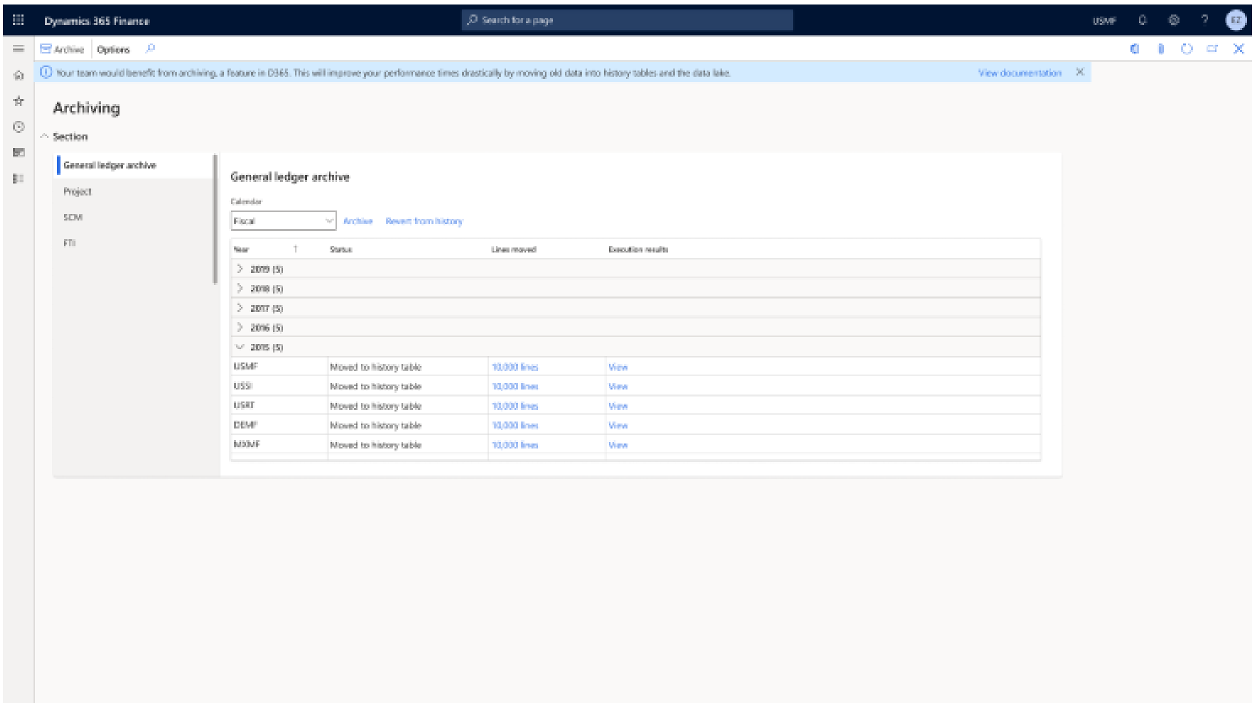
Business value

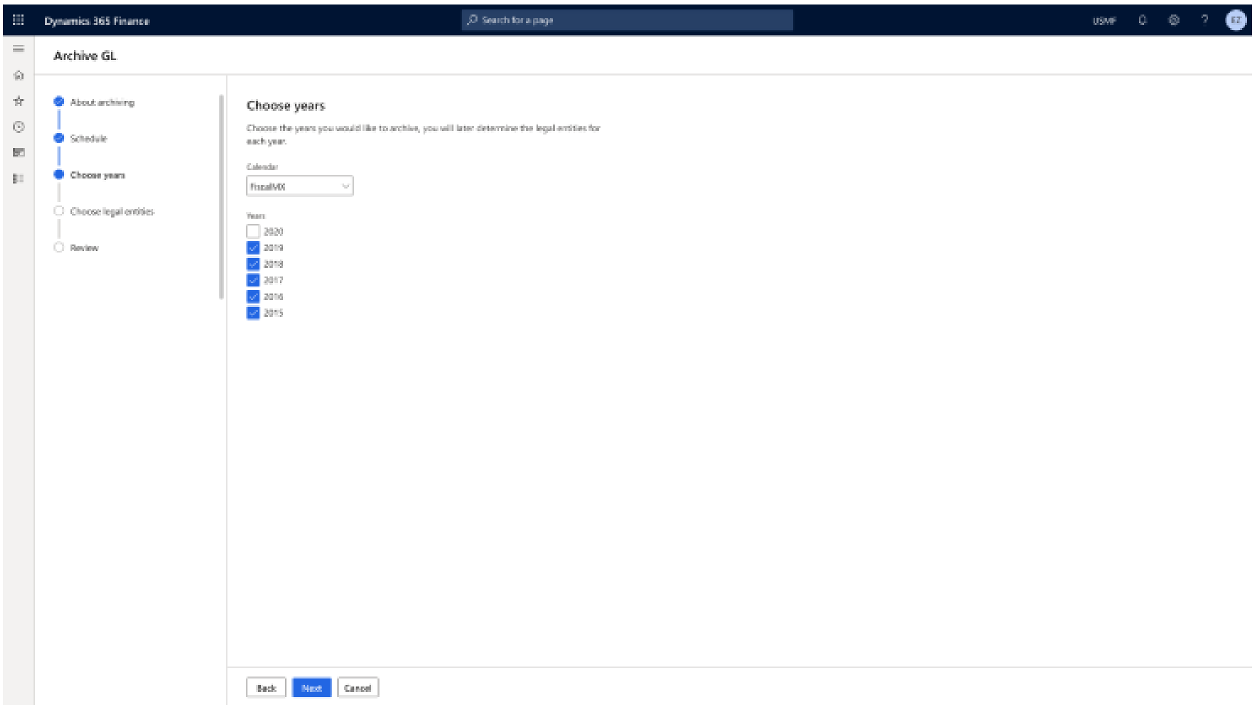
Save storage space and gain performance with a reduced data set to work against.

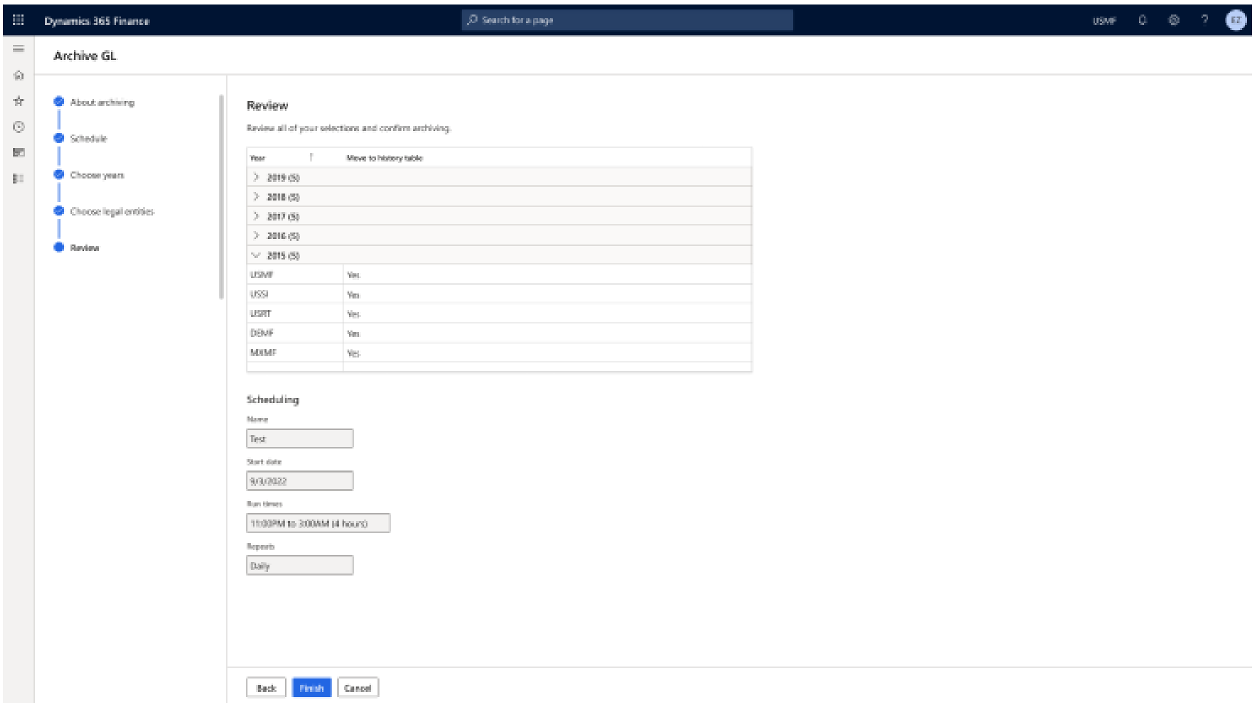
Feature details

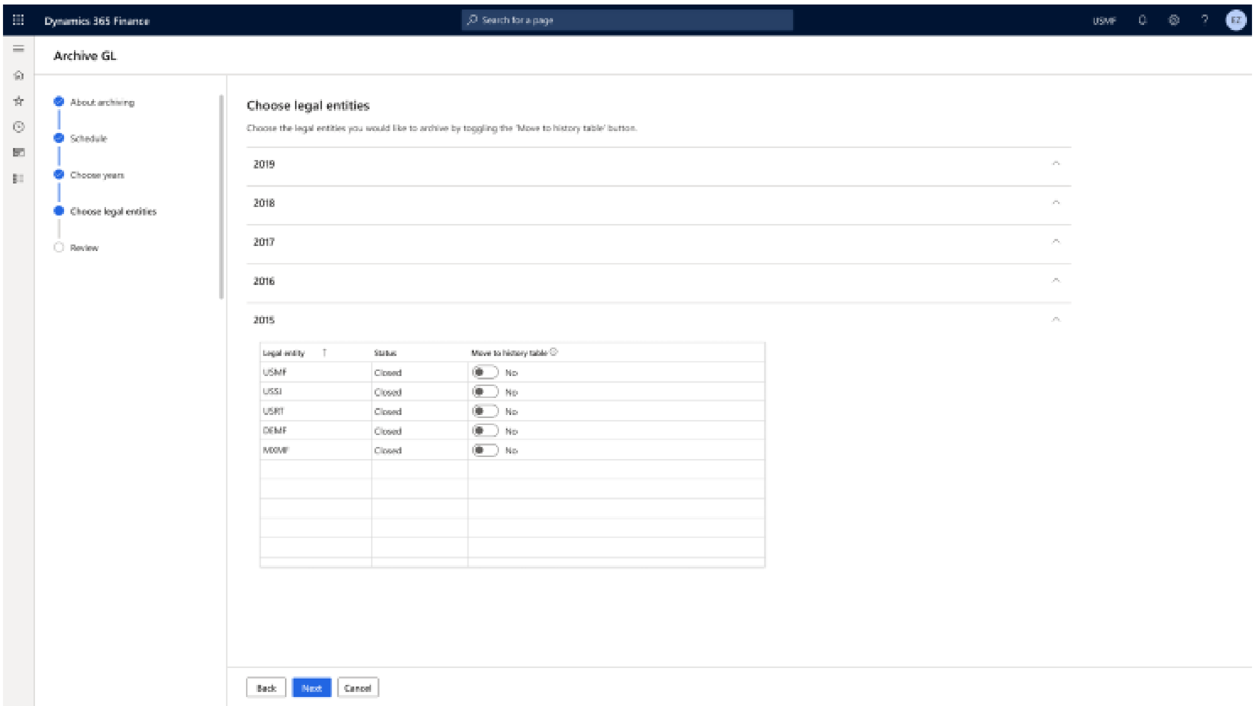
This feature lets you archive data in Dynamics 365 Finance. Using existing automation available in Dynamics 365 Finance, the data will move consistently, safely, and securely to the data archive while you continue to report and analyze historical data using standard reporting.






Dynamics 365 Finance
Search for a page
USMF
Archive GL
About archiving
Schedule
Choose years
Choose legal entities
Review
Choose years
Choose the years you would like to archive, you will later determine the legal entities for each year.
Calendar
FiscalMX
Years
2020
2019
2018
2017
2016
2015
Back
Next
Cancel


Dynamics 365 Finance
Search for a page
USMF
Archive GL
About archiving
Schedule
Choose years
Choose legal entities
Review
Review
Review all of your selections and confirm archiving.
Year
Move to history table
2019 (5)
2018 (5)
2017 (5)
2016 (5)
2015 (5)
USMF Yes
USSI Yes
USRT Yes
DEMF Yes
MXMF Yes
Scheduling
Name
Test
Start date
9/3/2022
Run times
11:00PM to 3:00AM (4 hours)
Repeats
Daily
Back
Finish
Cancel



Feedback

Was this page helpful? Yes No

Archive general ledger posted data

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Organizations are running low on storage space due to large quantities of data. They're also experiencing slower performance due to the large quantity of data. The archive feature will allow customers to archive data in order to reduce the size of their dataset. This will help reduce costs and improve performance of the system.

Feature details

This feature lets you archive data in Dynamics 365 Finance. For Finance, archiving can be done again for the general ledger posted accounting entries. The archival workspace allows an organization to select which fiscal year's data should be archived. The selected fiscal year's data will move consistently, safely, and securely to history tables within Finance and also to Dataverse. Limited reporting can be done from within Finance on the data within the history tables. Reporting will also be available through business performance analytics (BPA) on data that is moved to the Dataverse.

The archival action can also be reversed, allowing an organization to return the data to 'open' tables within Finance. This should only be done when a mistake was made in moving data to history and the Dataverse.

Feedback

Was this page helpful? Yes No

Archive tax transactions

Article • 01/25/2024

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

Expand table

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

Business value

Organizations are running low on storage space due to large quantities of data. They are also experiencing slower performance due to the large quantity of data. The Archive feature will allow customers to archive data in order to reduce the size of their data set. This will help reduce costs and improve performance of the system.

Feature details

This feature archives tax transactions data in Dynamics 365 Finance. Within the archival workspace, organizations can choose the specific fiscal year's data they wish to archive. Once selected, the tax transactions from the chosen fiscal year are seamlessly and securely moved to historical tables within Finance, as well as to Dataverse.

The archival action can also be reversed, allowing an organization to return the data to 'open' tables within Finance. This should only be done when a mistake was made in moving data to history and the Dataverse.

Feedback

Was this page helpful? Yes No

Automatic clear bridged transactions in advanced bank reconciliation

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

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

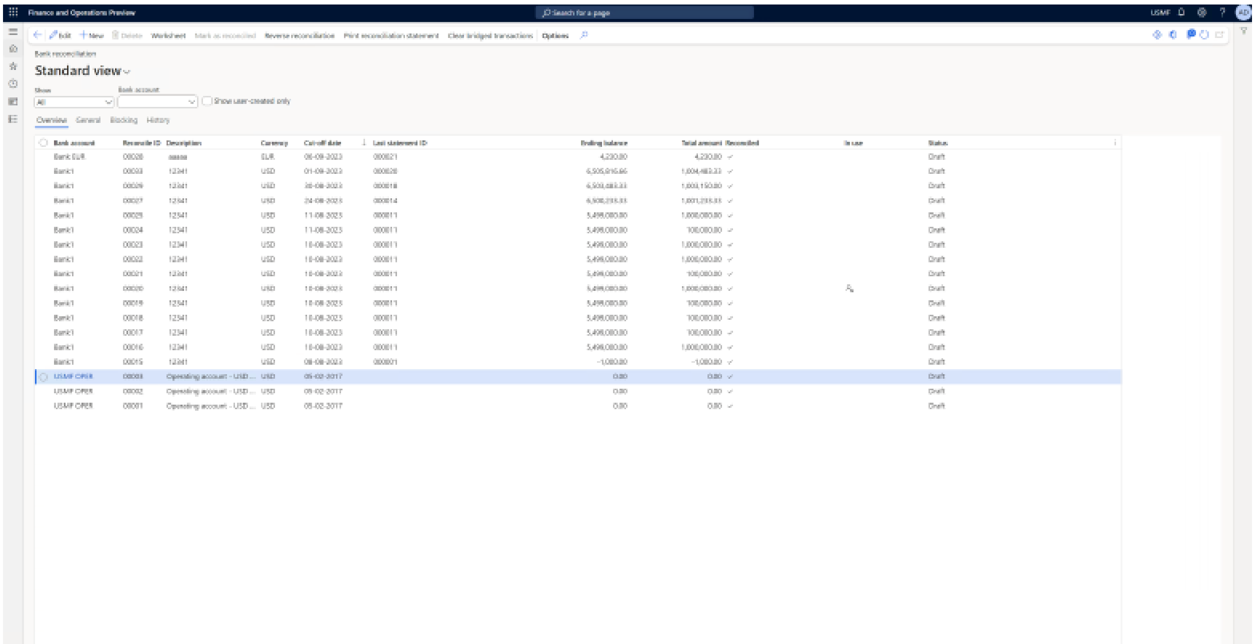
Feature details

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

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

This feature provides the following capabilities to automate the process:

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



Feedback

Was this page helpful? Yes No

Autonomous cash application in advanced bank reconciliation

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

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

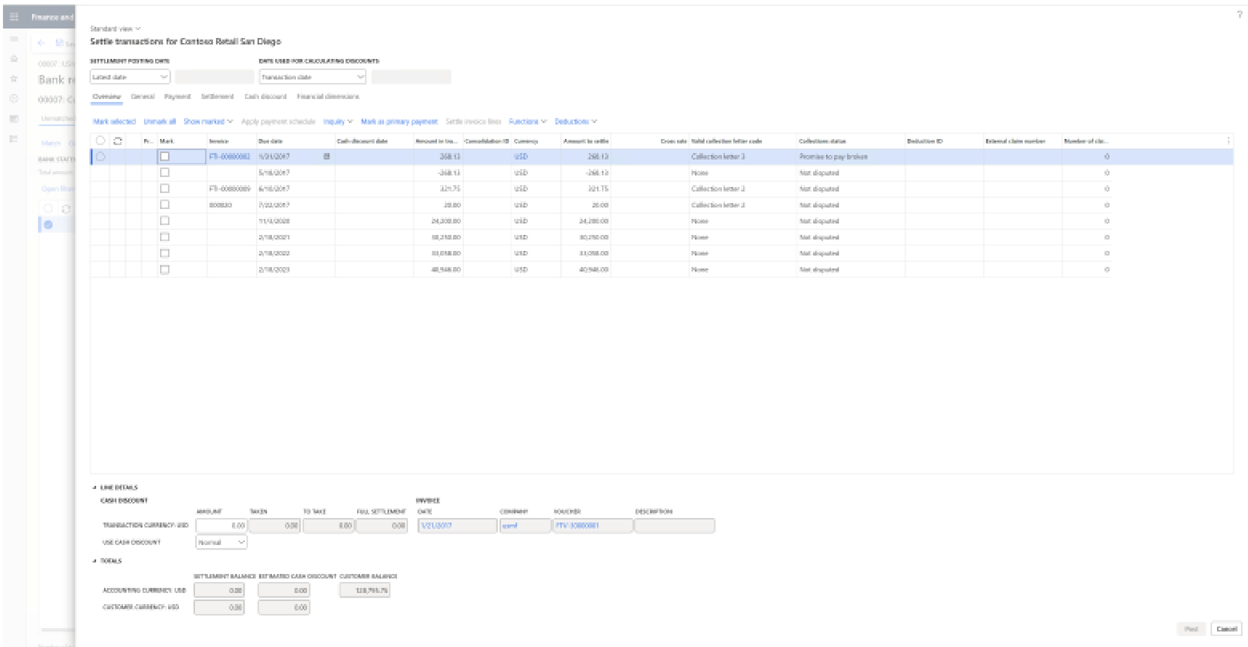
Feature details

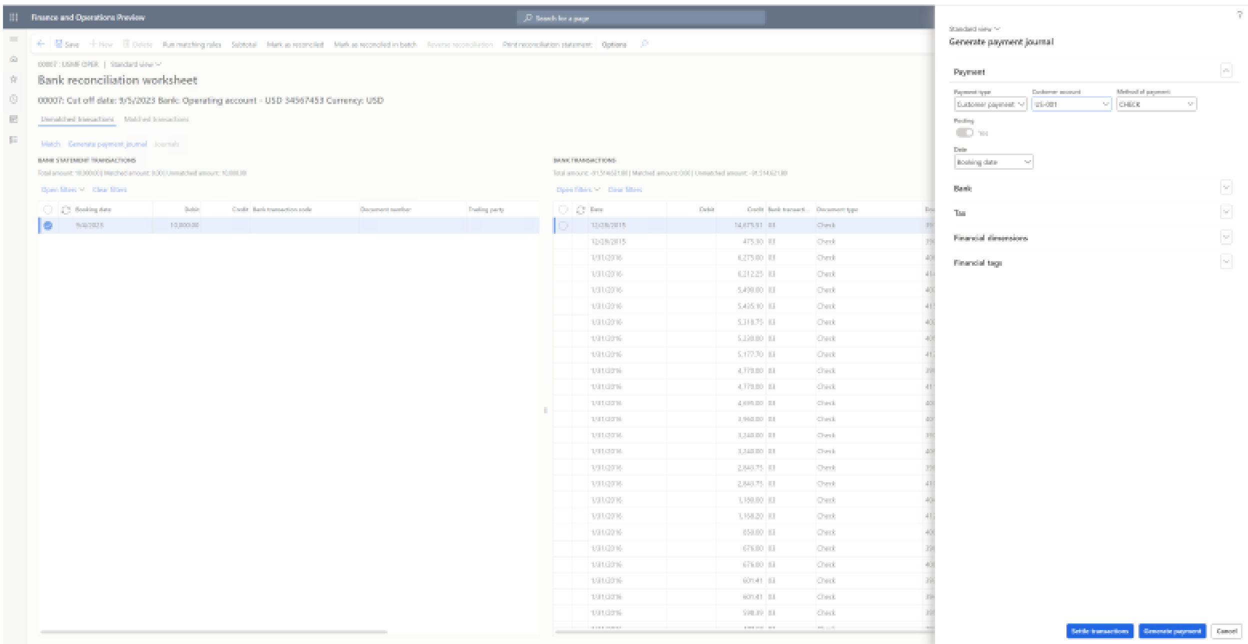
Bank reconciliation is a crucial step for businesses. It involves comparing the cash balance on a company's balance sheet to the corresponding amount on its bank statement, and identifying any discrepancies that may require accounting adjustments. This process can be time-consuming and labor-intensive,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

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

- Generate customer payment journal from bank reconciliation worksheet.

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





Feedback

Was this page helpful? Yes No

Bank account lifecycle management

Article • 01/25/2024

ⓘ Important

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

Expand table

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

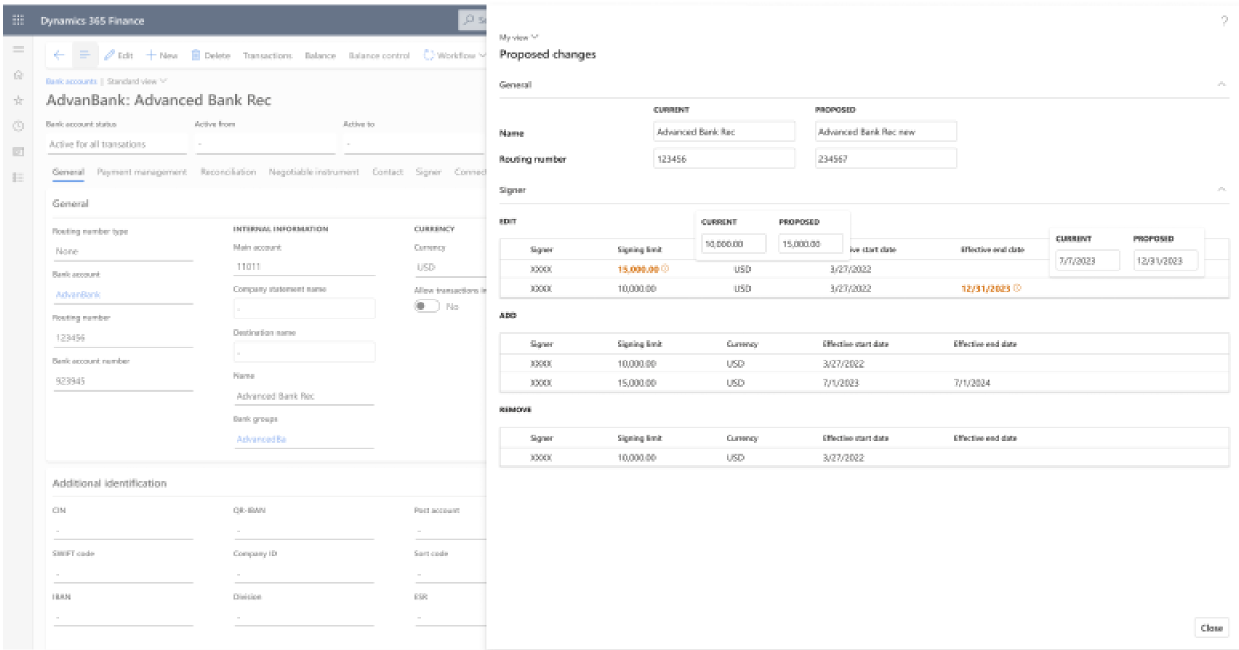
Business value

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 purpose.
- Additional signer master data on bank account.



Feedback

Was this page helpful? Yes No

Check out new AP clerk workspace capabilities

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (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 26, 2024	Jul 2024

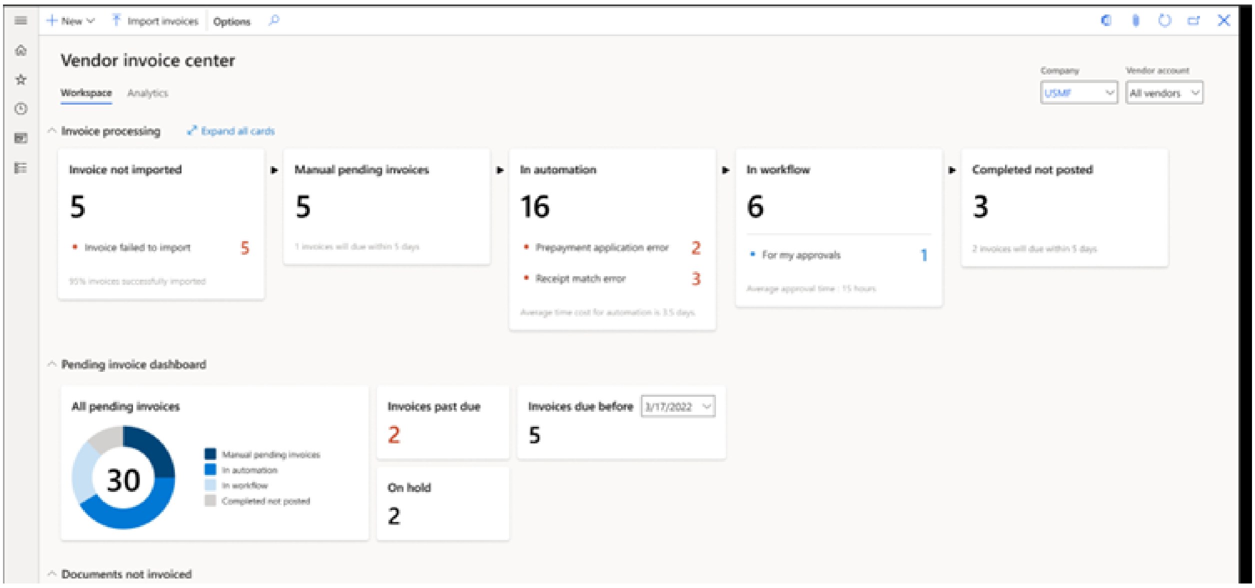
Business value

Our goal is to provide customers with a comprehensive vendor invoice automation solution. While the invoice automation can handle the majority of invoices, there are still some exceptional cases that require user intervention. Our new workspace will provide an intuitive view of all the pending vendor invoices in various processing status, allowing accounts payable clerks to easily identify and correct exceptional invoices.

Feature details

The workspace will be the central place for accounts payable clerks to do their routine work. Different features will be added piece by piece.

In 2024 release wave 1, the workspace can display all pending vendor invoices with various statuses during invoice automation. Accounts payable clerks can quickly identify exceptional invoices and make corrections. In future releases, the workspace will include invoice journals and provide better insight about the automation rate of invoice processing.



See also

Vendor invoice automation workspace (docs)

Feedback

Was this page helpful? Yes No

Correct receipt matching error in vendor invoices with Copilot

Article • 03/06/2024

ⓘ Important

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

Expand table

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

Business value

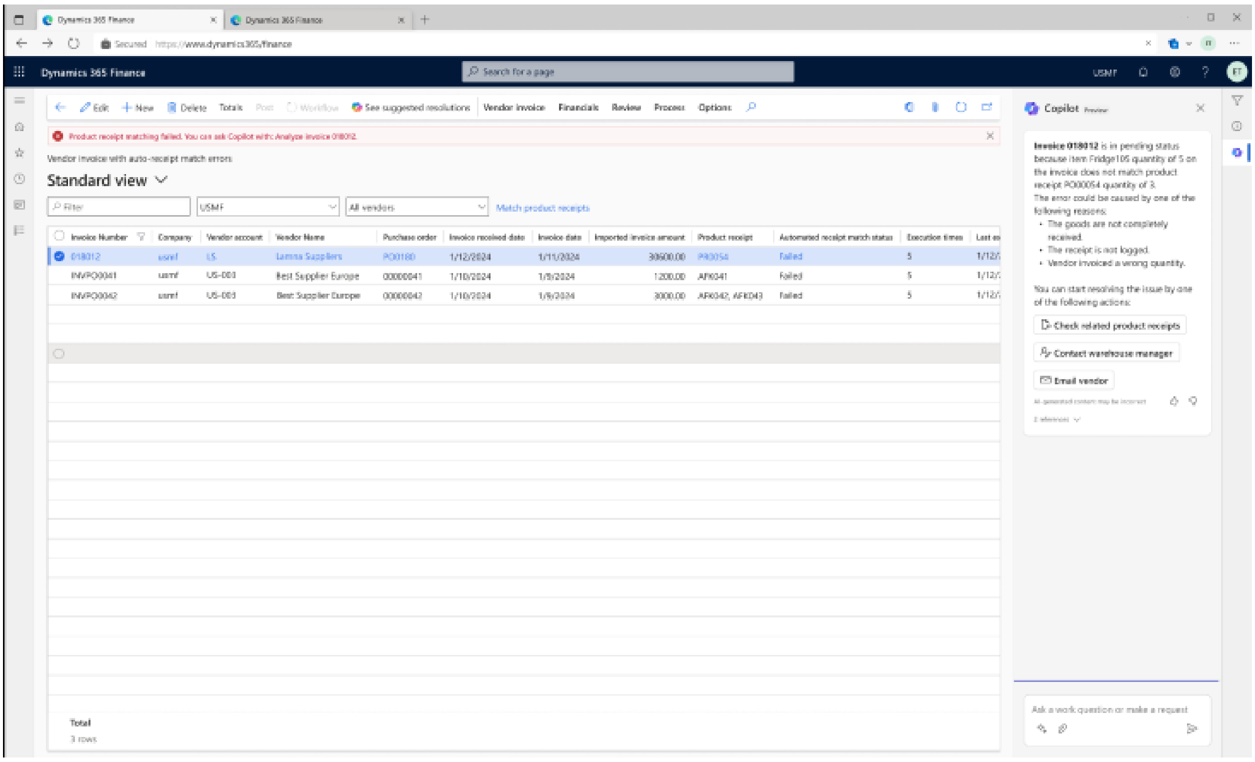
During the vendor invoice automation process within Dynamics 365 Finance, exceptions may arise at various stages of the process. The AP clerk may have to take many actions and search for data to make a correction. Copilot in the pending vendor invoice list and vendor invoice center eliminates the need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

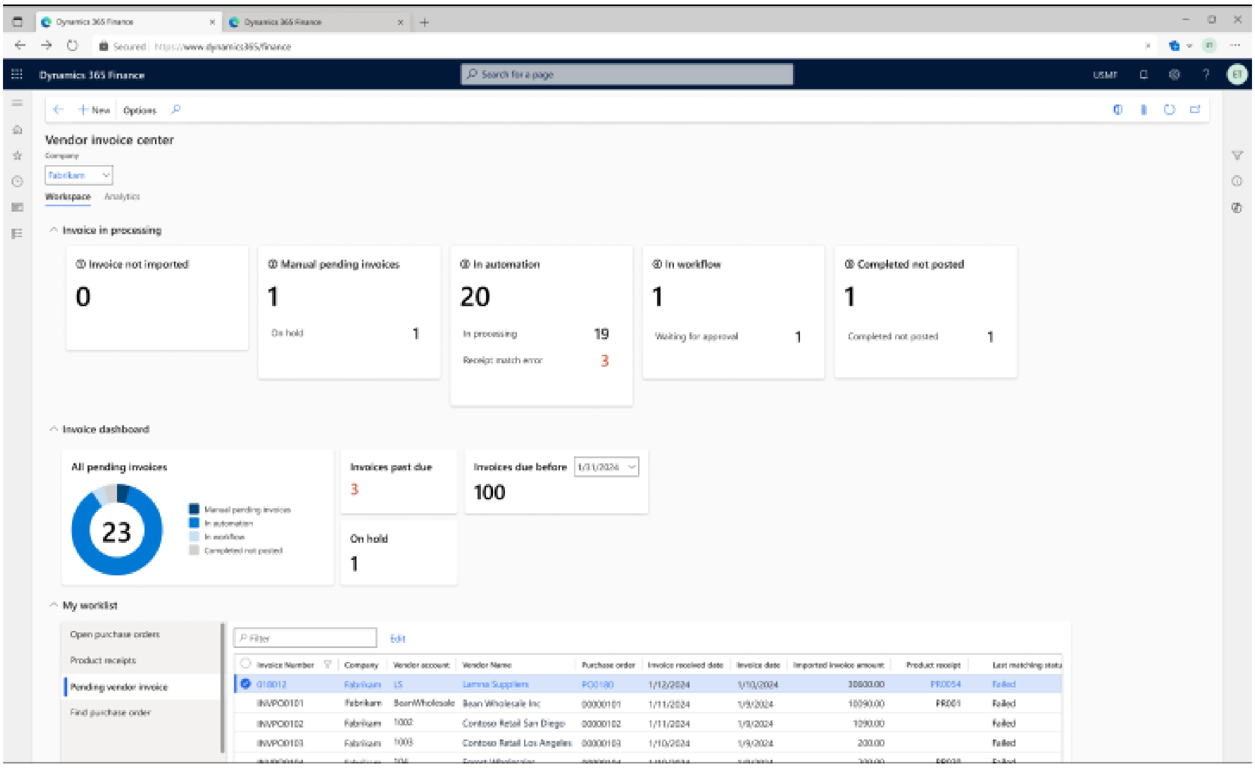
Feature details

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

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

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





Feedback

Was this page helpful? Yes No

Defaulting engine for Financial tags powered by AI-recommended rules

Article • 01/25/2024

ⓘ Important

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Expand table

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

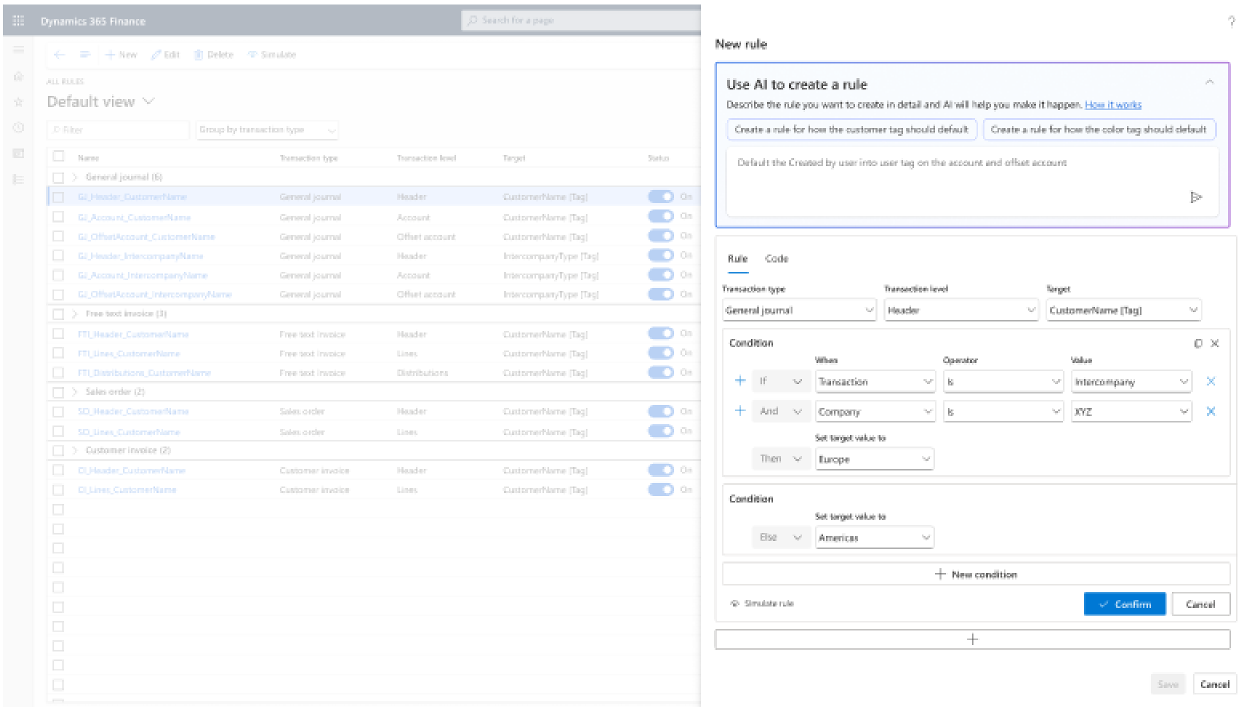
Business value

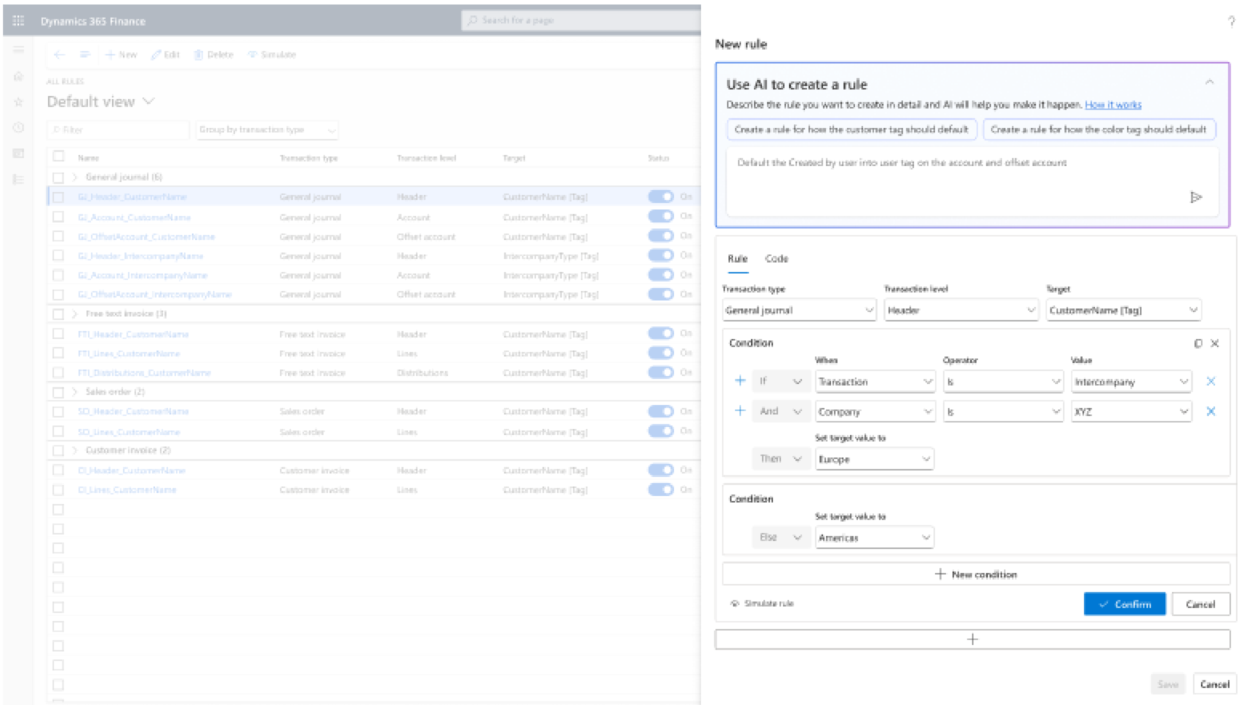
Financial tags can be used to track up to 20 user-defined fields on accounting entries. The defaulting capabilities for financial tags are limited with the initial releases. Organizations need the ability to default tag values based on data from the transaction being entered, without having to manually enter the information again. For example, if Tag 1 is set up to track Customer name, any time a customer exists on a transaction, the customer's name should default into Tag 1.

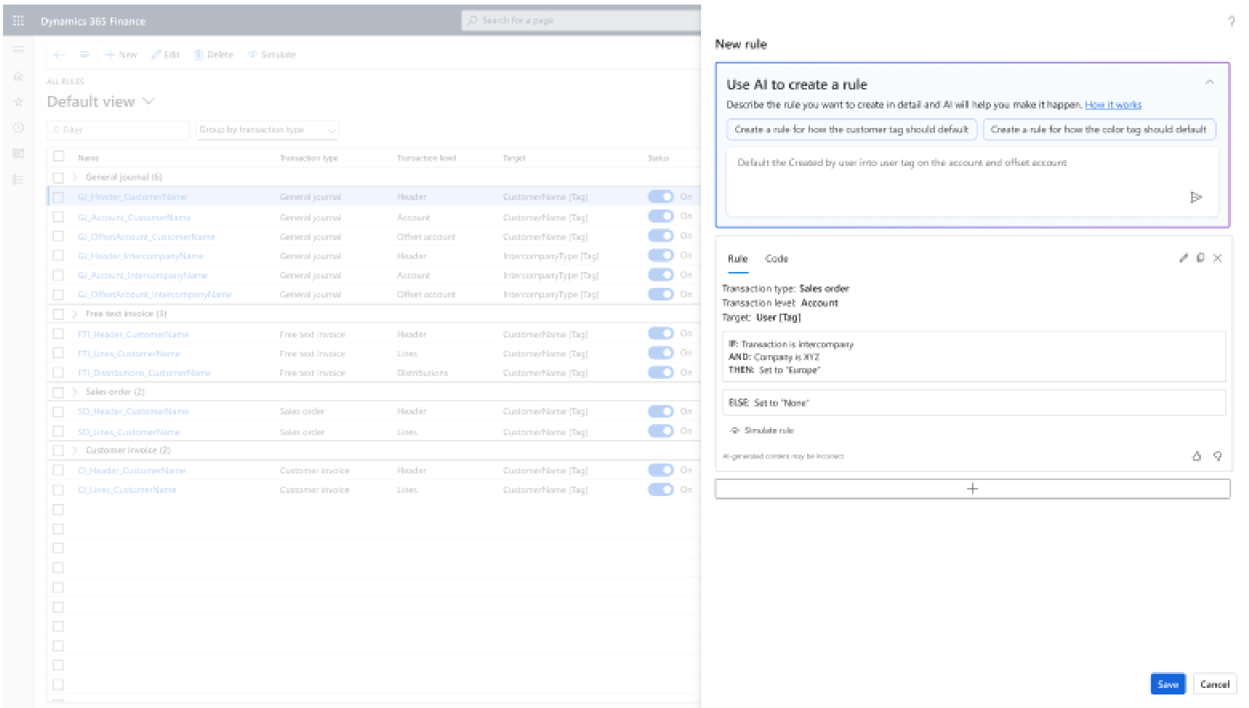
Feature details

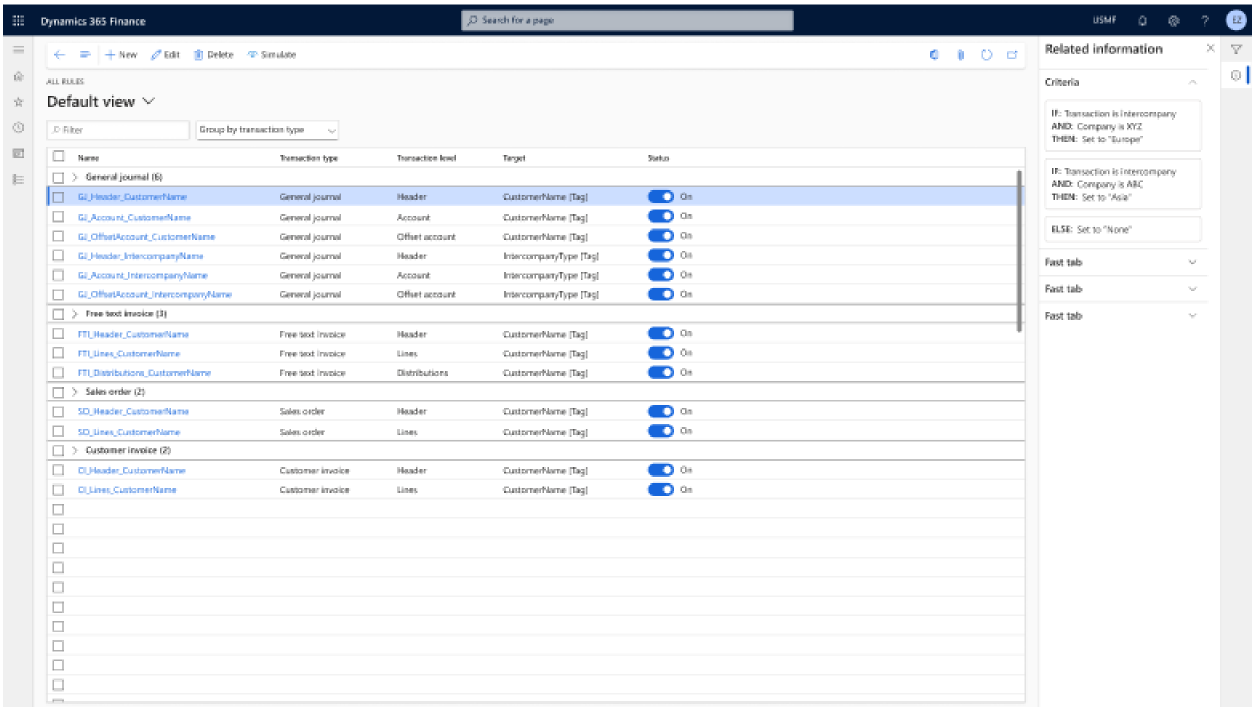
The Default engine for tags allows an organization to define its own rules to default financial tags. Rules can be defined per transaction type (general journal, free text invoice, PO, vendor invoice journal, and so on), per financial tag and per transaction level (header, lines, account, offset account,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

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


Dynamics 365 Finance
Search for a page
New
Edit
Delete
Simulate
ALL RULES
Default view
Filter
Group by transaction type
Name
Transaction type
Transaction level
Target
Status
General journal (6)
Free text invoice (3)
Sales order (2)
Customer invoice (2)
New rule
Use AI to create a rule
Describe the rule you want to create in detail and AI will help you make it happen. How it works
Create a rule for how the customer tag should default
Create a rule for how the color tag should default
Default the Created by user into user tag on the account and offset account
Rule
Code
Transaction type
Transaction level
Target
General journal
Header
CustomerName [Tag]
Condition
When
Operator
Value
If
Transaction
Is
Intercompany
And
Company
Is
XYZ
Set target value to
Then
Europe
Condition
Set target value to
Else
Americas
New condition
Simulate rule
Confirm
Cancel
Save
Cancel


Dynamics 365 Finance
Search for a page
New
Edit
Delete
Simulate
ALL RULES
Default view
Filter
Group by transaction type
Name
Transaction type
Transaction level
Target
Status
General journal (6)
Free text invoice (3)
Sales order (2)
Customer invoice (2)
New rule
Use AI to create a rule
Describe the rule you want to create in detail and AI will help you make it happen. How it works
Create a rule for how the customer tag should default
Create a rule for how the color tag should default
Default the Created by user into user tag on the account and offset account
Rule
Code
Transaction type
Transaction level
Target
General journal
Header
CustomerName [Tag]
Condition
When
Operator
Value
If
Transaction
Is
Intercompany
And
Company
Is
XYZ
Set target value to
Then
Europe
Condition
Set target value to
Else
Americas
New condition
Simulate rule
Confirm
Cancel
Save
Cancel





Feedback

Was this page helpful? Yes No

Enhanced bank reconciliation statement report

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

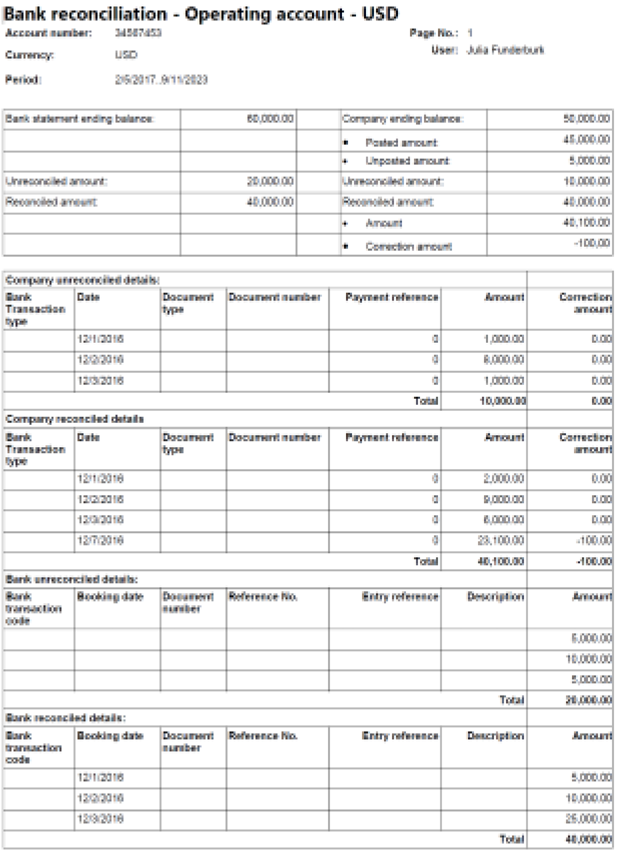
Dynamics 365 Finance offers an advanced bank reconciliation feature that help businesses manage the bank reconciliation process more efficiently. Businesses benefit from increased automation and more functional capabilities, reducing the need for manual work and saving time for cash management clerks.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

Feature details

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

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

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



Bank reconciliation - Operating account - USD

Account number: 34567453 | Page No.: 1
Currency: USD | User: Julia Funderburk
Period: 2/5/2017..9/11/2023

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

Company unreconciled details:

Bank Transaction type	Date	Document type	Document number	Payment reference	Amount	Correction amount
	12/1/2016			0	1,000.00	0.00
	12/2/2016			0	8,000.00	0.00
	12/3/2016			0	1,000.00	0.00
				Total	10,000.00	0.00

Company reconciled details

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

Bank unreconciled details:

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

Bank reconciled details:

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

Feedback

Was this page helpful? Yes No

Explore customer and vendor balance netting

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (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 2, 2023	Jul 2024

Business value

Netting can minimize the exchange of money between an organization and the customer/vendor party. It can help a company avoid making unnecessary payments or receipts, and save on transaction fees, by consolidating the company's customer and vendor balances.

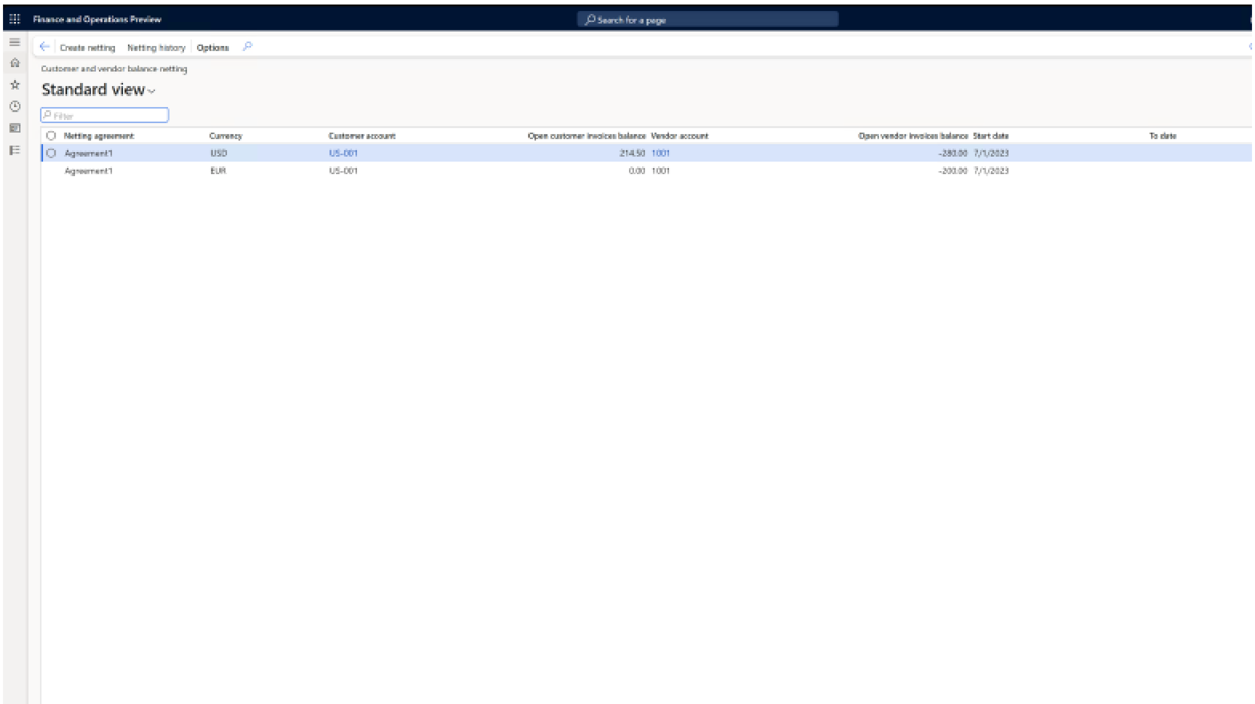
Feature details

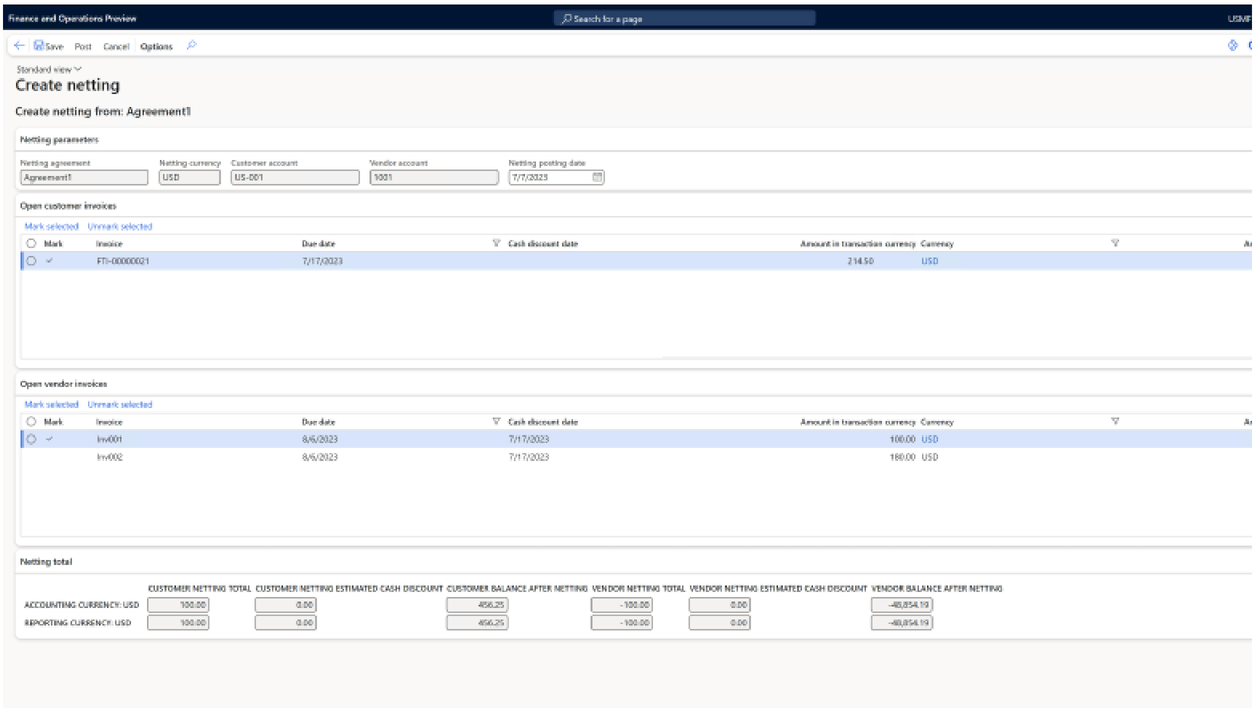
Customer and vendor balance netting is a process where the balances for a vendor and customer are netted against each other because the vendor and customer are the same party. Currently, to process a netting in Dynamics 365 Finance, cash clerks have to manually calculate the correct netting amount, create dummy payment journals, and settle open customer invoices and open vendor invoices with the dummy payment journals.

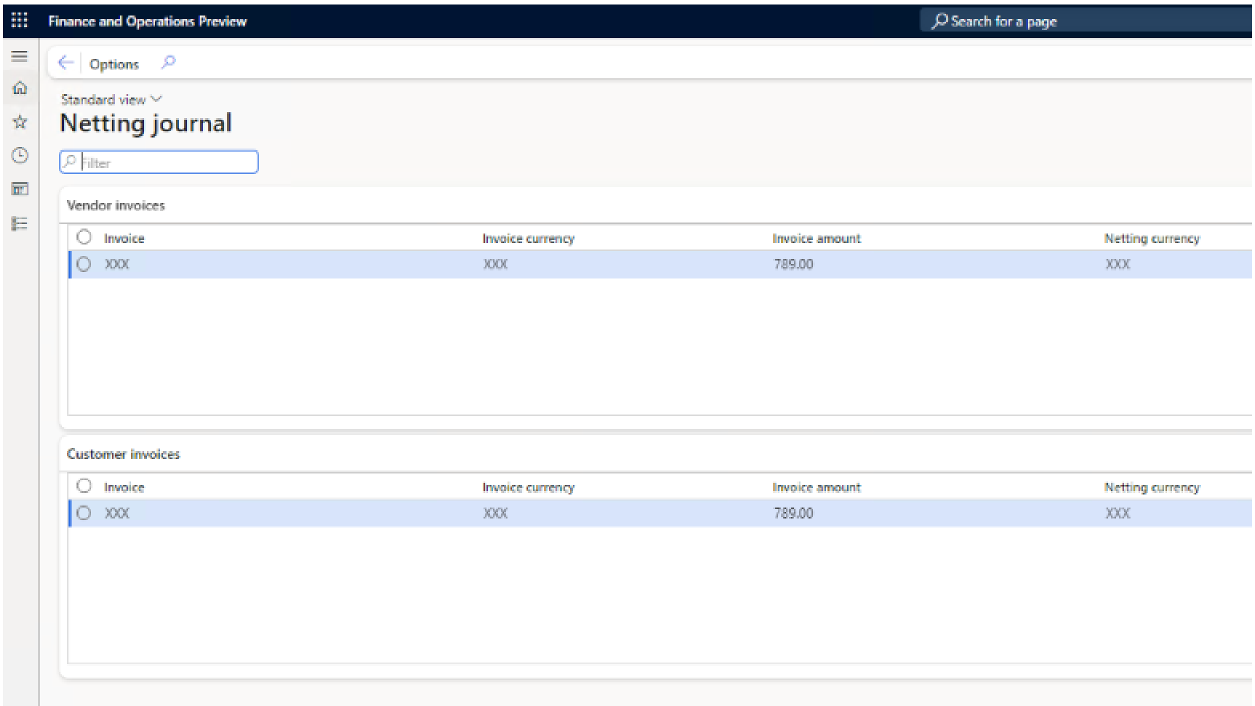
This feature provides standard netting capability in Dynamics 365 Finance. It automates the netting process by calculating the netting amount based on the selected customer and vendor invoices, posting the netting journal, and settling the netting journal with selected customer and vendor invoices.

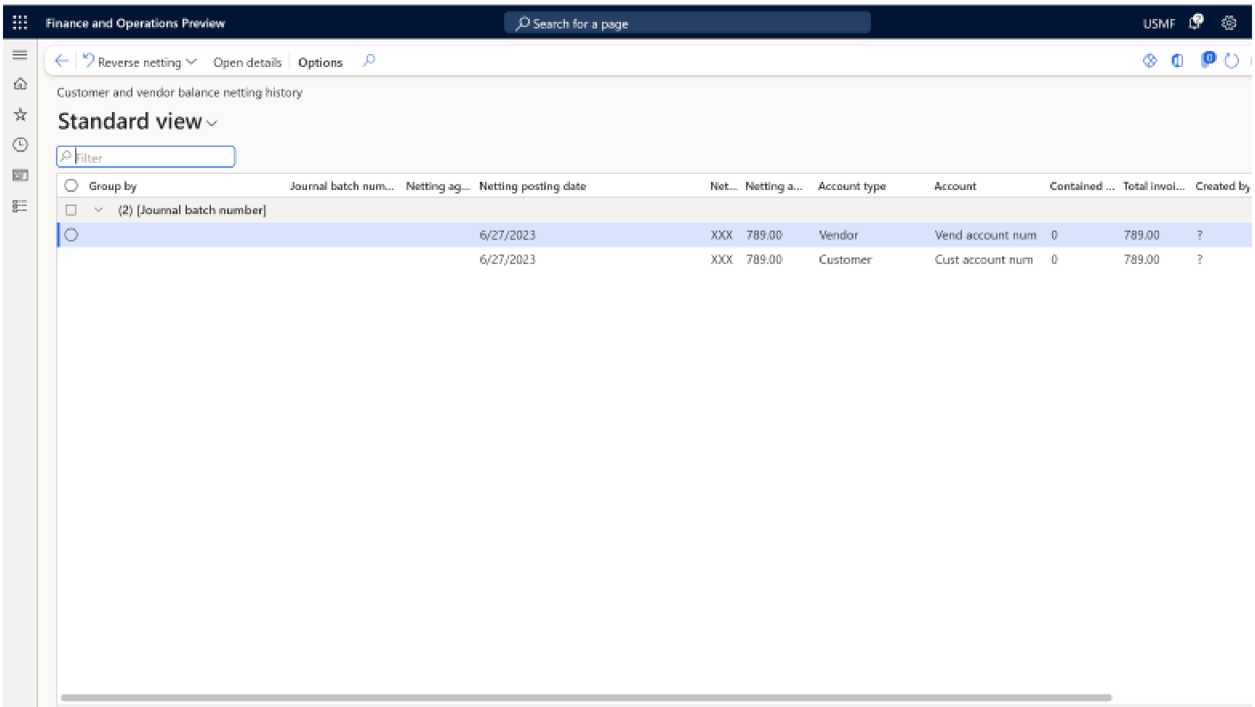
The following functions are provided in this feature for all countries and regions:

- **Netting agreement**: Allows users to specify the customer and vendor pair for netting, and other parameters like effective date range, netting sequence to automate the netting process and minimize compliance risks.
- **Netting overview**: Allows users to query all available customer invoices and vendor invoices for netting.
- **Manual netting**: Users can manually select the customer invoices and vendor invoices for netting. A netting journal will be posted automatically and settle the open invoices.
- **Automatic netting**: Users can run periodical task and process automation to trigger the netting process automatically.
- **Netting history**: A page will be available to query all the netting history.
- **Netting details**: A page will be available to view netting relations between customer invoices and vendor invoices.
- **Netting advice**: A report will be available to print the netting relation details between customer invoices and vendor invoices.




Finance and Operations Preview
Search for a page
Save Post Cancel Options
Standard view
Create netting
Create netting from: Agreement1
Netting parameters
Netting agreement
Netting currency
Customer account
Vendor account
Netting posting date
Agreement1
USD
US-001
1001
7/7/2023
Open customer invoices
Mark selected Unmark selected
Mark Invoice Due date Cash discount date Amount in transaction currency Currency
FTI-00000021 7/17/2023 214.50 USD
Open vendor invoices
Mark selected Unmark selected
Mark Invoice Due date Cash discount date Amount in transaction currency Currency
Inv001 8/6/2023 7/17/2023 100.00 USD
Inv002 8/6/2023 7/17/2023 180.00 USD
Netting total
CUSTOMER NETTING TOTAL CUSTOMER NETTING ESTIMATED CASH DISCOUNT CUSTOMER BALANCE AFTER NETTING VENDOR NETTING TOTAL VENDOR NETTING ESTIMATED CASH DISCOUNT VENDOR BALANCE AFTER NETTING
ACCOUNTING CURRENCY: USD 100.00 0.00 456.25 -100.00 0.00 -48,854.19
REPORTING CURRENCY: USD 100.00 0.00 456.25 -100.00 0.00 -48,854.19


Finance and Operations Preview
Search for a page
Options
Standard view
Netting journal
Filter
Vendor invoices
Invoice Invoice currency Invoice amount Netting currency
XXX XXX 789.00 XXX
Customer invoices
Invoice Invoice currency Invoice amount Netting currency
XXX XXX 789.00 XXX



Netting advice

Date of compensation 7/1/2023

A.Datum Corporation

Lilienweg 9
24103 Kiel
deu

Customer account DE-010

Opal Audio

Rebhuhnweg 45
79539 Berlin
DEU

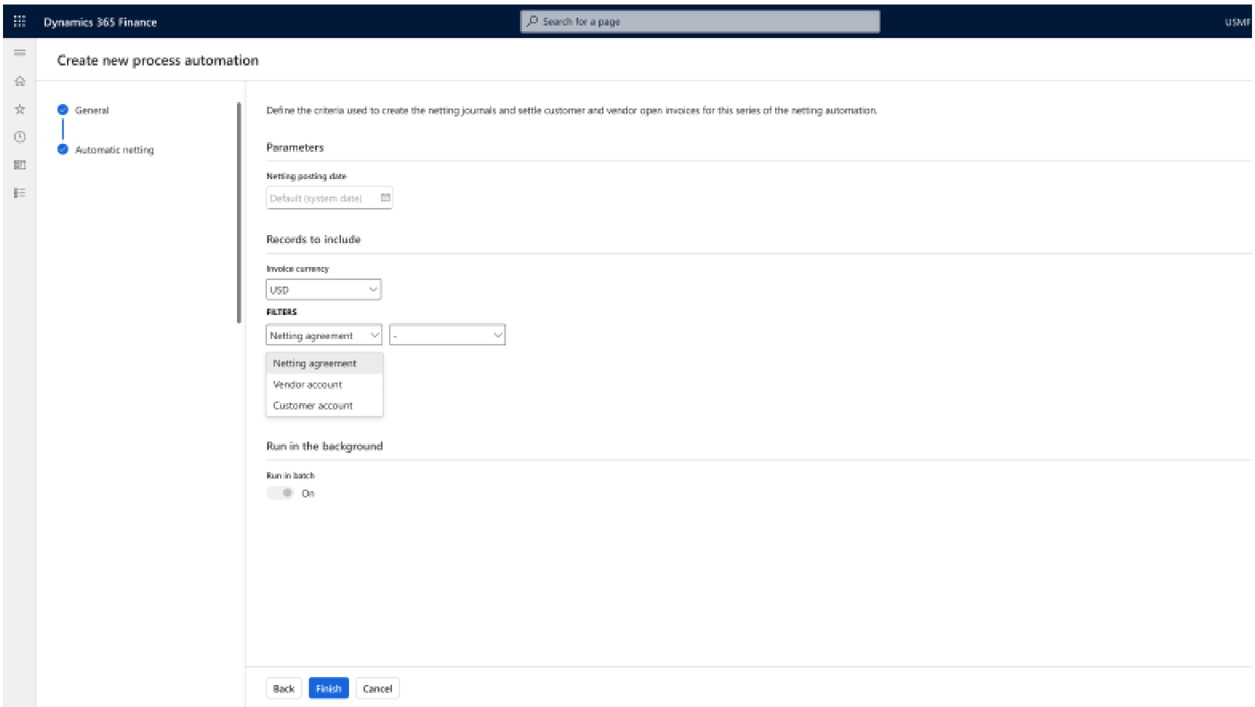
Vendor account DE-001

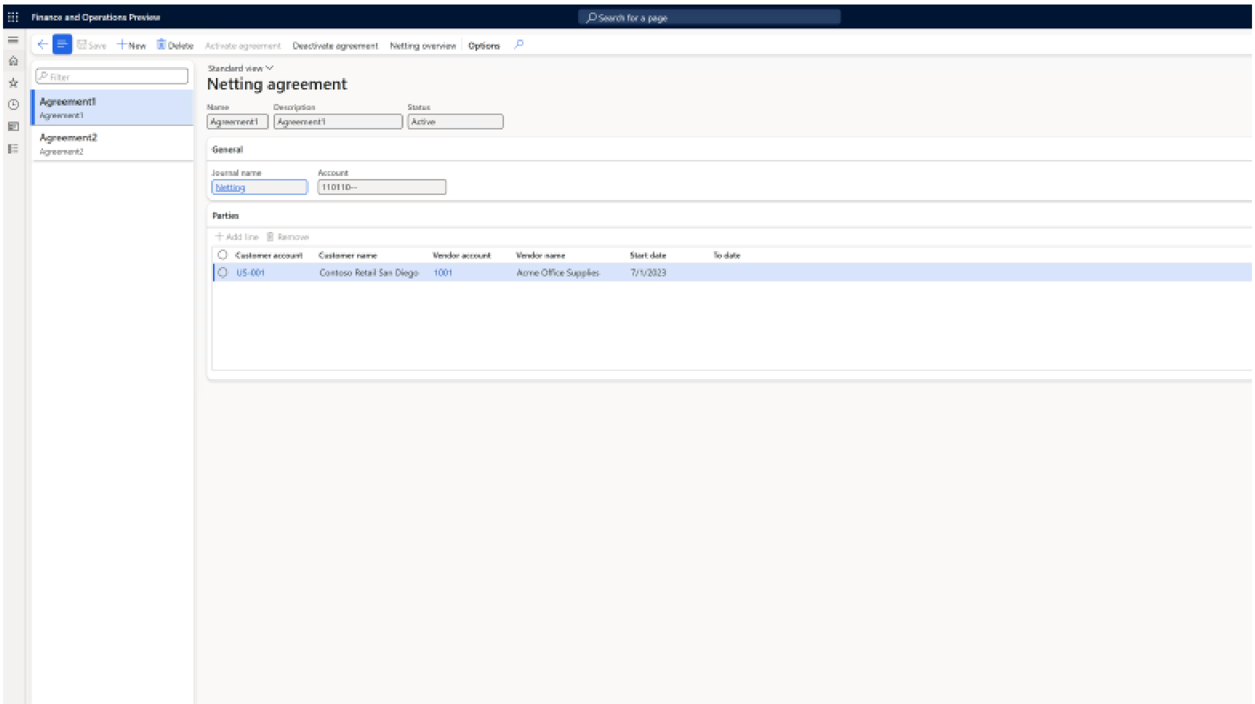
Customer transactions

Invoice	Transaction date	Due date	Voucher	Transaction text	Currency	Amount currency	To settle	Settled
CIV-000163	1/18/2017	2/17/2017	INV-10000162		EUR	2,082.33	2,082.33	571.39
						Total	2,082.33	571.39

Vendor transactions

Invoice	Transaction date	Due date	Voucher	Transaction text	Currency	Amount currency	To settle	Settled
TESTINT001	7/4/2023	7/14/2023	PIV-110000056		EUR	-571.39	-571.39	-571.39
						Total	-571.39	-571.39
						Netting amount		571.39





Tell us what you think

Help us improve Dynamics 365 Finance by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://experience.dynamics.com/ideas/idea/?ideaid=c1f0b1fc-0c8a-ea11-99e5-0003ff68a4b4 .

See also

Net customer and vendor balances (docs)

Feedback

Was this page helpful? Yes No

Financial tags added to accounting distributions

Article • 01/25/2024

ⓘ Important

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

Expand table

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

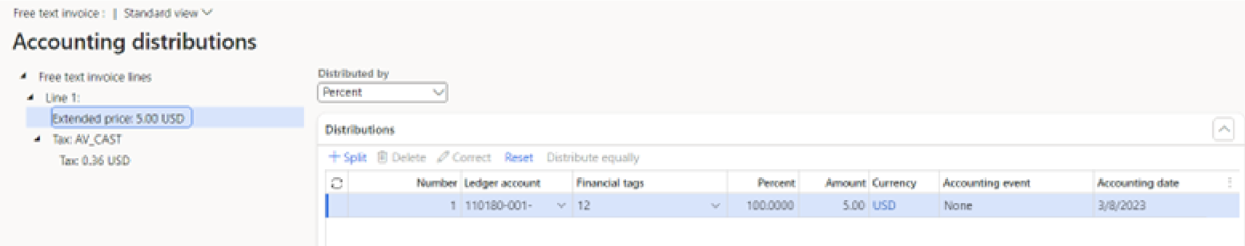
Business value

Financial tags let organizations track user-defined fields on accounting entries posted to the general ledger. Financial tags are an alternative to financial dimensions and can be used to track transaction-specific data, such as document numbers or master data. Additional financial dimensions increase the size of an organization's chart of accounts, negatively impacting performance on processes such as the foreign currency revaluation and year-end close. Financial tag values are displayed on inquiries, such as voucher transactions, and can be used for reporting and analytics. They will be available for processes such as ledger settlement to provide more matching options. For example, a financial tag can be created to track payment references, making it easier to match transactions within ledger settlement. This enhancement to financial tags for source document framework and the accounting distributions will further complete the financial tags.

Feature details

Financial tags can now be added to accounting distributions for documents that use the source document accounting framework. As with journals on the original release of the financial tags feature, this enhancement allows the entry of financial tag values on the **Accounting distribution** page. The same financial tags defined and activated in prior releases for journals will be available for entry on the **Accounting distribution** page.

In future releases of the product, financial tags can default for accounting distributions from the documents that create accounting distributions. With future releases, financial tags will be incorporated into more source documents such as free text invoice, purchase order, and vendor invoice document entry.



Feedback

Was this page helpful? Yes No

Financial tags support added to more journals and documents

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Financial tags can be used to track up to 20 user-defined fields on accounting entries. Tags are considered an alternative to financial dimensions. They can be tracked on the accounting entries of transactions to help with analytical reporting or reconciliation, just like financial dimensions, but without the overhead of financial dimensions. Tags aren't subject to rules and validation. They aren't part of an account structure because they aren't part of the ledger account. No validation is performed on the tag values either.

Feature details

Financial tags continue to be added to the remaining financial journals, such as Bill of exchange, Promissory notes, and Advanced ledger entry. Tags will also be introduced into the purchase order documents, free text invoice, some project accounting transactions (journals), and other transactions.

Feedback

Was this page helpful? Yes No

Manage petty cash

Article • 03/06/2024

ⓘ Important

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

Business value

This feature provides a standard petty cash management capability in Dynamics 365 Finance and helps prevent fraud and misuse of funds, maintain accurate records, and demonstrate accountability to stakeholders.

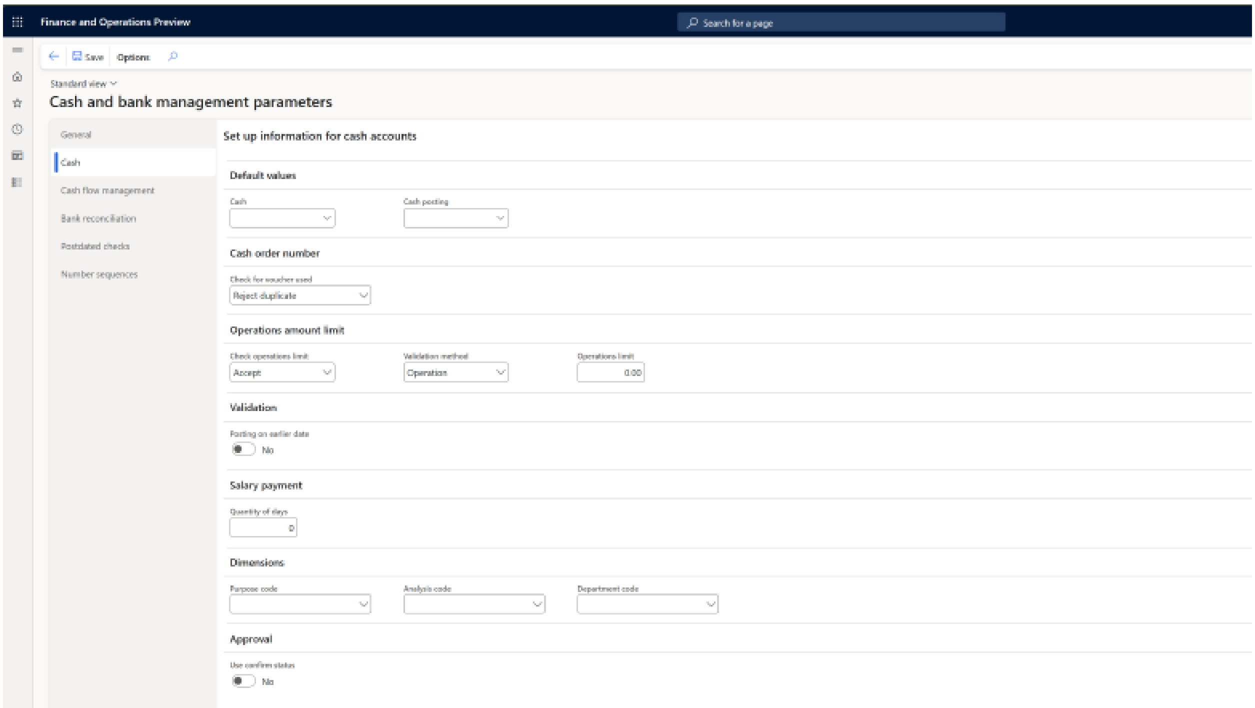
Feature details

Petty cash is a convenient way for businesses to handle small expenses and reimbursements. It provides flexibility and ease of use, but also requires proper management and monitoring to prevent misuse.

With this new feature, users have a standard petty cash management procedure in Dynamics 365 Finance to ensure compliance with legal and regulatory requirements. This helps prevent fraud and misuse of funds, maintain accurate records, and demonstrate accountability to stakeholders.

The following functions will be available in this feature:

- Cash payment limitation control
- Cash posting validation
- Cash transaction status and special approval workflow
- Cash-related inquiry, reports, and periodic tasks
- Foreign exchange revaluation for cash account



Feedback

Was this page helpful? Yes No

Matching rule enhancement in advanced bank reconciliation

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

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

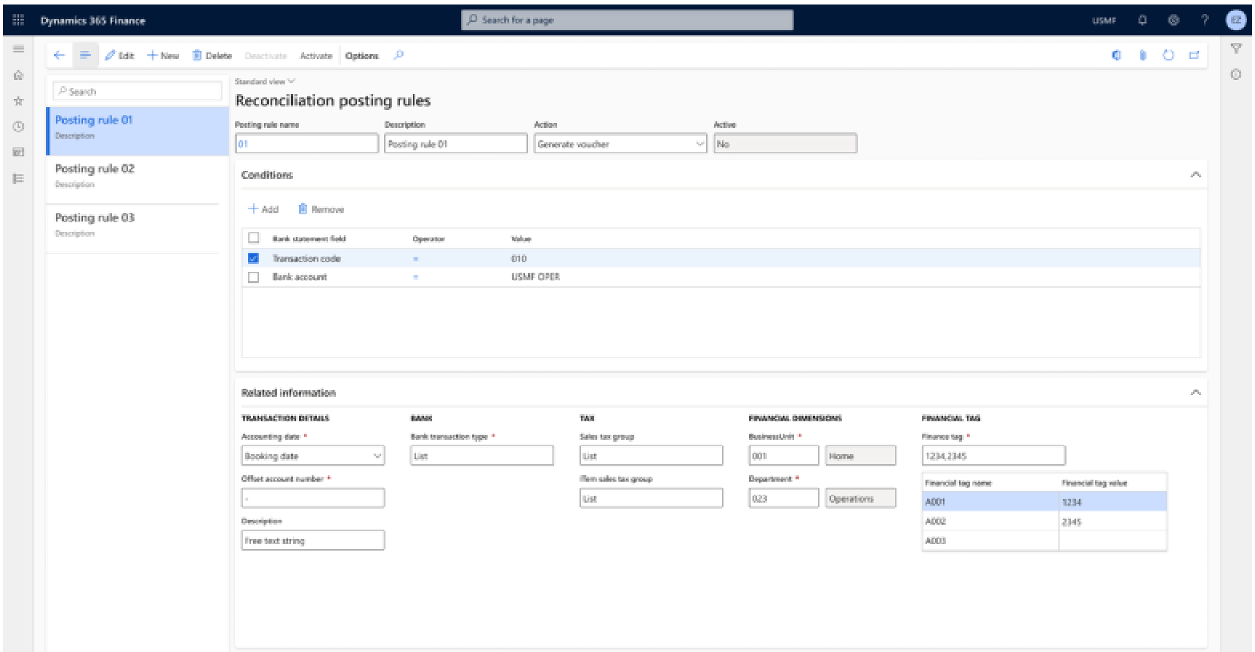
Feature details

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

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

- Automatic post voucher

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



Feedback

Was this page helpful? Yes No

Prepayment sales invoice

Article • 03/06/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

Feedback

Was this page helpful? Yes No

Globalization Studio

Article • 01/25/2024

ⓘ Important

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

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

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

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

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

Feedback

Was this page helpful? Yes No

Electronic invoicing introduction in Malaysia

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

The Electronic invoicing service in Dynamics 365 Finance allows businesses to fully satisfy e-invoicing requirements that will be mandatory in Malaysia starting in August 2024.

Feature details

The Electronic invoicing feature supports e-invoice file generation and submission in the format required in Malaysia starting in August 2024.

E-invoicing will be mandated in phases, taking into account the turnover or revenue thresholds to provide taxpayers with sufficient time to prepare and adapt to the e-invoice implementation. The phases are as follows:

- August 1, 2024 - For taxpayers with an annual turnover or revenue of more than RM100 million.
- January 1, 2025 - For taxpayers with an annual turnover or revenue of more than RM25 million and up to RM100 million.
- July 1, 2025 - For all taxpayers.

Feedback

Was this page helpful? Yes No

Expand localization for LATAM countries - Bolivia

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

Country-specific features for Bolivia

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

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

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

- Tax
    - Fiscal document
        - State identification
        - CA Number

Feedback

Expand localization for LATAM countries - Colombia

Article • 03/06/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 22, 2023	Jul 2024

Business value

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

Feature details

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

Country-specific features for Colombia

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

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

- Reporting
  - General ledger and tax reporting
    - Declaration reports trial balance
    - Declaration reports General ledger
    - File export file format 1001 - PAGOS O ABONOS EN CUENTA Y RETENCIONES PRACTICADAS
    - File export file format 1003 - RETENCIONES EN LA FUENTE QUE LE PRACTICARON
    - File export file format 1005 - IMPUESTO A LAS VENTAS POR PAGAR - DESCONTABLE
    - File export file format 1006 - IMPUESTOS A LAS VENTAS POR PAGAR (GENERADO) E IMPUESTO AL CONSUMO
    - File export file format 1007 - INGRESOS RECIBIDOS
    - File export file format 1008 - SALDOS POR CUENTAS A COBRAR
    - File export file format 1009 - SALDOS POR CUENTAS A PAGAR
    - File export file format 1012 - INFORMACION DE LAS DECLARACIONES TRIBUTARIAS, ACCIONES Y APORTES E INVERSIONES EN BONOS, CERTIFICADOS, TITULOS Y DEMAS INVERSIONES TRIBUTARIAS

See also

Colombia overview (docs)

Feedback

Was this page helpful? Yes No

Expand localization for LATAM countries - Dominican Republic

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

Country-specific features for Dominican Republic

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

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

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

Feedback

Was this page helpful? Yes No

Expand localization for LATAM countries - Ecuador

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

Country-specific features for Ecuador

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

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

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

Feedback

Expand localization for LATAM countries - Guatemala

Article • 03/06/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 22, 2023	Jul 2024

Business value

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

Feature details

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

Country-specific features for Guatemala

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

    - Invoicing from sales order invoice, free text invoice, and project invoice

- Reporting
  - General ledger and tax reports
    - Declaration reports general ledger
    - Declaration reports trial balance
    - Declaration reports sales VAT book
    - Declaration reports purchases VAT book

See also

Guatemala overview (docs)

Feedback

Was this page helpful? Yes No

Expand localization for LATAM countries - Paraguay

Article • 03/06/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 22, 2023	Jul 2024

Business value

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

Feature details

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

Country-specific features for Paraguay

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

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

- Reporting
  - General ledger and tax reports
    - Declaration reports General ledger
    - Declaration reports sales VAT book
    - Declaration reports purchases VAT book
    - Declaration reports trial balance

See also

Paraguay overview (docs)

Feedback

Was this page helpful? Yes No

Expand localization for LATAM countries - Peru

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

Country-specific features for Peru

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

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

- Reporting
  - General ledger and tax reports
    - Declaration Reports Cash and Bank Ledger
    - Declaration Reports General Ledger
    - Declaration Reports Trial Balance
    - Declaration Reports Purchases Register Report
    - Declaration Reports Sales Register Report
    - File export Annual declaration of operations with third parties (DAOT): Purchases and Sales
    - File export Electronic Journal Book
    - File export Electronic Ledger
    - File export Electronic Purchase Book
    - File export Electronic Sales Book
    - File export Withholdings File- SUNAT

Expand localization for LATAM countries - Uruguay

Article • 03/06/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Dec 22, 2023	Jul 2024

Business value

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

Feature details

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

Country-specific features for Uruguay

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

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

- Reporting
  - General ledger and tax reports
    - Declaration reports trial balance
    - Declaration reports General ledger
    - Purchase VAT book
    - Sales VAT book

See also

Uruguay overview (docs)

Feedback

Was this page helpful? Yes No

Expand localization for LATAM countries - Venezuela

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

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

Feature details

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

Country-specific features for Venezuela

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

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

- Reporting
  - General ledger and tax reports
    - Declaration Reports General Ledger Book (Libro Diario)
    - Declaration Reports ISLR Withholdings Book
    - Declaration Reports Purchases VAT Book
    - Declaration Reports Relationship purchases Book
    - Declaration Reports Relationship Sales Book
    - Declaration Reports Sales VAT Book
    - File export ISLR Withholdings
    - File export VAT withholdings

Feedback

Merge regulatory configuration service into Finance as Globalization Studio

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Globalization stakeholders will have a seamless experience in Dynamics 365 Finance for extending and customizing key globalization areas of tax, e-invoicing, regulatory reporting, banking, and business documents. It was previously available as a separate service—Regulatory Configuration Service—and now will be under the Globalization Studio workspace.

Feature details

This feature simplifies the experience of extending and customizing key globalization areas of tax, e-invoicing, regulatory reporting, banking, and business documents. Regulatory Configuration Service (RCS) will be deprecated. With the release of this feature, all new RCS provisioning is stopped. If provisioning is required, register a support ticket. We will be working with partners and customers on migrating existing RCS instances. We plan to fully shut down RCS by August 1, 2024.

The application lifecycle management (ALM) part of RCS and Electronic Reporting (ER), currently leveraging the Global repository, will be done via Dataverse solutions. A new type of repository for getting ER configurations in Dynamics 365 Finance is added: Dataverse configuration repository. With this, the Global repository will be deprecated.

The e-invoicing service design experience will use the Globalization Studio workspace and will align with the overall RCS merge timeline.

- **Tax calculation service**: With the RCS merge into Dynamics 365 Finance, Tax calculation service (TCS) will also be seamlessly incorporated into the Globalization Studio workspace. With this change, installing the TCS add-in is no longer a mandatory step for new environments. In addition, the constraint to have a Tier-2 environment will no longer apply.

- **Migration of Tax calculation features and configurations**: Migration of tax calculation features that were created in RCS and are being used in Dynamics 365 Finance legal entities in Tax calculation parameters will be provided via a background job processing. The process runs automatically after the **Enable Globalization feature setup for Tax Calculation Service** feature in Feature management is enabled. In the new workspace for Globalization Studio, under the Globalization services, the Tax calculation tile will be available to create and maintain tax features in Dynamics 365 Finance. After the batch job is completed, you'll be able to see and update your features migrated from RCS and used in legal entities. Also, you will be able to restore additional feature versions migrated from RCS.

  Tax calculation configurations will be available in the **Globalization Studio workspace** > **Electronic reporting**, under the **Tax configurations** tile.

- **User experience**: It's important to note that the user experience (UI) for configuring tax features remains consistent and unaffected by this release.

- **Timeline**: We will be enabling TCS in all environments. The activities related to discontinuation of TCS as an add-in will align with the timeline set for RCS.

Feedback

Plan and prepare for Microsoft Copilot for Finance in 2024 release wave 1

Article • 03/06/2024

> ⓘ **Important**
>
> The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. In this article, you'll find the product overview and what's new and planned for **Microsoft Copilot for Finance**.

Overview

Microsoft Copilot for Finance accelerates time-to-impact for finance professionals by surfacing insights that support strategic decision-making and reduce the time spent on manual, repetitive work. Copilot empowers finance professionals to stay in the flow of work by seamlessly connecting productivity tools, such as Microsoft Excel, with existing financial systems, such as ERP, to support critical business processes and generate insights and actions in real time. With the assistance of Microsoft Copilot for Finance, common financial tasks can now be completed in Excel and Outlook to reduce the need to sign in to ERP systems, while still maintaining financial data integrity and compliance. Copilot for Finance is integrated natively within Dynamics 365 Finance ERP and is independently adaptable to provide the flexibility to integrate with existing investments in third-party ERP and finance solutions like SAP.

Microsoft Copilot for Finance will be released for global availability as a part of 2024 release wave 1. With this release, Copilot for Finance will support the collections process and enable more streamlined data reconciliation. Users can connect to Dynamics 365 Finance directly from Outlook, for easy access to valuable insights from customer data in ERP, to get help when crafting email responses, and to save communication summaries and action items for scaled impact. Users also get Copilot support to reconcile their financial data using Excel, including intelligent prompts when comparing financial data structures, automated reconciliation report creation, and auto-generated insights and suggestions on possible ways to address discrepancies. The reconciliation report summary and documented action items are automatically prepared and available for saving for future reference and audit.

Investment areas

Microsoft Excel experiences
Microsoft Copilot for Finance helps finance professionals work with financial data in Microsoft Excel without jeopardizing financial data integrity in ERP system. In 2024 release wave 1, finance professionals will be able to reconcile their financial data with next-generation AI support from Microsoft Copilot for Finance to compare financial data structures, create reconciliation reports, and troubleshoot and correct the discrepancies.

Microsoft Outlook experiences
Microsoft Copilot for Finance experiences in Microsoft Outlook empower account receivable department employees to effectively communicate with their customers. In 2024 release wave 1, finance professionals will be able to connect to ERP directly from Outlook, while communicating with their customers, get valuable insights into customer data in ERP, get help when crafting email responses and save communication summaries and action items back in ERP.

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

Check out the release plan

For application administrators

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

Features that must be enabled by application administrators
This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their users. For the

complete list, look for all features tagged "Users by admins, makers, or analysts" in the release plan.

Get the most out of Microsoft Copilot for Finance

Expand table

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

Feedback

Was this page helpful? Yes No

What's new and planned for Microsoft Copilot for Finance

Article • 03/06/2024

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

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

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

Microsoft Excel experiences

Microsoft Copilot for Finance enables finance professionals to perform their tasks in Microsoft Excel.

Expand table

Feature	Enabled for	Public preview	General availability
Use Excel to reconcile financial data	Users by admins, makers, or analysts	Feb 2024	May 2024

Microsoft Outlook experiences

Microsoft Copilot for Finance enables finance professionals to review customer financial information and communicate more efficiently using Microsoft Outlook.

Expand table

Feature	Enabled for	Public preview	General availability
Manage accounts receivable communications in Outlook	Users by admins, makers, or analysts	Feb 2024	May 2024

- You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Feedback

Was this page helpful? Yes No

Microsoft Excel experiences

Article • 03/06/2024

ⓘ Important

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

Microsoft Copilot for Finance helps finance professionals work with financial data in Microsoft Excel without jeopardizing financial data integrity in ERP system. In 2024 release wave 1, finance professionals will be able to reconcile their financial data with next-generation AI support from Microsoft Copilot for Finance to compare financial data structures, create reconciliation reports, and troubleshoot and correct the discrepancies.

Feedback

Was this page helpful? Yes No

Use Excel to reconcile financial data

Article • 03/06/2024

ⓘ Important

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

Expand table

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

Business value

With Microsoft Copilot for Finance, users will get support to reconcile their financial data using Excel, including intelligent financial data structures comparison, automated reconciliation report creation, insights, and suggestions on possible ways to address discrepancies. The reconciliation report summary and documented action items are automatically prepared and available for saving for the future reference and audit.

Account reconciliation is a process completed on a recurring basis (monthly, quarterly, and annually/year-end) as a part of financial period closure where we need to prove or confirm the accounting entries used are correct. Reconciliation ensures that financial records are accurate and free from errors or fraud. Control allows organizations to detect and rectify discrepancies promptly.

There are many dedicated tools to perform reconciliation, but none is as well known as Excel. With this feature, users will get support to reconcile their financial data using Excel. This includes intelligent support when comparing financial data structures, automated reconciliation report creation, and insights and suggestions on possible ways to address discrepancies. The reconciliation report summary and documented action items are automatically prepared and available for saving for future reference and audit.

Feature details

Microsoft Copilot for Finance will support the following capabilities for financial data reconciliation:

- Start a new reconciliation project.
- Get Copilot-suggested relations between data structures for reconciliation.
- Perform comparison of data structures per given auto-suggested or user-defined criteria.
- Analyze reconciliation results in the system-prepared ready report that highlights any discrepancies.
- Get support and guidance on troubleshooting and resolving any discrepancies.

> ⓘ Note
>
> The February release will be in English only. Additional languages will be added after the public preview.

Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Microsoft Outlook experiences

Article • 03/06/2024

ⓘ Important

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

Microsoft Copilot for Finance experiences in Microsoft Outlook empower account receivable department employees to effectively communicate with their customers. In 2024 release wave 1, finance professionals will be able to connect to ERP directly from Outlook, while communicating with their customers, get valuable insights into customer data in ERP, get help when crafting email responses, and save communication summaries and action items back in ERP.

Feedback

Was this page helpful? Yes No

Manage accounts receivable communications in Outlook

Article • 03/06/2024

ⓘ Important

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

Expand table

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

Business value

Microsoft Copilot for Finance is revolutionizing the collections experience for accounts receivable (AR) personnel. By integrating with Outlook, it enhances customer communications through several key features:

- Provides a summary of customer information directly from the source ERP, eliminating the need for manual data retrieval.
- Offers a summarization of inbound emails in Outlook, streamlining the communication process.
- Assists in crafting customer communication emails, ensuring clarity and professionalism.
- Serves as a single source of truth storage in the ERP for critical updates such as transactions, contact information, action items, and relevant customer communication.

This holistic approach not only optimizes the collections experience but also fosters efficiency and accuracy in AR operations.

Steady and predictable cash flow is the lifeblood of a healthy business, providing the necessary liquidity for day-to-day operations and facilitating strategic investment for growth. An effective collections process in accounts receivable plays a critical role in this context, ensuring timely inflow of revenue and thereby driving the predictability essential for financial planning and stability.

Accounts receivable professionals spend a lot of time in Microsoft Outlook responding to customer balance inquiries. They are switching between Outlook and ERP to gather the required details to perform their work and updating information back to ERP such as follow-up actions, updated contact information, and promise-to-pay dates.

Professionals in the accounts receivable department frequently toggle between Microsoft Outlook and their ERP system to respond to customer balance inquiries, gather necessary details, and update information such as follow-up actions, contact updates, and promised payment dates.

However, Microsoft Copilot for Finance aims to streamline this process significantly. It will enable employees to connect directly to their ERP system from within Outlook. While communicating with customers, accounts receivable personnel can access valuable ERP customer data, receive assistance in crafting email responses, and conveniently save communication summaries and action items back in the ERP system all while avoiding the toll of switching.

Feature details

Copilot for Finance is a game-changer for collections coordinators, offering a suite of capabilities that streamline and enhance the collections process. Integrated with Microsoft Outlook, Copilot for Finance provides an immersive experience that allows coordinators to avoid context switching while remaining in the tool they often spend most of their time in.

Here are the key capabilities of Copilot for Finance:

- **Customer insights**: Understand customer's payment behavior and preferences through a Copilot sidecar experience in Outlook.
- **Content generation for emails**: Dynamically generate business-focused email to address common inquiries or specific customer correspondence including attachments of customer invoices and customer balance summaries.
- **Save communications and notes**: Maintain a history of searchable customer communications and notes that can be related to each customer.
- **Customer contact maintenance**: Create and update contacts related to a customer directly from the copilot experience.
- **Invoice updates**: Update the payment due date and dispute status of any outstanding invoice.

ⓘ Note

The February release will be in English only. Additional languages will be added after the public preview.

Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Supply Chain Management in 2024 release wave 1

Article • 01/25/2024

ⓘ **Important**

The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Supply Chain Management**.

Overview

https://aka.ms/ReleaseHighlight/2024W1/ERP

Dynamics 365 Supply Chain Management provides capabilities for end-to-end processes that manufacturers, distributors, consumer product groups, and retailers require to meet their supply chain needs. Functionality ranges from product information management, forecasting, planning, inventory, sales, and procurement to complex manufacturing, asset maintenance, warehousing, and transportation management.

The investments in this release wave focus on optimizing and enhancing business processes to provide companies with the agility and insight needed to navigate an increasingly complex business environment.

- Manufacturers that rely on fast **capable-to-promise (CTP)** for sales orders can calculate CTP without waiting for the next full master planning run to complete.
- Improved supply **planning collaboration** enables planners and sellers to work on the same master plan at the same time.
- A new and efficient **warehouse returns process** allows goods to be inspected on return from customers, blind receipts, putaway of inventory for resale or scrapped for disposal, carrier return labels, and automatic creation of return orders directly from the Warehouse Management mobile app.
- General availability of **warehouse-only mode** allows companies to use the warehouse management capabilities of Supply Chain Management on their own, without needing to configure the rest of the system.

- Allow external systems to easily query future inventory availability for up to 180 days, with **available to promise (ATP)** powered by the Inventory Visibility service.
- A new **Inventory Visibility API** allows you to aggregate and synchronize external inventory changes into Supply Chain Management as adjustment journals.
- Use the Inventory Visibility service to query, post, and reserve inventory without having to specify site or warehouse.
- Users responsible for **approving purchase requisitions** and purchase orders can now respond to approval workflow tasks directly from mobile devices.
- **Copilot skills** in Dynamics 365 Supply Chain Management transform users' daily tasks. The features are embedded right into the user experience and include context awareness, actionable guidance, data inquiry, report generation, and taking the next best action.
- **Copilot in the Demand planning app** closes the skills gap for planners by providing AI-driven guidance and enabling accurate forecasting.
- **The Demand planning app** becomes generally available with improvements to external signals, row-level access, time-fences, analytics and insights, rolling plans, new product introductions, and end of lifecycle.

Investment areas

Copilot and AI innovation

Dynamics 365 Supply Chain Management provides a rich set of capabilities for supporting organizations' business processes. The breadth of functionality means that, like most business applications, users require initial training to get started with the application and need a fair amount of experience with the product before they become proficient. With innovative in-product, generative AI-based contextual help, users are empowered to rapidly unlock the full potential of Dynamics 365 Supply Chain Management.

Inventory and logistics

The inventory and logistics capabilities of Dynamics 365 Supply Chain Management enable businesses to manage their sales and fulfillment processes efficiently while ensuring inventory availability that matches the desired service levels. Investments in this area continue to focus on helping businesses gain more visibility, efficiency, and resiliency in their supply chain operations.

Planning

Planning Optimization provides significantly improved performance and scalability, which enables near real-time insights into requirement changes. We introduce a next-generation intelligent demand planning capability that is powered by best-in-class forecasting algorithms and models, offers immersive user experiences, and provides intelligent reports and analytics.

Procurement

Investments in the procurement and sourcing area continue to be targeted at making organizations more agile and resilient in their supply chain operations.

Product information management

Product information management enables companies to centrally manage information about products and product variants throughout their lifecycle, including the attributes, configurations, documentation, and identifiers needed for supporting critical business processes. Investments in this area are focused on helping companies that trade internationally to navigate and verify compliance with the increasingly complex rules governing the export of products.

Warehouse Management

The Warehouse Management solution in Dynamics 365 Supply Chain Management provides a rich and flexible set of capabilities that can be combined and configured to support many warehouse layouts and operational scenarios.

Investments continue to focus on driving efficiencies in warehouse operations through optimization and automation of key processes, including counting, customer returns, product receipts, and re-waving of orders. New interfaces and streamlined processes allow companies to deploy Dynamics 365 Supply Chain Management and use only the warehouse management capabilities, making these broadly available to companies using third-party ERP or order-management systems.

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

Check out the release plan

For application administrators

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

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

Get the most out of Supply Chain Management

Expand table

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

Helpful links	Description
Release calendar	Know important release milestones.
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.

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Supply Chain Management

Article • 01/25/2024

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

For a list of the previous wave's release plans, go to 2023 release wave 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
Enable efficient, accurate demand planning with Copilot	Users by admins, makers, or analysts	Apr 2024	-
Make procure-to-pay purchasing decisions with Copilot help	Users by admins, makers, or analysts	Apr 2024	-

Inventory and logistics

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

Expand table

Feature	Enabled for	Public preview	General availability
Reproduce business documents that include product bundles	Users by admins, makers, or analysts	Apr 2024	Jun 2024
Track time-series inventory in Inventory Visibility	Users by admins, makers, or analysts	Jul 2024	Sep 2024
Sync external changes through Inventory Visibility	Users by admins, makers, or analysts	Jul 2024	Sep 2024
Query and manage inventory without site or warehouse info	Users by admins, makers, or analysts	Apr 2024	Jul 2024
Evaluate discrete manufacturing costs using standard cost	Users by admins, makers, or analysts	Sep 2024	-

Planning

Planning Optimization enhancements add support for additional manufacturing scenarios.

Expand table

Feature	Enabled for	Public preview	General availability
Calculate capable-to-promise quantities in real time	Users by admins, makers, or analysts	Sep 2024	Sep 2024
Collaborate on supply plans within and across teams	Users by admins, makers, or analysts	Sep 2024	Sep 2024
Forecast with intelligence for validated demand plans	Users by admins, makers, or analysts	✔ Oct 31, 2023	Apr 2024
Build collaborative, accurate demand plans powered by AI	Users by admins, makers, or analysts	-	Apr 2024

Procurement

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

Expand table

Feature	Enabled for	Public preview	General availability
Approve POs and requisitions from mobile device	Users by admins, makers, or analysts	Apr 2024	Jun 2024

Product information management

Centrally manage information about products throughout their lifecycle, including attributes and identifiers needed to manage your business processes.

Expand table

Feature	Enabled for	Public preview	General availability
Manage compliance with export control restrictions	Users by admins, makers, or analysts	✔ Jul 31, 2023	Apr 2024

Warehouse Management

Warehouse Management provides a rich and flexible set of capabilities that can be combined to support many warehouse layouts and operational scenarios.

Expand table

Feature	Enabled for	Public preview	General availability
Implement warehouse management only mode enhancements	Users by admins, makers, or analysts	✔ Sep 1, 2023	Sep 2024
Inspect and process returned items more efficiently	Users by admins, makers, or analysts	-	Apr 2024

- You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

Was this page helpful? Yes No

Copilot and AI innovation

Article • 01/25/2024

ⓘ Important

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

Dynamics 365 Supply Chain Management provides a rich set of capabilities for supporting organizations' business processes. The breadth of functionality means that, like most business applications, users require initial training to get started with the application and need a fair amount of experience with the product before they become proficient. With innovative in-product, generative AI-based contextual help, users are empowered to rapidly unlock the full potential of Dynamics 365 Supply Chain Management.

Feedback

Was this page helpful? Yes No

Enable efficient, accurate demand planning with Copilot

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Copilot provides demand planners with in-product guidance, forecast insights, and the ability to explore trends, anomalies, and influencing factors using natural language. This helps demand planners in Dynamics 365 Supply Chain Management to make informed decisions, improve forecast accuracy, and optimize supply chain operations.

Feature details

Copilot helps demand planners learn how to work with data to create accurate forecasts in Dynamics 365 Supply Chain Management. It then helps them to create, monitor, and execute demand plans. With Copilot, demand planners can use natural language to explore insights, trends, anomalies, and other factors that affect demand across dimensions.

Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Make procure-to-pay purchasing decisions with Copilot help

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

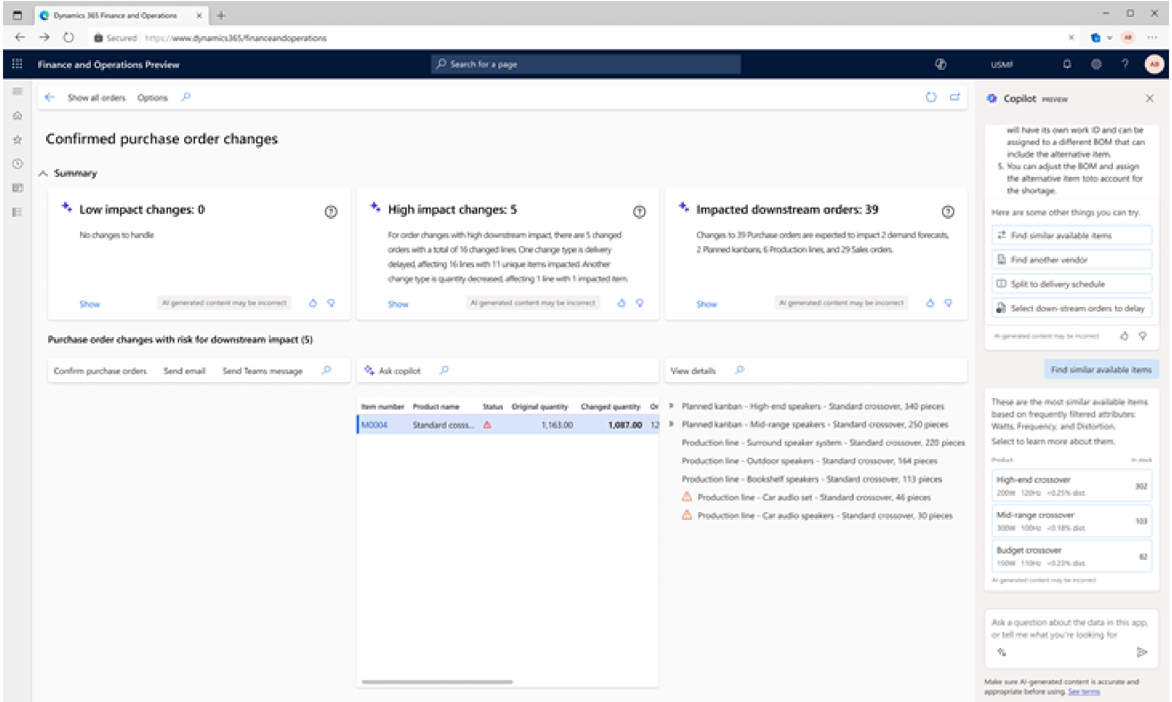
Businesses using procure-to-pay processes regularly receive new information and customer requests that require purchasing agents to update existing purchase orders. Dynamics 365 Supply Chain Management now provides a conversational AI experience that helps purchasing agents handle these changes efficiently while also identifying ripple effects on downstream processes such as planned production, service work, or sales orders.

Feature details

Deciding how best to react to purchase-order changes can be time-consuming, especially when it comes to assessing the impact of each change and collaborating with stakeholders to mitigate the issue or take alternative procurement decisions. With many signals coming in, agents often struggle to identify and understand the overall impact and can sometimes make suboptimal decisions or overlook ripple effects that could otherwise have been prevented. Copilot provides purchasing agents with a conversational experience that helps them make better purchasing decisions in the light of fresh information or changes regarding purchase orders. The conversational experience helps purchasers focus on the relevant changes and act efficiently.

Key benefits include intelligent decision-making support, streamlined change management, improved stakeholder collaboration, and effective risk mitigation. This integration not only boosts operational efficiency but also enhances decision quality, leading to increased agility and resilience in supply chain operations. Consequently, businesses can expect improved profitability and a competitive edge in the market.

The following image shows an example of the user interface.



Geographic areas

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

- United States

Feedback

Was this page helpful? Yes No

Inventory and logistics

Article • 01/25/2024

ⓘ Important

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

The inventory and logistics capabilities of Dynamics 365 Supply Chain Management enable businesses to manage their sales and fulfillment processes efficiently while ensuring inventory availability that matches the desired service levels. Investments in this area continue to focus on helping businesses gain more visibility, efficiency, and resiliency in their supply chain operations.

Feedback

Was this page helpful? Yes No

Enable quality control for goods-in-transit orders

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (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 2024	-

Business value

Enriching the goods-in-transit process with Quality Control in Dynamics 365 is a transformative initiative that elevates supply chain operations. This integration ensures that products undergo stringent quality checks throughout transit, guaranteeing the delivery of high-quality goods when they are received at the warehouse.

Feature details

Quality orders in Supply Chain Management now support goods-in-transit orders as a reference type. This makes it possible to initiate the quality control process for goods-in-transit orders, ensuring a heightened level of product quality throughout the goods-in-transit process. Users can monitor existing quality orders and proceed with further actions directly from the goods-in-transit order form. This integration enhances visibility and control over quality-related processes, promoting a proactive approach to maintaining and safeguarding product quality when importing goods from the Landed Cost module.

During the quality control process, inventory from goods-in-transit orders can be blocked to prevent the shipment of defective products. This function aligns with regulatory compliance and helps to mitigate legal risks. The proactive approach of inventory blocking reduces rework costs, avoiding the need for post-distribution corrections. Ultimately, this integration helps ensure that only high-quality products reach your customers, fostering brand trust and loyalty.

Thank you for your idea

Thank you for submitting this idea:

- Landed cost and quality management

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

Evaluate discrete manufacturing costs using standard cost

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Many international discrete manufacturing companies are required to implement parallel inventory accounting practices for standard cost (based on a single document) using multiple currencies or cost calculation methods. In addition, discrete manufacturers need a comprehensive and practical solution to cover as many business scenarios as possible. Interactive, and informative Power BI report templates provide vital evidence for management to analyze and use to make strategic and tactical changes in the future.

Feature details

This enhancement for the Global Inventory Accounting Add-in for Dynamics 365 Supply Chain Management enables discrete manufacturing companies to perform accurate parallel inventory accounting practices for standard cost (based on a single document) using multiple configurations. This release enables you to:

- Gain an improved onboarding experience that helps you configure and set up Global Inventory Accounting.
- Track and record discrete manufacturing costs for related business documents and sub-production orders.
- Process returns for trade transactions that support certain marking documents.

- Create enhanced power BI reports that provide a comprehensive view covering both trading and manufacturing cost transactions.

This feature is turned on by default because it provides an essential enhancement to existing functionality. It's listed as *Evaluate costs in discrete manufacturing using standard cost* in the **Feature management** workspace, where you can turn it off if needed.

Feedback

Was this page helpful? Yes No

Query and manage inventory without site or warehouse info

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Dynamics 365 Supply Chain Management supports large organizations that manage many different sites and warehouses. As a result, the system makes use of site and warehouse information when querying inventory, adjusting inventory, making soft reservations, and making allocations. In some business scenarios (such as in-store sales), users know and use warehouse information. However, in other scenarios (such as e-commerce, in-basket reservations), users may need to query or update inventory at the product level, without having accurate warehouse information. This feature allows the Inventory Visibility service for Supply Chain Management to support business scenarios both where users know the site and warehouse and where they don't.

Feature details

This feature allows users to query, post, soft reserve, and allocate inventory through the Inventory Visibility service either with or without specifying a site and warehouse.

The Inventory Visibility service API now supports two options for querying or updating inventory data:

- Specify organization ID and product ID, plus other relevant inventory and tracking dimensions.

- Specify organization ID, product ID, site ID, and warehouse ID, plus other relevant inventory and tracking dimensions.

System administrators can configure the required data hierarchy using preference settings in Inventory Visibility.

Feedback

Was this page helpful? Yes No

Reproduce business documents that include product bundles

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Dynamics 365 Supply Chain Management now preserves detailed product-bundle information in its database, which means that you'll be able to reprint original sales order confirmations and invoices even after the related sales order has been deleted or archived and purged. You'll also be better able to exchange order confirmations and invoices electronically.

Feature details

Product bundles enable businesses to group multiple items so that they can be priced and sold together. They provide an easy way to ensure that the correct items are always sold and priced together. The product bundle feature in Dynamics 365 Supply Chain Management has now been updated to ensure that, after deleting or archiving and purging a sales order, the original sales order confirmation and invoice can still be reprinted. Because product bundles are now represented in journals, it's also possible to exchange order confirmations and invoices that include product bundles electronically.

Feedback

Was this page helpful? Yes No

Sync external changes through Inventory Visibility

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Businesses integrating Dynamics 365 Supply Chain Management with external inventory systems typically need to synchronize inventory updates between systems, create order and journal records in Supply Chain Management, and aggregate data to optimize performance. Inventory Visibility now provides out-of-the-box functionality that supports all these operations, thereby minimizing implementation efforts while improving system performance. The resulting solution also lets you trace inventory transactions back to the original source documents and run historical inventory analyses based on the synchronized data.

Feature details

The Inventory Visibility service for Supply Chain Management now enables external systems to synchronize, aggregate, and store cross-channel inventory transactions in the Supply Chain Management inventory adjustment journal. The system now provides the following capabilities:

- Post inventory changes with all the information previously supported, and include additional information about the source document (such as document type and order number) and the target inventory adjustment journal. An Inventory Visibility service provides new API to support these operations.

- Automatically store transactions in Inventory Visibility based on your API input. These transactions can be used for inventory analysis and other business purposes.
- Set up inventory transaction aggregation rules in Inventory Visibility for synchronizing with Supply Chain Management.

Feedback

Was this page helpful? Yes No

Track time-series inventory in Inventory Visibility

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

External systems integrated with Dynamics 365 Supply Chain Management can now access accurate and up-to-date inventory availability information. This capability enables users to promise sales orders, search for spare parts, and view material availability more efficiently and confidently.

Feature details

The Inventory Visibility service now enables external systems to query Supply Chain Management for inventory changes occurring up to 180 days in the future. As a result, users working in an external system will be able to view future inventory availability details and make accurate projections for when orders can be delivered.

This feature enables the Inventory Visibility service to import information about planned inbound and outbound inventory changes together with the related dates. Available-to-promise (ATP) functionality in Inventory Visibility can then query these time-series based inventory changes and calculate your omnichannel ATP. External systems can query and retrieve this information from Inventory Visibility in near real time by calling its API.

Feedback

Was this page helpful? Yes No

Planning

Article • 01/25/2024

ⓘ Important

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

Planning Optimization provides significantly improved performance and scalability, which enables near real-time insights into requirement changes. We introduce a next-generation intelligent demand planning capability that is powered by best-in-class forecasting algorithms and models, offers immersive user experiences, and provides intelligent reports and analytics.

Feedback

Was this page helpful? Yes No

Build collaborative, accurate demand plans powered by AI

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Demand planning for Dynamics 365 Supply Chain Management facilitates an easy creation of highly accurate forecasts based on historical data. It does this by leveraging powerful AI, which can be configured in detail or with a simple click. You can override data based on your own experience or insights from the team. Throughout the process, you can quickly collaborate with colleagues about specific parts of the forecast, and review versions of the forecasts with stakeholders before approving them. Data can seamlessly flow between applications, ensuring accurate end-to-end supply chain planning.

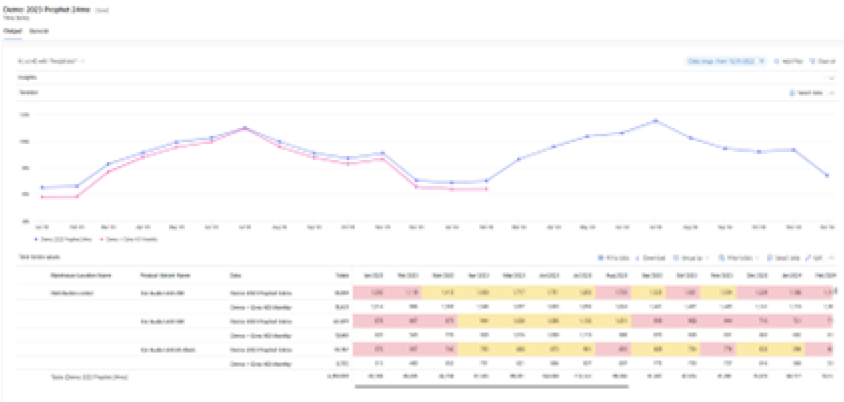
Feature details

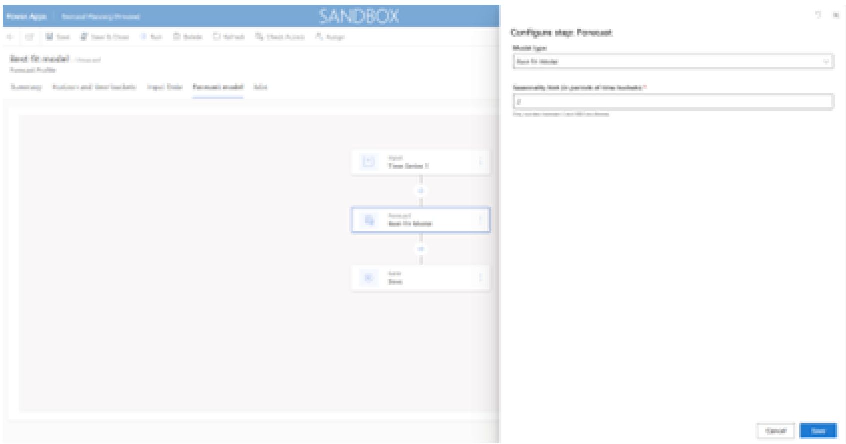
Planning is a crucial process for any business that wants to meet customer demand, optimize inventory, and reduce costs. However, planning can be challenging when you need to deal with multiple products, markets, and stakeholders, and when you need to account for changing conditions and uncertainties. That's why you need a planning solution that can help you create and work with demand plans that cover your entire organization, support multiple units of measure and currencies, and enable data-driven decisions. Demand planning for Dynamics 365 Supply Chain Management is such a solution. It offers a range of features and benefits that can help you plan more effectively and efficiently, such as:

- **New product introduction and end of lifecycle management**: Easily plan for the launch of new products and the phase-out of old ones and adjust your demand forecasts accordingly.
- **Time-fence control**: Set up periods where your forecasts can't be changed, to ensure stability and consistency in your plans.
- **Row-level access**: Control who can view and edit your plans, and assign different permissions to different planners, based on their roles and responsibilities.
- **Rolling plans**: Update your plans continuously, and extend them to cover longer time horizons, to keep up with changing demand and supply scenarios.
- **Excel integration and qualitative forecasting**: Import and export your time series data directly to and from Excel.
- **Qualitative forecasting**: Use qualitative methods, such as surveys and expert opinions, to supplement your quantitative forecasts.
- **Planner's workspace**: Customize your dashboard with charts, key performance indicators, and alerts, to monitor and manage your plans more easily. The planner's workspace is powered by Power BI, which provides advanced analytics and visualization capabilities.
- **Recalculation of related time series**: Trigger the recalculation of your time series, either periodically or based on events, to ensure your plans are always up to date and aligned with your data sources.
- **Filter on input data for calculations and forecasts**: Apply filters to your input data (such as by product, location, or customer) to perform calculations and forecasts on specific segments or scenarios.
- **Scheduled jobs for data ingestion, transformation, calculation, and forecast**: Automate the processes of importing, transforming, calculating, and forecasting your data, and run forecasts on a regular or on-demand basis, to save time and resources.
- **Rules for automatic allocation of data**: Set up rules to allocate data from higher to lower levels of aggregation, or vice versa, to ensure consistency and accuracy in your plans.
- **Time series decomposition**: Break down your time series into components to better understand and forecast your demand patterns.
- **Support multiple units of measure**: Each planner can plan and view data in their preferred units of measure, and convert them automatically using conversion factors.

With these features and benefits, Microsoft Dynamics 365 Supply Chain Management can help you create accurate and collaborative plans that support your business goals and customer satisfaction.

The following images show examples of the Demand planning user interface for working with demand plans and setting up forecast calculations.





Feedback

Was this page helpful? Yes No

Calculate capable-to-promise quantities in real time

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Give customers realistic dates for when you can promise specific goods. For each sales line, you can provide a date that takes account of existing on-hand inventory, production capacity, and transportation times.

Feature details

Capable-to-promise (CTP) calculations in Dynamics 365 Supply Chain Management now consider both materials and resources when calculating delivery dates. This information is essential for assemble-to-order or make-to-order businesses. CTP calculations explode all the components, purchases, transfers, and capacities needed to manufacture any specific item and can be run for any selected sales order line.

Accurate confirmed ship and receipt dates allow you to:

- Tell customers the exact dates on which they will receive their orders in real time, while they are on the phone.
- Check how any change to a product (such as color, design, or other options) would affect the promised delivery date.
- Check how any change in quantity would affect the promised delivery date.

- Group or separate line quantities to meet delivery deadlines on make-to-order products.

Feedback

Was this page helpful? Yes No

Collaborate on supply plans within and across teams

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Master planning is a complex process that considers a wide variety of factors when deciding which goods and materials need to be ordered to keep the business running smoothly. Multiple supply planners, production planners, material managers and other stakeholders are involved in and affected by the process. As a result, users working within and across teams often need to collaborate while entering relevant data and preparing and reviewing each plan.

To collaborate effectively, all contributors need access to the same, up-to-date information. Dynamics 365 Supply Chain Management now provides greatly improved support for master planning collaboration because it continuously recalculates your master plans, refreshing them after each edit. All planners and other stakeholders will nearly always see the latest, fully optimized planning results as they evaluate and update each plan.

Feature details

Master planning calculations consume significant computer resources, so companies typically schedule these processes to run overnight when spare computing capacity is available. As a result, a fresh set of optimized plans is available for review at the start of the next business day. Then, throughout the day, supply planners, production planners, and material managers can review and update each master plan as needed to accommodate new issues such as material delays, machine breakdowns, or changing priorities. As the day goes on, each modified plan can become progressively less optimized and harder to work with until the system has time to recalculate them overnight.

Because the planning engine in Supply Chain Management operates in parallel with the rest of the system, it's able to recalculate master plans throughout the day without affecting overall system performance. That means that freshly optimized supply plans are continuously available to all collaborators, thereby ensuring the best use of materials and capacity and minimizing delays in providing products to customers.

Forecast with intelligence for validated demand plans

Article • 03/06/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Oct 31, 2023	Apr 2024

Business value

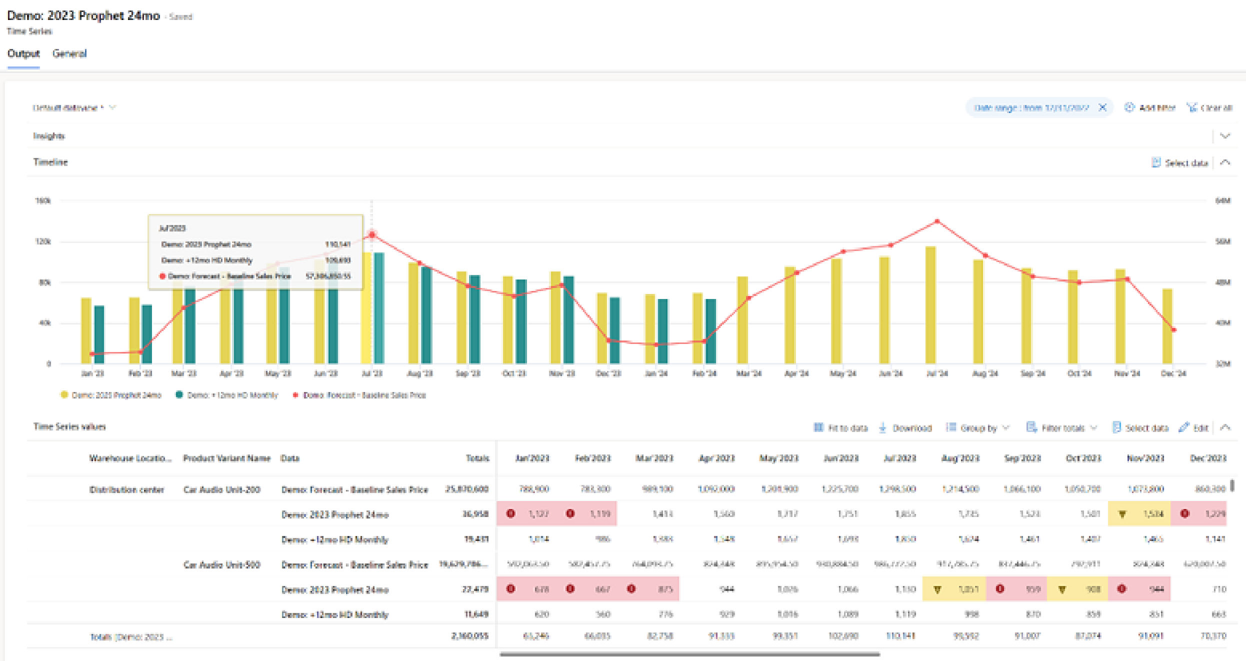
Inaccurate forecasts can lead to lost revenue and inefficiency in the supply chain, but providing forecasts infused with intelligence will lead to more accurate and effective demand plans. The direct impact can be measured in improved revenue and fewer stockouts. Operating expenses are reduced in supply chains that require fewer fire drills.

Feature details

This is Microsoft's next-generation collaborative demand-planning solution for Dynamics 365 Supply Chain Management, powered by best-in-class forecasting algorithms and models, and offering immersive user experiences, intelligent reports, and analytics. It empowers organizations to build an agile, resilient, and sustainable demand-planning practice fueled by intelligence and collaboration. It offers:

- **A no-code approach** to demand modeling and planning configuration. Flexible building blocks enable the vast majority (over 85 percent) of demand planners who are not data scientists to do what-if planning and analyze, optimize, and compare scenarios in minutes.
- **Seamless, on-the-fly aggregation and disaggregation**, which enable planners to edit forecasts on a corporate or product-group level, then zoom in and instantly see the impact on the regional and stock keeping unit (SKU) level.

- **Improved forecast accuracy** with automatic AI parameter tuning, which helps ensure accurate forecasting and preprocessing. External signals enable superior forecast accuracy by considering promotions or stockouts.
- **Disruption readiness** with interactive and fast what-if analysis. Version history allows tracking, evaluating forecast changes, and using the lessons learned to improve the decision-making process.
- **Effective collaboration throughout the planning cycle** made possible by Microsoft Teams in-context communication, in-product commenting, and restorable versions of forecast values throughout the planning process.
- **Increased agility through integrated planning and execution flow** with native integration to Supply Chain Management, customizable worksheets, and exception-based planning.



See also

Demand planning home page (docs)

Feedback

Was this page helpful? Yes No

Procurement

Article • 01/25/2024

ⓘ Important

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

Investments in the procurement and sourcing area continue to be targeted at making organizations more agile and resilient in their supply chain operations.

Feedback

Was this page helpful? Yes No

Approve POs and requisitions from mobile device

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Many businesses make use of approval workflows to make sure all new purchase requisitions and purchase orders are valid, in-budget, and in line with all business practices and standards. Unfortunately, this extra layer of security can sometimes add delays to the purchasing process. Therefore, Dynamics 365 Supply Chain Management now provides a mobile approval experience, which adds flexibility, efficiency, resiliency, and responsiveness to the approval process.

Feature details

Users responsible for approving purchase requisitions and purchase orders can now respond to approval workflow tasks from their mobile devices. Procurement approval activities include approvals related to purchase requisitions, requisitions lines, purchase orders, and order lines.

The mobile app starts by presenting an overview of the user's assigned approval tasks and due dates. From there, the user can open details for each purchase requisition and purchase order to be approved, all without switching context. On gaining a full understanding of the context and details of an approval request, the user can then choose between the approval options configured for the workflow by selecting the appropriate response (approve, reject, request change, or delegate to another user).

Feedback

Was this page helpful? Yes No

Product information management

Article • 01/25/2024

ⓘ Important

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

Product information management enables companies to centrally manage information about products and product variants throughout their lifecycle, including the attributes, configurations, documentation, and identifiers needed for supporting critical business processes. Investments in this area are focused on helping companies that trade internationally navigate and verify compliance with the increasingly complex rules governing the export of products.

Feedback

Was this page helpful? Yes No

Manage compliance with export control restrictions

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Jul 31, 2023	Apr 2024

Business value

Companies that trade internationally and are subject to external regulations and internal policies are challenged to keep track of the many different rules and policies. The new advanced export control functionality allows you to express these rules, including complex ones, by using formulas like those in Microsoft Excel and ensure that the rules are honored throughout the sales and fulfillment process.

Feature details

Dynamics 365 Supply Chain Management now lets you manage, track, and verify compliance with export control restrictions before confirming, packing, shipping, and invoicing sales orders.

The system lets you manage export control policies using a native Microsoft Dataverse solution that interfaces directly with your Supply Chain Management instance. Supply Chain Management then enforces compliance with international trade regulations by consulting your export-control policies in real time.

The Dataverse-based architecture means that many of the other systems you use can also access your export control rules thanks to the hundreds of connectors available for Dataverse. Likewise, you can use the rich features of Microsoft Power Platform (like the

Microsoft Power Fx language) to extend the solution, allowing your export control administrator to support complex scenarios by creating formulas like those in Microsoft Excel.

See also

Advanced export control overview (docs)

Feedback

Was this page helpful? Yes No

Warehouse Management

Article • 01/25/2024

ⓘ Important

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

The Warehouse Management solution in Dynamics 365 Supply Chain Management provides a rich and flexible set of capabilities that can be combined and configured to support many warehouse layouts and operational scenarios.

Investments continue to focus on driving efficiencies in warehouse operations through optimization and automation of key processes, including counting, customer returns, product receipts, and re-waving of orders. New interfaces and streamlined processes allow companies to deploy Dynamics 365 Supply Chain Management and use only the warehouse management capabilities, making these broadly available to companies using third-party ERP or order-management systems.

Feedback

Was this page helpful? Yes No

Implement warehouse management only mode enhancements

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	✔ Sep 1, 2023	Sep 2024

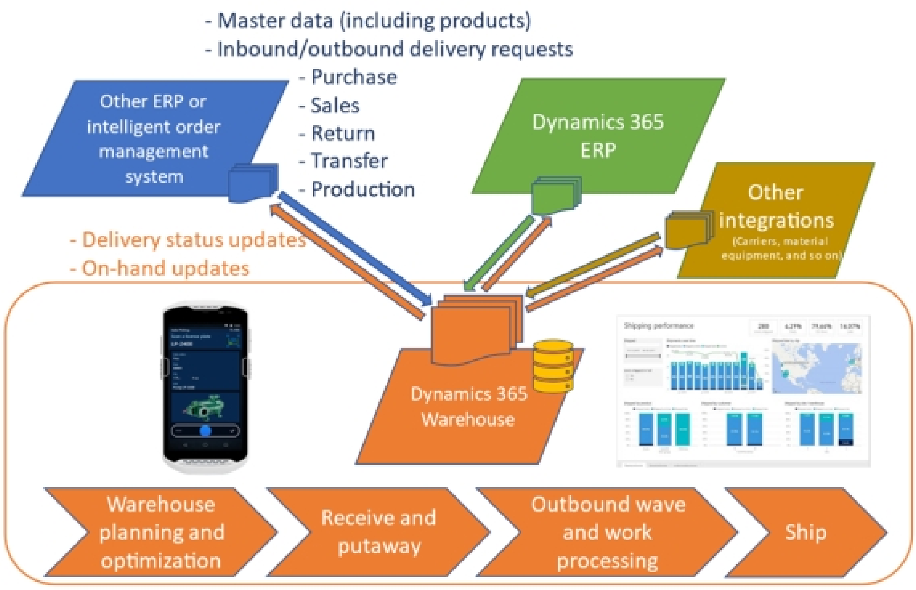
Business value

Businesses can now take advantage of the core warehouse management (WMS) functionality offered by Dynamics 365 Supply Chain Management while continuing to leverage their existing investments in third-party ERP and order-management systems. Regardless of which ordering or ERP systems you have in place, you can now rapidly deploy our advanced WMS without having to set up or maintain areas of Supply Chain Management that you don't need. Then you'll be ready to benefit from advanced WMS features such as automation integration, carrier integration, the Warehouse Management mobile app, and more.

Feature details

Supply Chain Management WMS functionality integrates with external ERP and ordering systems by exchanging new, lightweight source documents dedicated to inbound and outbound shipment orders. These new documents focus exclusively on warehouse management and are therefore able to replace multiple types of previously used documents (such as sales orders, purchase orders, transfer orders, and more) from a pure warehouse-management perspective.

Warehouse management only mode has now been enhanced to support cross-docking by linking inbound and outbound shipment orders. Integration processes have been enhanced to enable near real-time, on-hand inventory reconciliation between external solutions and Supply Chain Management by importing product master data. Product master data imports are easy to view, schedule, and run using the message processor.



Feedback

Was this page helpful? Yes No

Inspect and process returned items more efficiently

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Gain more control and flexibility over the customer return process. Warehouse operators can now inspect returned goods and can choose to postpone disposition code selection until the inspection is done.

Feature details

This feature makes it easier for warehouse operators to manage and review returned items and to choose how to process the return. Warehouse workers no longer need to select a disposition code immediately upon receiving a returned item; instead, they can choose to postpone that decision until after they have had a chance to inspect the item.

Warehouse workers can now create return orders using the Warehouse Management mobile app *Return item receiving* menu item, which can now implement a *blind receiving* and/or *return details receiving* process.

The process for working with return labels has been enhanced to provide the following capabilities:

- Return labels can now be printed during the manual packing process.
- A new batch job can clean up return data, return-label information, and expiration dates after the return validity period has passed.

All businesses dealing with customer returns in the warehouse can now gain greater control and flexibility over their return process while improving productivity and the user experience.

Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Project Operations in 2024 release wave 1

Article • 01/25/2024

ⓘ **Important**

The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Project Operations**.

Overview

https://aka.ms/ReleaseHighlight/2024W1/ERP

In one application, Dynamics 365 Project Operations connects your sales, resourcing, project management, and finance teams so they can win more deals, accelerate delivery, empower employees, and maximize profitability. The application provides the necessary visibility, collaboration, and agility across the project lifecycle to drive success for project-centric businesses. Powered by Microsoft Power Platform, customers are provided with an unmatched set of capabilities that enable everyone to analyze, act, and automate across their organization to transform their services business from the ground up. It's everything you need to run your project operations, from deal management to financials, all in one application.

For 2024 release wave 1, we're delivering functionally rich experiences in the following areas:

- General availability of increased work breakdown structure task limits to 1,000.
- Usability improvements for resource bookings and assignment reconciliation across projects and resources.
- Usability improvements in contract management to reduce clicks for common tasks and KPI access.
- Performance improvements in entry and correction journal confirmation, and approvals.
- Support for invoices with more than 500 lines.
- Support for defining project stage rules.

- Support for discounts and fees definition on quotes, quote lines, contracts, and contract lines.
- Time entry enhancements to support definition of time entry periods and delegation.
- Time entry enhancements to support definition of min and max and time entry increments.
- Mobile experiences for time entry.
- Improvements to expense entries in the mobile experience.
- Ability to attach the invoice report on project invoice proposal in finance and operations apps to the confirmed proforma invoice in Dataverse.
- Investments in generative AI to help with core operational workflows in project proposal generation and side car conversations on project data.

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. Every release wave, Project Operations continues to invest in capabilities to improve usability, performance, and scale across critical areas of the product like project sales, planning, resourcing, budgeting, invoicing, and core transaction processing flows. The core processes in outsourcing and purchasing will get the spotlight with enhancements to service procurement scenarios with integration to Purchase Order, support for vendor retention, pay-when-paid, intercompany vendor invoices, and 3-way vendor invoice match functionality in Dynamics 365 Finance. Project contracting and pricing models will see new scenarios enabled with units, progress and subscription billing and contracting models, cost-plus and contribution-based pricing models. Intelligent resource recommendations will make project staffing easier by providing resource suggestions using experience and a multidimensional prioritization of criteria like costs, utilization, skill match, and availability.

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

Check out the release plan

For application administrators

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

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

Get the most out of Project Operations

Expand table

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

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Project Operations

Article • 01/25/2024

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

- For a list of the previous wave's release plans, go to 2023 release wave 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
Use copilot enhancements to tailor project status reports	Users by admins, makers, or analysts	Sep 2024	Sep 2024

Optimize project operations

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

Expand table

Feature	Enabled for	Public preview	General availability
Use progress billing for resource and nonstock scenarios	Users by admins, makers, or analysts	Aug 2024	-
Support historical tracking using project sales budget	Users by admins, makers, or analysts	Mar 2024	Aug 2024
Create budgets with summarization during estimate import	Users by admins, makers, or analysts	Mar 2024	Jul 2024
Easily summarize budget lines in Dynamics 365 apps	Users by admins, makers, or analysts	Mar 2024	Jul 2024
Cost rate defaulting in project estimation scenarios	Users, automatically	Aug 2024	Sep 2024
Visualize date effective overrides on the price list	Users, automatically	Aug 2024	Sep 2024
Enable audit of project manager field in project entity	Admins, makers, marketers, or analysts, automatically	-	Sep 2024
Separate contract value from invoicing milestones	Users by admins, makers, or analysts	-	Sep 2024
Use fixed exchange rate agreements for project contracts	Users by admins, makers, or analysts	-	Jul 2024
Enable on-account transactions created by project category	Users by admins, makers, or analysts	-	Jul 2024
Add time zone agnostic fields for project and project tasks	Users, automatically	-	Sep 2024
Utilize repaired precision feature with certain values	Users, automatically	-	Sep 2024
Optimize resource requirement generation	Users, automatically	-	Sep 2024
Improve performance for resource booking generation	Users, automatically	-	Sep 2024
Use time zone agnostic fields in project planning	Users by admins, makers, or analysts	-	Sep 2024
Use time zone agnostic fields in resource planning	Users, automatically	-	Sep 2024

Feature	Enabled for	Public preview	General availability
Expense app offers intuitive reimbursement experience	Users by admins, makers, or analysts	-	Apr 2024
Enable delegation of time entries to other team members	Users by admins, makers, or analysts	Aug 2024	Sep 2024

- You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

Feedback

Was this page helpful? Yes No

Copilot in Project Operations

Article • 01/25/2024

ⓘ Important

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

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

Feedback

Was this page helpful? Yes No

Use copilot enhancements to tailor project status reports

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Through this enhancement, project managers gain flexibility to tailor report sections according to their specific business needs and cater to diverse audiences. This feature ensures reports align with the unique requirements of each project.

Feature details

This feature uses the insight generator to capture data from predefined entities and enables the users to add these entities to the project status report. Users can also save and share the report with various audiences.

Feedback

Was this page helpful? Yes No

Optimize project operations

Article • 01/25/2024

ⓘ Important

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

Project Operations continues to invest in capabilities to improve usability, performance, and scale across critical areas of the product like project sales, planning, resourcing, budgeting and tracking, invoicing, and core transaction processing flows. The core processes in outsourcing and purchasing will get the spotlight with enhancements to service procurement scenarios with integration to purchase order, support for vendor retention, pay-when-paid, intercompany vendor invoices, and 3-way vendor invoice match functionality. Project contracting and pricing models will see new scenarios enabled with units, progress and subscription billing and contracting models, cost-plus and contribution-based pricing models. Intelligent resource recommendations will make project staffing easier by providing resource suggestions using experience and a multidimensional prioritization of criteria.

Feedback

Was this page helpful? Yes No

Add time zone agnostic fields for project and project tasks

Article • 01/25/2024

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

Expand table

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

Business value

This feature gives you the option to use a field that stores start and end dates on projects and project tasks in a time zone agnostic manner. Currently times are converted to GMT before being saved, and issues can arise when the conversion moves this to a different day. These issues will be solved by using the time zone agnostic fields that are not converted to GMT when stored.

Feature details

Project and project task start and end are saved in a date time format which is converted to GMT prior to saving. They will then be converted back to the user's time zone when being displayed in the product. However, some integrations and customizations pull only the date from this field. Problems with this arise when the conversion to GMT changes the date, then an integration pulls only that date from the field without converting it back to GMT.

To prevent this issue, new fields on the entity are being created which will store the start and end date time without first converting to GMT. This will allow you to confidently pull only the date without concern that the time zone conversion has caused the date to change.

Feedback

Was this page helpful? Yes No

Cost rate defaulting in project estimation scenarios

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Aug 2024	Sep 2024

Business value

Currently in Dynamics 365 Project operations users can only see the markup cost based on the mark up price configuration on a price list in actuals. The markup cost was not reflected in the project estimates, quote line details (QLD), contract line details (CLD), and project budgets. This resulted in a confusion for users because they could see different prices in actuals when compared to estimates, QLD, CLD and budgets.

Feature details

With this feature users will not face any confusion with different prices in actuals when compared to estimates, QLD, contract line details CLD, budgets, when the price list is configured with markup price.

Feedback

Was this page helpful? Yes No

Create budgets with summarization during estimate import

Article • 03/06/2024

ⓘ Important

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

Expand table

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

Business value

A project budget can be created from estimates by importing the estimates into budget lines. When estimates are created at a granular level, like an estimate created for every resource associated with a task, the number of budget lines created makes it difficult to track costs at such a granular level. Summarization during import enables a recap of the estimate lines, for example, at a task level, where the quantity and amount of all time estimate lines associated with a task are summarized and budgeted against the task. This summarization helps keep the number of budget lines at a manageable hierarchy, so tracking actuals against the budget lines is easier for you to manage.

Feature details

This feature enhances the import-from-estimates experience during budget creation, where summarized budget lines are created to make budget tracking easier at a dimension level, like task or role.

Feedback

Was this page helpful? Yes No

Easily summarize budget lines in Dynamics 365 apps

Article • 03/06/2024

ⓘ Important

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

Expand table

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

Business value

In a resource non-stocked deployment type, finance and operations forecasts can be created from budget lines in addition to the existing capability of creating forecasts from estimates. When estimates are created at a granular level, such as for each resource associated with a task, the resulting number of budget lines can make it challenging to track forecasts at such a detailed level. To address this, summarization during transfer to finance and operations apps allows for consolidating budget lines, such as at a task level. This means the quantity and amount of all-time budget lines associated with a task will be summarized and created as a forecast against the task.

Feature details

This feature enables flexible forecast line creation from budgets by summarizing budget lines at a task, role, or contract level for better forecast management in finance and operations apps.

Feedback

Was this page helpful? Yes No

Enable audit of project manager field in project entity

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Track changes to the project manager of a project and verify when this field has been updated. All other types of customizations on the project manager field will be disabled.

Feature details

Currently, the project manager field is classified as non-customizable to prevent customizations from causing problems within the product. An unwanted side effect of this is that this prevents the field from being audited. This feature allows this field to be audited, so you can track changes to the field over the course of a project, while preventing other customizations to ensure the product works as designed.

Feedback

Was this page helpful? Yes No

Enable delegation of time entries to other team members

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

There might be scenarios when you, as a team member, are not able to log time because of limited access to external services. For example, while working from a secure, client location, when taking time off for personal reasons. These missed time entries could lead to loss of pay and delayed invoicing if not addressed promptly. This can be addressed with the ability to delegate time entries to one or more team members who can log time on your behalf during a specified date range.

Feature details

This feature gives you the ability to nominate one or more team members so they can create, modify, and submit time entries on your behalf during a specified date range. This feature builds a layer of security, through user roles and access configuration, around time entries to ensure only resources that have been nominated as delegates for you can submit time entries on your behalf for your projects or tasks.

The experience can be broken down into the following steps.

1. Delegate set up experience: Users can add one or more delegates who are authorized to log time on their behalf only. A user can only view their own delegates. Similarly, modification of the delegation details (name of the resource, date range, etc.) and deletion of an entry can also be achieved from here.

2. Project Manager experience: Project managers can view the entire list of delegates for each team member on their project(s).

3. Delegate time entry experience: During the specified date range authorized delegates can view, create, and modify time entries for the bookable resource(s) who have nominated. They can only view older time entries that fall outside the delegation date range. New fields known as delegated and delegate resource are introduced to identify such time entries.

**Note: ** *This feature refers to the Dataverse time entry experience only.*

Feedback

Was this page helpful? Yes No

Enable on-account transactions created by project category

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Organizations may have requirements to categorize and report on revenue from different sources. By enabling on-account transactions to have an additional field of category, it allows for different financial accounts to be used and reported on.

Feature details

This feature provides the ability to specify different project categories for project milestones, or other on-account transaction types. The project categories allow you to specify a different financial account for posting and recording in the general ledger and the project subledger for reporting purposes. This feature is available for resource/non-stocked deployments.

Feedback

Was this page helpful? Yes No

Expense app offers intuitive reimbursement experience

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

This release provides an intuitive expense mobile app that is effortless to use, accelerates the reimbursement process for the employee, and increases your productivity.

Feature details

The new expense mobile app for Project Operations lets you easily enter expense details while on the go. This feature is designed with flexibility and adaptability in mind. We aim to accommodate any feedback and enhancements received from customers after its general availability release.

Feedback

Was this page helpful? Yes No

Improve performance for resource booking generation

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

We're improving the resource booking creation, optimization, and performance in Project Operations.

Feature details

These performance improvements within resource management leverage multiple approaches and run CRUD (create, read, update, delete) operations in parallel while generating resource bookings. These changes help improve the scale and throughput of the resource booking functionality.

Feedback

Was this page helpful? Yes No

Optimize resource requirement generation

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

This feature optimizes generation of resource requirements based on multiple tasks that take place on the same day for a resource role.

Feature details

These performance improvements within resource management leverage multiple approaches and run CRUD (create, read, update, delete) operations in parallel while generating resource bookings. These changes help improve the scale and throughput of the resource booking functionality.

Feedback

Was this page helpful? Yes No

Separate contract value from invoicing milestones

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

This feature allows users to edit the contract value to facilitate revenue recognition for fixed price projects. The contract value at the end of the project needs to match the invoicing milestones, but for in-progress projects, the contract value allows edits so the user can recognize revenue based on the contract value.

Feature details

This feature includes the following capabilities:

- Allows contract value to be edited for fixed price projects.
- Ability to recognize revenue based on the edited contract value as opposed to the total of invoicing milestones.

Feedback

Was this page helpful? Yes No

Support historical tracking using project sales budget

Article • 03/06/2024

ⓘ Important

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

Expand table

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

Business value

This feature enhances control over billed sales status and enables accurate revenue forecasting for project managers.

We are first introducing this capability to the lite deployment type of Project Operations. This establishes the necessary infrastructure to support this feature in subsequent release waves for customers using Project Operations for resource/non-stocked deployment.

Feature details

A project sales budget serves as a versioned snapshot of the estimated billed sales or revenue for a project. Project managers have the flexibility to create these snapshots at various stages of the project lifecycle, accommodating revisions and re-estimations of project scope and work.

The latest snapshot represents the most up-to-date revenue forecast for the project, serving as a benchmark for tracking billed sales. This key capability provided by Project Operations enables project managers, accountants, and other stakeholders to gain a clear overview of their progress toward the projected revenue target at the project level.

By comparing actual revenue to the budgeted and forecasted figures, project managers can perform revenue analysis for their projects.

Furthermore, project managers can revise the project sales budget when encountering new scopes or changes, enabling ongoing tracking of billed sales against the updated budget.

Feedback

Use fixed exchange rate agreements for project contracts

Article • 01/25/2024

ⓘ Important

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

Expand table

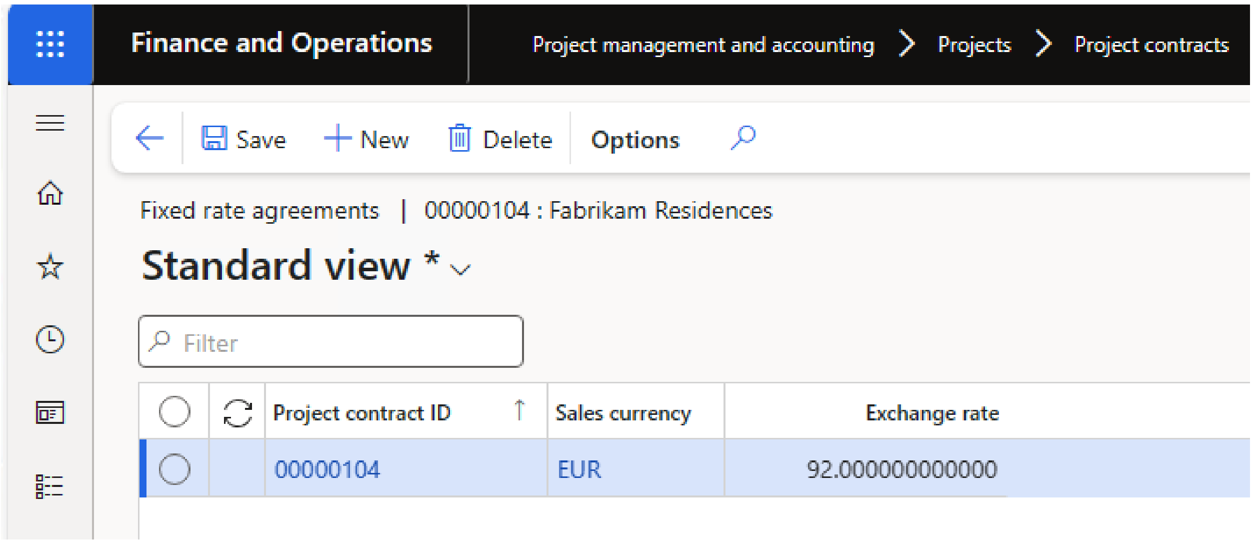
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	-	Jul 2024

Business value

Customers currently using Project Operations for resource/non-stock deployments are limited to using fluctuating exchange rates. This release provides the ability to enter a fixed exchange rate to be used to meet contractual or regulatory requirements.

Feature details

This feature adds the ability to optionally configure a fixed exchange rate for a project contract. Once the fixed exchange rate is configured, all project transactions use the configured exchange rate for converting from the contract currency back into the accounting currency of the legal entity.



Feedback

Was this page helpful? Yes No

Use progress billing for resource and nonstock scenarios

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Progress billing allows users to maintain progress billing rules in Project Operations non-stock/resource-based scenarios. They can maintain the progress % for the contracts and system allow them to create invoices based on the progress completed.

Feature details

- Progress billing rules are available for project operations non-stock/resource-based scenarios.
- User can maintain the progress % for the contracts.
- Users can create invoices based on the progress completed.

Feedback

Was this page helpful? Yes No

Use time zone agnostic fields in project planning

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

When a project is created, the time zone is based on the time zone defined in the applied work hour template. When a task is created, the start time, end time, and hours/day is controlled by the working hours of the project. This time zone component can make it difficult to enforce extensibility scenarios related to contracts where the definition of the time boundaries may not cross due to differences created by time zones.

Feature details

The functionality of start and end dates in projects and project tasks within Dynamics 365 Project Operations entails the inclusion of supplementary fields that are not dependent on specific time zones. These additional fields are incorporated into both the project and project task entities, thereby facilitating integration and extensibility possibilities for scenarios where the time zone aspect of the start and end fields is not of utmost importance or for improved accounting alignment.

Feedback

Was this page helpful? Yes No

Use time zone agnostic fields in resource planning

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

The time zone agnostic feature enhances an organization's ability to create resource requirements and bookings with accurate dates that are independent of time zone differences.

Feature details

Time zone agnostic fields on resource requirements and resource bookings allow project owners to set the default start and end dates for a project's resource requirements, details, bookings, and related tables. Currently all date fields in these entities are time zone aware and convert the dates when users are based in different time zones from when the requirements and bookings are created. This conversion results in unintentional discrepancies. This feature aims to enhance extensibility by providing flexibility for organizations to use time zone independent date fields when their organization spans across multiple geographies.

Feedback

Was this page helpful? Yes No

Utilize repaired precision feature with certain values

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

We are adjusting the way we handle precision for values coming from Project for the web to properly address precision issues across assignments, bookings, resource requirements and time entry.

Feature details

There is a mismatch between the precision used in certain values in Microsoft Project for the web and Microsoft Dynamics 365 Project Operations. This can lead to incorrect values being used for assigned effort (for example seeing 79.5 hours when 80 is expected), which can cause major issues with bookings, time entry, and accounting. This feature will correct that mismatch and ensure that accurate values are displayed and used.

Feedback

Was this page helpful? Yes No

Visualize date effective overrides on the price list

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Aug 2024	Sep 2024

Business value

Project Managers and users who are responsible for setting the price list for roles, materials, and categories can add a date-effective price override where the price would change starting from a certain date until the end of the price list effective date.

However, users do not have an easy way of looking at all price overrides across roles, materials, and categories in the price list grid itself. To see these, they must click each price to find out if there was a date-effective price override applied to the price. This is a click-intensive user experience.

Feature details

The roles, categories, and materials where price overrides are applied on the price list are visible only when the price line in the grid is expanded.

To make the user experience better, for the prices where there is a price override, the grid indicates when there is a price override applied on the price.

Feedback

Plan and prepare for finance and operations cross-app capabilities in 2024 release wave 1

Article • 01/25/2024

ⓘ **Important**

The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. 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, 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

One Dynamics One Platform

Virtual table users accessing finance and operations data will experience better performance, automation, and less management, making it an alternative solution for accessing finance and operations data on Power Platform with less effort. This is a huge leap in realizing a long-standing customer promise of the One Dynamics One Platform.

Customers using export to Data Lake will have an opportunity to transition to 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 Synapse Link for Dataverse supports finance and operations tables and entities.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for finance and operations cross-app capabilities** below:

Check out the release plan

For application administrators

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

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

Feedback

Was this page helpful? Yes No

What's new and planned for finance and operations cross-app capabilities

Article • 01/25/2024

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

For a list of the previous wave's release plans, go to 2023 release wave 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.

One Dynamics One Platform

Build finance and operations extensions in Power Platform.

Expand table

Feature	Enabled for	Public preview	General availability
Hassle-free use of finance and operations data on Dataverse	Users by admins, makers, or analysts	-	Jun 2024
Enable support for asynchronous operation in dual-write functionality	Users by admins, makers, or analysts	Feb 2024	Apr 2024

- You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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

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

Feedback

Was this page helpful? Yes No

One Dynamics One Platform

Article • 01/25/2024

ⓘ Important

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

Virtual table users accessing finance and operations data will experience better performance, automation, and less management, making it an alternative solution for accessing finance and operations data on Power Platform with less effort. This is a huge leap in realizing a long-standing customer promise of the One Dynamics One Platform.

Customers using export to Data Lake will have an opportunity to transition to 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 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 • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

This feature enables asynchronous business processes for dual-write functionality for your business.

Feature details

Dual-write functionality currently supports initial synchronization and live synchronization modes. In this release wave, dual-write functionality supports continuous, asynchronous data movement between finance and operations apps and Microsoft Dataverse for eventual data consistency. It enables asynchronous business processes to participate in dual-write functionality. By executing bulk create and update operations in asynchronous mode, you can avoid session timeout problems and delays that can occur with blocking synchronous operations.

Feedback

Was this page helpful? Yes No

Hassle-free use of finance and operations data on Dataverse

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Our customers, ISVs, and partners can experience hassle-free use of finance and operations data on Dataverse due to increased entity coverage readily available for access through virtualization. We make how-to documents available for administrators, developers, and makers on virtual entity usage for copilot scenarios.

Feature details

In order to create hassle-free use of finance and supply chain data on Dataverse, improvements will be made to virtual entity infrastructure in the following areas:

- Improve the virtual entity infrastructure to expose entities in the thousands.
- Reduce the restrictions in exposing different kinds of finance and operations data on Dataverse.
- Differentiate the entity source through new publisher properties.
- Access headless form bound functionalities through virtual entities.
- Better user guides for administrators, developers, and makers on virtual entity ALM.

Feedback

Plan and prepare for Dynamics 365 Human Resources in 2024 release wave 1

Article • 01/25/2024

> **Important**
>
> The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Human Resources**.

Overview

https://aka.ms/ReleaseHighlight/2024W1/ERP

How we work and the workplace itself have fundamentally changed — yet, for many businesses, HR processes have not. Today, people are connected via mobile devices, plugged into their network, have higher career path expectations, and want to work for organizations aligned with their values.

Legacy human capital management (HCM) systems are disconnected, and data is siloed across HR architectures, typically comprised of multiple vendor solutions. Many processes are still manual, and the employee experience needs to be connected. Employee disruption impacts the organization by lack of product innovation, expensive operational errors, less satisfied customers, and suboptimal financial results.

We aim to help limit the number of manual processes and connect your employee experiences. We also aim to bring systems together to ensure data is readily available and not siloed. Our goal is to enable employees to focus on their work, inspire managers to help employees grow and help HR business partners focus on strategic areas of the organization.

For 2024 release wave 1, our focus will be on:

- **Improve recruiting experiences** with functionally rich and intuitive experiences that target recruiters, candidates, and hiring managers.
- **Expand the HCM ecosystem** to include learning management system integration through public APIs leveraging Dataverse along with expanding our payroll partner network.

- **Build better together experiences** that cross the Dynamics 365 space.

Investment areas

Copilot in Dynamics 365 Human Resources With every new release wave, AI and automation investments through copilot 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 to optimize their human resource operations from personnel management, compensation, benefits, and performance management. Improvements in recruiting operations, skills and competency management, and succession management bring efficiencies in the hire-to-retire lifecycle. Core employee experiences around leave and absence, learning, and training management will benefit from investments bringing core HR data and processes to meet employees where they are.

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

Check out the release plan

For application administrators

User-impacting features to the user experience enabled automatically
User-impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new

capabilities released to market. For the complete list, look for all features tagged "Users, automatically" in the release plan.

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

Get the most out of Human Resources

Expand table

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

Helpful links	Description
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 • 01/25/2024

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

- For a list of the previous wave's release plans, go to 2023 release wave 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 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	Jun 2024	Sep 2024

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
Utilize Microsoft Entra ID integration	Users by admins, makers, or analysts	Jul 2024	Sep 2024
Use recruiting for service centric organizations	Users by admins, makers, or analysts	Jun 2024	Sep 2024

- You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

Was this page helpful? Yes No

Copilot in Dynamics 365 Human Resources

Article • 01/25/2024

ⓘ Important

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

With every new release wave, AI and automation investments empower employees, HR managers, administrators and recruiting agents, providing them with intelligent, natural-language interactions. These enhancements extend beyond business applications to productivity tools like Microsoft Teams, Microsoft Outlook, and Microsoft Excel, meeting employees where they are most productive. Copilot features in Human Resources streamline and expedite workflows from the frontline of employee experiences to the human resources back office, optimizing operational efficiencies.

Feedback

Was this page helpful? Yes No

Explore recruiting copilot scenarios

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jun 2024	Sep 2024

Business value

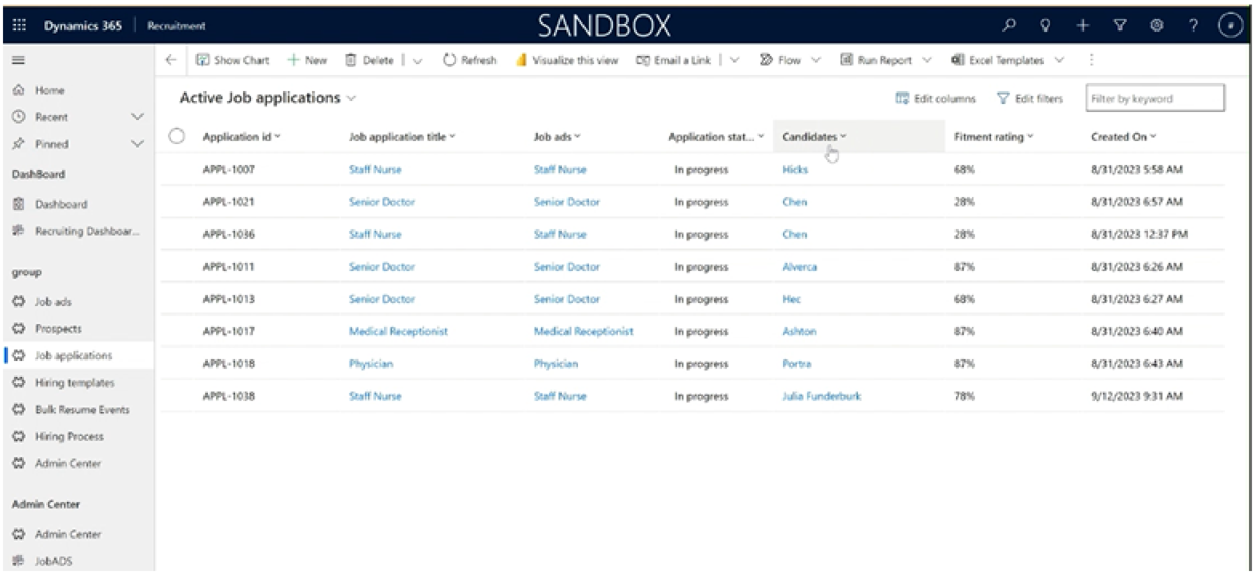
The copilot scenario in recruiting provides a range of benefits, enhancing the efficiency and effectiveness of the entire hiring process. Human resources administrators, recruiters, and hiring managers can make use of a candidate's auto calculated fitment percentage and auto job description generation features. This allows them to focus on more strategic aspects of the hiring process and 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 are:

Candidate recommendation - This will calculate a percentage by assessing how well a candidate's skills, experiences, and attributes align with the requirements of a particular role. Candidate recommendation adds an objective measure to candidate evaluation, allowing recruiters to assess candidates based on predefined criteria and reduce subjective biases.

Job description generation - This quickly creates comprehensive and well-structured job descriptions without the need for manual input. Automatic job description generation in recruiting can offer several advantages, streamlining the hiring process and improving overall efficiency.



Feedback

Was this page helpful? Yes No

Optimize human resource operations

Article • 01/25/2024

ⓘ Important

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

Every new release wave of the Dynamics 365 Human Resource application brings new enhancements for corporations to optimize their human resource operations from personnel management, compensation, benefits, and performance management. Improvements in recruiting operations, skills and competency management, and succession management bring efficiencies in the hire-to-retire lifecycle. Core employee experiences around leave and absence, learning, and training management will benefit from investments bringing core HR data and processes to meet employees where they are.

Feedback

Was this page helpful? Yes No

Use recruiting for service centric organizations

Article • 01/25/2024

ⓘ Important

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

Expand table

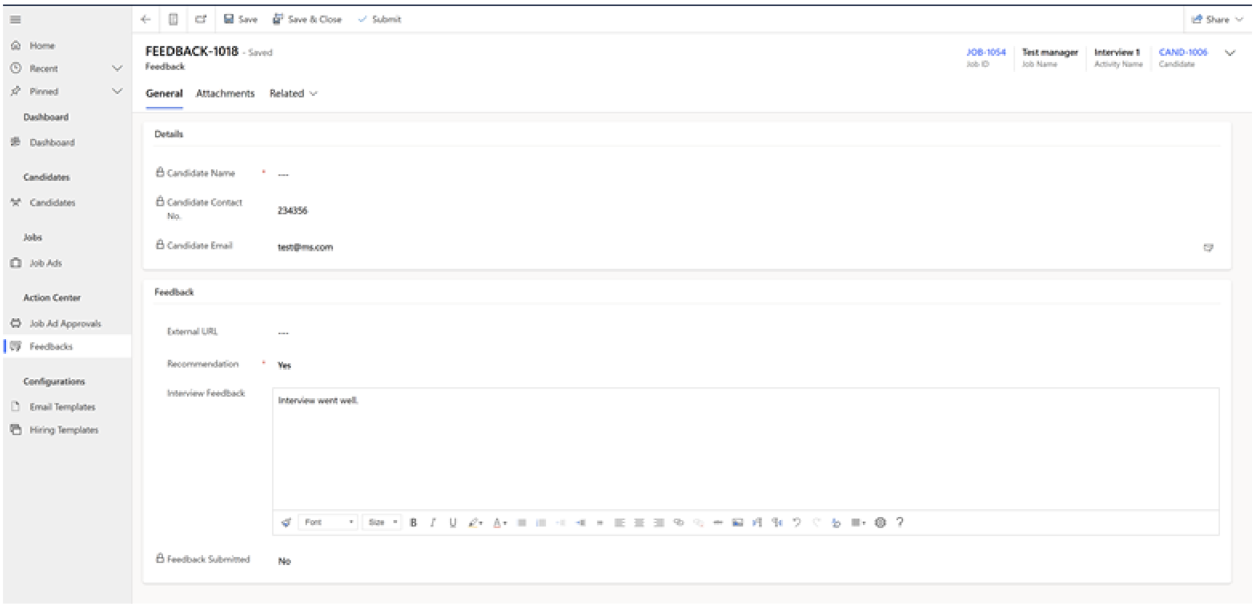
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	Jun 2024	Sep 2024

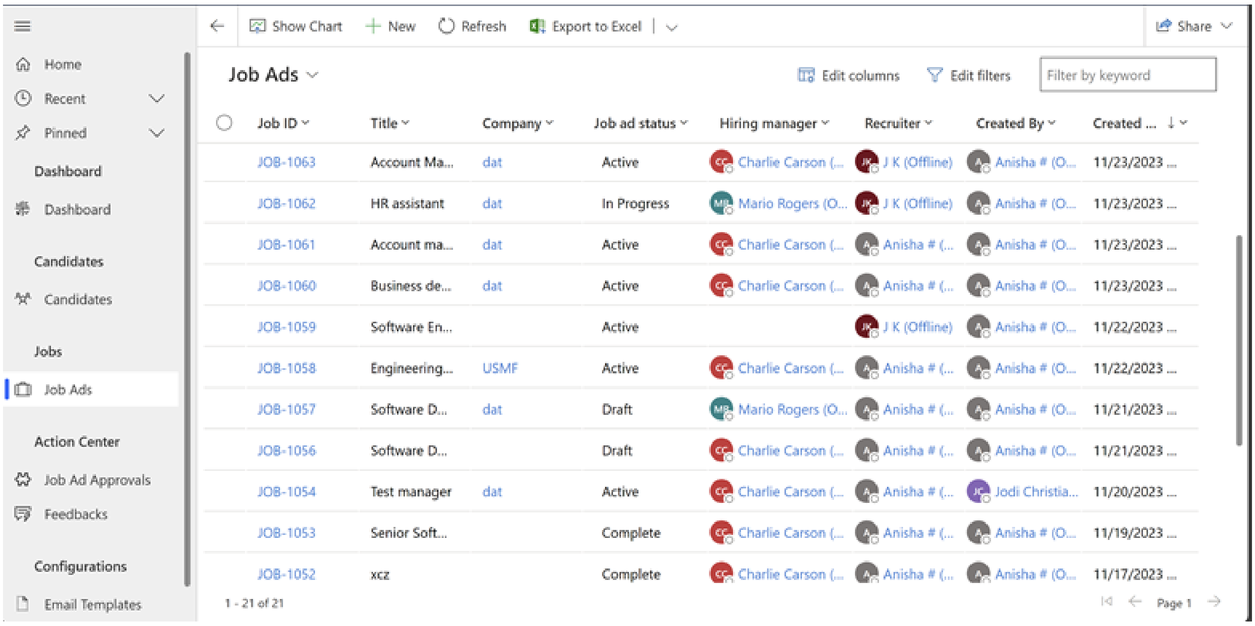
Business value

The recruiting feature provides human resources business partners, recruiters, and hiring managers the ability to create interview process templates, create talent pools, read candidate profile information from LinkedIn, collaborate, and include relevant information related to the position when creating a job posting.

Feature details

We will enable the end-to-end flow of the hiring process by leveraging both Finance and Power Platform to align with the different personas in the process. Managers will use manager self-service within Dynamics 365 to submit a recruitment request that signals the beginning of the recruiting activities for the hiring team. Recruiters will use a model-driven Power App to manage jobs and internal job postings, interviews, feedback, and candidate pipelines. Candidates will use a job portal built on Power Pages to apply and track progress. The experiences are tailored to best align with how each person works and enable companies to extend and customize to meet their business needs.





Feedback

Was this page helpful? Yes No

Utilize Microsoft Entra ID integration

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

You can avoid duplication of data entry in Microsoft Entra and Dynamic 365 Human Resources with this integration. Data needs to be updated only at one place which then flows into the other which 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 will 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. As you might have already known, 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

Plan and prepare for Dynamics 365 Commerce in 2024 release wave 1

Article • 01/25/2024

ⓘ **Important**

The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Commerce**.

Overview

Dynamics 365 Commerce is an omnichannel commerce solution that delivers seamless end-to-end retail scenarios across all channels by combining sales, mobility, intelligence, and productivity into a single platform enabling customer-facing businesses to achieve more. The Dynamics 365 Commerce omnichannel solution enables comprehensive support to operate a broad range of retail business processes, including point of sale (POS), mobile point of sale (MPOS), call center, digital commerce, clienteling, merchandising, inventory, and channel management while providing a unified and immersive customer experience for both business-to-business (B2B) and direct to consumer (DTC) engagements across physical and digital channels.

Organizations can leverage Commerce to drive better business outcomes by:

- **Engaging customers across retail channels**: Give your customers or partners the option to purchase when, how, and where they want—on any device—by delivering a frictionless and consistent engagement across physical and digital channels.
- **Building your digital commerce presence**: Grow your business with an integrated, end-to-end, unified digital commerce solution.
- **Modernizing retail stores and streamlining operations**: Create personalized and friction-free commerce experiences in-store and online through user-friendly applications powered by robust back-office operations.
- **Gaining agility and scalability through a natively headless solution**: Support traditional and emerging channels by using an agile, API-driven headless commerce engine to help adapt to current and emerging needs. Employ a configurable and extensible platform that expands and grows to fit your business needs.

Key features for this release include:

- **Point of sale innovations**: Enable new MPOS options with Tap to pay for iOS and out-of-the-box bar code scanning, while increasing employee efficiency with streamlined payment workflows.
- **Extend Store Commerce for Android and iOS**: Light up new capabilities through hardware station extensions on Store Commerce for mobile devices.
- **B2B innovations**: B2B buyers can now select products by unit of measure and add new key details to orders. In addition, buying for multiple stores or organizations is faster and easier.
- **Localization**: Retailers doing business in Spain can use out-of-the-box capabilities to comply with Spanish fiscal laws.

Investment areas

Digital Commerce

Investments in this release include streamlining site management and design and adding key features and capabilities for digital sales channels.

Intelligent Order Management

Built on a modern, open platform, Dynamics 365 Intelligent Order Management provides the flexibility companies need to capture orders from any order source, including e-commerce, marketplace, mobile apps, or traditional sources like electronic data interchange (EDI). Companies can fulfill those orders from their own warehouses, third-party logistics (3PL) providers, stores, or drop-ship with vendors or other delivery fulfillment partners using out-of-the-box, prebuilt connectors from an ecosystem of more than 200 Microsoft Power Platform connectors.

Intelligent Order Management leverages an integrated, real-time inventory visibility service, and a microservice built on Microsoft Dataverse that is highly scalable and extensible, providing a single, global view of the inventory positions across systems.

Intelligent Order Management also uses distributed order management (DOM) to give real-time recommendations for each order, so they are fulfilled accurately and in a more cost-effective manner, improving supply chain efficiency to better meet customer expectations.

With Intelligent Order Management, brand owners gain real-time visibility into each step of the order journey, and fulfillment insights in real time through customizable and integrated dashboards that enable their supply chain team to overcome constraints and improve operational efficiency.

Store Commerce

Investments in this wave enable the rollout of the Store Commerce app in Sweden and Eastern Europe and address market-specific needs.

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

Check out the release plan

For application administrators

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.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Commerce.
Product documentation	Find documentation for Commerce.
User community	Engage with Commerce experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Commerce.

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Commerce

Article • 01/25/2024

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

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Digital Commerce

Provide fully integrated e-commerce storefronts for Dynamics 365 Commerce customers.

Expand table

Feature	Enabled for	Public preview	General availability
Enable business buyers to purchase for multiple organizations	Admins, makers, marketers, or analysts, automatically	Apr 2024	Apr 2024
Enable customers to specify order delivery date, notes	Users by admins, makers, or analysts	May 2024	Jun 2024
Boost sales by enabling promotions page on your site	Users by admins, makers, or analysts	May 2024	Jul 2024

Intelligent Order Management

Intelligent Order Management on Microsoft Supply Chain Center allows you to capture and fulfill orders from an omnichannel source.

Expand table

Feature	Enabled for	Public preview	General availability
Enable purchase order orchestration	Users, automatically	✔ Oct 16, 2023	Apr 2024

Store Commerce

New features and capabilities for customers using Dynamics 365 Commerce point of sale.

Expand table

Feature	Enabled for	Public preview	General availability
Check out faster with optimized payment flows	Users by admins, makers, or analysts	May 2024	Jun 2024
Move historical data to non-indexed tables for reduced costs	Users by admins, makers, or analysts	May 2024	Jun 2024
Enable all-in-one mobile POS with Adyen Tap to Pay	Users by admins, makers, or analysts	Jun 2024	-
Scan bar codes and QR codes in Store Commerce	Users, automatically	Apr 2024	Jun 2024
Use Store Commerce app for inventory of batch-controlled products	Users, automatically	May 2024	Jul 2024
Customize payments, peripherals on Store Commerce for Android	Users by admins, makers, or analysts	Jul 2024	Sep 2024

- You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

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Feedback

Was this page helpful? Yes No

Digital Commerce

Article • 01/25/2024

ⓘ Important

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

Investments in this release include streamlining site management and design and adding key features and capabilities for digital sales channels.

Feedback

Was this page helpful? Yes No

Boost sales by enabling promotions page on your site

Article • 01/25/2024

ⓘ Important

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Expand table

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

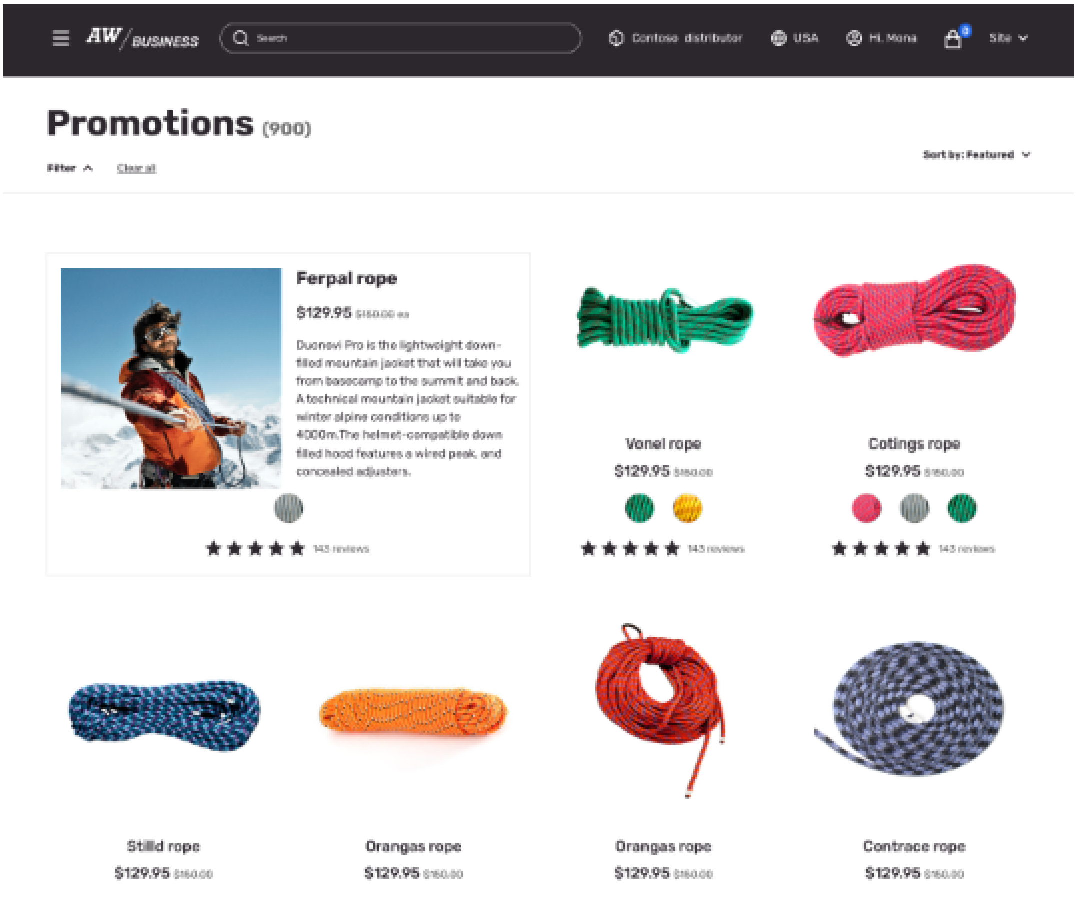
Business value

A promotions page on an e-commerce site serves as a hub to showcase various deals and promotions that shoppers can take advantage of. The promotions page is a marketing tool commonly used by retailers to attract customers and boost sales. This feature enables site builders to configure a promotions page on their e-commerce site using Dynamics 365 Commerce.

Feature details

This feature enables the following functionality:

- Site builders can enable and configure a promotions page on their e-commerce site.
- Shoppers can browse running promotions and discounted products on the promotions page.
- Shoppers can navigate from promotion banners to promotions page to browse relevant products.



Feedback

Was this page helpful? Yes No

Enable business buyers to purchase for multiple organizations

Article • 01/25/2024

ⓘ Important

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Expand table

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

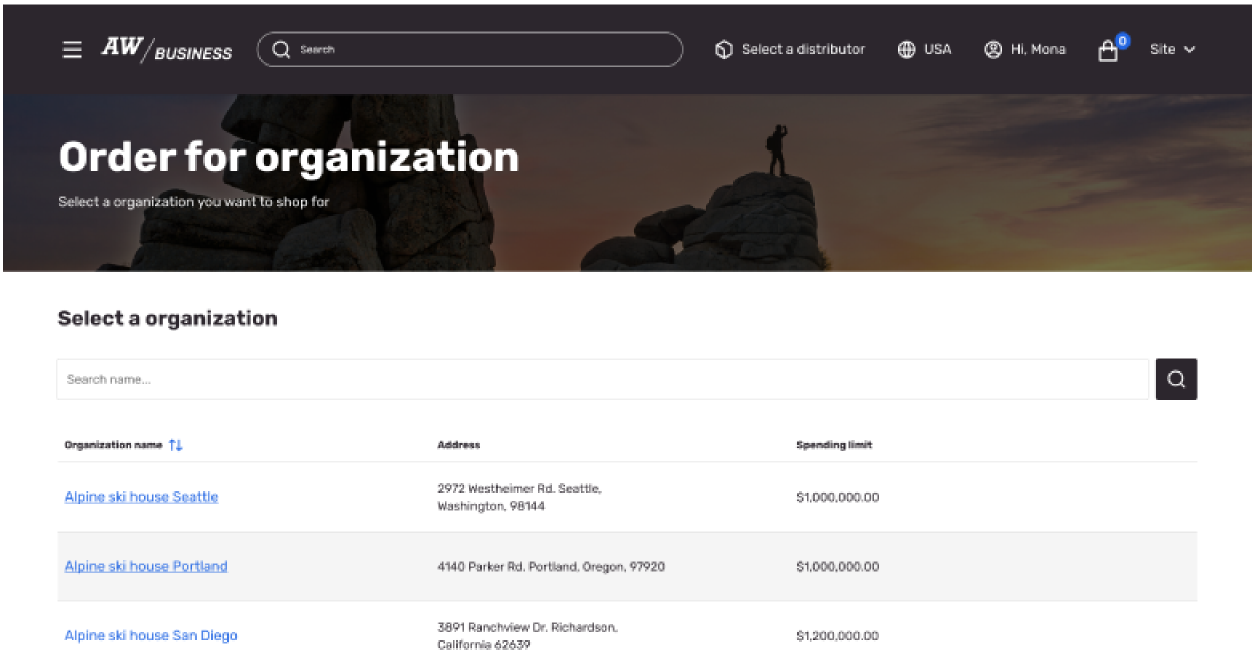
Business value

Many business buyers are associated with more than one organization and need to buy for all of them. Commerce provides the ability to seamlessly buy for multiple organizations using the same email account, enabling buyers to be more efficient.

Feature details

With this new functionality, buyers can:

- Use the same email account when purchasing for more than one business organization.
- Select a business organization and complete a purchase. The address and the credit limit are populated from the organization data, rather than the user data.
- Switch to a different organization without signing out.
- Be assured that the business buyer's name is captured in the sales order as the order taker.



Feedback

Was this page helpful? Yes No

Enable customers to specify order delivery date, notes

Article • 01/25/2024

ⓘ Important

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Expand table

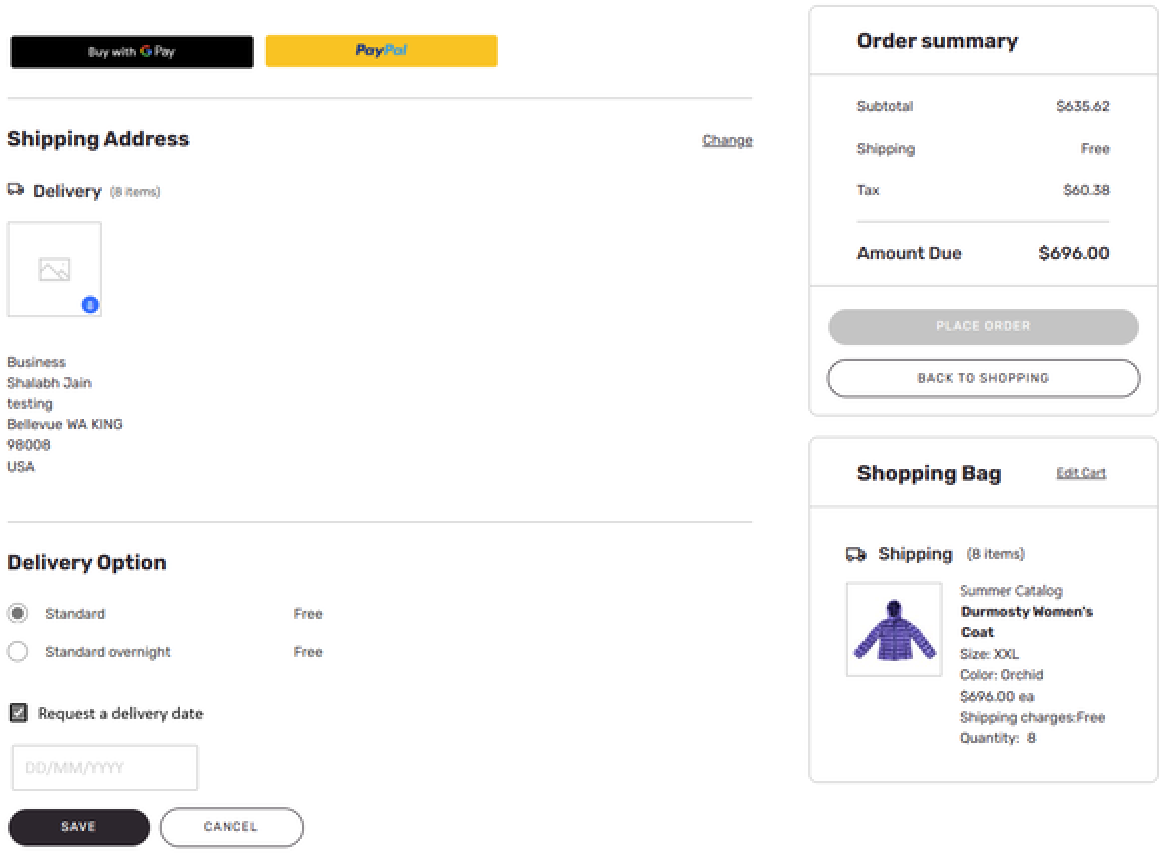
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2024	Jun 2024

Business value

It's a common practice in some businesses to order products in advance to ensure they have adequate stock when needed. For example, a hardware store that sells Christmas trees starting the month of December usually places the order for the tress several months in advance to ensure they have enough inventory for Christmas. This feature will enable customers to specify the desired delivery date and include order notes.

Feature details

This feature enables businesses to select the desired delivery method and date for an order so that they can place future orders using Commerce and not have to resort to non-digital means to place the order. This functionality will be available on an opt-in basis so that businesses can enable it on selected websites.



Feedback

Was this page helpful? Yes No

Intelligent Order Management

Article • 01/25/2024

ⓘ Important

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Built on a modern, open platform, Dynamics 365 Intelligent Order Management provides the flexibility companies need to capture orders from any order source, including e-commerce, marketplace, mobile apps, or traditional sources like electronic data interchange (EDI). Companies can fulfill those orders from their own warehouses, third-party logistics (3PL) providers, stores, or drop-ship with vendors or other delivery fulfillment partners using out-of-the-box, prebuilt connectors from an ecosystem of more than 200 Microsoft Power Platform connectors.

Intelligent Order Management leverages an integrated, real-time inventory visibility service, and a microservice built on Microsoft Dataverse that is highly scalable and extensible, providing a single, global view of the inventory positions across systems. Intelligent Order Management also uses distributed order management (DOM) to give real-time recommendations for each order, so they are fulfilled accurately and in a more cost-effective manner, improving supply chain efficiency to better meet customer expectations.

With Intelligent Order Management, brand owners gain real-time visibility into each step of the order journey, and fulfillment insights in real time through customizable and integrated dashboards that enable their supply chain team to overcome constraints and improve operational efficiency.

Feedback

Was this page helpful? Yes No

Enable purchase order orchestration

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	✓ Oct 16, 2023	Apr 2024

Business value

Leverage the power of low code and no code to create purchase order orchestrations that allow for B2B scenarios and execution of creating purchase orders that are based on changing business needs.

Feature details

- Ability to orchestrate Purchase and Transfer Orders in Intelligent Order Management so policies, actions, and custom providers can be created with these entities.
- Ability to raise an action from sales order orchestration to create purchase orders when inventory availability could not be found.
- Dual-write support to enable the synchronization of the orchestrated purchase and transfer orders to Dynamics 365 Supply Chain Management.
- Ability to view the open sales order products for purchase order products in a singular view.

Feedback

Was this page helpful? Yes No

Store Commerce

Article • 01/25/2024

ⓘ Important

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

Investments in this wave enable the rollout of the Store Commerce app in Sweden and Eastern Europe and address market-specific needs.

Feedback

Was this page helpful? Yes No

Check out faster with optimized payment flows

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2024	Jun 2024

Business value

Efficiency and predictability are key to the smooth operation of a point of sale (POS) system, especially when it comes to payment processing. When store associates can process customer payments across a variety of payment types with minimal friction, customers spend less time waiting. Dynamics 365 Commerce is improving the POS payment processing user experience to create more consistent workflows across payment types, and that will contribute to efficiencies in the checkout process and more satisfied customers.

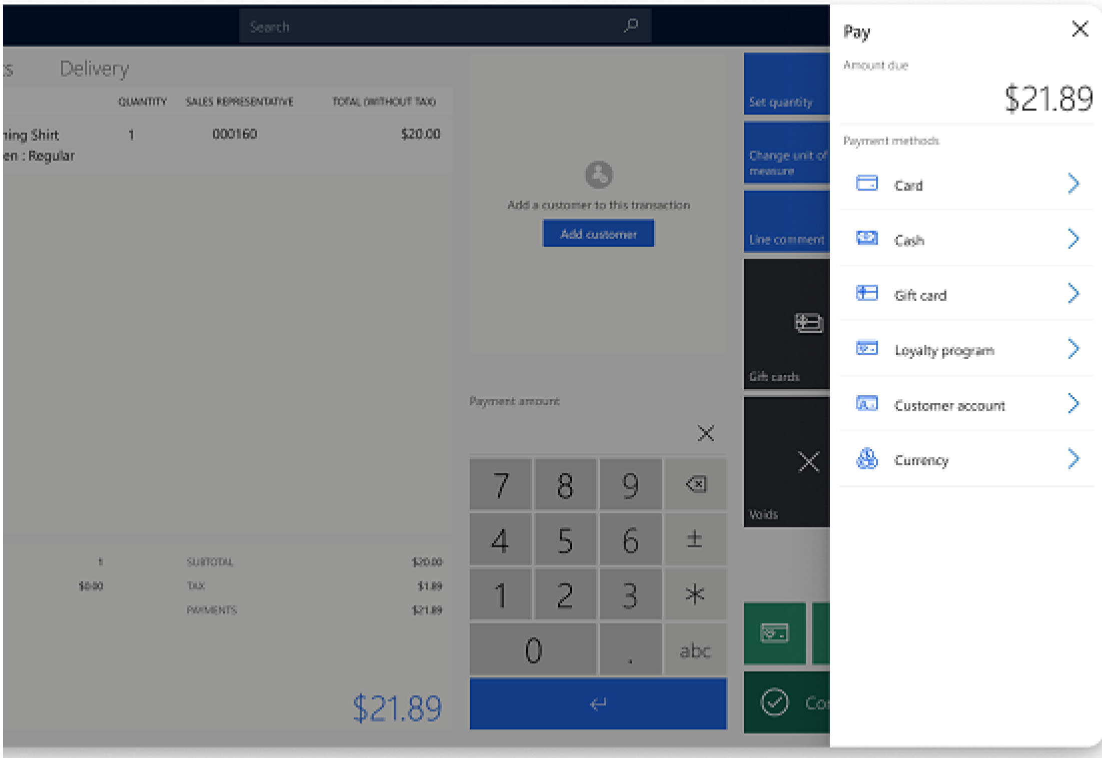
Feature details

The payment processing workflows for Dynamics 365 Commerce POS apps will benefit from several updates and improvements. The updates will apply across all our POS experiences, including Store Commerce for Windows, Android, and iOS, as well as Store Commerce for web.

Improvements include:

- New, consistent payment user interface (UI) patterns across payment types for credit card and cash flows.

- Enhanced workflows for payment methods that are currently unintuitive or overly complex.
- Ability to send payments directly to the payment terminal during checkout.
- Smart denominations which anticipate cash payment amounts based on the amount due and denominations available.



Feedback

Was this page helpful? Yes No

Customize payments, peripherals on Store Commerce for Android

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

The sealed Store Commerce app for mobile platforms has greatly simplified deployment and maintenance for organizations that wish to introduce or expand mobile point of sale (POS) devices in retail stores. Dynamics 365 Commerce will enable the implementation of hardware station extension for Store Commerce for Android so that customers who use payment providers other than Adyen can deploy mobile solutions.

Feature details

With this release, you'll be able to implement a hardware station extension for Store Commerce for Android. Hardware station extensions allow you to:

- Implement a connector for your preferred or existing payment processing service.
- Use Commerce fiscal localization sample code to integrate with a fiscal printer.
- Enable a peripheral that is not currently supported by the Store Commerce app.

Feedback

Was this page helpful? Yes No

Enable all-in-one mobile POS with Adyen Tap to Pay

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

The utility and versatility of an all-in-one mobile point of sale device is undeniable as organizations reimagine their in-store retail experiences to be more customer-centric and engaging. The ability to complete transactions through a mobile device on the sales floor, pop-up store or remote location is critical as it opens new retail opportunities. Dynamics 365 Commerce is introducing Adyen Tap to Pay capabilities into the Store Commerce app for iOS so that retailers everywhere can accept payments directly on Apple iPhones.

Feature details

Adyen Tap to Pay and the Store Commerce app for iOS enable organizations to:

- Accept credit card payments directly on supported Apple iPhones through a tap interface.
- Process payments through Visa, Mastercard, and American Express, and using Apple Pay.
- Handle returns and exchanges on mobile POS devices.

Feedback

Was this page helpful? Yes No

Move historical data to non-indexed tables for reduced costs

Article • 01/25/2024

ⓘ Important

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

Expand table

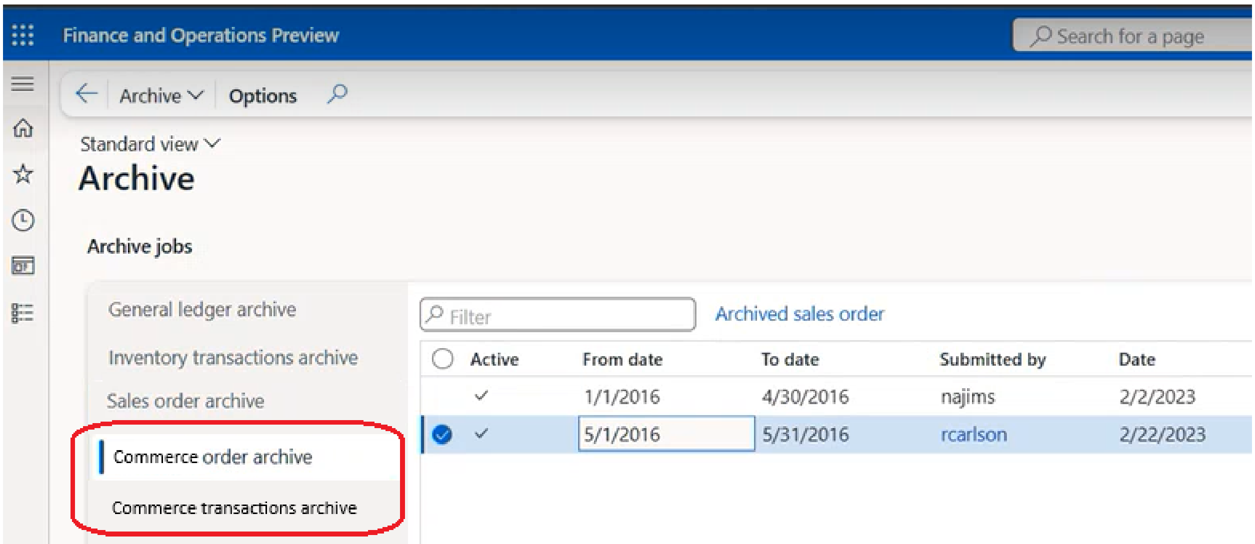
Enabled for	Public preview	General availability
Users by admins, makers, or analysts	May 2024	Jun 2024

Business value

Over the years, companies will typically generate and store a large volume of commerce transactions. These transactions are useful for the first few months to help with returns, but after that, the records aren't required for day-to-day operations. While these records may still be needed for purposes such as historical reporting, auditing, machine learning, or legal claims, keeping a large volume of historical commerce transactions in your day-to-day working environment not only results in increased storage costs, but also impacts system performance and usability.

Feature details

This feature leverages the standard data archival solution provided with the Dynamics 365 finance and operations application platform to archive your historical commerce transactions. Administrators can set up logical rules to control when and how the commerce transactions will be archived from active high efficiency, costly data store to non-indexed data storage for historical reporting, auditing, machine learning, legal claims, and other purposes.



Feedback

Was this page helpful? Yes No

Scan bar codes and QR codes in Store Commerce

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2024	Jun 2024

Business value

Bar code and QR code scanning is becoming a must-have capability for mobile devices in a retail point-of-sale setting. As retailers make the shift toward consumer-grade mobile point-of-sale devices on tablets and phones, the rear-facing camera on the device gives them the ability to capture product and customer information without having to integrate a peripheral scanner. For 2024 release wave 1, we are introducing camera-based bar code scanning as an out-of-the-box feature in the Store Commerce app for Android and iOS.

Feature details

With this feature release, you can:

- Scan bar codes and QR codes on any iOS or Android device that has a rear-facing camera.
- Activate the scanner through UI in the Store Commerce app.
- Decode common bar code symbologies and QR codes.
- Use camera-based scanning for all common point-of-sale scenarios that currently support insertion of a product ID, receipt number, or other ID.
- Disable out-of-the-box scanning if you're already using a third-party scanning app or peripheral solution.

Feedback

Was this page helpful? Yes No

Use Store Commerce app for inventory of batch-controlled products

Article • 01/25/2024

ⓘ Important

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

Expand table

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

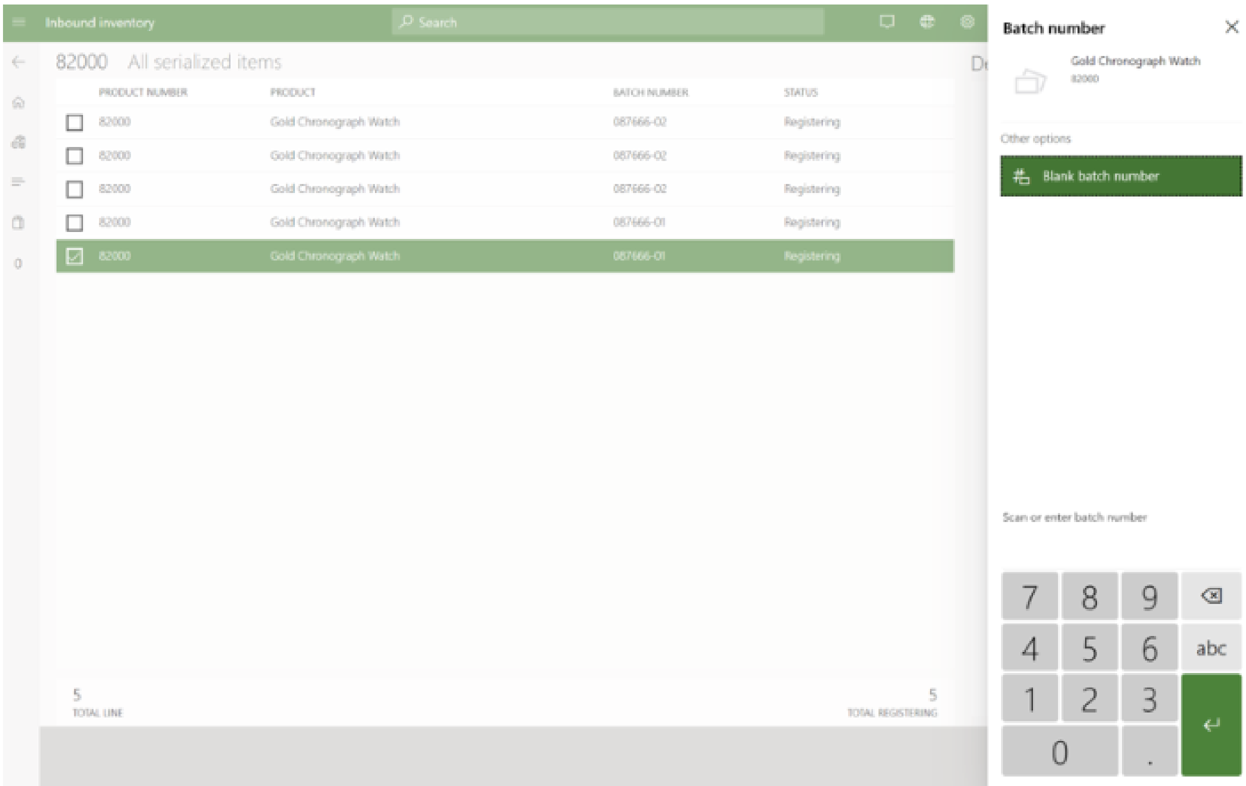
Business value

Batch-controlled products, which are commonly used in food, chemical, and electronics industries, are manufactured in batches and associated with unique identifiers for quality control and traceability. This feature enhances the Store Commerce point-of-sale (POS) app to support batch-controlled products in store inventory operations.

Feature details

This feature will provide the following capabilities in the Store Commerce app:

- Register and validate batch numbers during inventory receipt (by means of purchase orders or transfer orders).
- Capture and validate batch numbers during inventory shipment (by means of transfer orders).
- Capture batch numbers during inventory adjustment and movements.
- Capture batch numbers during stock counting.



Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Business Central in 2024 release wave 1

Article • 01/25/2024

ⓘ **Important**

The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Business Central**.

Overview

Business Central is a business management application for small and mid-sized organizations that automates and streamlines business processes. Highly scalable and adaptable with a rich set of capabilities, Business Central enables companies to manage their finances, supply chain, manufacturing, shipping, projects, services, and more. Companies can easily add functionality that's relevant to their specific industry or region of operation by picking apps from the industry-leading ISVs and customizing the app to fit their specific business needs. Business Central is fast to implement and easy to configure. Simplicity guides innovations in product design, development, implementation, and usability.

This release takes our investment in Copilot to the next level. We're providing more capabilities for people to optimize their business processes and complete tasks faster with the assistance of Copilot. Developers are already improving their productivity with GitHub Copilot in Visual Studio Code, and there's more innovation to come from these world-leading development tools for AL developers. We've also enabled developers to enrich the application metadata with more details to use for a better Copilot experience.

We'll help organizations focus on their primary business while staying compliant with various government regulations by automating regulatory tasks. Usability is always a focus, and this release boosts efficiency with selection-aware, context-based actions.

Additional updates in 2024 release wave 1 include:

- **Adapt faster with Microsoft Power Platform**: It's easier to set up workflows in Business Central. We're delivering more templates that support more scenarios out of the box, so that you can automate more processes to be more productive.

- **Application**: We've invested in better project and service management capabilities in this release. For the finance area, we've improved the consolidation experience.
- **Country and regional**: We've expanded Business Central's global availability. Business Central is now available in more than 155 countries and regions.
- **Development**: We'll continue to invest in areas that enhance productivity for developers who work with GitHub, Visual Studio Code, and AppSource marketplace. We're adding new code refactoring capabilities, an easy path to functional and performance testing, and ISV and custom code with AL GO for GitHub.
- **Governance and administration**: Business Central delivers a set of additional self-service features to help administrators manage more granular access to environments, and audit critical admin operations using Microsoft 365 Audit Log, which provides ever stronger options for reinforcing data privacy with customer-managed encryption keys and Azure Lockbox.
- **Legislation**: This release offers new capabilities for accessing VAT dates when you preview the results of posting transactions. In this release you'll also find the sustainability journal, which will help you with sustainability reporting.
- **Reporting and data analysis**: We're adding more capabilities to Analysis mode, and Power BI and Excel Layouts are ready for use.
- **Service and platform**: We're continuing to invest in the fundamentals of our service, focusing on high availability, performance, stability, resource governance, security, and compliance.

Investment areas

Adapt faster with Power Platform

Business Central's seamless integration with Power Platform lets you improve efficiency in your organization by automating repetitive tasks. Use Power Automate templates to automate workflows that optimize your business processes for your unique requirements. We'll continue to invest in a tight integration with Power Platform to make it more powerful and give you more ways to use your business data effectively. For example, you can use the Copilot capabilities for cloud flows in the Power Platform products to create connected business workflows and experiences. What's more, you can do so through quick and easy natural language expressions.

Application

To determine what goes into the application in every release, we prioritize the top requests from customers and respond to market trends. For example, our investment in helping customers use Copilot to optimize their business processes.

For the last couple of releases, we've invested in multicompany capabilities because an increasing number of businesses are using Business Central across borders and to manage multiple companies. We'll continue to improve the experience of using Business Central to manage multiple companies. We'll invest throughout the application, improve experiences in inventory management, service and project management, and improve our integrations with other Dynamics 365 applications.

Copilot and AI innovation

According to our recent survey on business trends, nearly 9 out of 10 workers hope to use AI to reduce repetitive tasks in their jobs. But until recently, AI has been a commodity that few SMBs could truly invest in.

Microsoft Dynamics 365 Copilot enables professionals to perform their day-to-day work with the assistance of cutting-edge AI by their side. With Copilot in Business Central, our customers empower their workers with intuitive AI tools to get more done with less effort, without needing to become data scientists.

This wave expands on our use of Copilot capabilities, in order to boost productivity for a broader set of SMB roles.

Country and regional

Business Central continues to become available to businesses in more countries and regions. This expansion happens largely through partner-led localizations. Our partners create and maintain apps for specific countries and regions, and publish their apps on AppSource. In combination with built-in language offerings, Business Central is available to serve customers in more than 155 countries and regions worldwide. Additionally, in the countries where Microsoft is responsible for the localization, we provide updates for all regulatory features.

Development

To empower AL developers and increase their productivity, we've laid the foundation for introducing namespace support in the platform and application. Namespace support makes it easier to structure apps, create better object names, and avoid identifier clashes. As apps mature, the need to refactor is inevitable, so we've added the ability to move ownership of a table and its data between extensions. Additionally, developers can hide specific variable data so that other parties can't access it during debugging, which protects internal data.

When it comes to data analysis and reporting, developers have more control. For example, you can turn off Analysis Mode on pages and specify how to embed content from Power BI.

Consultants and developers can easily open Visual Studio Code for a production or sandbox environment to investigate and understand objects across installed extensions, view code for owned extensions, and perform troubleshooting—all without having to set up Visual Studio Code manually. Similarly, we've improved profiling from the client and Visual Studio Code so it's easier to find database-related performance issues.

AppSource publishers can sell through CSPs, and better handling for AppSource runtime packages gives seamless development and troubleshooting across app dependencies for publishers and resellers.

Governance and administration

We're giving Business Central administrators more tools for managing environments, apps, and data migrations. The goal is for administrators to be self-sufficient, able to solve their customer needs, and handle a wide variety of administrative scenarios.

- More granular administrator roles to give more control over the access granted to (delegated) administrators.
- Improved processes for minor update releases.
- The ability to link Business Central and Power Platform environments to set up integrations consistently and to apply Power Platform environment settings to Business Central.
- The ability to cancel Cloud Migration replication runs.

Legislation

Business Central offers updates to regulatory features based on popular requests for improvements and ever-changing requirements from local authorities. To give our customers peace of mind and enable them to focus on their core business, we automate many processes and ensure that features comply with the regulations set by government agencies. For example, if local regulations require that you create vouchers that serve as proof of transactions and a detailed audit trail, you can automate the process. Business Central can automatically generate and attach vouchers to general ledger entries, so that accountants can rest assured that they're compliant, without extra steps. The retention policy features let you specify how long you need to store vouchers before you clean them up, giving you more control over the amount of data you store.

We're working to make regulatory features a standard part of Business Central, so that we can deliver improvements out of the box across the countries and regions where they're relevant. For example, the E-documents module is a foundation that supports processes for sales and purchase invoicing, and it's easy for partners to extend by building country-specific apps for e-invoicing.

Reporting and data analysis

In the modern world, data has become an invaluable resource, forming the foundation of decision-making and progress across all sectors. Recent advances in AI technology and data analytics tools bring radically new ways for businesses to distill complex information into actionable intelligence, reveal hidden patterns and trends, and find correlations that were previously concealed. The critical insights gained from data analysis empower organizations to optimize their strategies, enhance customer experiences, identify potential risks, gain unprecedented insights into the details of their operations and environments, and innovate in ways that were once inconceivable.

As data continues to fuel innovation and drive transformative advancements, harnessing its potential has become essential for staying competitive and shaping a more efficient and sustainable future for SMBs.

Our reporting strategy revolves around building universal BI and analytics within the Business Central experience. We aim to seamlessly integrate in-context, rich, and immersive BI and analytics content from first and third parties into Business Central. Alongside flexible self-service capabilities, you can effortlessly access and leverage your data for maximum value.

User experiences

Business Central offers a broad portfolio of user interfaces that enable our customers to work with their data from anywhere, and on any device. User interfaces include an installable desktop app, a browser-based web app, and mobile apps. Whether you need to enter data at high speed, casually update entries, or analyze relational data, Business Central offers numerous features that are easy to get started with and powerful when needed.

Every release includes enhancements to usability, accessibility, performance, and reliability. In this release wave, we're boosting efficiency when you're working with actions across selections in lists of records and viewing summarized data to help you easily fix data entry mistakes.

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

Check out the release plan

For application administrators

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

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

Get the most out of Business Central

Expand table

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

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Business Central

Article • 01/25/2024

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

For a list of the previous wave's release plans, go to 2023 release wave 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.

Adapt faster with Power Platform

We're continuously investing in a seamless experience for customers who use Business Central together with Power Apps, Power Automate or Power BI.

Expand table

Feature	Enabled for	Public preview	General availability
Manage work orders in Field Service, invoice them in Business Central	Users by admins, makers, or analysts	Mar 2024	Apr 2024
Use virtual tables to expose more Business Central data in Dataverse	Users by admins, makers, or analysts	Mar 2024	Apr 2024
Improve approval processes via Power Automate	Users, automatically	Apr 2024	Apr 2024

Application

Core application functionality is a key investment area for us. It's what helps companies optimize their business processes. We listen to our partners and customers to make sure we deliver what they need to be even more productive with every release.

Expand table

Feature	Enabled for	Public preview	General availability
Archive projects	Users by admins, makers, or analysts	Mar 2024	Apr 2024
Usability improves for service and projects	Users, automatically	Mar 2024	Apr 2024
Use deferral codes in purchase and sales journals	Users, automatically	Mar 2024	Apr 2024
Define a service invoice posting policy for various users	Users by admins, makers, or analysts	Mar 2024	Apr 2024
Define default location for project or project phase	Users, automatically	Mar 2024	Apr 2024
Block item, item variant or service item from use in service management transactions	Users, automatically	Mar 2024	Apr 2024
Connect Business Central with Shopify B2B	Admins, makers, marketers, or analysts, automatically	Mar 2024	Apr 2024
Set up financial consolidation runs more efficiently	Users, automatically	Apr 2024	Apr 2024
Simpler Shopify connection	Users, automatically	Mar 2024	Apr 2024
Use general ledger account revaluation for more accurate financial statements	Users, automatically	Mar 2024	Apr 2024
Get more productive while entering time sheets	Users, automatically	Mar 2024	Apr 2024
Create projects that you can invoice to multiple customers	Users, automatically	Mar 2024	Apr 2024
Assemble to project	Users, automatically	Mar 2024	Apr 2024
Invoice a customer for multiple projects	Users, automatically	Mar 2024	Apr 2024
Use new Excel layouts for 35 selected	Users, automatically	Apr 2024	Apr 2024

Feature	Enabled for	Public preview	General availability
reports			
Use standard terminology for project management	Users, automatically	Mar 2024	Apr 2024
Use currencies when posting employee transactions	Users, automatically	Mar 2024	Apr 2024

Copilot and AI innovation

This wave expands on our first Copilot capability, marketing text suggestions, boosting productivity for a broader set of SMB roles.

Expand table

Feature	Enabled for	Public preview	General availability
Introduce Power Automate Copilot integration with Business Central	Users, automatically	Apr 2024	-
Map e-documents to purchase order lines with Copilot	Users, automatically	Apr 2024	-
Create sales lines easily with Copilot	Users, automatically	Jul 2024	-
Extend Copilot using richer development tools	Admins, makers, marketers, or analysts, automatically	-	Apr 2024
Get to insights faster with Copilot-generated analysis tabs	Users, automatically	Apr 2024	-
Complete bank account reconciliation faster with Copilot	Users by admins, makers, or analysts	✔ Nov 10, 2023	Apr 2024
Create product information faster with Copilot	Users, automatically	Jul 2024	-
Learn more about fields with Copilot	Users, automatically	Apr 2024	-

Country and regional

We've made Business Central available in more countries and regions around the world in this release wave.

Expand table

Feature	Enabled for	Public preview	General availability
Automate IRS 1099 Form submission in US	Users, automatically	-	Apr 2024
Enable additional countries and regions	Users, automatically	Jun 2024	Jul 2024
Install UK localization as an app	Users, automatically	-	Aug 2024

Development

Our focus is on making Business Central AL developers more productive, and empowering consultants, citizen developers, and users to do more while lowering the cost of changes.

Expand table

Feature	Enabled for	Public preview	General availability
Handle multiple file uploads and file drop zones	Users, automatically	Mar 2024	Apr 2024
Debug the system application	Admins, makers, marketers, or analysts, automatically	Apr 2024	Apr 2024
Remove friction when working with external app dependencies	Admins, makers, marketers, or analysts, automatically	Apr 2024	Apr 2024

Governance and administration

We are adding new tools and improving existing tools for administrators to manage environments, apps, and data migrations.

Expand table

Feature	Enabled for	Public preview	General availability
Use linked environment in Dataverse integration	Users by admins, makers, or analysts	Mar 2024	Apr 2024
Audit Business Central operations in Microsoft Purview	Admins, makers, marketers, or analysts, automatically	-	May 2024
Encrypt data at-rest with customer-managed encryption key	Users by admins, makers, or analysts	-	May 2024
Allow customers to consent to Microsoft Support accessing their data	Users by admins, makers, or analysts	-	May 2024
Link Business Central environments to Power Platform environments	Users by admins, makers, or analysts	-	May 2024

Legislation

This Business Central release wave delivers a set of legislative capabilities that can act as a foundation for more specific requirements in local versions.

Expand table

Feature	Enabled for	Public preview	General availability
See VAT date in posting previews	Users, automatically	May 2024	Jun 2024
Automate country of origin listed for item tracking code in Intrastat reporting	Users, automatically	May 2024	Jun 2024
Achieve sustainable compliance with Business Central	Users, automatically	Apr 2024	May 2024

Reporting and data analysis

Access to the right reports and data analysis capabilities is essential for companies wanting to be in control of the business and identify new growth opportunities.

Expand table

Feature	Enabled for	Public preview	General availability
Discover report and data analysis content easily	Users by admins, makers, or analysts	Apr 2024	Apr 2024

User experiences

Great user experiences help users enter, update, and fix mistakes in their data in an intuitive way.

Expand table

Feature	Enabled for	Public preview	General availability
Use drag and drop to attach multiple files	Users, automatically	Mar 2024	Apr 2024
Use actions to navigate and highlight or fix platform-generated errors	Users, automatically	Mar 2024	Apr 2024
Share error details to get help from another user	Users, automatically	Mar 2024	Apr 2024

- You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ .

Description of **Enabled for** column values:

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

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

Feedback

Was this page helpful? Yes No

Adapt faster with Power Platform

Article • 01/25/2024

ⓘ Important

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

Business Central's seamless integration with Power Platform lets you improve efficiency in your organization by automating repetitive tasks. Use Power Automate templates to automate workflows that optimize your business processes for your unique requirements. We'll continue to invest in a tight integration with Power Platform to make it more powerful and give you more ways to use your business data effectively. For example, you can use the Copilot capabilities for cloud flows in the Power Platform products to create connected business workflows and experiences. What's more, you can do so through quick and easy natural language expressions.

Feedback

Was this page helpful? Yes No

Add table and field mappings to existing integration tables

Article • 03/06/2024

ⓘ Important

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

Expand table

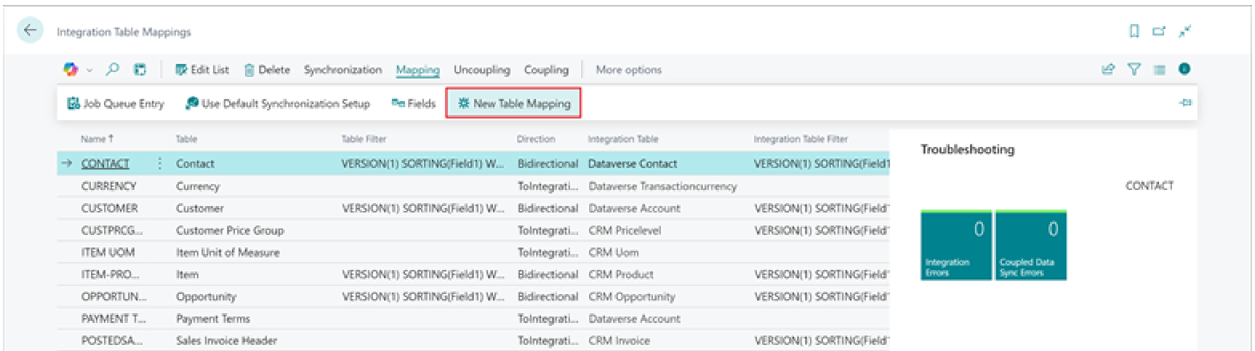
Enabled for	Public preview	General availability
Users, automatically	Apr 2024	-

Business value

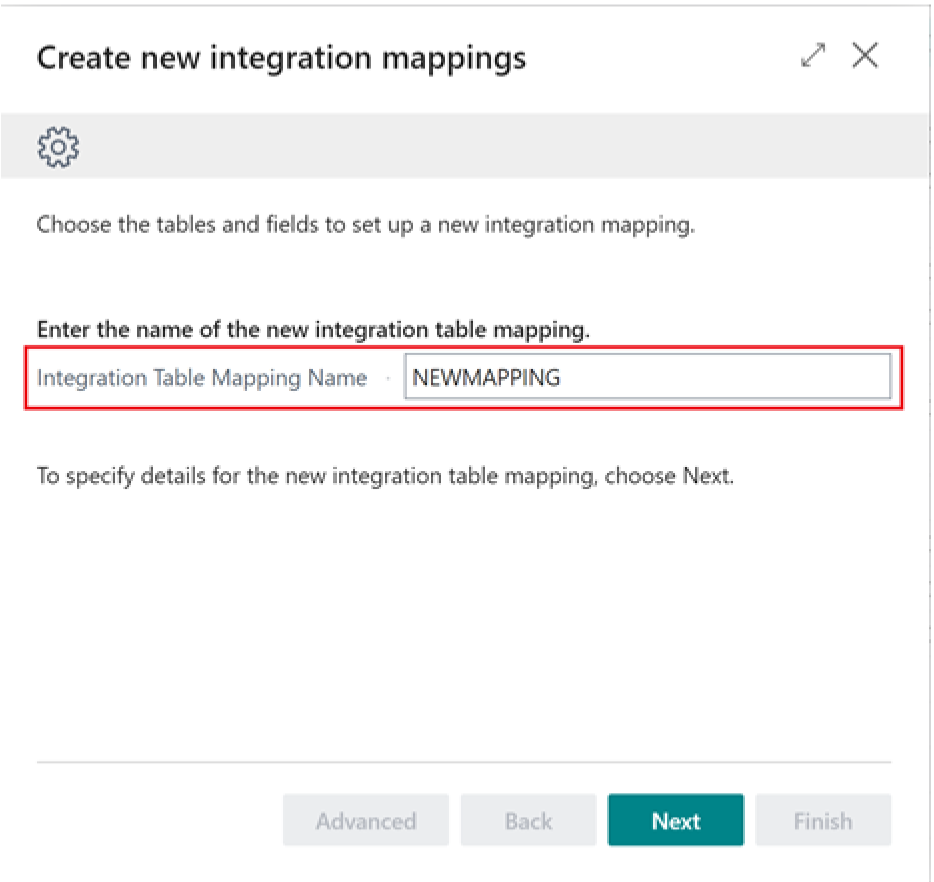
Business needs change and so do business processes. Changes of business processes require data being exchanged through integrations with Business Central to be implemented in a fast and cost-effective way.

Feature details

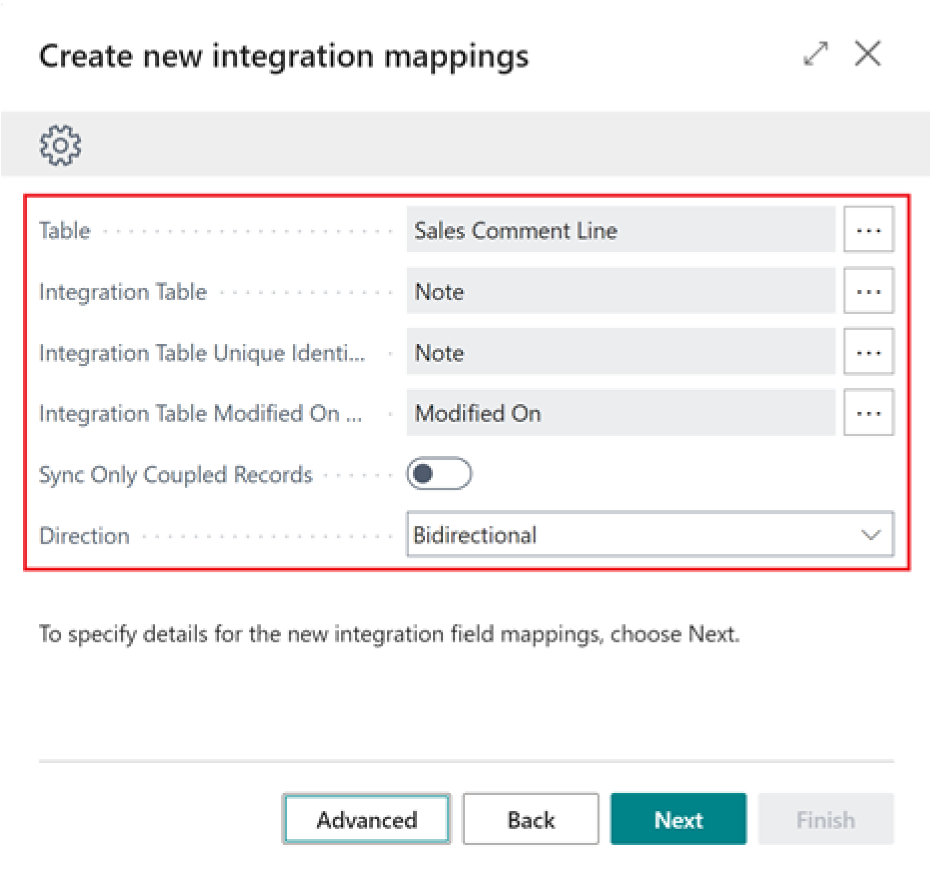
You can add new table mappings by choosing the **New Table Mapping** action on the **Integration Table Mappings** page.



The action starts the **New Integration Mappings** assisted setup guide, which will help you set up new integration table and field mappings.



After you enter an **Integration Table Mapping Name**, choose **Next** to set up new table mapping details.

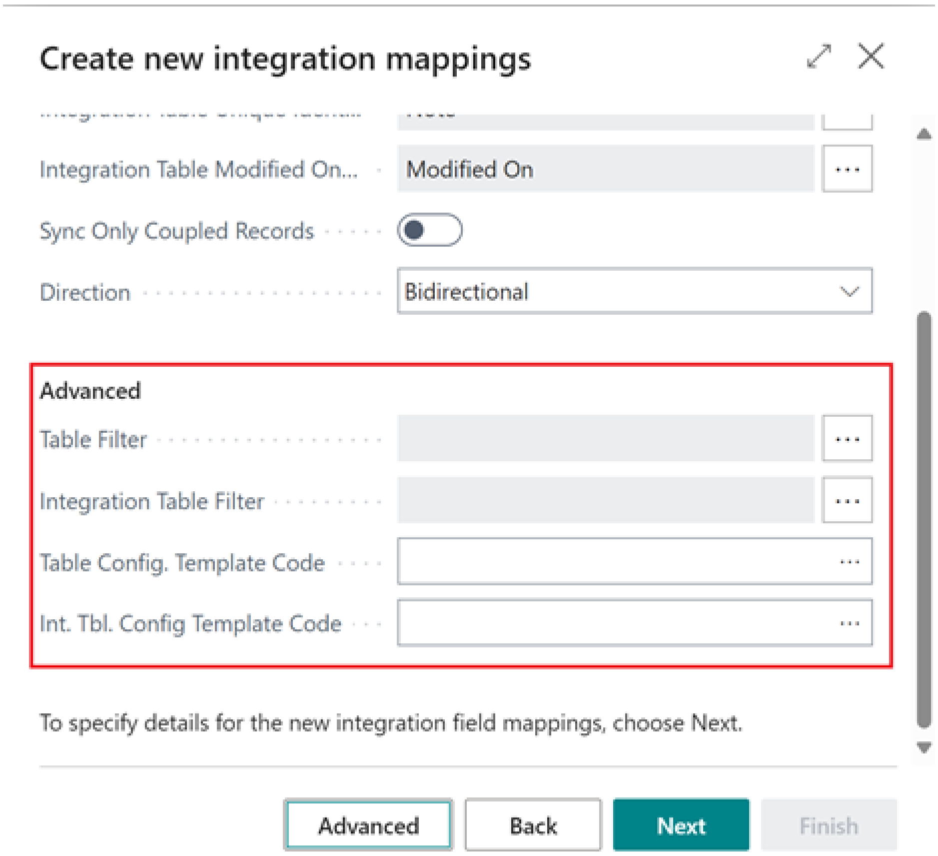


Here you can specify a **Table** in Business Central and an existing **Integration Table** in Dataverse that you want to map. You can also specify the Dataverse table's unique identifier in **Integration Table Unique Identifier Field Name** and the **Integration Table Modified on Field Name**, which are needed for data synchronization to work.

ⓘ Note

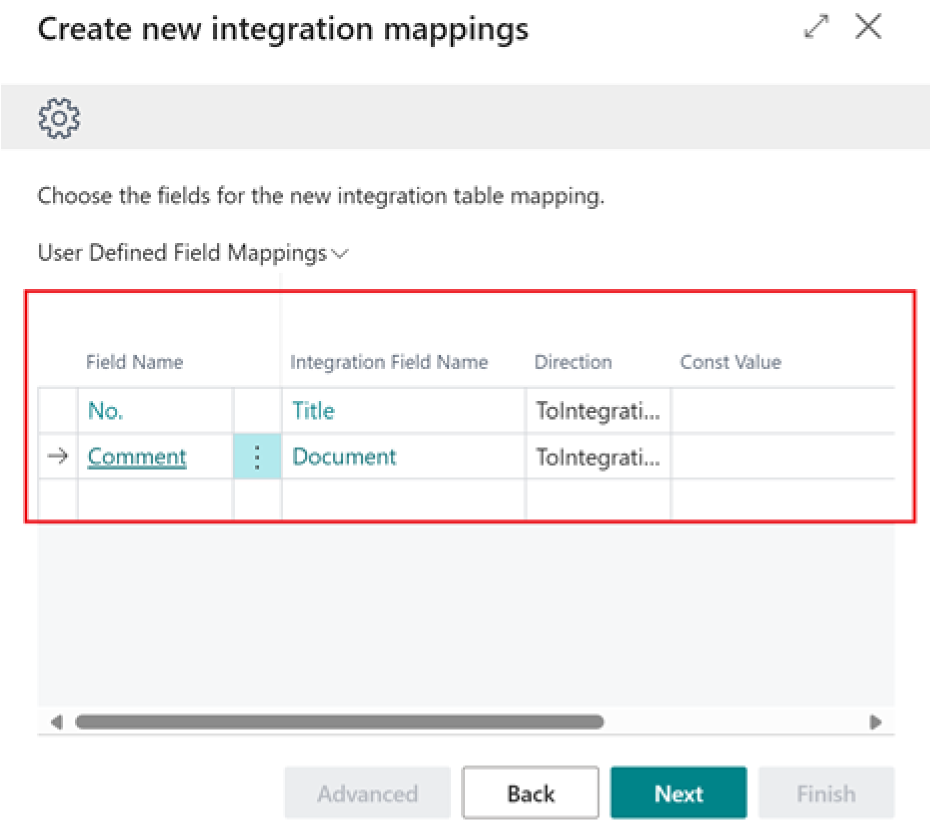
The lookup on the **Table** column shows all Business Central tables, including custom tables, that aren't yet mapped. It excludes those that already exist on your **Integration Table Mappings** page. The lookup on the **Integration Table** column shows only Dataverse tables (AL Proxy Tables) that are part of out-of-the-box integrations. To add additional or custom Dataverse tables, you'll need help from a developer to create and deploy them through an extension.

The **Advanced** action opens additional table mapping settings that you can set up.



In the Advanced section, the **Table Filter** field lets you specify filters for Business Central. Use the **Integration Table Filter** field for Dataverse data to consider in data synchronization together with the configuration template codes in **Table Config. Template Code** and **Int. Tbl. Config. Code** to prefill missing data when new data comes from either application.

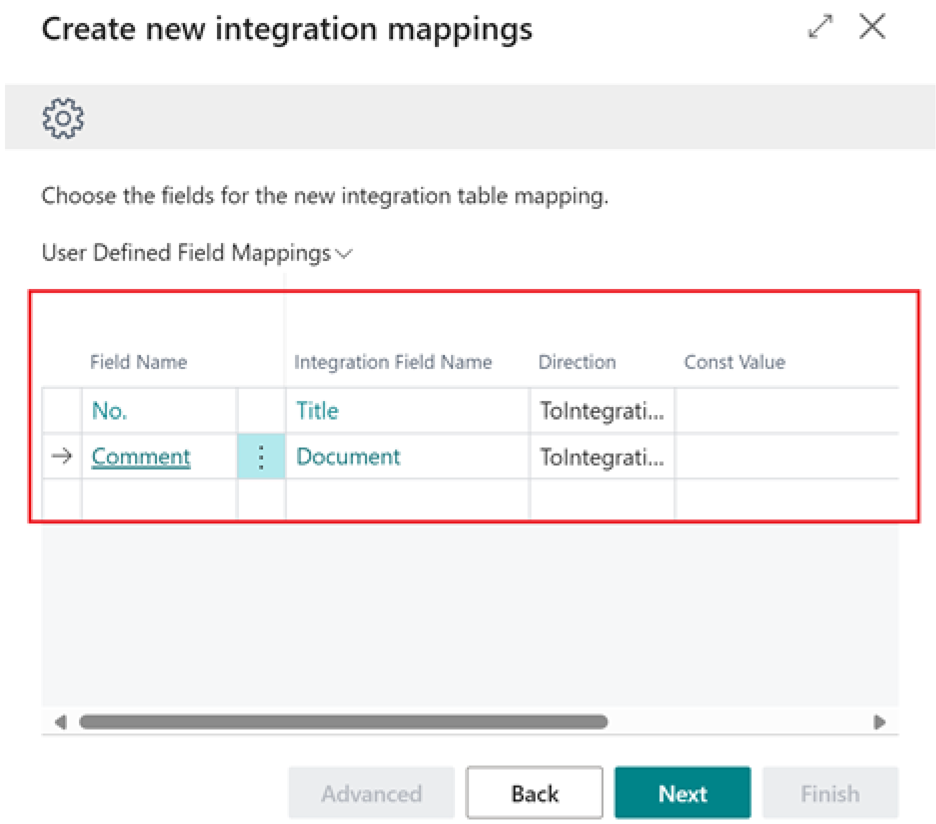
Choose **Next** to specify the field you want the new mapping to contain.



In this step of the guide, you can match a Business Central field in the **Field Name** column with a Dataverse field name in the **Integration Field Name** column. You can also specify a **Direction**, whether the field always will contain the same value in the **Constant** column, and whether validations or transformations need to be applied during field mapping.

> ⓘ **Note**
>
> To reduce errors, the **Integration Table Field** column's lookup filters to a list of available fields. You'll need help from a developer to map fields that the filters don't include:
>
> - Fields must be enabled.
> - You can't use the guide to map Flowfield and FlowFilter fields.
> - You can only map fields of the type BigInteger, Boolean, Code, Date, DateFormula, DateTime, Decimal, Duration, GUID, Integer, Option, and Text.

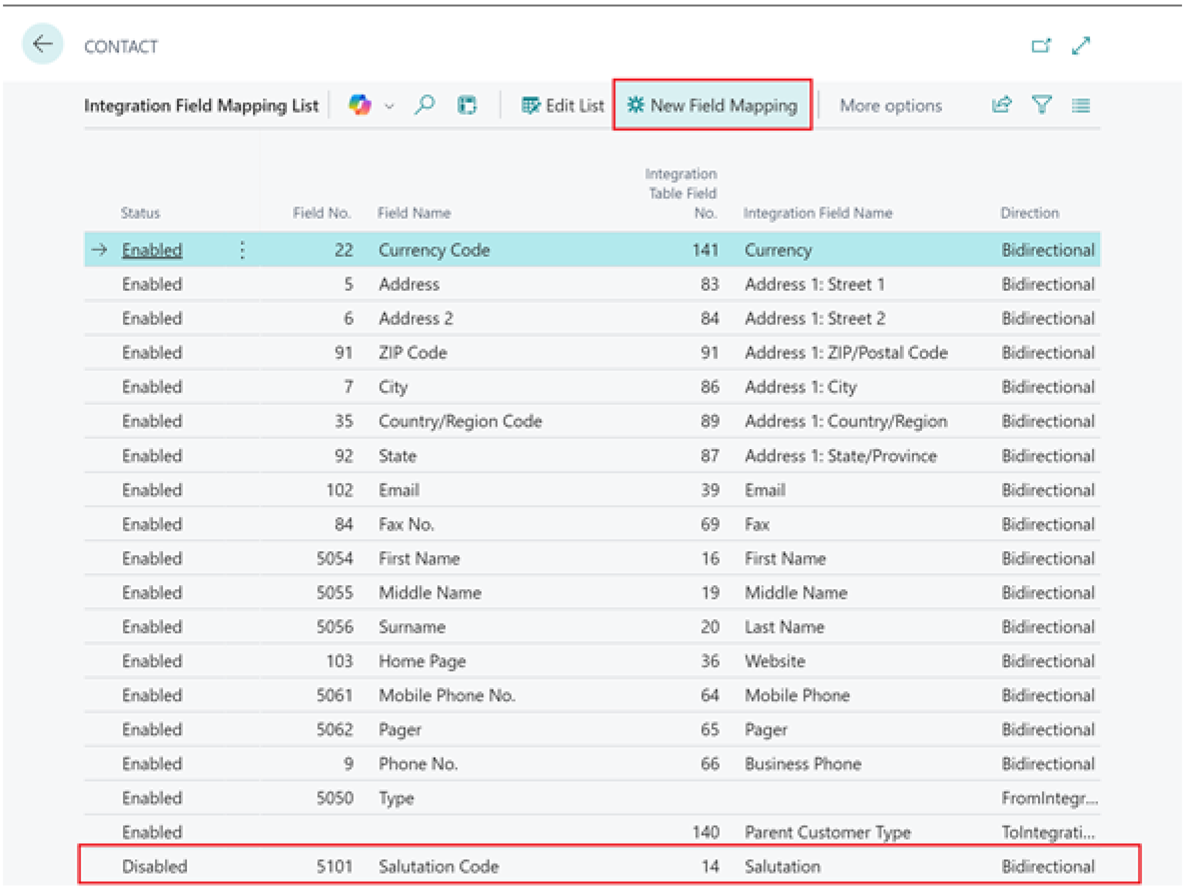
Choosing **Next** will take you to the last step of the guide, which tells you what will happen based on your input.



Choose **Finish** to create your new integration table mapping with the field mappings you defined, and create a Synchronization Job Queue Entry to synchronize data.

You can also add new field mappings to existing integration table mappings through the **Integration Field Mappings List** page, which you can access by choosing **Fields** on the **Integration Table Mappings** page.

Simply choose **New Field Mapping** to open the field mapping step of the **New Integration Mapping** assisted setup guide, and then proceed as described previously.



Status	Field No.	Field Name	Integration Table Field No.	Integration Field Name	Direction
Enabled	22	Currency Code	141	Currency	Bidirectional
Enabled	5	Address	83	Address 1: Street 1	Bidirectional
Enabled	6	Address 2	84	Address 1: Street 2	Bidirectional
Enabled	91	ZIP Code	91	Address 1: ZIP/Postal Code	Bidirectional
Enabled	7	City	86	Address 1: City	Bidirectional
Enabled	35	Country/Region Code	89	Address 1: Country/Region	Bidirectional
Enabled	92	State	87	Address 1: State/Province	Bidirectional
Enabled	102	Email	39	Email	Bidirectional
Enabled	84	Fax No.	69	Fax	Bidirectional
Enabled	5054	First Name	16	First Name	Bidirectional
Enabled	5055	Middle Name	19	Middle Name	Bidirectional
Enabled	5056	Surname	20	Last Name	Bidirectional
Enabled	103	Home Page	36	Website	Bidirectional
Enabled	5061	Mobile Phone No.	64	Mobile Phone	Bidirectional
Enabled	5062	Pager	65	Pager	Bidirectional
Enabled	9	Phone No.	66	Business Phone	Bidirectional
Enabled	5050	Type			FromIntegr...
Enabled			140	Parent Customer Type	ToIntegrati...
Disabled	5101	Salutation Code	14	Salutation	Bidirectional

ⓘ **Note**

New field mappings you add to an existing table mapping will be in a **Disabled** state. You can choose **Edit List** to enable them later.

Tell us what you 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

Find a matching record in a Power Automate flow

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected 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 2024	Apr 2024

Business value

Using Power Automate to build flows is already relatively easy, but from time to time, makers are stumbling into this common element of a given process: querying Business Central for a single record that matches certain criteria.

Feature details

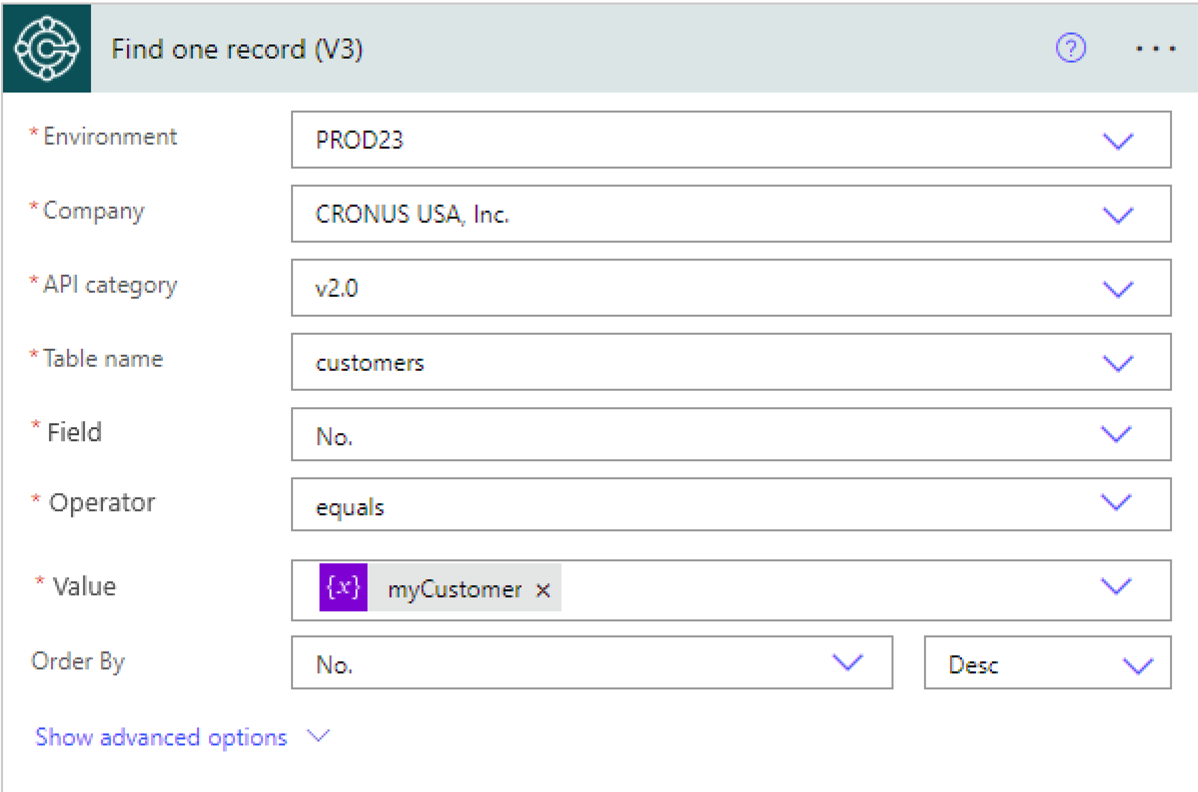
Currently, the **Find records** action always returns a collection or list of records, even if there's only one record that matches specific criteria, such as the unique record ID. The current action also requires that Power Automate makers understand the syntax of the OData query.

The new **Find one record** action not only lets makers find a single record that matches their criteria, but also gives them a more friendly user interface to provide parameters and define conditions.

Makers can select several conditions for various fields in the requested API, add sorting conditions so that the proper record is found, and the Power Automate connector transforms these settings into an OData query.

Finding a single record also ensures that all subsequent actions in the flow can operate on it, without requiring the **Apply to each** loop.

> ⓘ **Note**
>
> This feature is only available in Business Central online, but it's in the Power Platform connector so it's backward compatible with all supported versions of Business Central.



Tell us what you think

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Feedback

Was this page helpful? Yes No

Improve approval processes via Power Automate

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Approving documents or data changes in a modern company must be straightforward. We listen to feedback and continue to improve this area, making sure this experience matches business users' expectations.

Feature details

In previous releases, we introduced several new approval templates and a simplified experience based on Power Automate. With this wave, we improve this area by introducing several new changes:

- The **Approval User Setup** page has been updated and exposed to Power Automate. Approvers don't need to be defined manually on the Power Automate side anymore, but the flow execution takes the relevant approver directly from Business Central.
- The system passes information about user actions in Power Automate back to Business Central where the respective events are properly logged.
- More templates are enabled for Power Automate approval integration.

We welcome your feedback on these improvements as we continue to innovate.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Use virtual tables to expose more Business Central data in Dataverse

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Use virtual tables when you synchronize data between Business Central, Dataverse, and other Dynamics 365 apps to enhance the value of your Dynamics 365 investment. Virtual tables erase boundaries between Dynamics 365 apps and make your data accessible to users in their preferred app.

Feature details

When you synchronize data between Business Central and Dataverse, you can add a synthetic relationship between a synchronized entity and a virtual table if you enable virtual tables in Business Central. Virtual tables let you enrich the data you've set up to synchronize from Business Central with data you haven't, without help from a developer.

Feedback

Was this page helpful? Yes No

Application

Article • 01/25/2024

ⓘ Important

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

To determine what goes into the application in every release, we prioritize the top requests from customers and respond to market trends. For example, our investment in helping customers use Copilot to optimize their business processes.

For the last couple of releases, we've invested in multicompany capabilities because an increasing number of businesses are using Business Central across borders and to manage multiple companies. We'll continue to improve the experience of using Business Central to manage multiple companies. We'll invest throughout the application, improve experiences in inventory management, service and project management, and improve our integrations with other Dynamics 365 applications.

Feedback

Was this page helpful? Yes No

Block items or variants from service transactions

Article • 03/06/2024

ⓘ Important

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Expand table

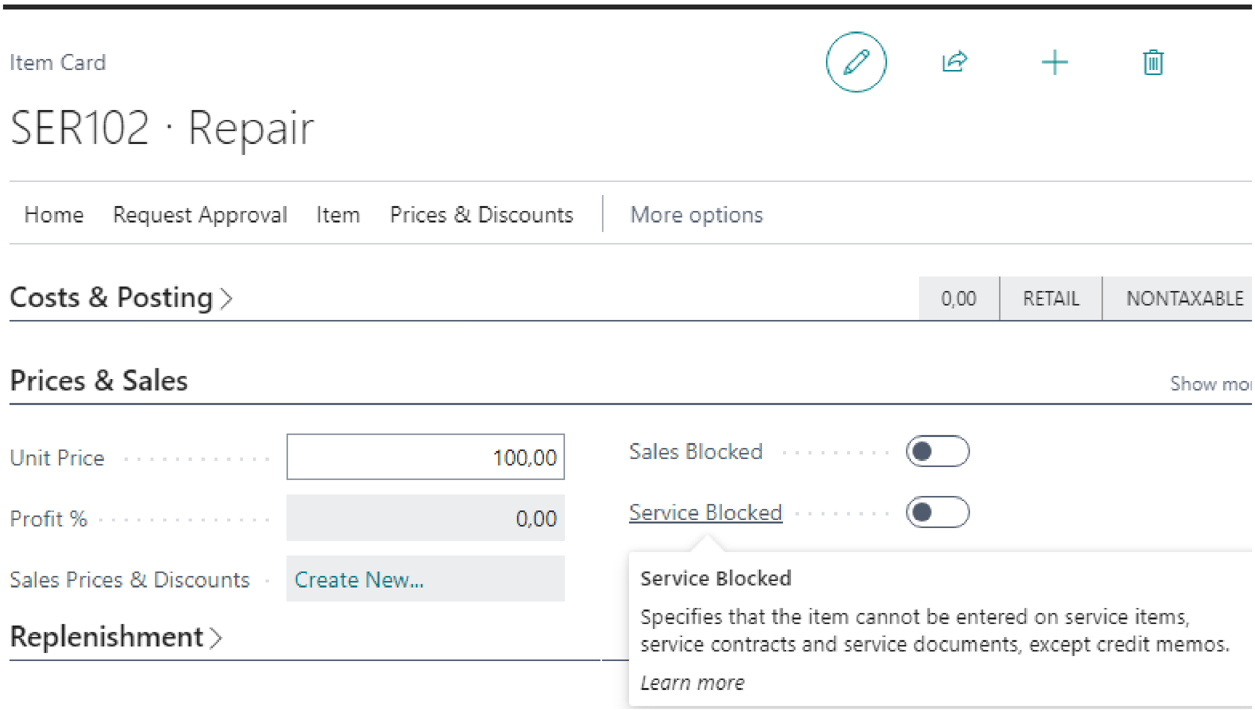
Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

Business value

Prevent certain items, item variants, or service items from being used in service management transactions, such as service contracts, service orders, and service invoices. This can be useful if you want to restrict the availability of some items or service items for service purposes, for example, due to discontinued support, limited stock, or contractual agreements.

Feature details

To block an item or an item variant from being used in service management transactions, turn on the **Service Blocked** toggle on the **Item Card**, **Item Variants**, and **Item Variant Card** page. You can also set this field on the **Item Template** page, and it will be copied to the items created from that template.



When an item or an item variant is service blocked, it isn't available for selection on the following pages:

- Service Line (except for service credit memos, where you'll see a notification that the item or variant is blocked, but allowed on this type of document)
- Service Item
- Service Contract Line
- Standard Service Line

If you manually enter an item number or variant code that's blocked, you'll get an error message that states, "The field contains a value that cannot be found in the related table."

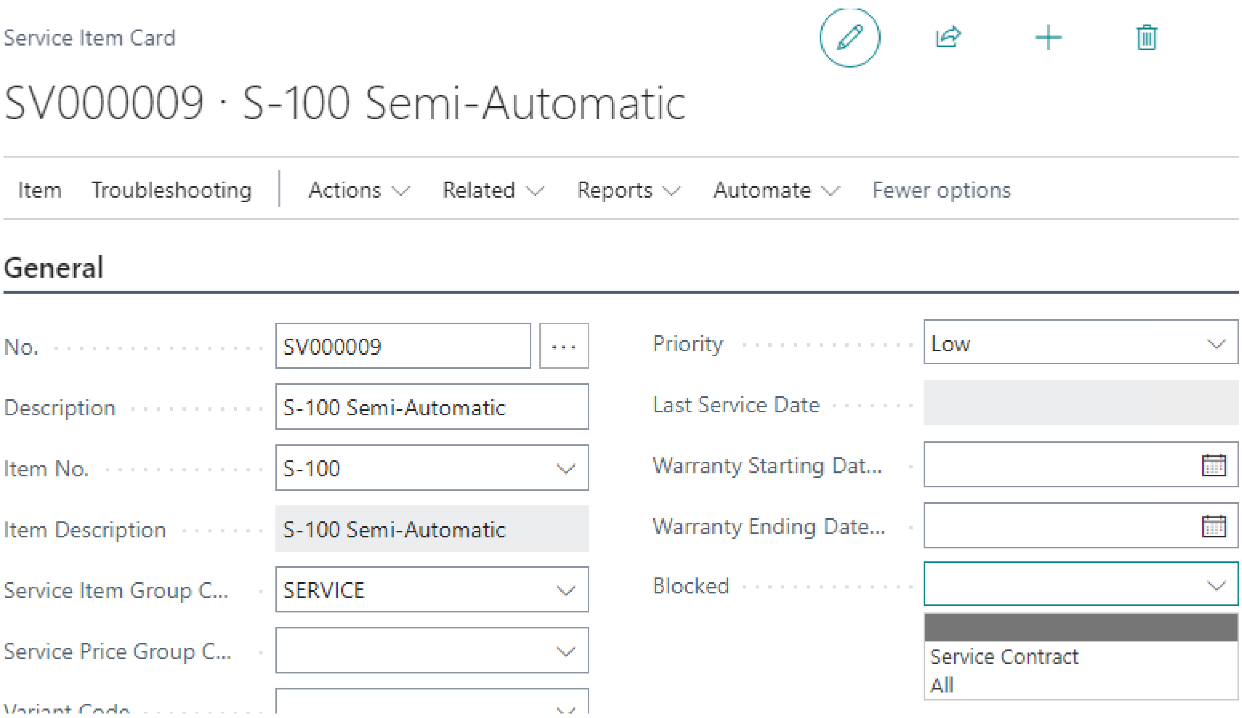
Additionally, if you have service contracts, service contract quotes, or service orders that include blocked service items or item variants, you can't use the following actions:

- **Lock** or **Make Contract** on the **Service Contract Quote** page.
- **Lock Contract**, **Sign Contract**, **Create Contract Service Orders** or **Create Contract Invoices** on the **Service Contract** page.
- **Make Order** on the **Service Quote** page.
- **Release to Ship** or **Post** on the **Service Order** page.
- **Post** in the **Service Invoice** page.

Block a service item

To block a service item from being used in service management transactions, on the **Service Item Card** page, in the **Blocked** field, choose one of the following options:

- **Service Contract**: Block the service item from being used in service contracts and service contract quotes, but not in service orders or other service documents.
- **All**: Block the service item from being used in any service management transaction, including service contracts, service orders, and other service documents.



When a service item is blocked, you can't select it on the following pages:

- Service Contract Line (if blocked for service contract, or all)
- Service Item Line (except for service credit memos, if blocked for all)

If you manually enter a service item number, you'll get an error message that states, "The field contains a value that cannot be found in the related table."

Additionally, if you have service contracts, service contract quotes, or service orders that include blocked service items, you can't use the following actions:

- **Lock** and **Make Contract** on the **Service Contract Quote** page (if blocked for service contract, or all).
- **Lock Contract**, **Sign Contract**, or **Change Customer** on the **Service Contract** page (if blocked for service contract, or all).
- **Make Order** on the **Service Quote** (if blocked for all).
- **Release to Ship**, **Post** on the **Service Order** (if blocked for all. If service order documents contain multiple service items, and some are blocked and others are not, you can release and post non-blocked lines. Consider whether to turn on the **One Service Item Line/Order** toggle on the **Service Management Setup** page).
- **Post** on the **Service Invoice** page (if blocked for all).

You can also view the blocked service items by applying a filter to the following reports:

- Service Items (report 5935)
- Service Items Out of Warranty (report 5937)
- Service Profit (Service Items) (report 5938)

Data upgrade

This feature doesn't require additional setup. However, if you upgrade your Business Central, be aware of the following data upgrade behavior:

- If you have items, item variants, or item templates where the **Sales Blocked** toggle is turned on, the **Service Blocked** field is also turned on for those records during upgrade. This ensures that the existing sales blocked logic also applies to service management transactions.
- Data upgrades only if you have at least one service item in your company, which means you're using the service management functionality and need the data upgrade. If you don't have service items, the data upgrade is skipped and the **Service Blocked** toggle is turned off by default for all items, item variants, and item templates.

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Feedback

Was this page helpful? Yes No

Archive projects

Article • 01/25/2024

ⓘ Important

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Expand table

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

Business value

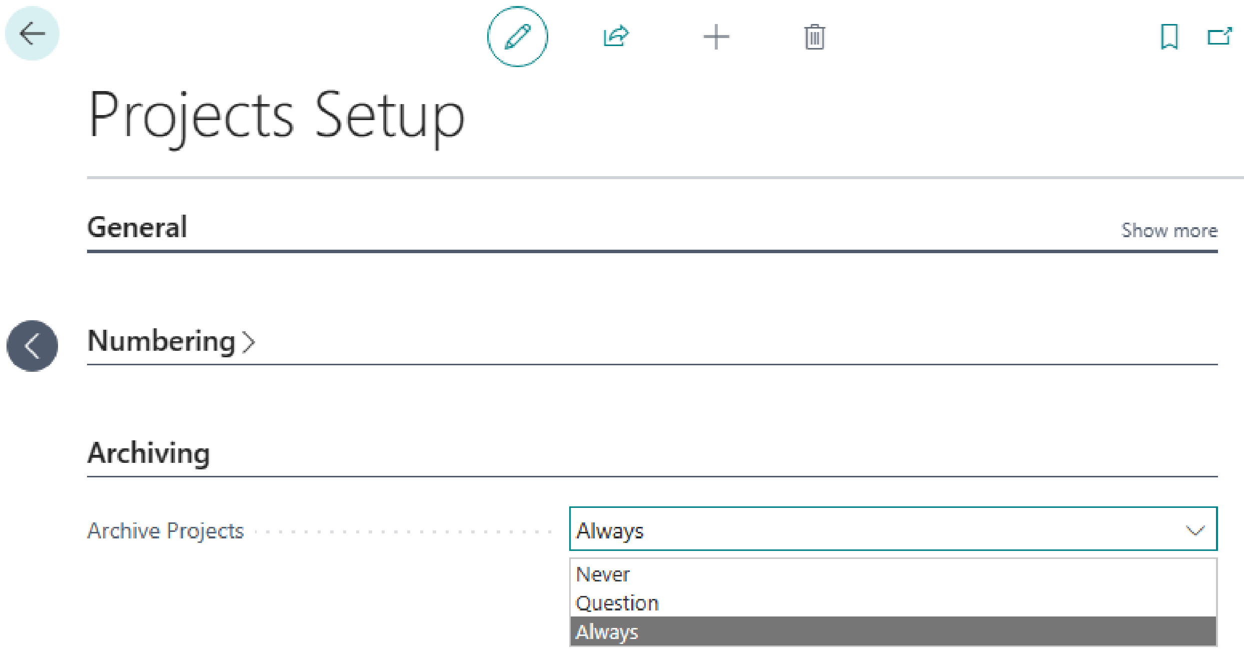
Projects often change and evolve during their lifecycle. The archiving capability gives you control over your project data through audit trails and version control.

Feature details

Archiving capabilities for projects are similar to the functionality you might already be familiar with from the sales and purchase areas. You can set up projects to archive automatically, so that you don't need to think about it. With automatic archiving, Business Central creates a new version of the archived document when people do the following:

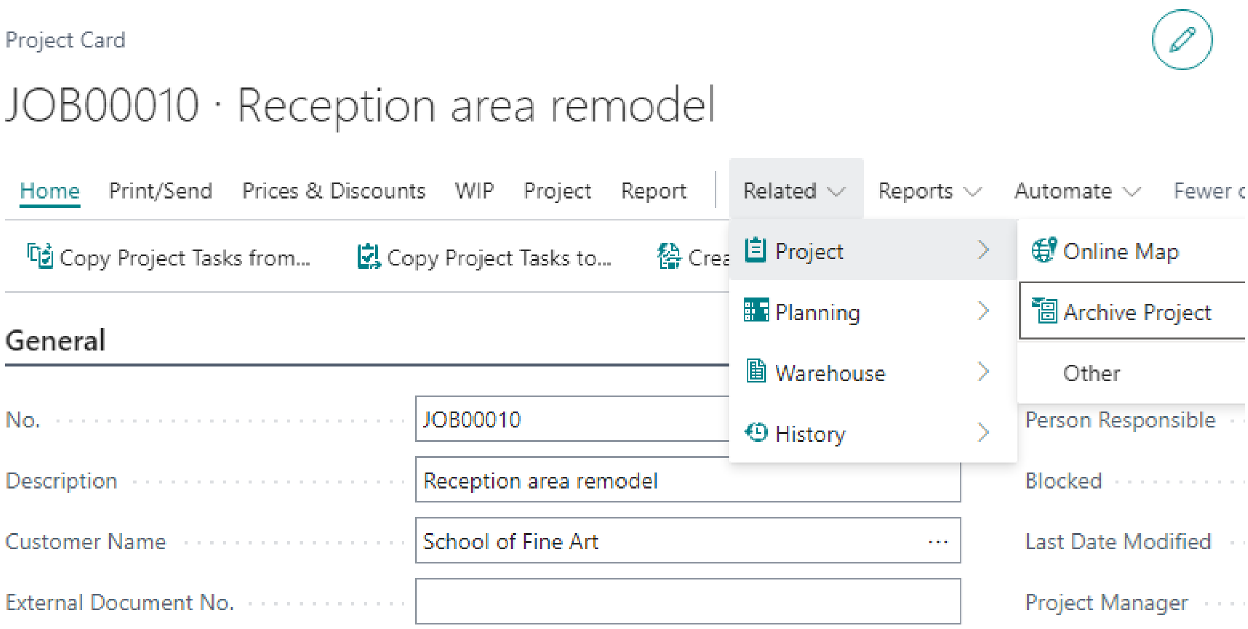
- Change the status of a document, or delete it.
- Print, download, or send a document by email.
- Post an invoice.

You're in full control of archiving. The following table describes the options you can choose when you set up automatic archiving on the **Project Setup** page.

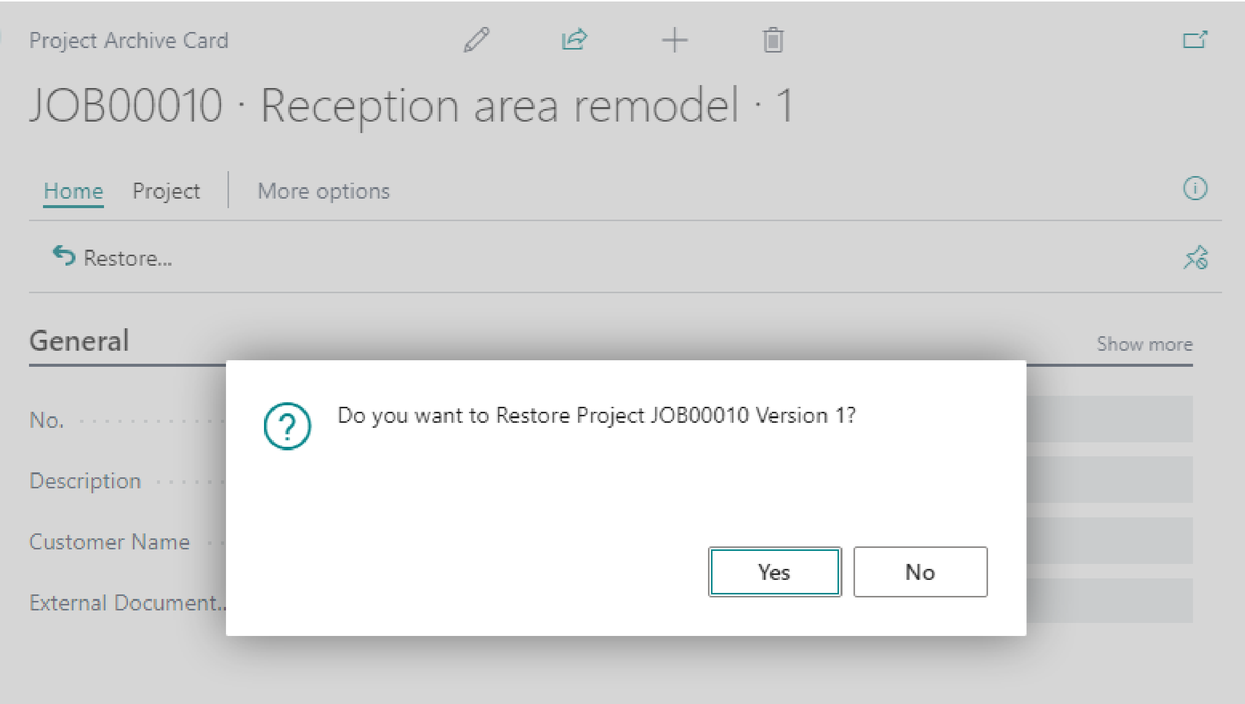


Expand table

Option	Description
Never	Don't archive projects automatically. You can manually archive projects by using the **Archive Document** action, if needed.
Question	Be prompted to choose whether to archive a project when one of the events mentioned earlier occurs.
Always	Silently archive the project automatically when one of the events mentioned earlier occurs.



You can reuse earlier versions of archived projects, if needed. For archived projects where the original still exists and isn't posted, you can use the **Restore** action to overwrite the current project with an archived version.



To keep database size under control, archived projects are added to a list of Retention policy tables.

The following are known limitations:

- The **Statistics** page isn't available on the **Archived Project Card** page.
- Dimensions aren't stored in the archive and can't be restored. When you restore a project, Business Central will use the default dimensions.

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Feedback

Was this page helpful? Yes No

Assemble to project

Article • 01/25/2024

ⓘ Important

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Expand table

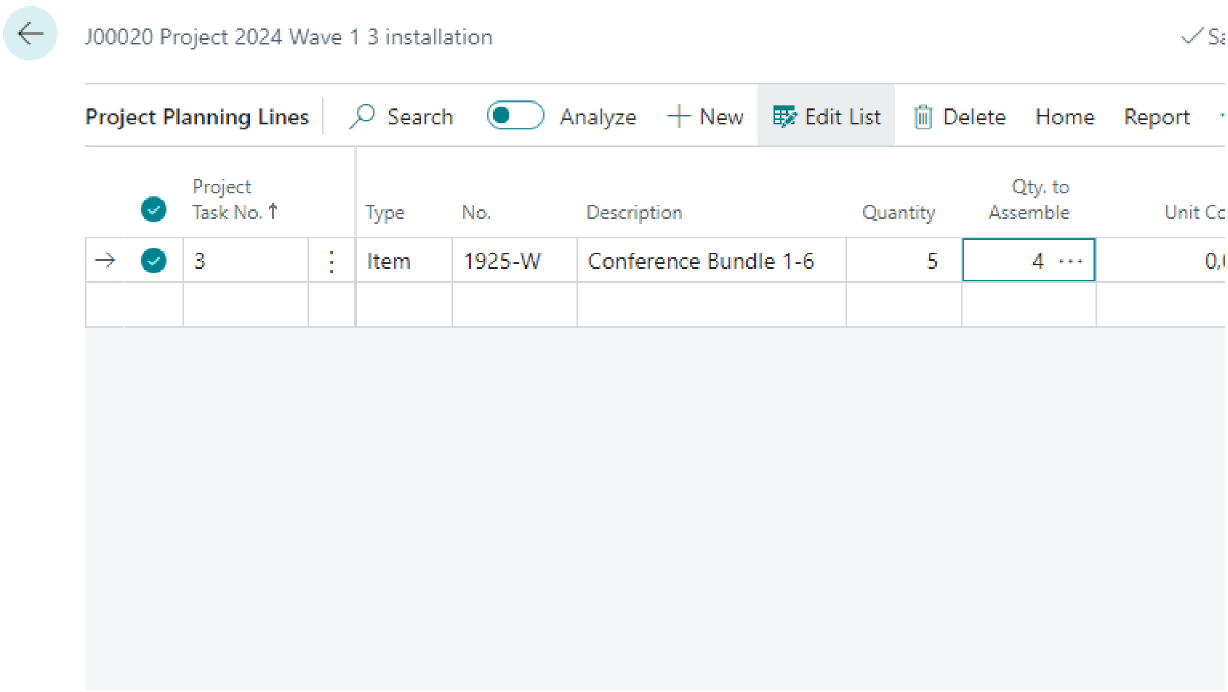
Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

Business value

Assemble to project helps you improve inventory management by assembling to order only when it's required, and enable other ways to customize projects.

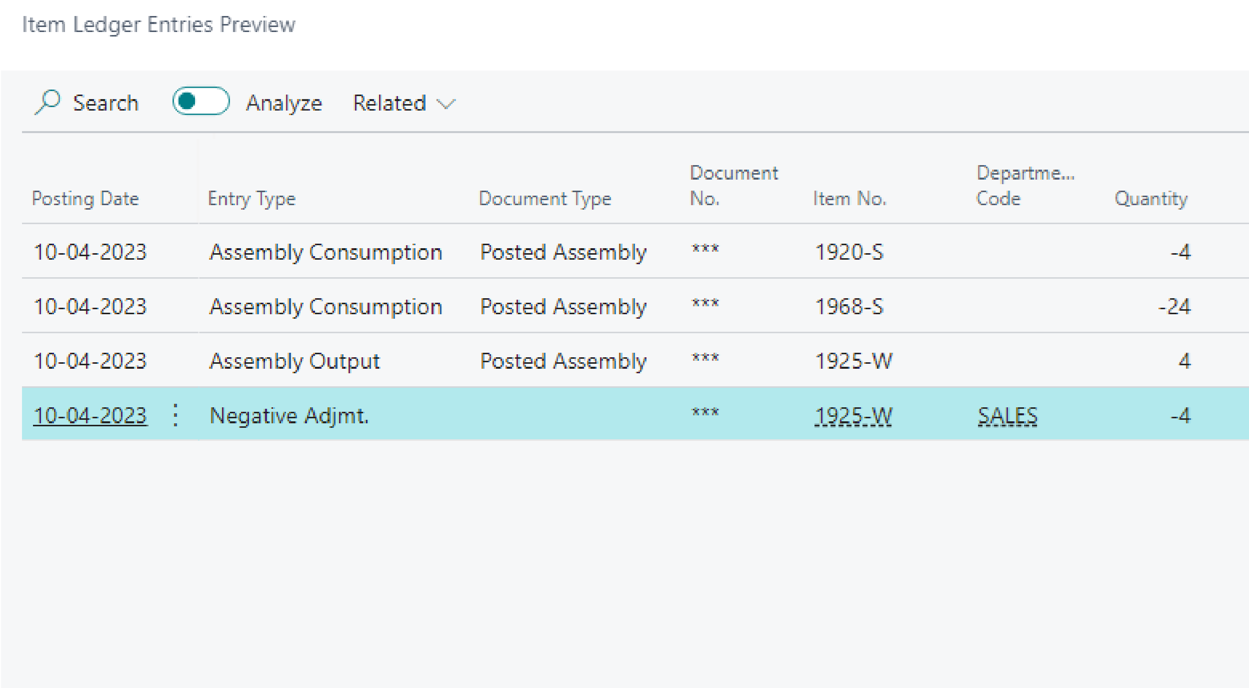
Feature details

When you enter an assemble-to-order item on a project planning line, an assembly order is automatically created. The assembly order is based on the project planning line, and its lines are based on the item's assembly BOM. The quantity of components on the assembly BOM is multiplied by the order quantity. The **Assemble-to-Order Lines** page shows details about the linked assembly order lines. The details can help you customize the assembly item. As in sales, you can't directly post linked assembly orders. The created assembly order is reserved for the project, and Business Central synchronizes item tracking between project planning lines and assembly orders. The feature integrates with warehouse management features to make assembly and shipping easier, and ensure that the workflow from project assembly to delivery runs smoothly.

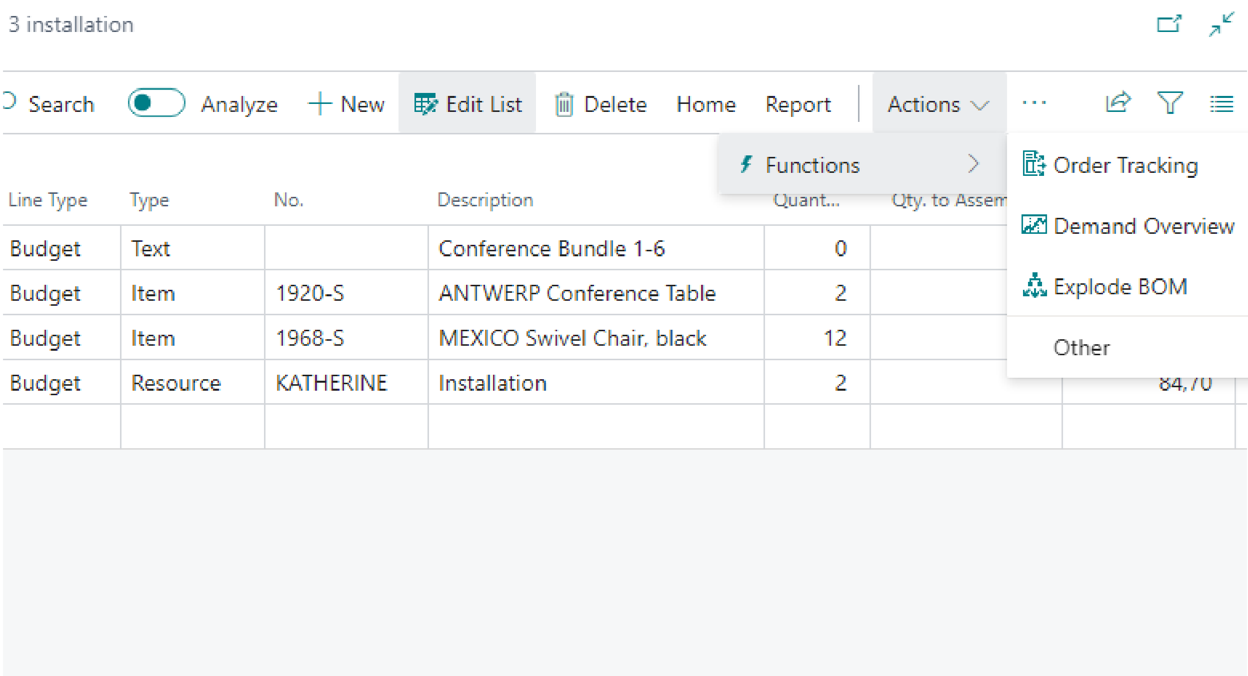


Assemble to project supports the following warehouse configurations:

- **No warehouse handling**: Use a project journal to post full or partial usage. The output and consumption of components post automatically for the assembly order.
- **Inventory pick**: Use an inventory pick to post full or partial usage. The output and consumption of components post automatically for the assembly order.
- **Warehouse pick**: Create and register warehouse picks for components, and then use a project journal to post usage. Business Central verifies whether the consumed assembly components were picked. The output and consumption of components post automatically for the assemble order.



You can also use the **Explode BOM** action in the **Project Planning Lines** to convert the product into a set of components.



The following are known limitations:

- The **Quantity to Assemble to Order** field isn't available for closed projects.
- For warehouse pick scenarios, the **Quantity to Assemble to Order** can be either zero or equal to the quantity. You can't mix assemble to order and assemble to stock on a project planning line. You must create separate project planning lines.
- Assemble to order does not affect billable parts of a project. An assembly is included on sales invoices, but not its components. You can't edit the **Quantity to Assemble to Order** field for Billable lines (not Budget+Billable).
- Order planning and the planning worksheet aren't affected because the job is the input for planning. The planning engine considers the assembly as demand.
- You can't enter a negative quantity in the **Quantity to Assemble to Order** field.
- You can't undo an assembly.

Tell us what you think

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Feedback

Was this page helpful?

Yes No

Assign salesperson to customer ship-to addresses

Article • 03/06/2024

ⓘ Important

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Expand table

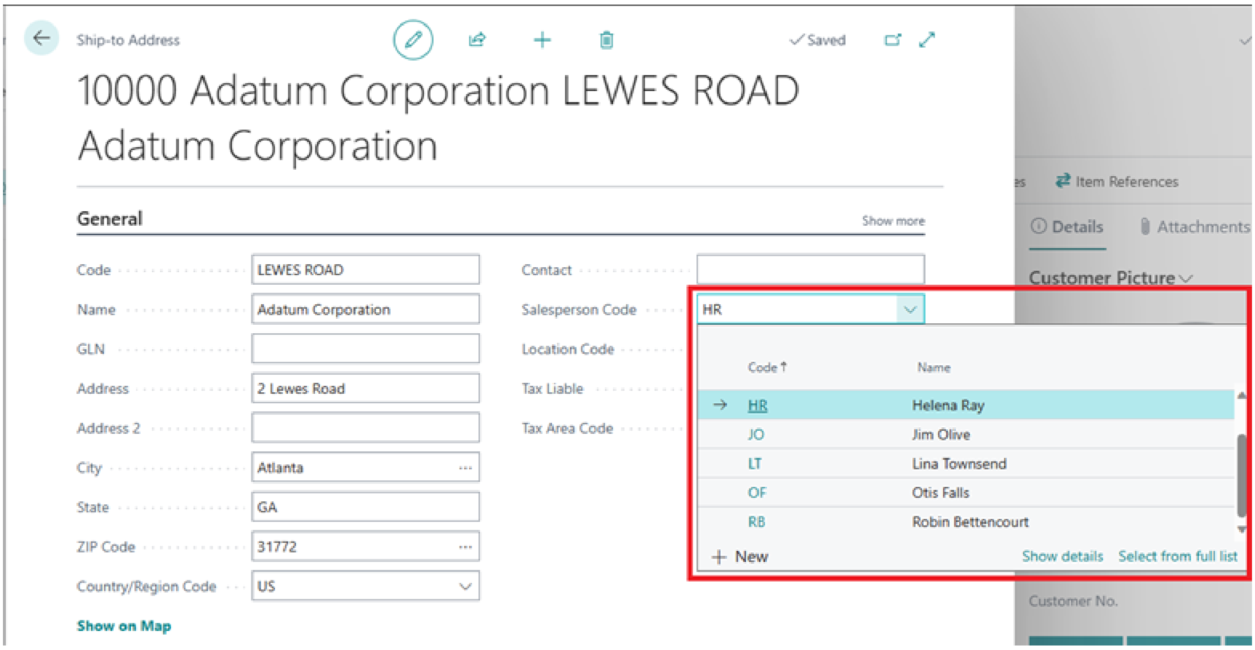
Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

Business value

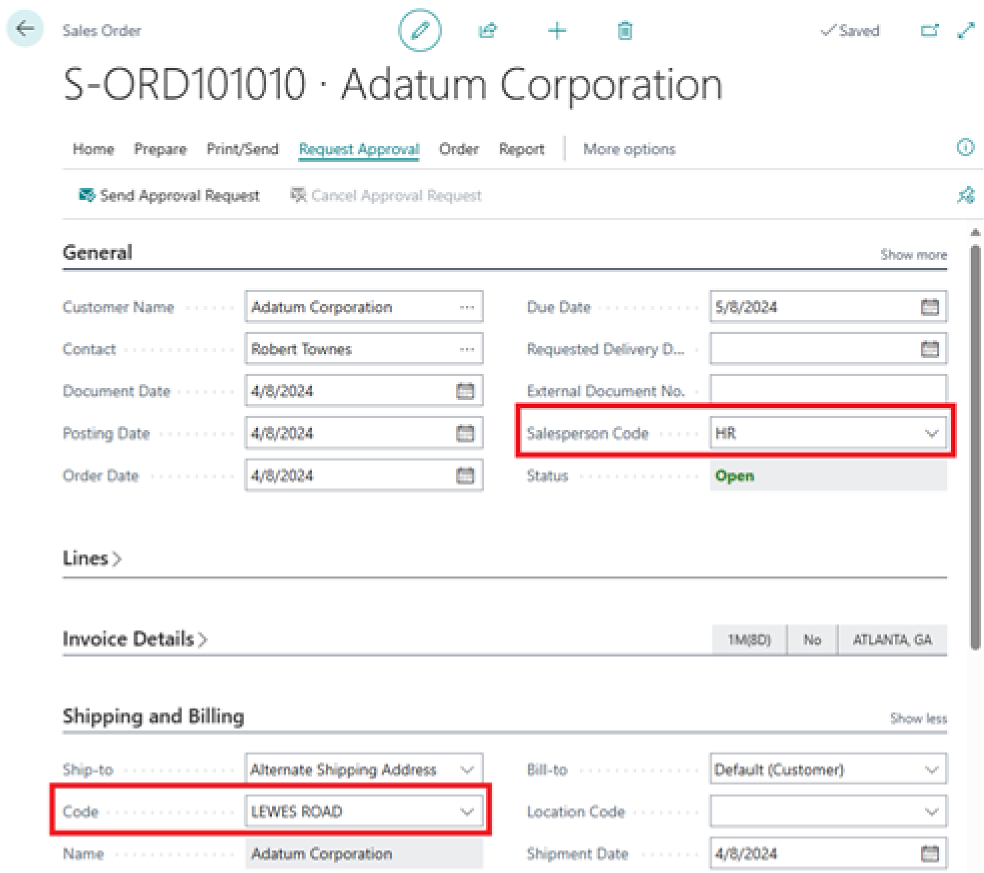
Assign salespeople to the shipping location rather than the billing address to ensure accurate sales reports by reflecting the true geographical distribution of your sales. Assigning a salesperson to a customer's ship-to address gives you more precise insights, optimizes resource allocation, and drives strategic growth in your business.

Feature details

You can assign a salesperson on the **Customer** card page by choosing **Customer**, and then **Ship-To Addresses** to open the **Ship-to Addresses List** page. Choose **Manage**, and then **Edit** to open the **Ship-to Address** card page. Enter or choose a **Salesperson Code** to select the salesperson who is responsible for the customer's ship-to address.



When you choose the **Alternate Shipping Address** option as a **Ship-To** location on a sales document, the **Salesperson Code** updates to match the salesperson from the **Ship-To Address** rather than the **Bill-To Customer**.



ⓘ **Note**

We'd like to thank our community for making this valuable contribution through our BusinessCentralApps open-source repo on GitHub.

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Feedback

Was this page helpful? Yes No

Be more productive when approving time sheets

Article • 03/06/2024

ⓘ Important

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Users, automatically	Mar 2024	Apr 2024

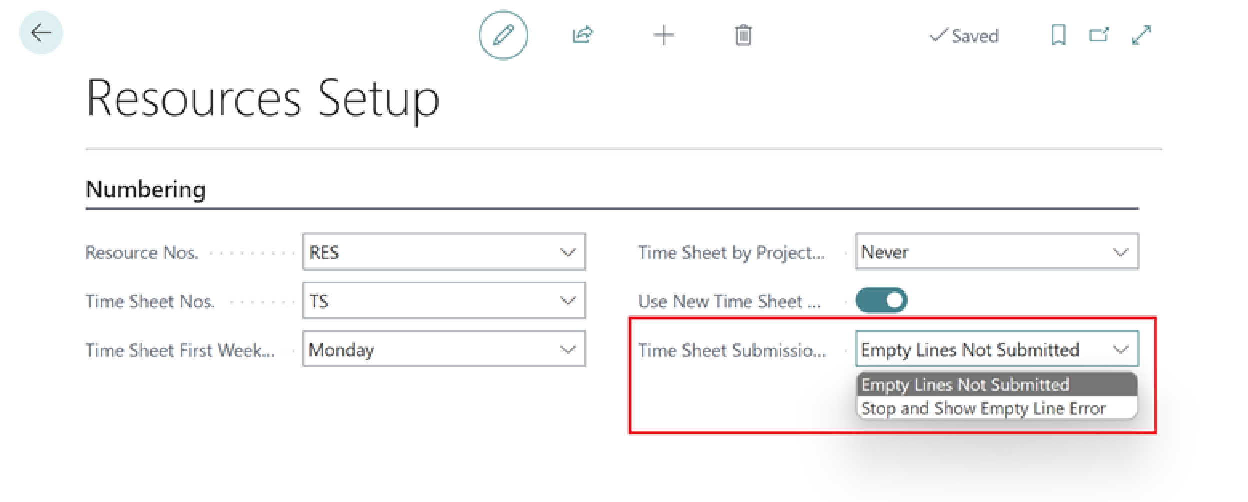
Business value

The ability to quickly and easily approve multiple time sheets at the same time makes the approval process more efficient for managers. Reducing the time and effort managers spend on reviewing and approving individual time sheets gives them more time to focus on their core business.

Feature details

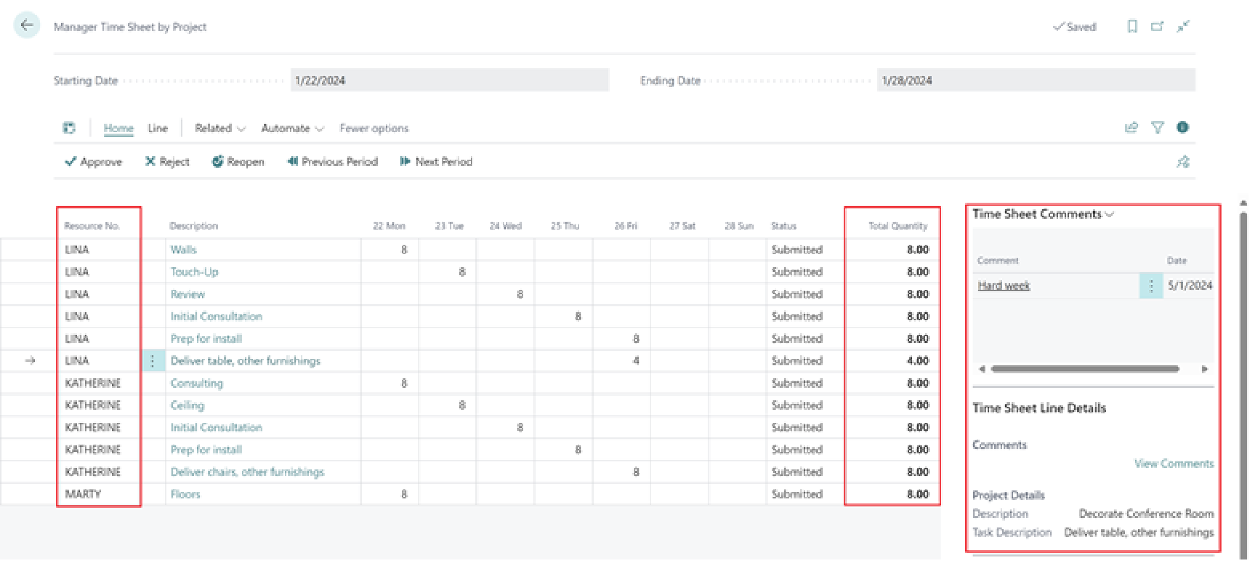
You can now set up how Business Central will handle empty lines during submission for approval by choosing **Time Submission Policy** in the **Resource Setup** page:

- Choose **Empty Lines Not Submitted** to skip lines that don't contain hours to submit. This is the default setting.
- Choose **Stop and Show Empty Line Error** to stop processing the time sheet if one or more lines are missing hours.

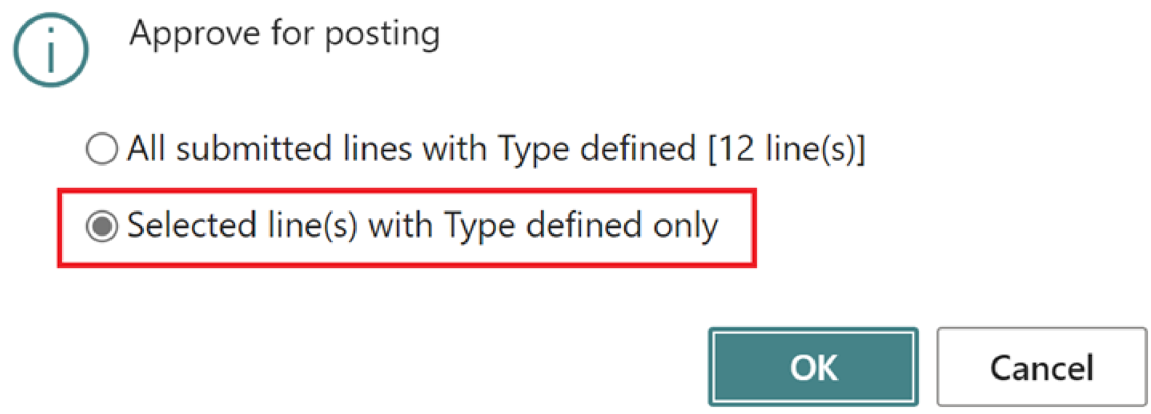


Project managers have more details in **Manager Time Sheet by Jobs** available while approving time sheets:

- The **Resource No.** shows on **Manager Time Sheet by Job**. You can also add the **Resource Name** by personalizing the page.
- Saturday and Sunday are included on the **Manager Time Sheet by Job**.
- The **Total** column shows the total per time sheet line.
- The **Time Sheet Comments** FactBox shows time sheet header comments during approval.
- The **Time Sheet Line Details** FactBox gives you quick access to time sheet line comments and activity details, such as the project name and task description.



When you choose **Approve** or **Reject** to approve or reject time sheet lines, the default is **Selected lines** to avoid mistakes.



Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your ideas

Thank you for submitting these ideas:

- Time Sheet View - Showing the Job Name
- Showing Resource code

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

Feedback

Was this page helpful? Yes No

Get more productive while entering time sheets

Article • 01/25/2024

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

Business value

Copying time sheets from previous periods can save you time and effort by reducing the need to manually enter data. The process improves productivity and efficiency by allowing you to quickly and easily create time sheets based on data you already have. Additionally, copying time sheets can help to ensure that your data is consistent and accurate by reducing the risk of data entry errors.

Feature details

We've made it faster and more efficient to fill out time sheets. You can use the **Copy From** action on the **Time Sheet** page to copy information from lines on previous time sheets. You can also copy information from the previous row on your time sheet. For example, when you're filling out a time sheet where you've worked on the same job, you might want to copy the job or job task numbers.

Tell us what you think

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See also

Use Time Sheets (docs)

Feedback

Was this page helpful? Yes No

Connect Business Central with Shopify B2B

Article • 01/25/2024

ⓘ Important

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Expand table

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

Business value

Connecting Shopify B2B and Business Central improves visibility into pricing, customers and their order histories, order status, billing, and payments. Better visibility means faster response to customer inquiries, timely returns and refunds, and more accurate order processing.

Feature details

The Shopify Connector now supports the latest features of Shopify's B2B platform, such as companies, prices, payment options and more. These features allow you to manage multiple buyers and groups, offer different pricing and discounts, and streamline your B2B operations. You can easily synchronize your Shopify B2B data with Business Central and automate your workflows. This helps save time, reduce errors, and increase customer satisfaction.

Adapt faster

Connecting Business Central with Shopify helps merchants around the world to implement more agile online business processes, while keeping their people focused on selling. With connected data across your online stores and business operations, you can rapidly respond to consumer demands to adjust product pricing and merchandising.

With support for multitier pricing structures and multiple currencies, companies, and entities, Business Central easily supports multiple Shopify store scenarios.

Work smarter

Eliminating manual processes improves accuracy and lets people focus on taking care of customers. Connecting Shopify and Business Central improves visibility into stock, pricing, existing customers and their order histories, order status, billing, and payments. Better visibility means faster response to customer inquiries, timely returns and refunds, and more accurate order processing.

Perform better

Enhanced operational efficiency not only saves you time and reduces costs, it can also translate into better results and faster decision-making. You'll have the confidence to expand your online presence while minimizing overhead with automatic synchronization between systems for price changes, product updates, and customers. At the end of accounting periods, Business Central will help with the financial reporting and tax reporting required by local legislation.

Details

To make sure that both the D2C and B2B flows are supported, the current customer synchronization flow focuses on D2C scenarios and a new flow is available for B2B customers.

Customer Sync D2C

Export Customers To Shopify is removed. The Connector won't export all existing Business Central customers automatically. Instead, on the **Shopify Customer** page, use the **Add Customers to Shopify** action. On the request page, specify the Shopify Shop and filters if you want to export a subset of customers. The Connector checks whether a customer with the same phone number or email address already exists in Shopify. If it finds a match, it maps it to a customer in Business Central. If it doesn't find a match, it creates a new customer.

You can also open the **Shopify Customers** page by using the **Customers** action on the **Shopify Shop** card.

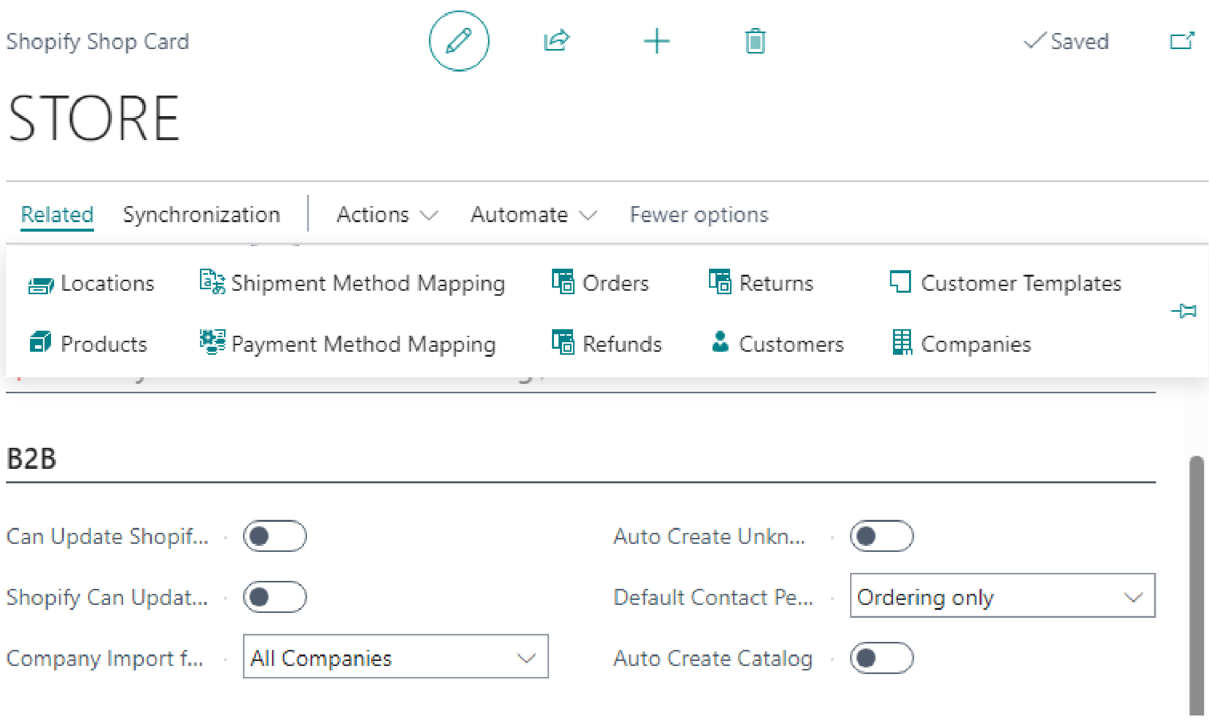
Company B2B

There are several new actions in the **Shop Card** page:

- Related > Companies
- Reset Companies Sync action

The B2B fields work in a similar way as their counterparts for the Customer D2C synchronization:

- **Can Update Shopify Companies**
- **Default Permission on Contact** that is assigned to the contact linked to the company. Possible options are: No permission, Ordering only, Location admin
- **Company import type**
- **Can Shopify Update Companies**
- **Auto Create Unknown Companies**
- **Auto Create Catalog**: If for exported company you want to create a catalog automatically. You can assign a catalog manually from a list of Shopify catalogs



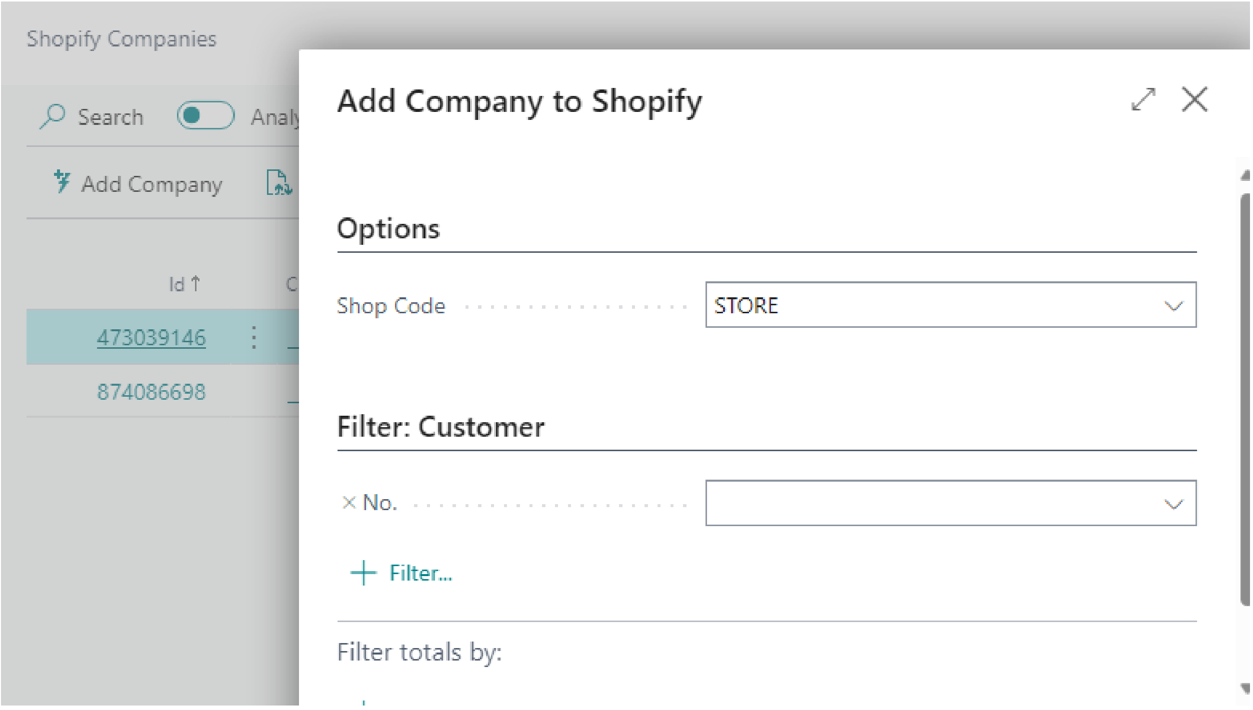
There's a new entity representing Company, for which we added the following objects:

- Company Table
- Company List
- Company Card
- Main Contact Factbox
- Company Location Table

New actions allow you to add or synchronize a company to Shopify.

The **Add Company to Shopify** action and report do the following:

- Create a customer and company in Shopify
- Add a customer as the main contact
- Add location ‘Main’ (this is subject to change)
- Add a catalog, depending on your settings



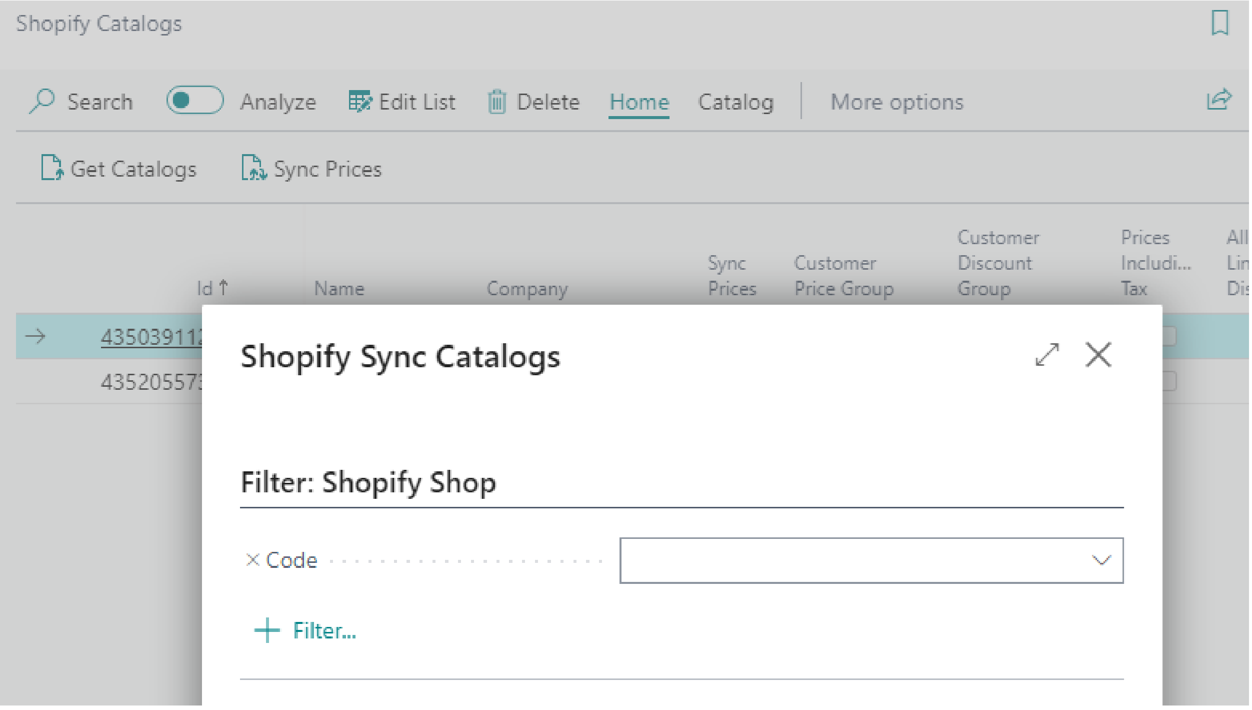
The **Sync Company** action and report which, depending on the synchronization direction, either updates the company in Shopify or imports a company to Business Central. In the latter case, the Connector does the following:

- Retrieves the company, main contact, and location and map Company/Customer, updated (if allowed) or create (if allowed).

For catalogs, we've added the following:

- Catalog Table
- Catalog List
- Price synchronization settings for each catalog. These settings are similar to the price settings in the Shopify Shop card FastTab.
- Hyperlink to Shopify Admin to review and manage products included in the catalog.

You can import catalogs from Shopify, assign them to companies, set price calculation settings, and trigger a price update for catalogs.



Orders

Imported orders use the D2C customer or, if available, the B2B company information to look for a mapping of bill-to and sell-to customers.

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Feedback

Was this page helpful? Yes No

Correct errors in service invoices

Article • 03/06/2024

ⓘ Important

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Business value

Mistakes can happen, so it's important to be able to quickly correct them. This update enhances your flexibility and efficiency in managing service contracts and invoices by making it easier to fix mistakes.

Feature details

You can delete service invoices that have service ledger entries associated with them. This means that you can correct errors or make changes to service invoices without getting stuck or losing data. For example, if you forget to assign a product posting group to a G/L account, you can add it later and recreate the service invoice.

Use the **Delete** action to delete a service invoice. A corrective service ledger entry will be posted, and the invoicing date and invoicing period will be restored in the service contract so you can create the invoice again. Note that you can revert several invoices, but you must do it sequentially starting from the very last invoice. Business Central won't allow you to delete a service invoice if its details, such as the invoicing period or the prepaid toggle were changed in the related service contract. Make sure that you delete invoices before you make such changes.

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Feedback

Was this page helpful? Yes No

Create projects you can invoice to multiple customers

Article • 03/06/2024

ⓘ Important

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Business value

When projects involve multiple customers, billing the right customers for the right project tasks can be challenging and take time. Business Central makes billing less complex by letting you specify the bill-to and sell-to customers on each project task line. Having that information on each task lets you automatically generate invoices for the correct customers.

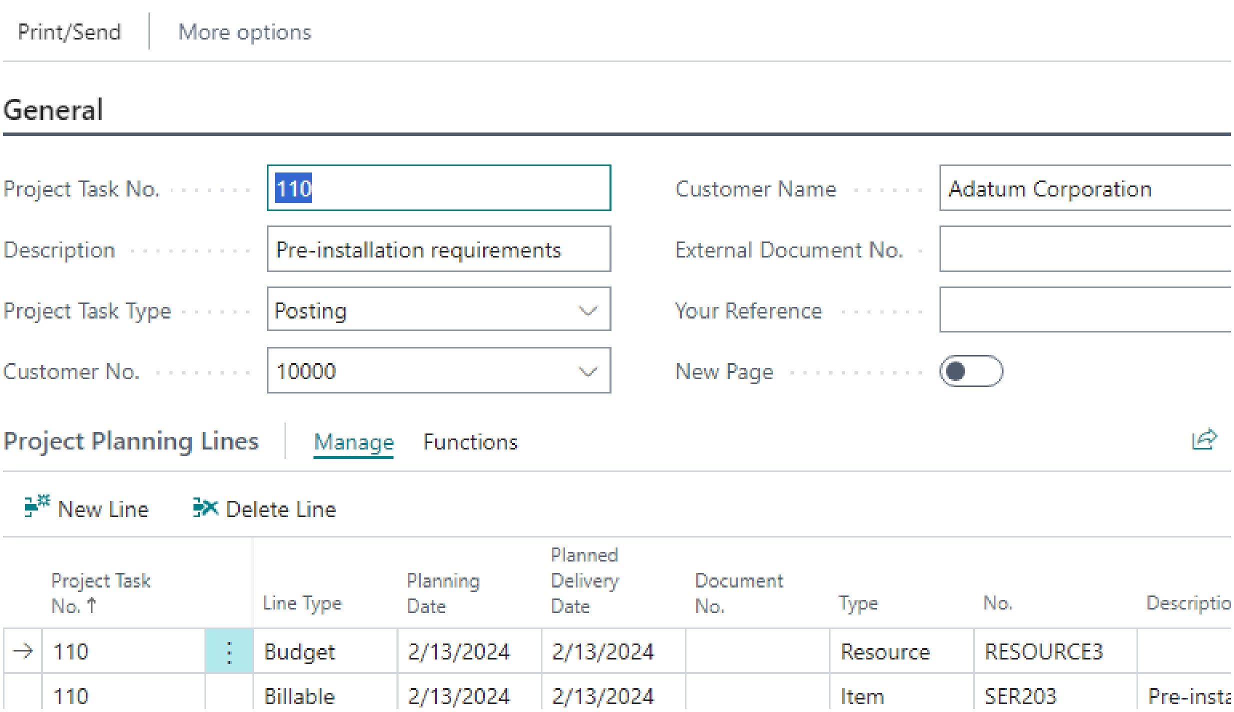
Feature details

You can define the **Bill-to Customer No.** and the **Sell-to Customer No.** for each project task line. To enable you to enter that information, we've made the following fields available on the **Project Task** table, **Project Task Lines** subform page, and the **Project Task Card** page:

- **Bill-to Customer No.**
- **Bill-to Name**, **Bill-to Name 2**
- **Bill-to Address**, **Bill-to Address 2**
- **Bill-to City**, **Bill-to Post Code**
- **Bill-to County**, **Bill-to Country/Region Code**
- **Bill-to Contact No.**, **Bill-to Contact**
- **Sell-to Customer No.**

- Sell-to Customer Name, Sell-to Customer Name 2
- Sell-to Address, Sell-to Address 2
- Sell-to City, Sell-to Post Code
- Sell-to County, Sell-to Country/Region Code
- Sell-to Contact No., Sell-to Contact
- Ship-to Code
- Ship-to Name, Ship-to Name 2
- Ship-to Address, Ship-to Address 2
- Ship-to City, Ship-to Post Code
- Ship-to County, Ship-to Country/Region Code
- Ship-to Contact
- Language Code, Format Region
- External Document No., Your Reference
- Payment Method Code, Payment Terms Code
- Price Calculation Method

The **Project Task Card** page includes most of the fields and makes them available from the **Project Task Lines** subform.

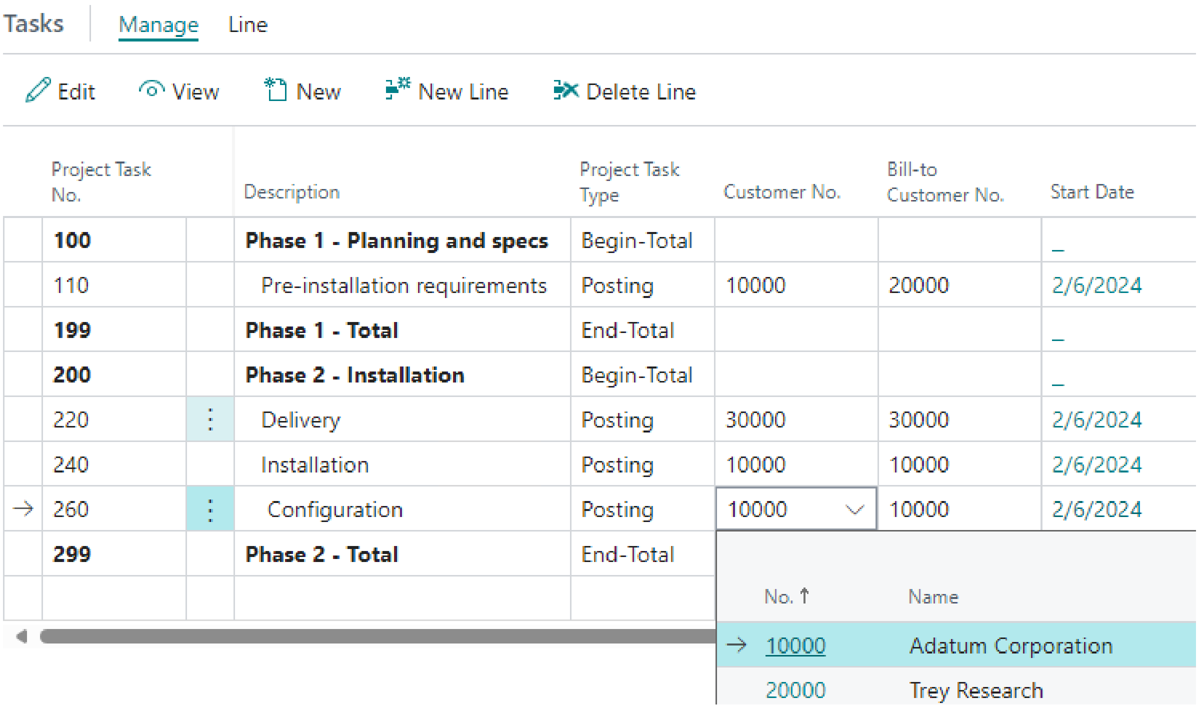


The **Project Task Card** page has the following FastTabs:

- **General**, which has the **Customer Details**, **Description**, **External Document No.**, and **Project Task Type** fields.
- **Lines**, which has the project planning lines.
- **Posting**, which has the **Project Posting Group**, **WIP Method**, **WIP Total**, **Location**, and **Bin** fields.

- **Invoice and Shipping**, which has billing and shipping details and the **Payment Terms** and **Payment Method** fields.

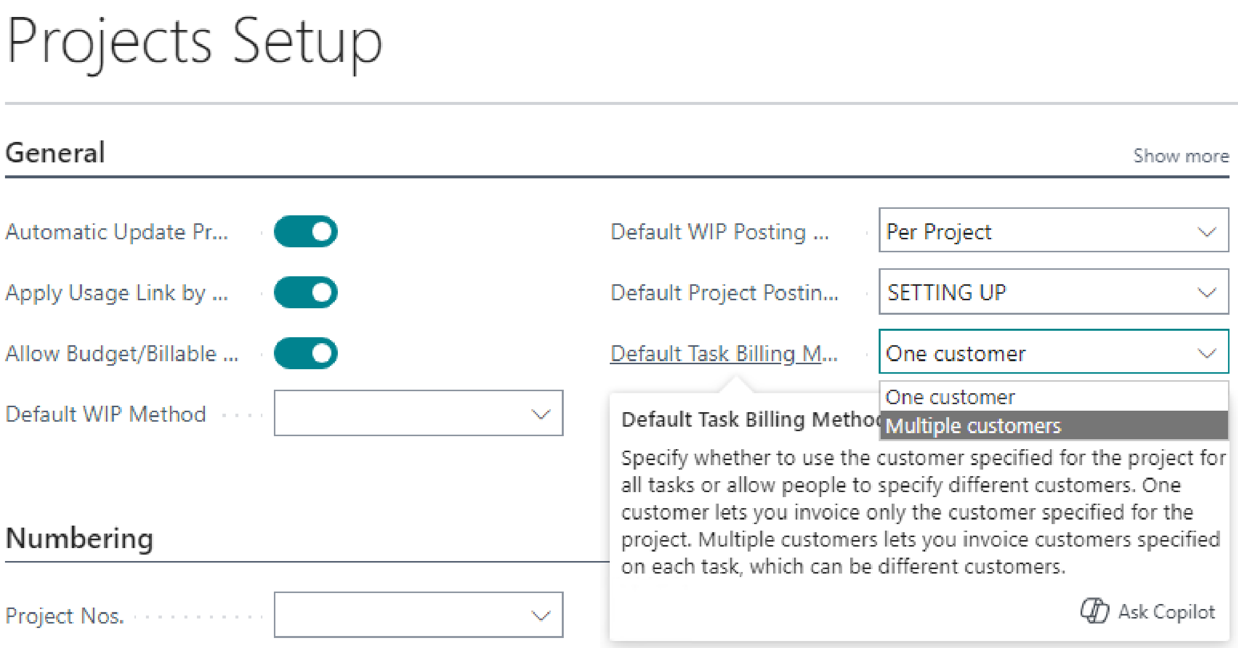
The **Project Task Lines** subform has the **Bill-to Customer No.**, **Sell-to Customer No.**, **External Document No.**, and **Your Reference** fields. Other fields don't display, but you can add them through personalization.



You can edit the fields only if you select **Posting** in the **Project Task Type** field.

Turn the feature on, or leave it off

If you're happy with the invoicing features you're already using, you can continue to do so. If you decide you do want to use this feature, it's easy to turn on.



On the **Project Setup Page**, in the **Default Billing Method** field, choose one of the following options:

- **Per Project**, which is the default setting. If you choose this option, the fields are empty and you can't edit them. The fields don't display on the **Project Task Lines** subform page.
- **Per Project Task**. If you choose this option, you can edit the fields. Business Central uses the billing details you define on project task lines to create invoices and define prices.

To ensure flexibility, you can use the **Billing Method** field on the **Project Card** page on the **Invoice and Shipping** FastTab. To display the field, you might need to choose **Show more**.

You can switch from **Per Project** to **Per Project Task**. If you do, Business Central populates the fields on the task level based on values in the header. This switch is irreversible if tasks are defined for the project.

Tell us what you 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

Define a service invoice posting policy for various users

Article • 01/25/2024

ⓘ Important

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

Expand table

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

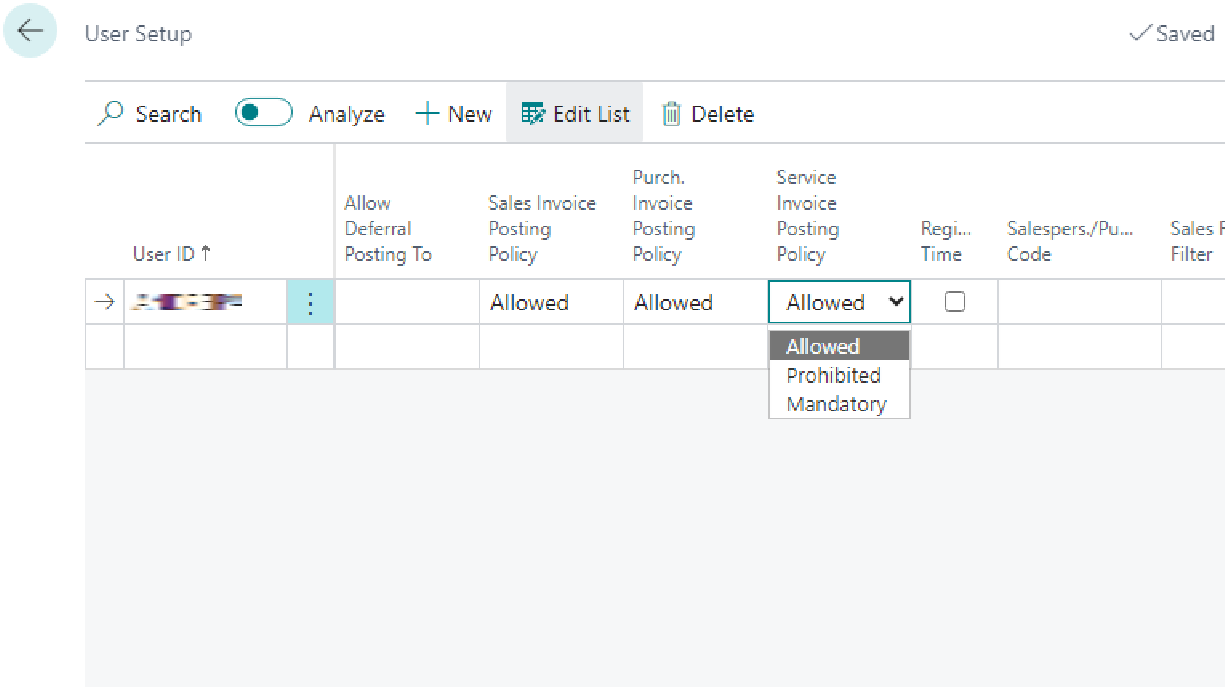
Business value

Companies often have unique processes for invoices and shipments. For example, processes can vary from one person posting everything on a service order to multiple employees, each working with their own pages. A setting on the **User Setup** page lets you specify how each user can process service invoices.

Feature details

You can use posting policies to restrict users from posting service invoices, or require them to post invoices together with the related service shipment. To specify a posting policy, on the **User Setup** page, choose one of the following options in the **Service Invoice Posting Policy** field:

- **Allowed** (Default): Keep the current behavior, where you can choose the posting option, such as **Ship**, **Invoice**, and **Ship and Invoice**.
- **Prohibited**: Prevent people from posting invoices. Business Central shows a confirmation dialog that provides only the **Ship** option.
- **Mandatory**: Let people post invoices along with service shipments. Business Central shows a confirmation dialog with the **Ship and Invoice** option.



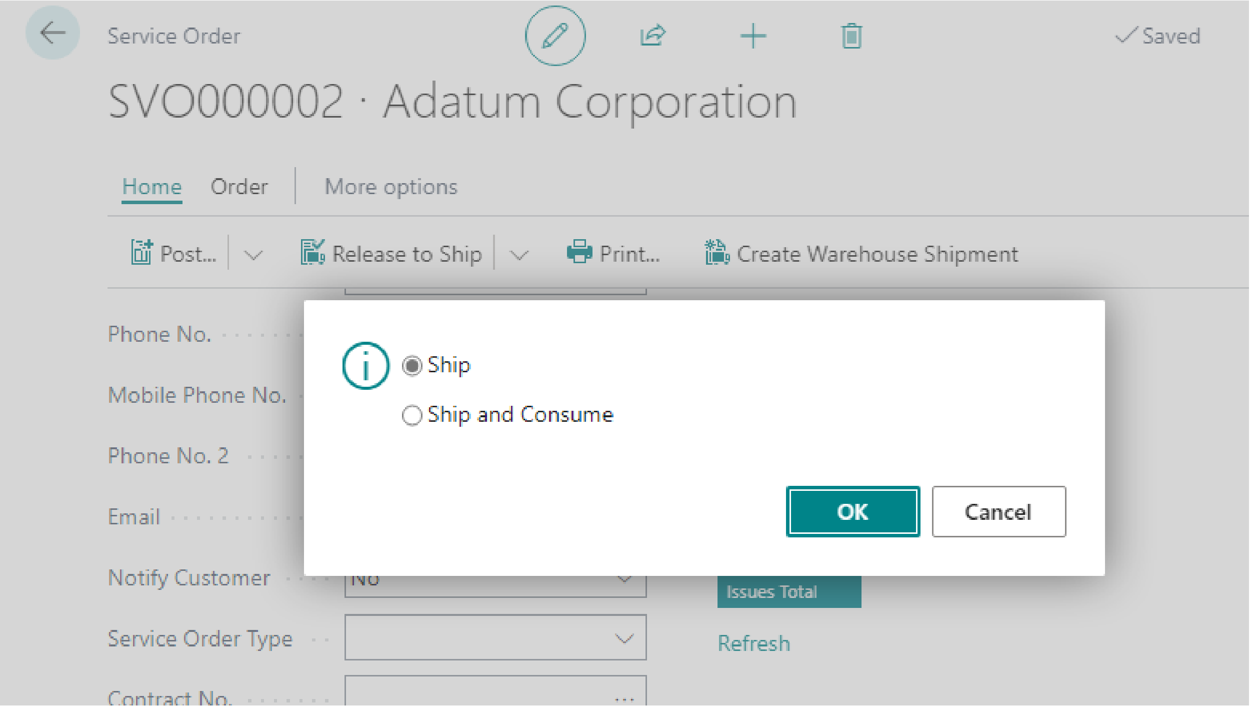
The setting affects the following documents:

- Service orders
- Warehouse shipments
- Service invoices
- Service credit memos

The following table describes the effects on different documents.

Expand table

Document	**Option 1: Allow Displays a series of options**	**Option 2: Prohibited Confirmation dialog**	**Option 3: Mandatory Confirmation dialog**
Service Order	- Ship - Invoice - Ship and Invoice	Do you want to post the shipment?	Do you want to post the shipment and invoice?
Warehouse Shipment	- Ship - Ship and Invoice	Do you want to post the shipment?	Do you want to post the shipment and invoice?
Service invoice	No options	Do you want to post the invoice?	Do you want to post the invoice?
Service credit memo	No options	Do you want to post the credit memo?	Do you want to post the credit memo?



> ⓘ **Note**
>
> When you post service invoices and credit memos, you don't have any posting options. The documents always post the physical and financial transactions together. You can't partially post invoices and credit memos.

Tell us what you think

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Feedback

Was this page helpful? Yes No

Define default location for project or project phase

Article • 01/25/2024

ⓘ Important

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

Expand table

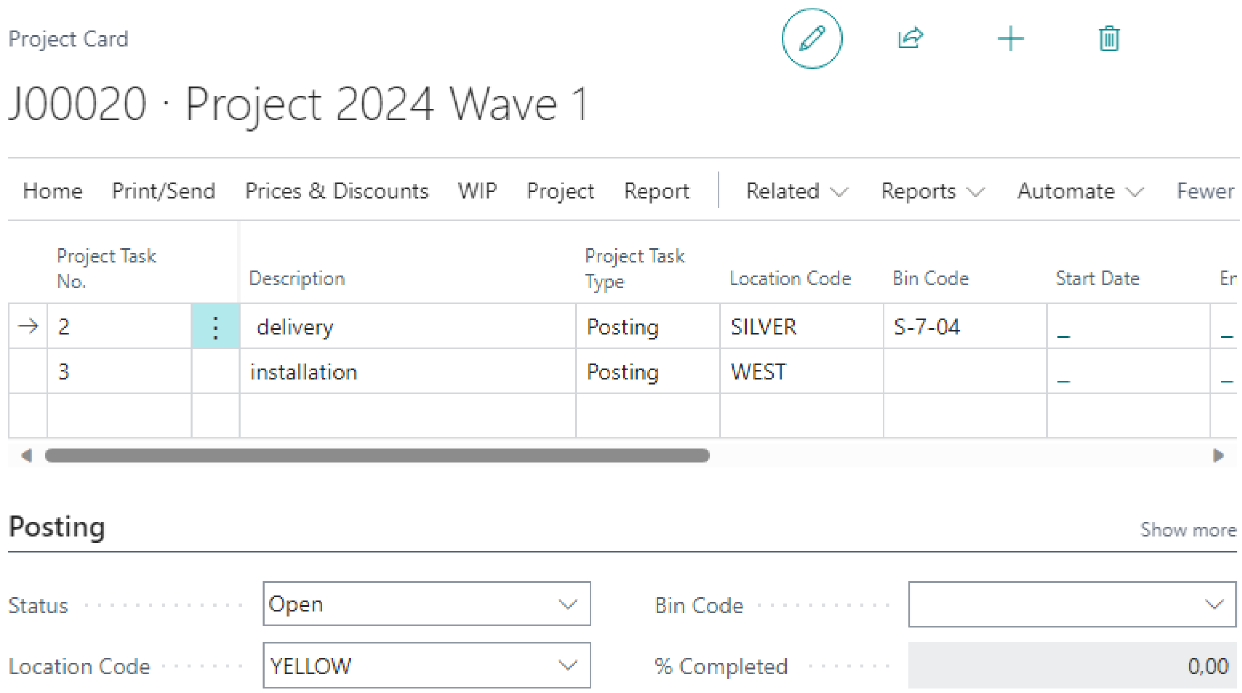
Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

Business value

Reduce the time you spend on data entry and focus more on core tasks by specifying a default location and bin for projects on the Project Card page. When you create project tasks, project planning lines, and project journal lines for the project, the default location and bin are automatically assigned. Stay flexible with the ability to change the location code and bin on tasks and lines if needed.

Feature details

Specify a default **Location Code** and **Bin Code** on the **Project** and **Project Task Lines Subform** pages. Similar to production order processes, these default values simplify data entry on project tasks, project planning lines, and project journal lines.



Project Card page

The **Location Code** and **Bin Code** are available on the **Posting Tab**. If you define a **To-Project Bin Code** on the location, the bin code is populated when you select the location code. If your warehouse flow requires warehouse picks, you can also define other bins from which to consume items.

These fields are the defaults when you create project tasks. Changes won't be made to existing project tasks.

Project tasks

The **Location Code** and **Bin Code** don't display by default, but you can add them through personalization. These fields are the defaults when you create project planning lines and project journal lines. Changes won't be made to existing lines.

Project planning lines

The **Location Code** is based on the value selected on the job planning line when you select an item. If a bin code isn't defined for the project task, the bin from the default bin content is selected. You can change both values manually.

Project journal lines

The **Location Code** is based on the value selected on the job journal line when you select an item. If a bin code isn't defined for the project task, the bin from default bin content is selected. You can change both values manually.

Purchase lines

This change doesn't affect purchase documents.

Tell us what you think

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

Export, import multiline text with Configuration Packages

Article • 03/06/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

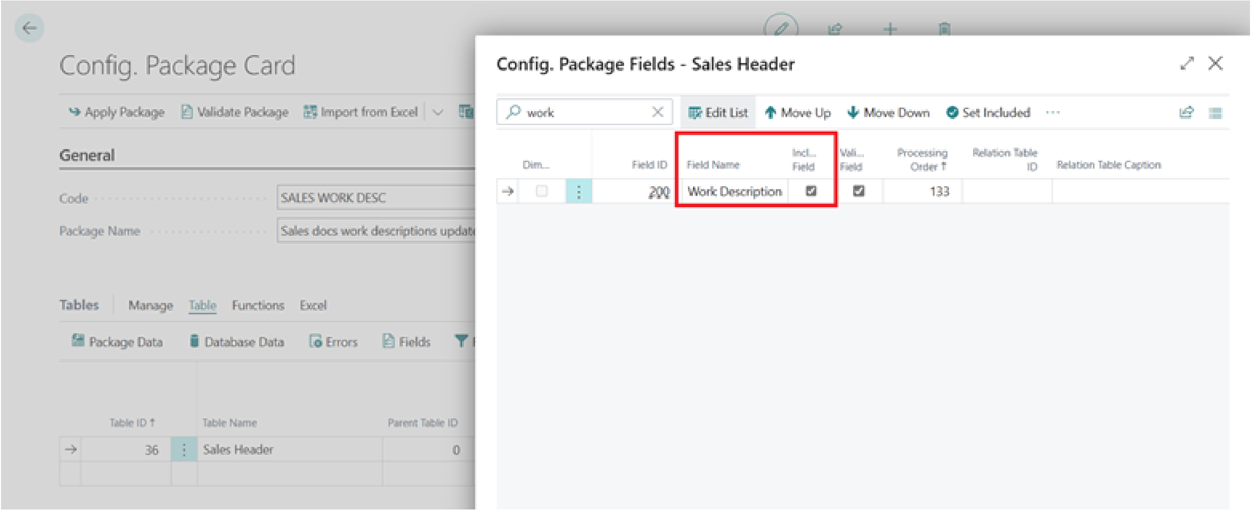
Business value

Avoid having to manually export and import multiline text by using an improved configuration packages capability that allows you to do that with efficiency and ease. This feature is especially useful for businesses that deal with large amounts of multiline texts and need to transfer them between different companies or environments.

Feature details

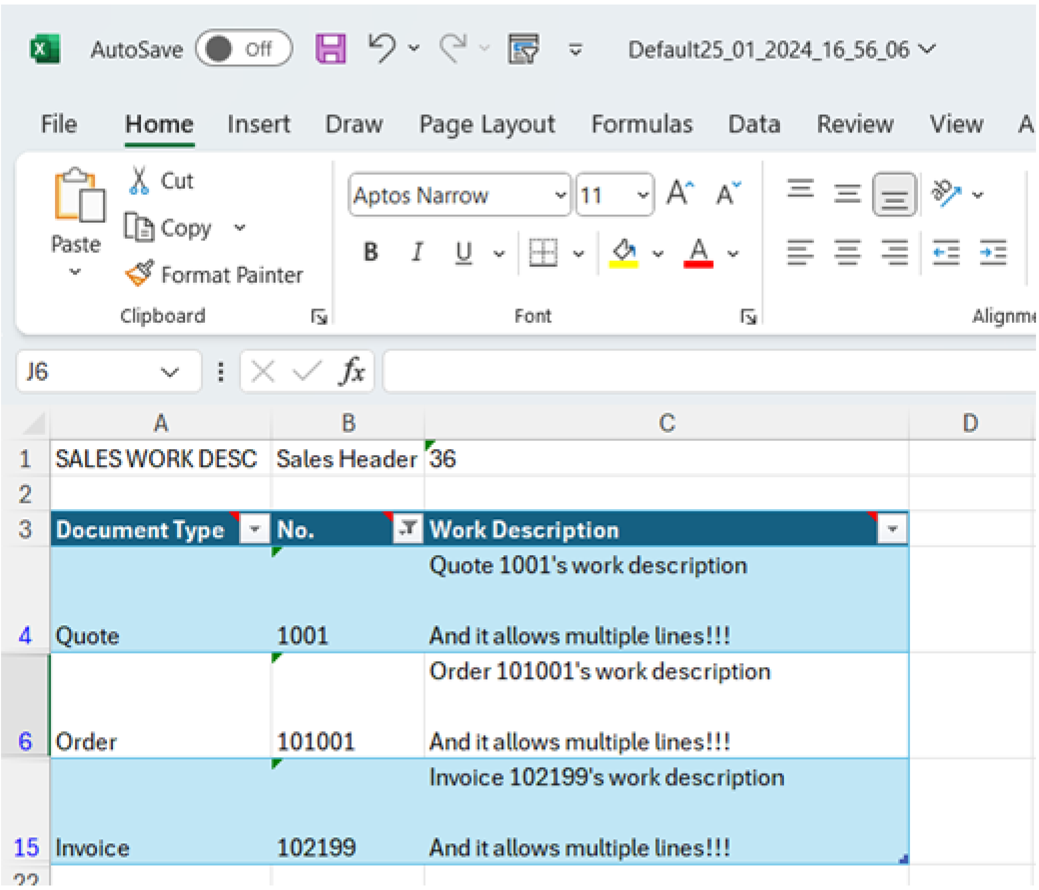
You can now use BLOB type fields, which usually contain multiline text, to import and export data using **Configuration Packages**.

Simply choose **Include Field** on the **Config. Package Fields** page to include fields that contain multiline text, such as the **Work Description** field, in your package.



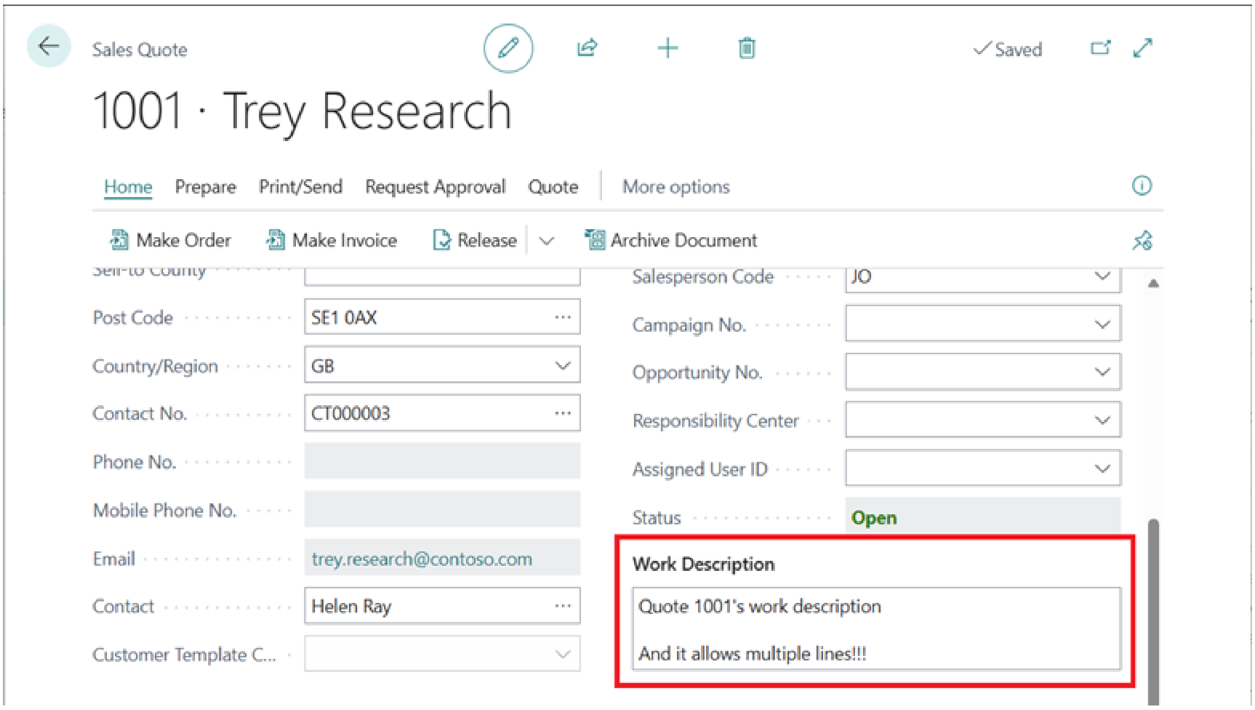
Export data by choosing the **Export to Excel** action in the **Config. Package Card** page to update it in Excel.

Update your data in Excel, for example, by adding multiline text in the Work Description column.



Back in Business Central, import the updated Excel file by choosing the **Import from Excel** action on the **Config. Package Card** page. After you validate the data, import it by choosing the **Apply Package** action.

After you apply the package, open a sales document that you updated, such as a sales quote, to verify that you imported multiline text to your sales document.



> ⓘ **Note**
>
> We'd like to thank our community for making this valuable contribution through our BusinessCentralApps open-source repo on GitHub.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Invoice a customer for multiple projects

Article • 01/25/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

Business value

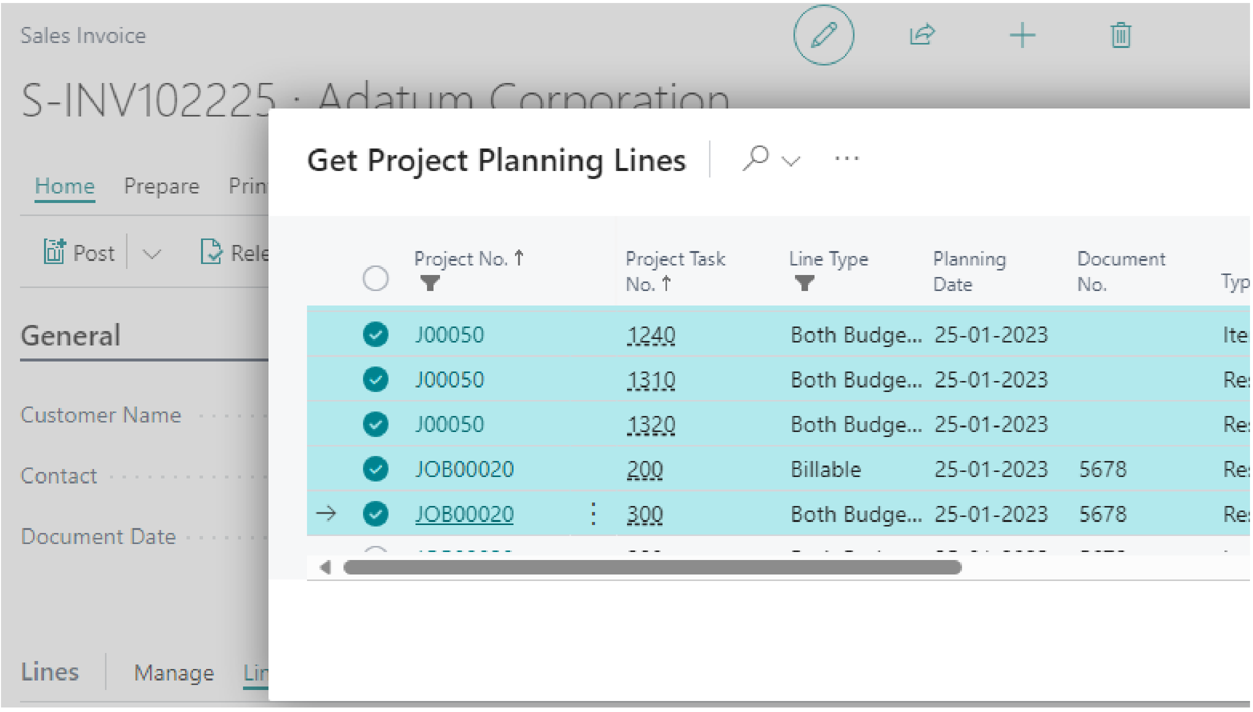
Simplify your invoicing process by sending one invoice for multiple projects, which reduces manual effort and improves accuracy.

Feature details

Add project planning lines from multiple projects to a sales invoice in one go. This process is similar to creating a sales invoice from a project planning line and entering a value in the **Append to Sales Invoice No.** field.

Here's an overview of the process.

1. Create a new sales invoice, and fill in the **Sell-to Customer No.** field. If needed, also fill in the **Bill-to Customer No.** and **Currency Code** fields.
2. On the **Lines** FastTab, choose the **Get Project Planning Lines** action. The **Get Project Planning Lines** page shows billable project planning lines from projects for the sell-to customer, bill-to customer, and invoicing currency where the quantity to invoice is more than zero.
3. Choose the lines you want to add to the invoice, and then choose **OK**.



You can repeat these steps to add another set of project planning lines. You can also delete the invoice or its lines and start over.

There are these noteworthy limitations:

- The **Get Project Planning Lines** action isn't available on sales orders or sales quotes.
- You can't filter on the **Ship-to Code** or **Contact No.** fields.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Manage document attachments in service items and documents

Article • 03/06/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

Business value

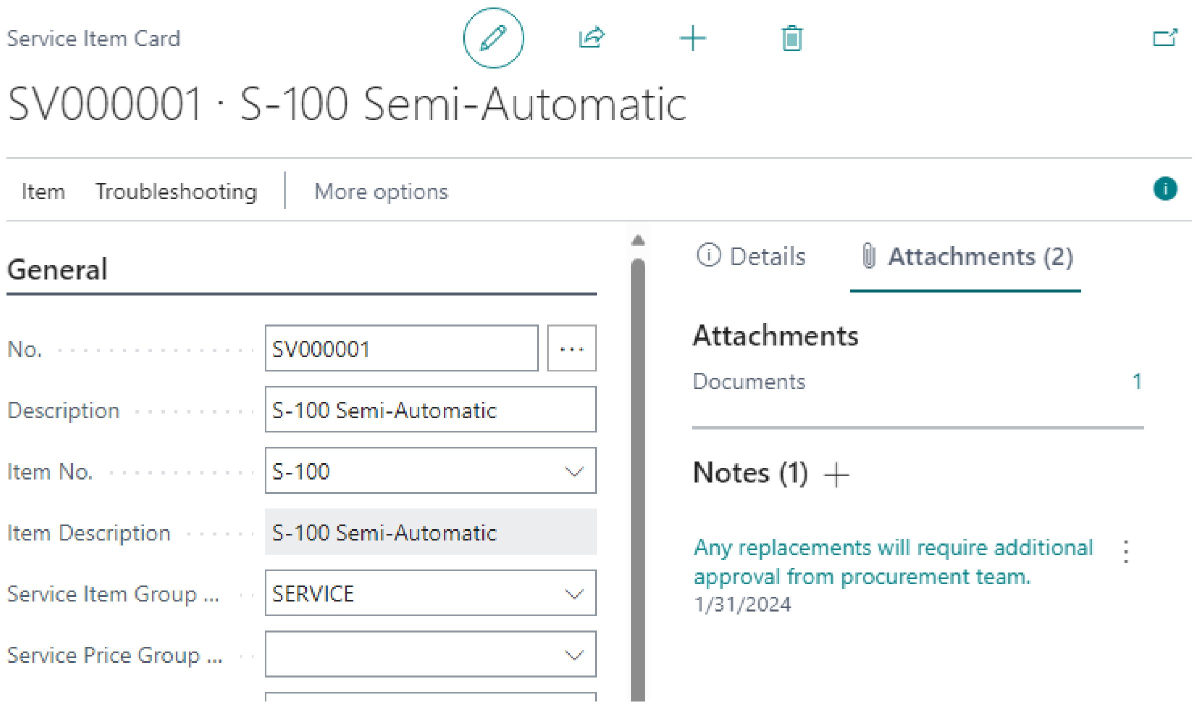
Digitalize document management of service-related documents (such as maintenance manuals, warranty certificates, or inspection reports) by attaching them directly to service items, contracts, and invoices. Access critical documentation on the go, ensuring efficient service delivery.

Feature details

In this release, we've made document attachments available on pages in Service Management. The **Document Attachment** FactBox is available in multiple places, like:

- **Service Item Card** (page 5980 "Service Item Card")
- **Service Items** (page 5981 "Service Item List")
- **Service Items** (page 5988 "Service Items")
- **Service Contract** (page 6050 "Service Contract")
- **Service Contracts** (page 9321 "Service Contracts")
- **Service Contract Quote** (page 6053 "Service Contract Quote")
- **Service Contract Quotes** (page 9322 "Service Contract Quotes")
- **Service Credit Memo** (page 5935 "Service Credit Memo")
- **Service Credit Memos** (page 9320 "Service Credit Memos")
- **Service Invoice** (page 5933 "Service Invoice")

- **Service Invoices** (page 9319 "Service Invoices")
- **Service Order** (page 5900 "Service Order")
- **Service Orders** (page 9318 "Service Orders")
- **Service Lines** (page 5905 "Service Lines")
- **Service Quote** (page 5964 "Service Quote")
- **Service Quotes** (page 9317 "Service Quotes")
- **Service Quote Lines** (page 5966 "Service Quote Lines")
- **Posted Service Credit Memo** (page 5972 "Posted Service Credit Memo")
- **Posted Service Credit Memos** (page 5971 "Posted Service Credit Memos")
- **Posted Service Invoice** (page 5978 "Posted Service Invoice")
- **Posted Service Invoices** (page 5977 "Posted Service Invoices")



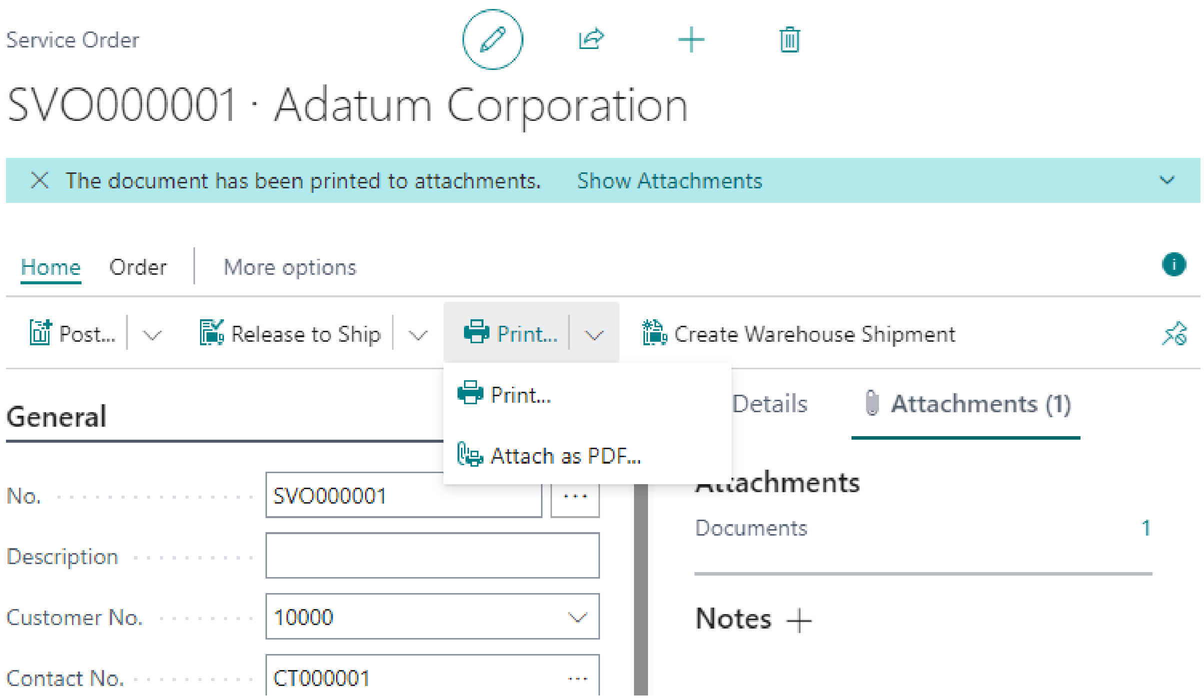
You can also choose the **Attachment** action to go to document attachments from lines:

- **Service Contract Quote Lines** (page 6054 "Service Contract Quote Subform")
- **Service Contract Lines** (page 6052 "Service Contract Subform")
- **Service Credit Memo Lines** (page 5936 "Service Credit Memo Subform")
- **Service Invoice Lines** (page 5934 "Service Invoice Subform")
- **Posted Serv. Cr. Memo Lines** (page 5973 "Posted Serv. Cr. Memo Subform")
- **Posted Service Invoice Lines** (page 5979 "Posted Service Invoice Subform")

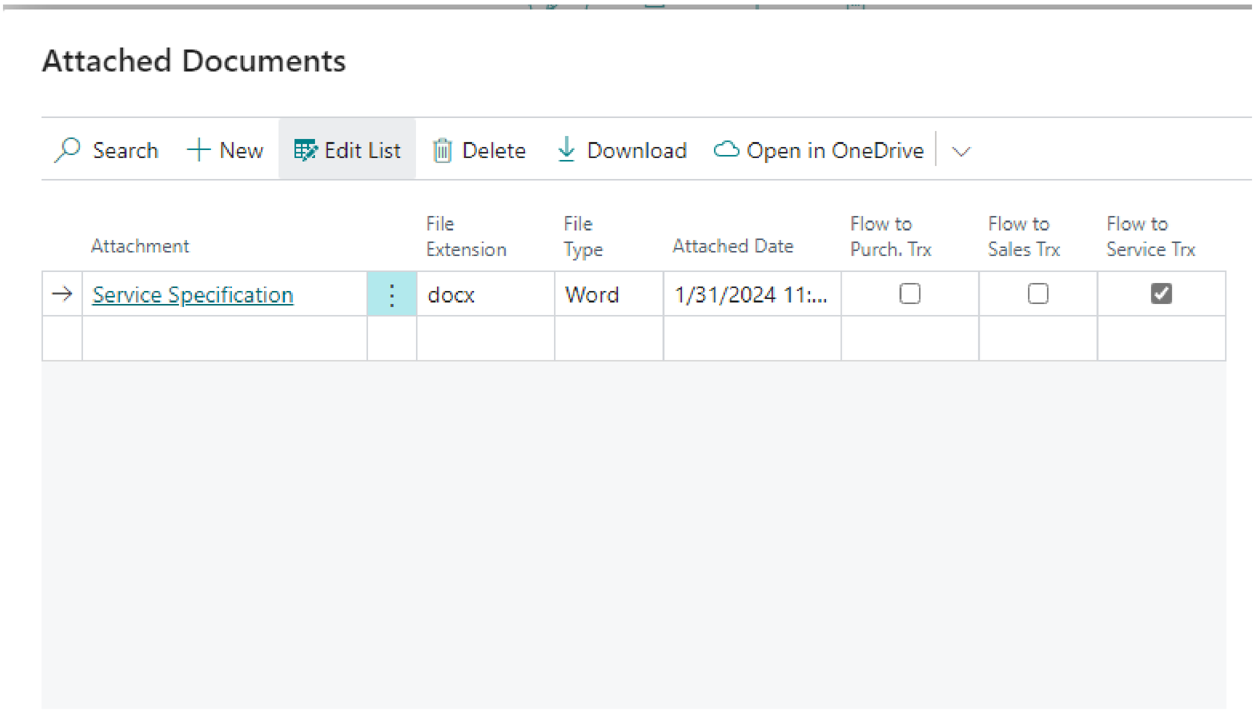
You can also print the following document to attachments using the **Attach as PDF** action:

- **Service Contract**
- **Service Contracts**
- **Service Contract Quote**

- Service Contract Quotes
- Service Order
- Service Orders
- Service Quote
- Service Quotes
- Posted Service Credit Memo
- Posted Service Credit Memos
- Posted Service Invoice
- Posted Service Invoices



Use the new **Flow to Service Trx** toggle in the **Attached Documents** page to control how documents attached to customers, items, or service items flow to documents, lines, and transactions.



Expand table

From	To	When
Customer	Service header: Service Order, Service Quote, Service Invoice, Service Credit-memo	Select value in the **Customer No.** field
Customer	Service contract header: Service Contract or Service Contract Quote	Select value in the **Customer No.** field
Item	Service Item	Select value in the **Item No.** field
Item	Service Line: Service order line, Service quote line, Service Invoice line, Service Credit-memo line	Select value in the **No.** field
Item	Service Contract Line: Service Contract line or Service Contract Quote line	Select value in the **Item No.** field
Service Item	Service Line: Service order line, Service quote line, Service Invoice line, Service Credit-memo line	Select value in the **Service Item No.** field
Service Item	Service Contract Line: Service Contract line or Service Contract Quote line	Select value in the **Service Item No.** field

Note

Document attachments are not available for service item lines.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your ideas

Thank you for submitting these ideas:

- Attachments Service Items
- Ability to add Documents to Service Items
- Attach Documents in Service Orders and Quotes

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

Feedback

Was this page helpful? Yes No

Manage work orders in Field Service, invoice them in Business Central

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

This integration is particularly valuable for organizations that provide professional services. It offers a seamless and integrated solution for managing service tasks, consumption, and financial transactions, which benefits service technicians, service managers, and finance teams. It's a powerful solution for managing work orders and consumption in Field Service and efficiently invoicing and fulfilling them in Business Central. This integration adds value to organizations by streamlining service operations, improving financial management, and enhancing overall operational efficiency.

Feature details

We're excited to announce the integration with Field Service. You can manage work orders and consumption in Field Service, and efficiently invoice and fulfill them in Business Central. This integration streamlines the end-to-end process of managing service operations and ensures a seamless flow of information between the two systems.

You can easily create and manage work orders in Field Service, track the progress of service tasks, assign resources, and capture consumption details. When the service tasks are complete, the integration enables the smooth transfer of data to Business Central for further processing.

The integration also facilitates the invoicing and fulfillment of work orders in Business Central. You can generate accurate invoices based on the service activities performed and the consumption recorded in Field Service. This ensures timely and accurate billing, which improves financial management and customer satisfaction.

By integrating Business Central with Field Service, you benefit from a unified and efficient workflow. The integration eliminates the need for manual data entry or duplication, which reduces errors and saves valuable time. It also provides a comprehensive view of service operations and financials, which improves decision-making and operational efficiency.

Tell us what you think

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

Inventory package numbers work like item tracking dimensions

Article • 03/06/2024

ⓘ Important

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Expand table

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

Business value

This update addresses a gap that was present when the feature was originally introduced, and unlocks physical inventory orders for companies that use package-specific tracking.

Feature details

To start using this feature, you must activate **Feature Update: Enable use of package tracking in physical inventory orders** on the **Feature Management** page. Existing physical inventory orders will be updated, however, Business Central can't populate the **Package no.** field. You must recreate these lines using the **Calculate Lines** action on the **Phys. Inventory Order** page.

You can enter the package number for items where package tracking is needed on the **Phys. Inventory Recording Lines** page. Choose **Finish** to finalize recording.

After you choose **Finish** in the **Physical Inventory Order**, Business Central will calculate differences with respect to the package and other item tracking details, and will make positive or negative adjustments.

Phys. Invt. Item Track. List

Item Tracking Information

Item No.	Variant Code	Location Code	Serial No.	Lot No.	Package No.	Positive	Quantity
1001	VAR1		111111		CT000024	☑	1
1001	VAR1		SN000022			☑	1
1001	VAR1		SN000055		CT000024	☑	1
1001	VAR1		SN00002		CT000024	☐	-1
1001	VAR1		SN00005	LOT0001	CT000024	☐	-1

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas .

Feedback

Was this page helpful? Yes No

Prevent editing number series on service documents, cards

Article • 03/06/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

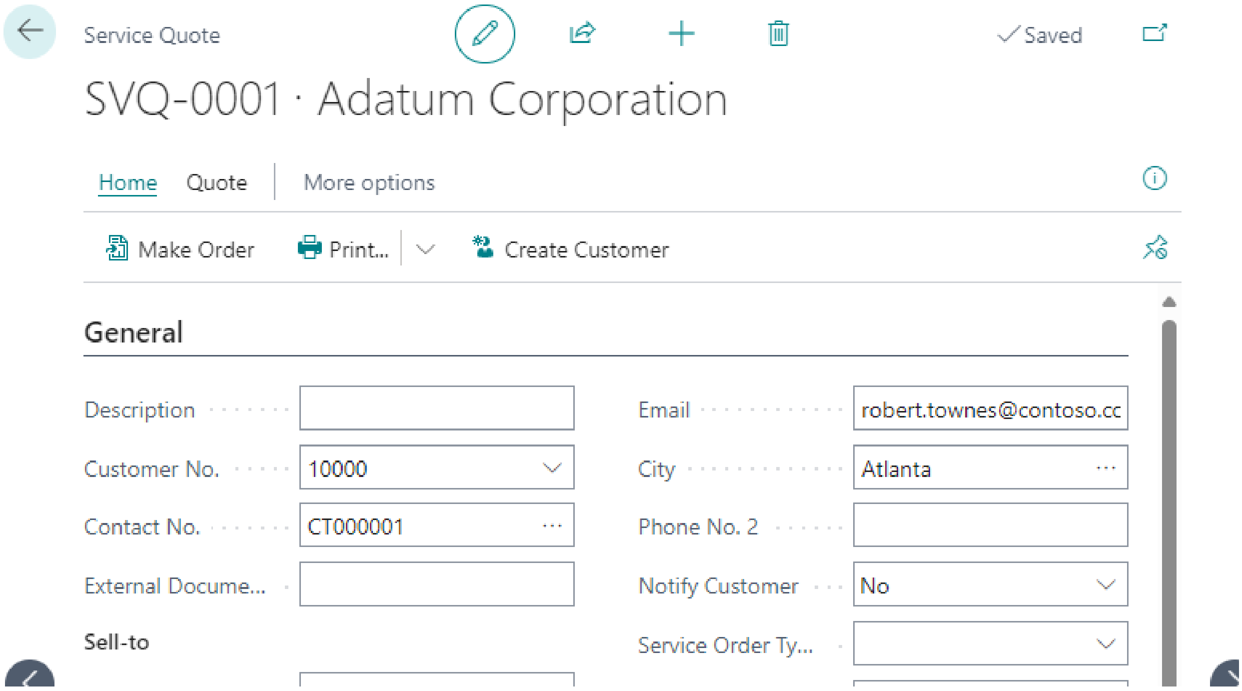
Business value

For each company where you set up service management, you must assign unique identification codes to things such as service items, invoices, and other documents. Numbering isn't only important for identification purposes. A well-designed numbering system also makes the company more manageable and easier to analyze, and can reduce the number of errors that occur in data entry.

Feature details

Behavior of the No. field on documents and cards

On service documents and all cards, the **No.** field can be filled in automatically from a predefined number series, or you can add it manually. However, under certain circumstances, the **No.** field isn't available so that you can't edit its value.



The **No.** field can be filled in three ways:

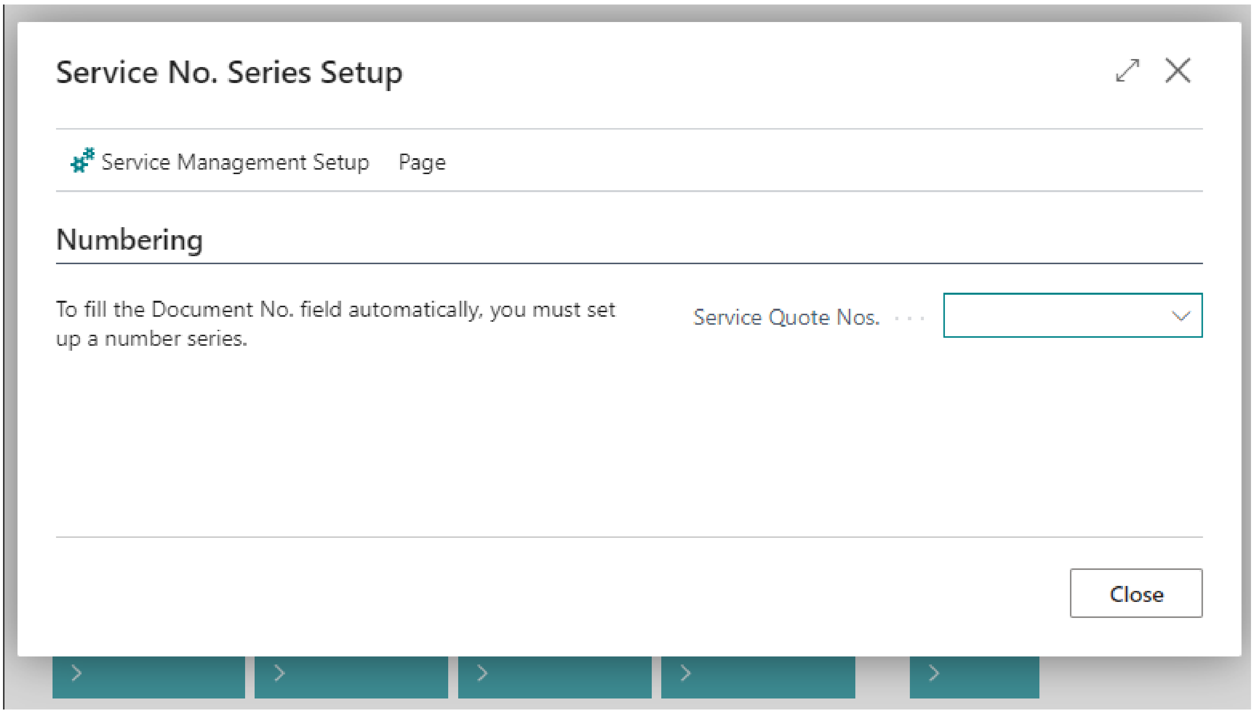
1. If only one number series for the type of document or card exists, and the **Default Nos.** field is selected and the **Manual Nos.** field is not selected for that number series, the field is automatically filled with the next number in the series. The **No.** field will not be visible on the card or document.

   > ⓘ **Note**
   >
   > If the number series doesn't work, for example because it's run out of numbers, the **No.** field will be visible and you can manually enter a number or resolve the issues on the **No. Series** page.

2. If more than one number series for the type of document or card exists, and the **Default Nos.** checkbox isn't selected for the number series that's assigned, then the **No.** field is available and you can look up the **No. Series** page and select the number series you want to use. The **No.** field contains the next number in the series.

3. If you haven't set up a number series for the type of document or card, or if the **Manual Nos.** field is selected for the number series, the **No.** field is available and you must manually enter a number of up to 20 characters, which can be both numbers and letters.

When you open a new document or card that a number series doesn't exist for, the **No. Series Setup** page opens so that you can set up a number series for that type of document or card before you start to enter data.



> ⓘ **Note**
>
> If you need to enable manual numbering on, for example, new service item cards that have been created with a data migration process that's hidden the **No.** field by default, go to the **Service Management Setup** page and choose the **Service Item Nos.** field to set the number series to **Manual Nos.**.

Tell us what you think

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Feedback

Was this page helpful? Yes No

Set up financial consolidation runs more efficiently

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

When you run consolidation for business units that use a foreign currency, you must pay special attention to the exchange rates that various parts of the process use, and even more so when you redo consolidation. To do that, you can use the **Set Up Business Unit Currencies** page to easily keep track of the rates. The feature helps streamline your consolidation processes and improve your productivity.

Feature details

When you run a consolidation, the **Set Up Business Unit Currencies** page gives you the last rates that were entered for average, closing, and last closing rate. Also, you can look up the exchange rates in the currency exchange rate table, which makes it easier to validate. You can modify the rates used for the current run by either entering the values or copying values from previous runs by selecting **Select from previous consolidation**. This page is particularly valuable when you want to rerun a previous consolidation, where you need to use the closing rate of the consolidation run previous to the earliest of such runs. This is required to correctly revaluate your balance sheet items. You can use the **Select from previous consolidation** register to find the relevant last run to copy values from, or just look up the rates that were used when you're troubleshooting. The page is filtered to runs that included the selected business unit.

The **Run Consolidation** batch job with the new parameters is available on the **Business Units** list page. You can also find the **Set Up Business Unit Currencies** page by selecting the **Exchange Rates** action.

> **Note**
>
> The Exchange Rate setup pages for average, closing, and last closing rate, which are currently on the Business Unit card, will be deprecated. However, you can still maintain these rates if you have business units you import through files.

Tell us what you think

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Feedback

Was this page helpful? Yes No

Simpler Shopify connection

Article • 01/25/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

Business value

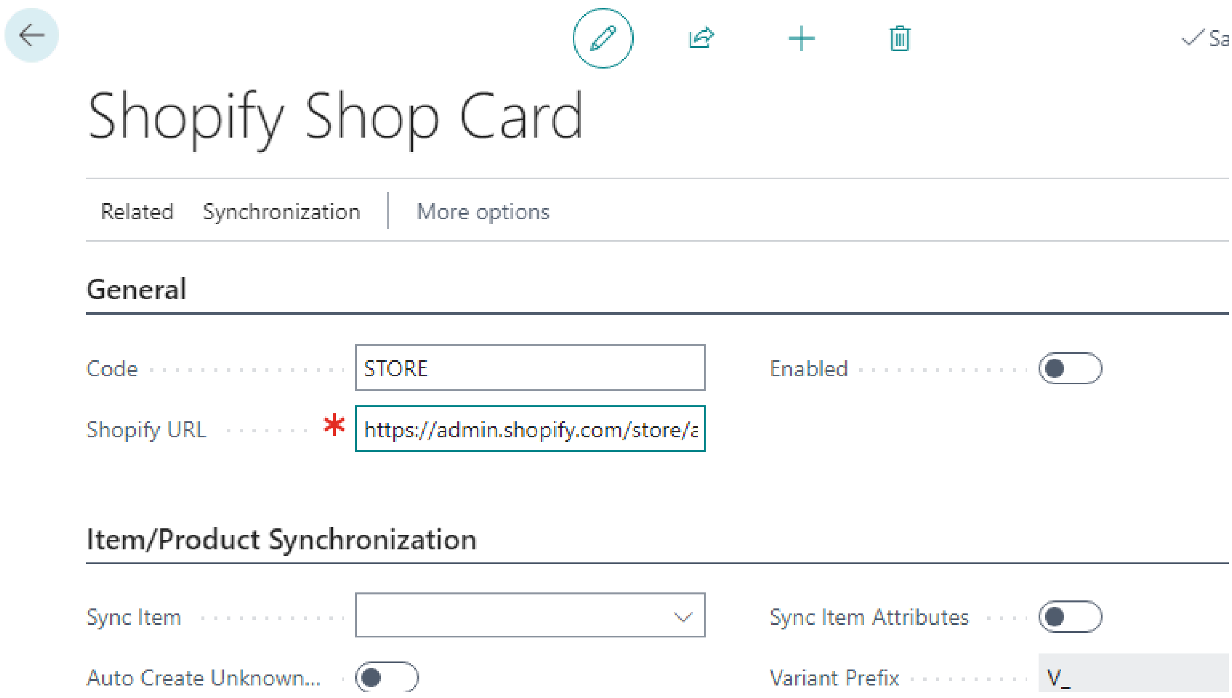
Business Central has teamed up with Shopify to help our customers create a better online shopping experience. Shopify provides merchants with an easy-to-use e-commerce solution, and Business Central offers comprehensive business management across finance, sales, service, and operations. The seamless connection between the two applications synchronizes order, stock, and customer information to ensure that merchants can fulfill orders faster and better serve their customers. The joint effort furthers Business Central's commitment to connecting data that can help businesses adapt faster, work smarter, and perform effectively.

Feature details

Based on feedback from customers, we've made a number of improvements in the user interface.

It's easier to get the Shopify URL

The Connector requires a URL in the following format: https://.myshopify.com/. However, after Shopify introduced Unified Admin it hasn't been as easy to get the URL for the store. Therefore, we've reintroduced simplicity. Just copy the URL from Shopify Admin, such as https://admin.shopify.com/store/, and the Connector converts it to the required format.



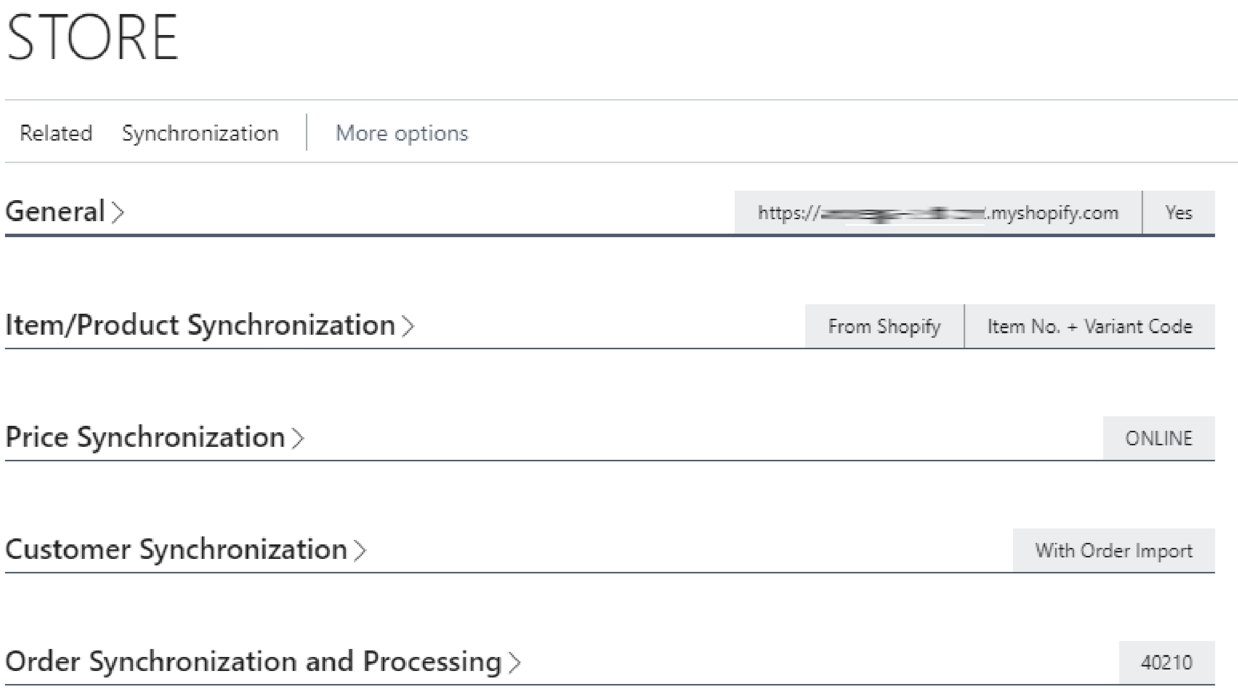
Skip blocked or sales blocked items and variants

When you want to export many items and variants, there might be some that are blocked. You can't include blocked items and variants in price calculations, so they aren't exported. The Connector now skips those items and variants automatically, so you don't need to filter them on the **Add Item to Shopify** request page.

Shopify Shop shows important fields when FastTabs are collapsed

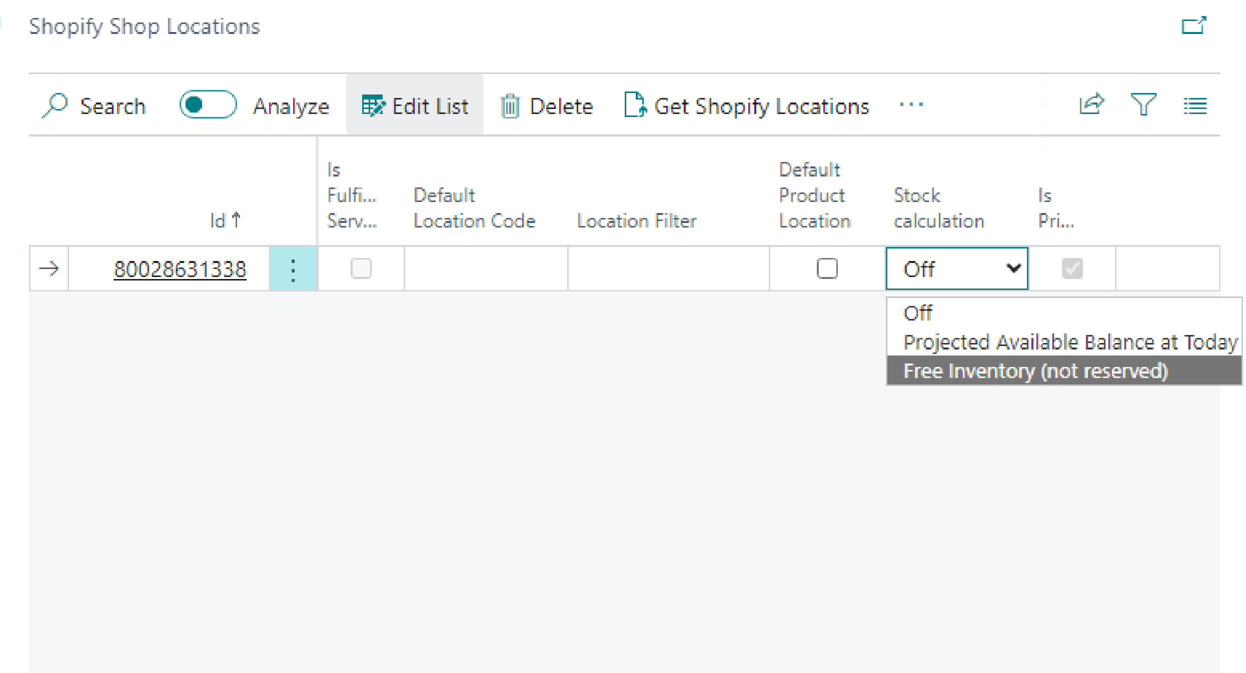
The values of the following fields display, even when a FastTab is collapsed:

- Shopify URL
- Enabled
- Sync Item
- SKU Mapping
- Customer Price Group
- Customer Discount Group
- Customer Import from Shopify
- Default Customer
- Shipping Charges Account
- Process Type



New stock calculation method

Because many businesses use extensibility to implement the same stock calculation, we decided to make it standard functionality. The **Free Inventory** method is simple and efficient. The method takes the current inventory and subtracts what's reserved from inventory. It ignores expected receipts or demand.



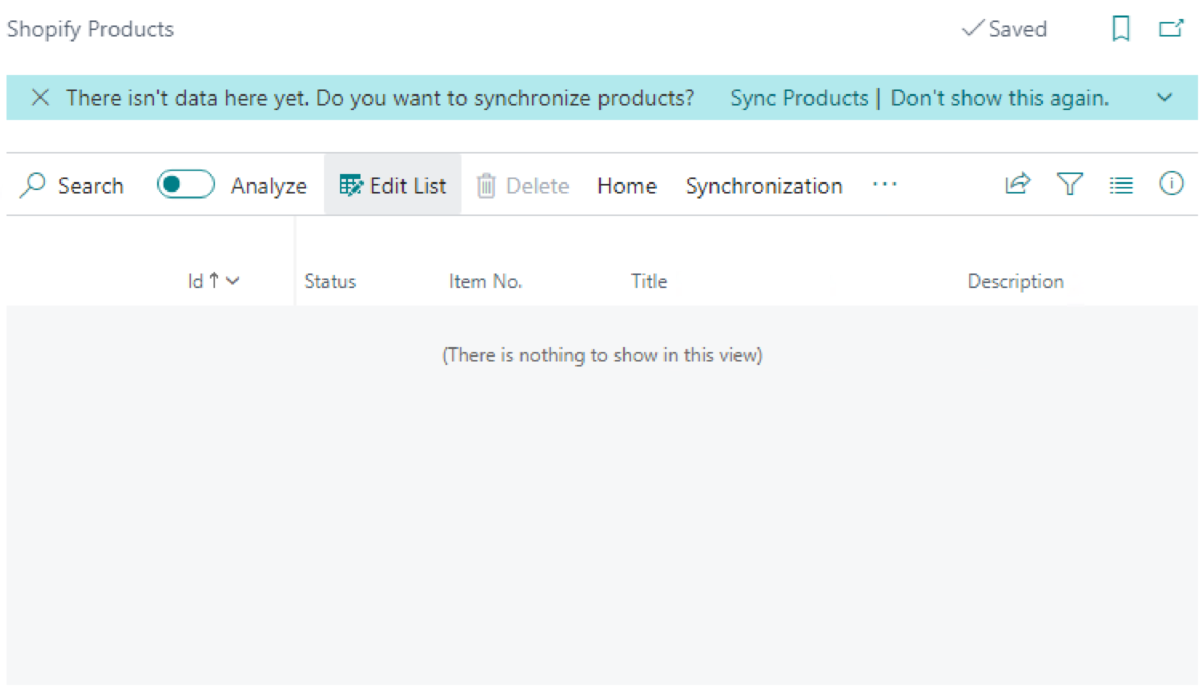
Decide whether fulfilment synchronization should trigger a notification

Send Shipping Notifications lets you control whether Shopify sends a notification when posted shipments synchronize to Shopify. The notification might be useful, for example, if your company sells services.

Guide users on item synchronization

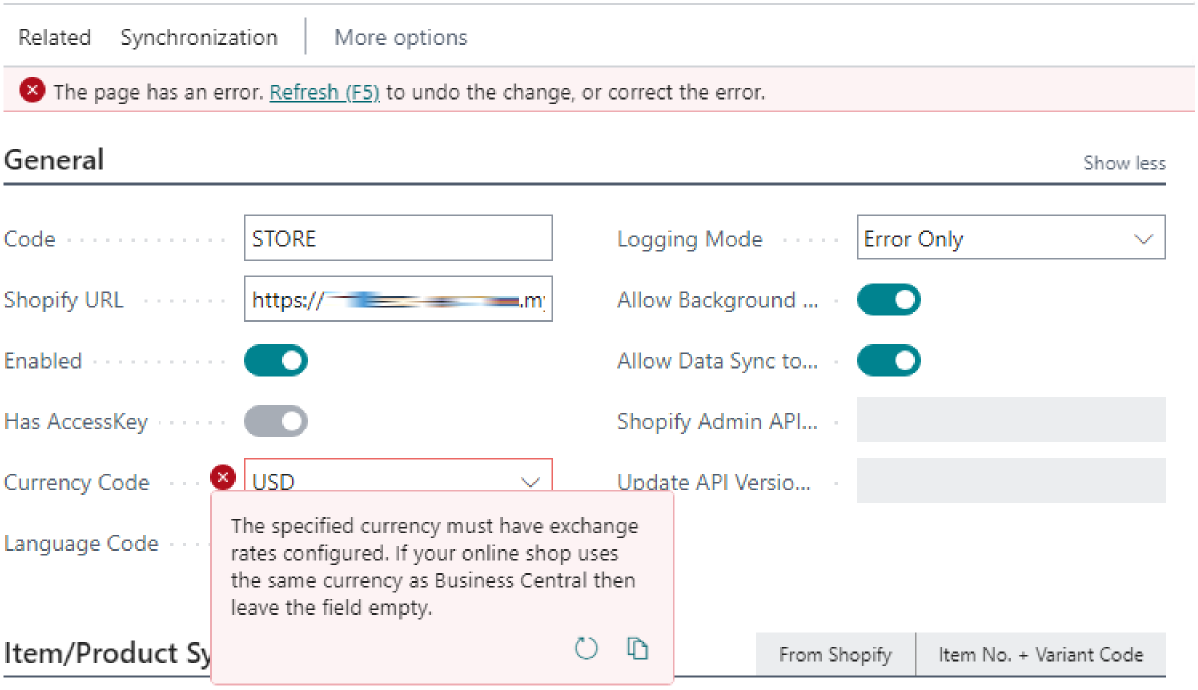
Often, the first task people use the Connector for is to synchronize products and items. To make that synchronization easier, a notification in Shopify Products suggests the following actions based on your settings:

- **Sych products**, if your shop is configured to import products from Shopify.
- **Add Items**, if you manage products in Business Central.



Extra checks reduce the risk of errors

- Check whether the selected currency code is assigned an exchange rate. If the rate is missing, it explains the use of the field.
- Check whether Business Central is part of fulfillment services in Shopify, and instruct users to enter a **SKU Mapping**.



Tell us what you think

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

Usability improves for service and projects

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

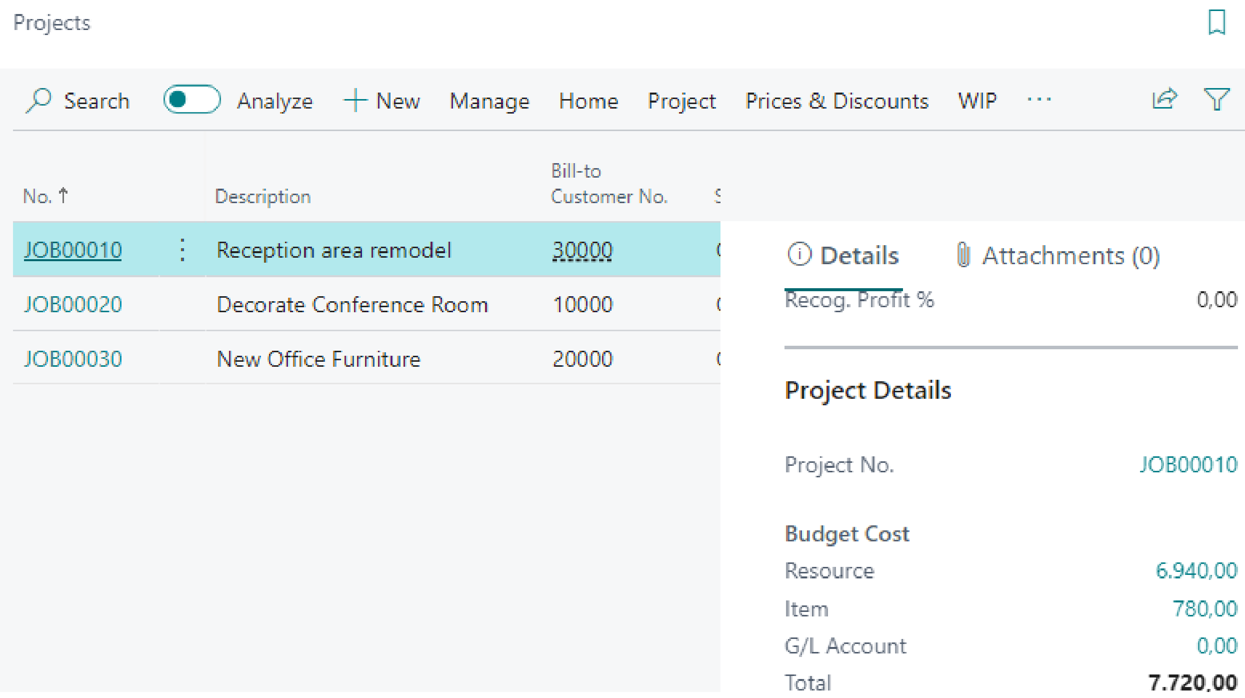
Business value

Productivity increases when processes are easy, so we've improved the usability of several areas within project and service management. For example, you can save a step by automatically releasing source documents, and in several places data is easier to access and digest.

Feature details

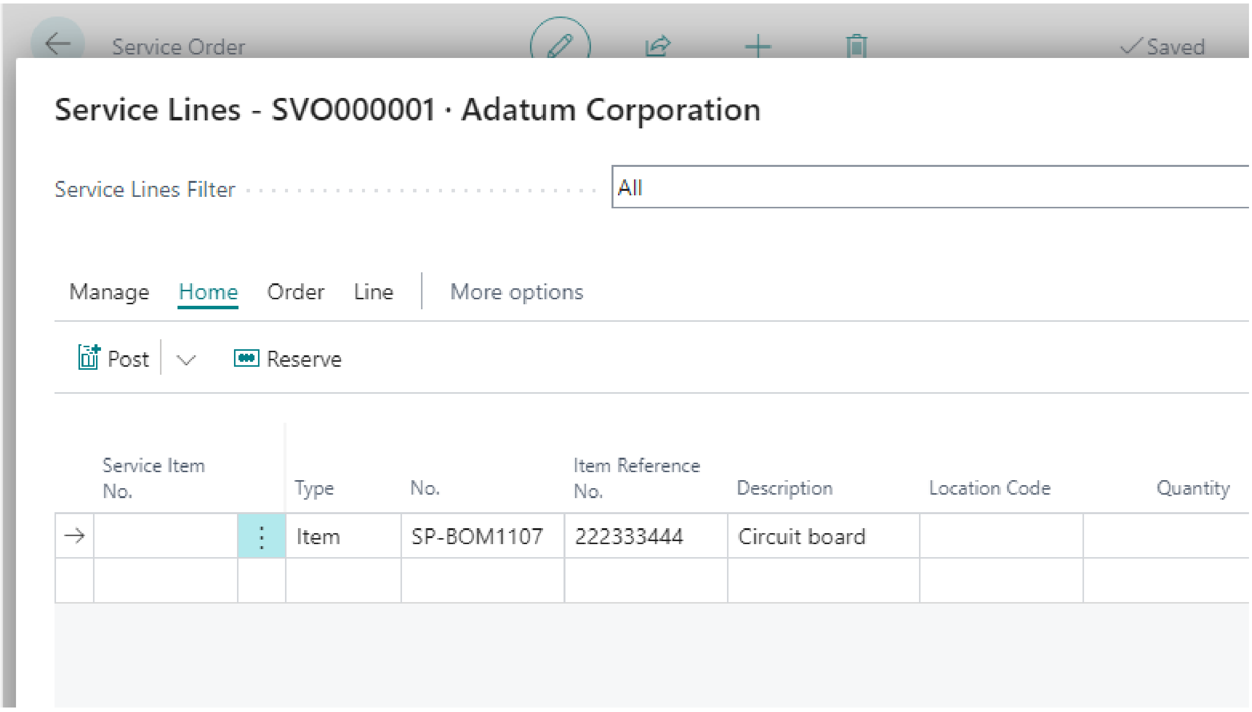
Based on feedback from our customers, we've made it easier to complete several business processes in service management and accounting.

The **PowerBI** and **Project Details** FactBoxes are available on the **Project List** page, so you can access project details from the list. The Power BI content that's currently available isn't changed.



The **Item Reference No.** field is available on the following tables and pages:

- table 5902 **Service Line**
- page 5934 **Service Invoice Subform**
- page 5936 **Service Credit Memo Subform**
- page 5906 **Service Item Worksheet**
- page 5905 **Service Lines**

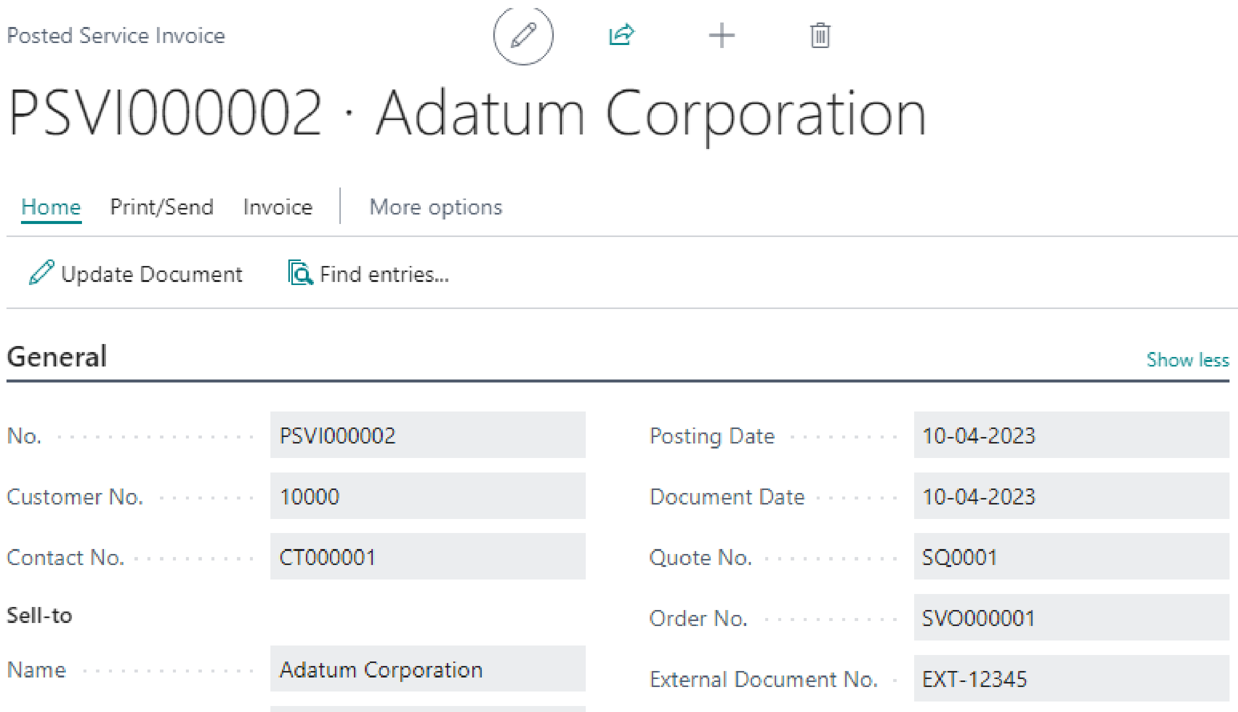


> ⓘ **Note**
>
> The lookup shows only item references with the reference type **blank**, but validation also recognizes the reference type **Barcode**. This is similar to sales and

purchase documents.

To give you better insight into the services you're providing to your customers, you can add more columns to service documents:

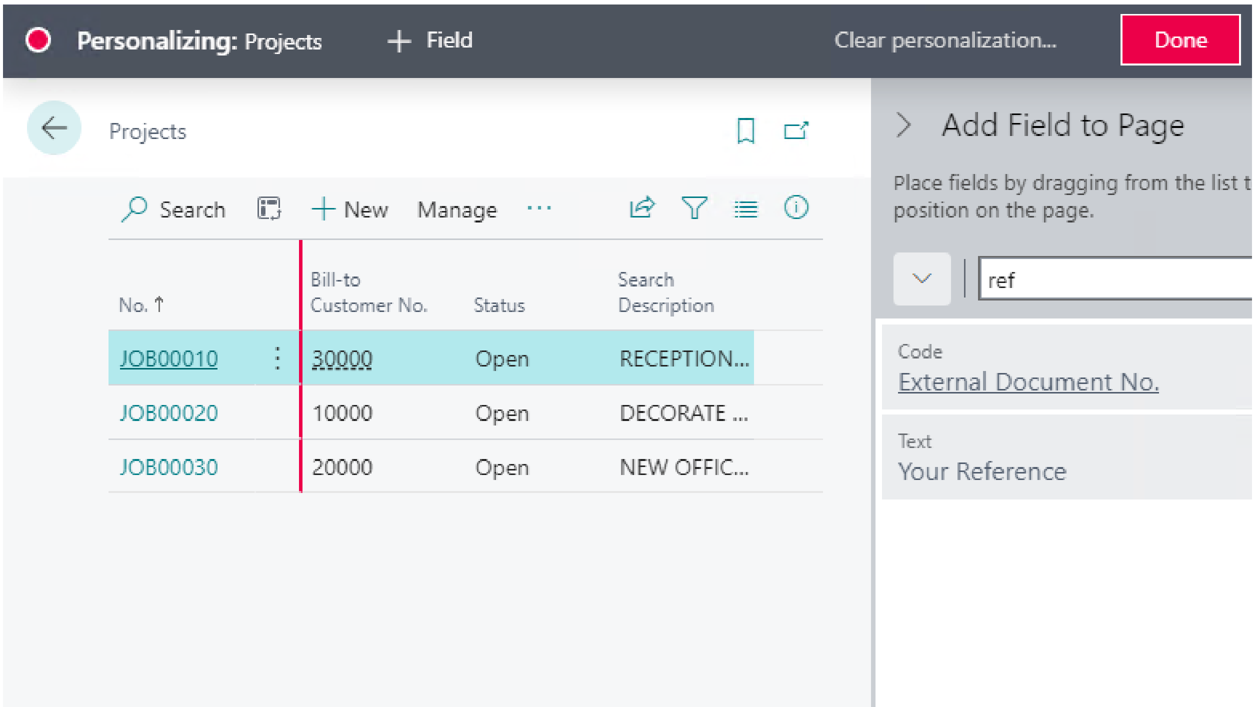
- **Quote No.** on posted services documents, such as posted service credit memos and invoices.
- **Bill-to Name** and **Sell-to Name** fields are available in the service contract list.
- **External Document No.** in service documents, service orders, credit memos, invoices, quotes, posted service invoices, shipments, credit memos, and service ledger entries. This data is passed to general ledger entries. If an external document number isn't specified, Business Central uses the original service document number when you post to the general ledger.



ⓘ **Note**

The **External Document No.** already exists in the Norwegian localization, so it will stay in the local range. For other localizations, the field is added to the W1 range.

Also, you can add the **External Document No.** or **Your reference** columns to the project list.



Tell us what you think

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Feedback

Was this page helpful? Yes No

Use currencies when posting employee transactions

Article • 01/25/2024

Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

Business value

You can use general journals for employee accounts to register employee expenses and reimbursement transactions in foreign currencies, and then easily track the amounts and compare them to receipts. Leave your calculator in your desk drawer—Business Central can adjust the exchange rate for you.

Feature details

When you use general journals to post transactions for employee accounts, such as when you reimburse expenses, you can use the **Currency Code** field to specify the currency for the transactions. Specifying a currency lets you use the same features as when you register transactions in the customer and vendor ledgers. For example, employees can register an expense in euros but get paid in dollars.

To ensure that the exchange rate for the amounts is up to date, you can adjust employee balances when you run the currency exchange rate batch job. If you want to use the exchange rate table, but settle employee balances in your local currency, you can exclude employee accounts when you adjust exchange rates.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Use deferral codes in purchase and sales journals

Article • 01/25/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

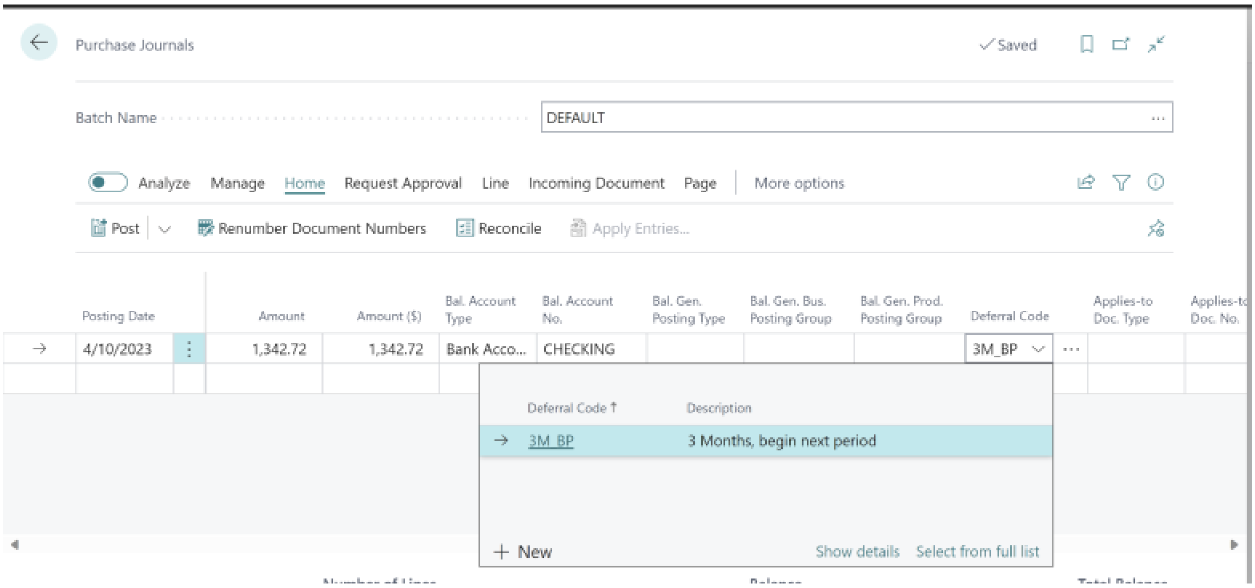
Business value

Entering sales and purchase journals is sometimes associated with data entry for transactions that require deferrals. The process of entering data is smoother because you can specify a deferral code on sales and purchase journals, without having to create a general journal.

Feature details

You can set a deferral code on sales and purchase journal lines, which allows you to post deferral transactions while you work in these journals. Deferral works the same way on sales and purchase journals as it does for general journals. To learn more about deferrals, go to Defer Revenue and Expenses.

Note that sales and purchase journals validate the source code. The validation requires that the source code for sales and sales journals, and purchase and purchase journals respectively, aren't identical when you're using deferrals. If it's set up to be identical, you can work around this limitation by creating a template and batch that uses another source code.



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Feedback

Was this page helpful? Yes No

Improve accuracy with general ledger account revaluation

Article • 03/06/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

Business value

With a new setup on the G/L account card, you can now run G/L Revaluations for accounts with transactions in foreign currencies. This enables you to generate a more accurate financial statement with little need to keep separate spreadsheets.

Feature details

If you use general ledger accounts to register balance sheet items that are denominated in foreign currencies, a revaluation of the balances is often required before you produce financial statements for your business.

Until now, most businesses have used either a bank account or a vendor account to register and track such assets and transactions. They've had to keep the bank or vendor account separate from others, and to make it work they've had to maintain an expanded setup for posting groups.

The G/L Revaluation feature simplifies revaluations. For the general ledger accounts that you use for revaluations, you can turn on a general ledger account subledger that will hold the original currency value of the transaction and any adjustments you made using the Adjust Currency Exchange Rate batch job. Balances present in local currency (LCY) are revalued, which enables you to produce a more accurate financial statement with little effort.

> ⓘ Note
>
> The G/L Revaluation feature might not meet all requirements for transaction and asset registrations that require revaluation. For example, for financial instruments, securities, leased assets, or if used for specific or large volumes of transactions or assets. We recommend that you discuss with your auditor whether you can use the feature.

Posting gains and losses during a currency exchange rate adjustment follows the normal posting routine. For example, it's done for each setup on the currency card.

> ⓘ Note
>
> The new feature doesn't provide the ability to apply or unapply entries. Adjustments are done on a balance per currency basis.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Use new Excel layouts for 35 selected reports

Article • 01/25/2024

ⓘ Important

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Expand table

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

Business value

Running reports to analyze and present business information is a frequent task in any business. Now you can use the Excel report layouts to interactively generate analyses and present learnings.

Feature details

We've added 35 Excel reports with new report layouts for finance, sales (customers), and purchases (vendors). To give you more options in creating your own Excel layouts for the report, you also get data from the report request pages and data for translations of a layout. If the data in the reports comes from multiple tables, the report layouts show the data in multiple worksheets, which makes it easy to understand where the data originated.

The reports are flexible, and you can use them in the way that best fits your needs:

- Use the reports as-is to get insight about your business.
- Use pivot tables to slice and dice data for analysis.
- Use them as a template to create your own Excel layouts for the same data.

Over the course of 2024 release wave 1 we expect to add more layouts to cover areas like Fixed Assets, Inventory Jobs (Projects), and Service Management. You'll find examples, typical use cases, and a description of the data for each report in our documentation.

> **Note**
>
> The Excel reports are limited to around 1 million rows. For reports that have a high volume of data, we recommend that you use the report request page to filter your data.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Use standard terminology for project management

Article • 01/25/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

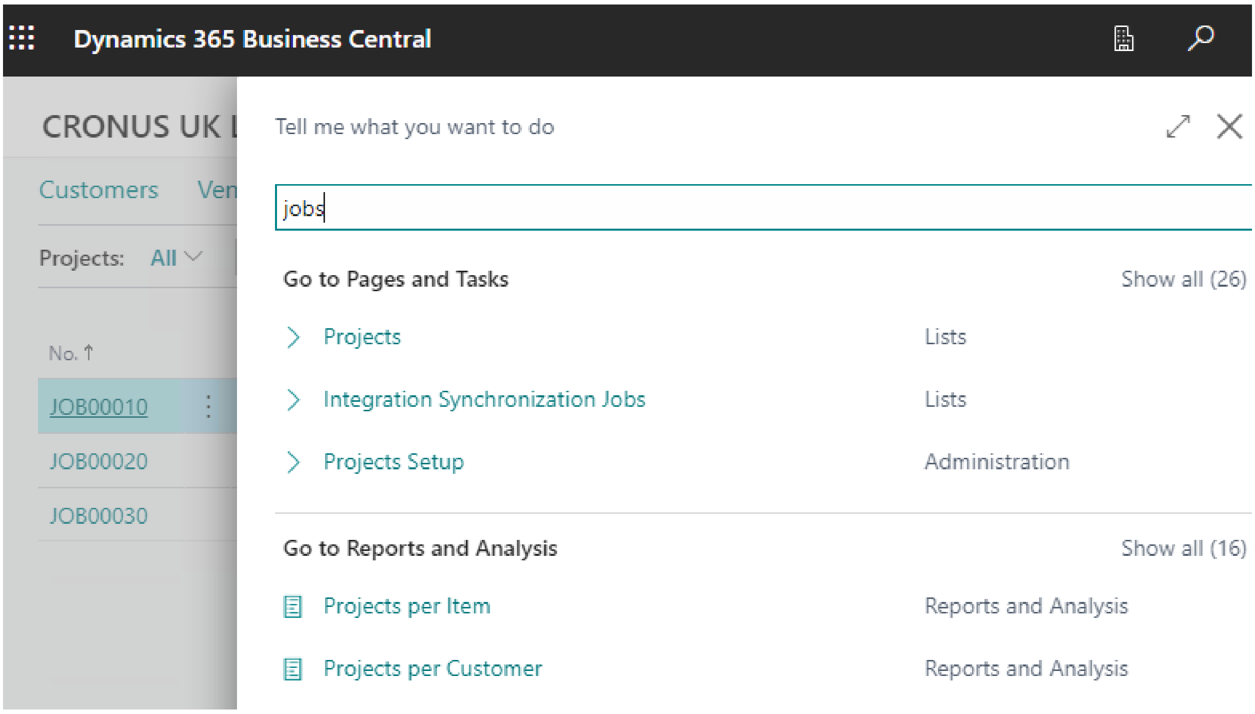
Business value

We're making it easier to work with project accounting by updating the terminology we use for its features in the product and documentation. Specifically, we're renaming things that were called “jobs” to “projects.” The goal is to improve the user experience, the clarity of the documentation, and the consistency of the terminology across the application.

Feature details

For a long time now, we’ve referred to project accounting features as “jobs,” which has caused confusion in our community because that’s not the term that people who work with project accounting expect. We’re happy to announce that we’re addressing this legacy problem. To clarify the true nature and purpose of the project accounting features for various types of businesses, we’re replacing the term “job” with “project” in the user interface and documentation.

For example, entities such as job tasks, job journals, and job planning lines are now project tasks, project journals, and project planning lines. The renaming won’t break existing integrations and customizations because we’re only updating the captions in the user interface and the terms in our documentation. We aren’t touching the names of the underlying table and field objects.



Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

View incoming documents in archived quotes and orders

Article • 03/06/2024

ⓘ Important

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Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

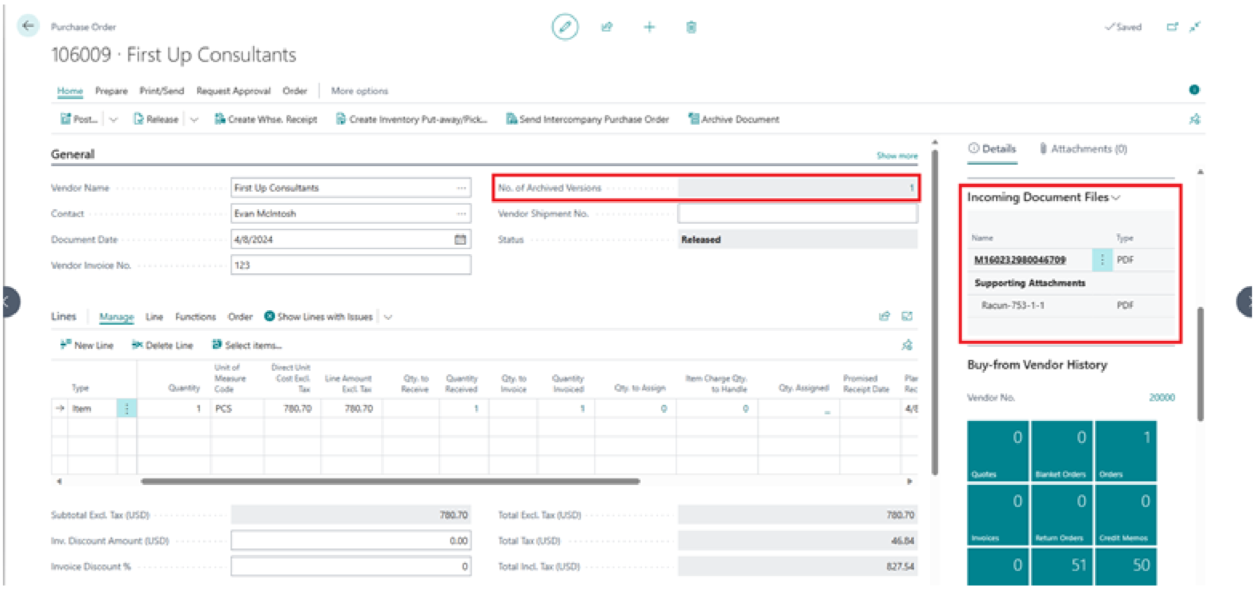
Business value

The ability to view incoming documents added to sales and purchase quotes and orders, even after they are archived, enhances your document management efficiency, ensures seamless access to critical information, supports informed decisions, and reduces administrative overhead.

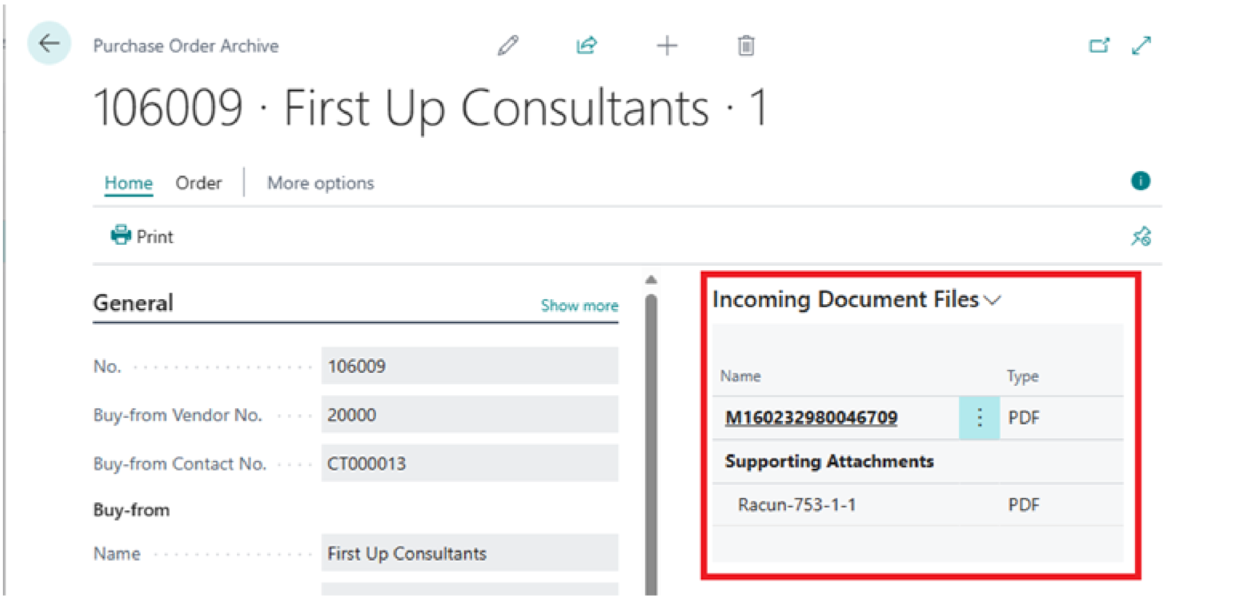
Feature details

After you archive purchase and sales quotes and orders, either manually or automatically, the archived version of those documents contains the incoming document you attached before you archived them.

For example, let's say you attached an incoming document to a purchase order, and then fully received and invoiced the order.



When you select the number in the **No. of Archived Versions** field to open the **Purchase List Archive** page and view the archived versions of a purchase order, the **Incoming Document** FactBox contains attachments that were attached to the original document.



ⓘ Note

The **Incoming Documents** FactBox is hidden by default, but you can personalize pages to show it.

ⓘ Note

We'd like to thank our community for making this valuable contribution through our BusinessCentralApps open-source repo on GitHub.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Copilot and AI innovation

Article • 01/25/2024

ⓘ Important

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

According to our recent survey on business trends, nearly 9 out of 10 workers hope to use AI to reduce repetitive tasks in their jobs. But until recently, AI has been a commodity that few SMBs could truly invest in.

Microsoft Dynamics 365 Copilot enables professionals to perform their day-to-day work with the assistance of cutting-edge AI by their side. With Copilot in Business Central, our customers empower their workers with intuitive AI tools to get more done with less effort, without needing to become data scientists.

This wave expands on our use of Copilot capabilities, in order to boost productivity for a broader set of SMB roles.

Feedback

Was this page helpful? Yes No

Learn more about fields with Copilot

Article • 01/25/2024

ⓘ Important

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Expand table

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

Business value

Learning how to use Business Central has never been easier. Getting more information about a given field is now just one click away. Copilot enables you to discover valuable field-specific information from Microsoft Learn without having to search for it. By bridging the gap between Business Central and our extensive Learn content, we're making it easier than ever for new customers and partners to learn how to use Business Central. Copilot is the AI-powered assistant for work that boosts creativity and improves productivity for Business Central users.

Feature details

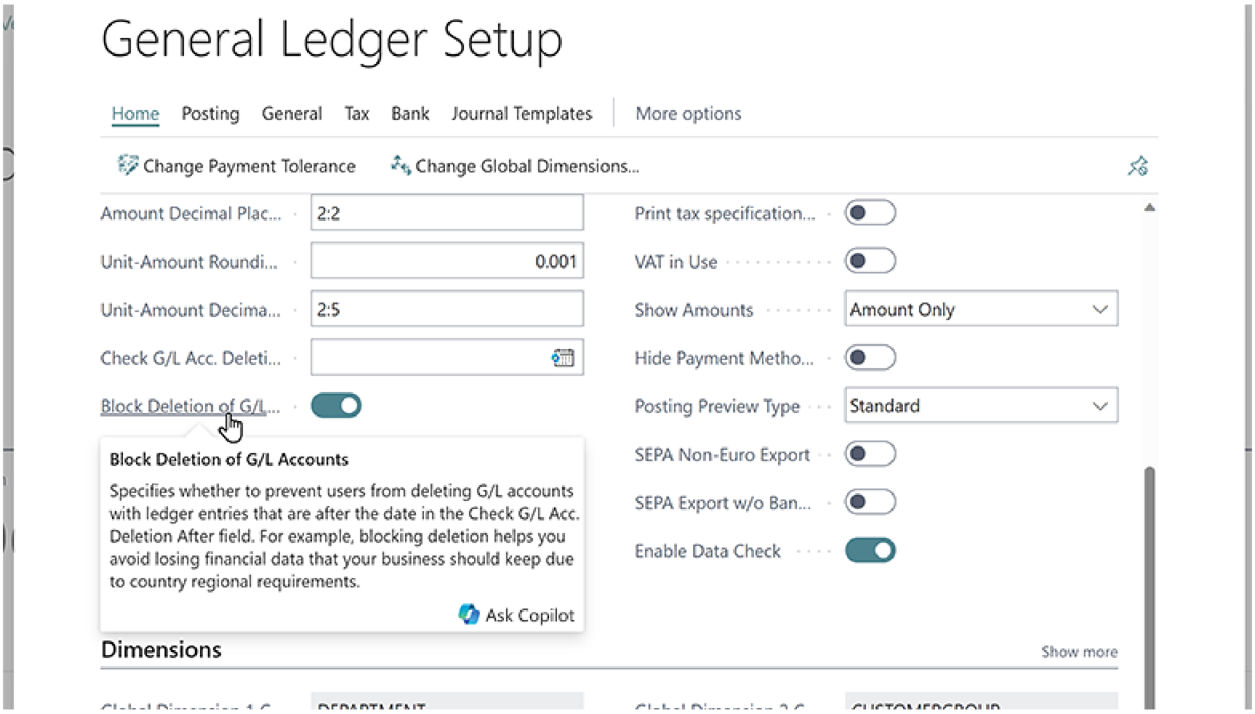
The introduction of the Copilot-powered chat (see link here) feature in Business Central has changed the game for how people learn and interact with the product. Copilot explains and guides people to learning about Business Central concepts and how to accomplish tasks, based on Business Central's extensive online documentation. This significantly reduces the time it takes to get unblocked or ramp up your Business Central knowledge.

This Copilot experience can be initiated by asking a question in the chat, or by other UI elements that trigger the chat functionality based on an action. One such action is to click a link in a tooltip. Today, the **Learn more** link in a tooltip opens the Help pane which shows page-level help. In this release, the Learn more link is replaced by an **Ask Copilot** link that triggers the Copilot chat pane to open and automatically post in the chat on the user's behalf, asking about the meaning of the field in question. By doing so, field-specific help is only one click away, which makes it much easier to understand the value and impact of fields and settings.

By leveraging Copilot's ability to understand and digest large volumes of text, potentially scattered across several learning articles, you get summaries, key paragraphs, and links to maximize your understanding of the field, which dramatically decreases the amount of time spent searching for information. As a result, the set-up of Business Central and implementations can now be done more rapidly, because learning is just one click away.

For now, triggering the Copilot chat functionality from tooltips only works for fields that are native to Business Central. It doesn't cover fields added by third-party apps.

> ⓘ **Note**
>
> - This feature is available as a production-ready preview for production and sandbox environments in any country localization, with the exception of Canada. Production-ready previews are subject to supplemental terms of use. For more information, see **Supplemental terms of use for Dynamics 365 preview**.
> - Chat is available only in English. Make sure your user language is set to English in My Settings.
> - AI-generated content can be incorrect.



Geographic areas

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

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

Tell us what you think

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Feedback

Was this page helpful? Yes No

Chat with Copilot

Article • 03/06/2024

ⓘ Important

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Expand table

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

Business value

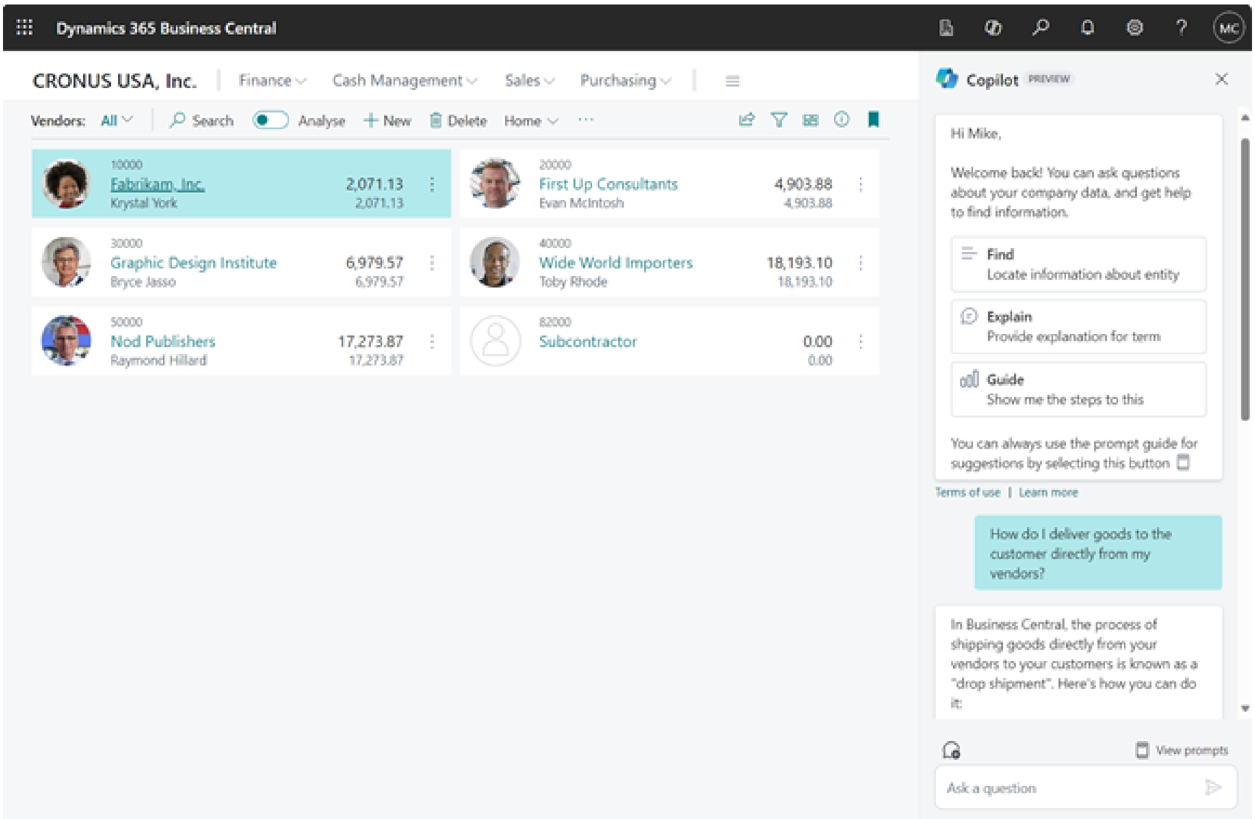
For our customers, much of their workday revolves around chatting with coworkers, customers, and vendors to get insights and solve problems. Now, Dynamics 365 Copilot helps them continue the conversation in Business Central with AI-powered chat alongside their data. Copilot in Business Central transforms how people approach business applications by empowering workers to express themselves using their own language.

Feature details

While in preview, Copilot will be able to assist with the following:

- **Quickly find and go to your data** by expressing what you're looking for in natural language. Locate pages by name or one or more records based on their fields and constraints. For example, tell Copilot: "Show me the latest sales order for Adatum."
- **Explain and guide** to learn about Business Central concepts or how to accomplish tasks, based on Business Central's extensive online documentation. For example, ask Copilot: "How do I save my list filters so that I can use them again later?"

Watch the video



Chat with 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.

> ⓘ Note
>
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> - Chat is available only in English. Make sure your user language is set to English in **My Settings**.
> - AI-generated content may be incorrect.

Try it out

Chat with Copilot starts rolling out with Update 24.0 to US customers, then proceeding to other regions.

In some regions where Azure OpenAI Service is not yet available, administrators must first consent to business data moving across geographic boundaries from the **Copilot &**

AI capabilities page.

Copilot is available exclusively for Business Central online.

To experience this feature, sign in to your Business Central environment and choose the new *Copilot* icon in the app bar.

Tell us what you think

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at aka.ms/bcIdeas, or join the discussion on the Dynamics 365 Business Central Development Yammer network to help us shape the future of AI in Business Central.

Geographic areas

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- Europe
- Asia Pacific
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- Korea

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Feedback

Was this page helpful? Yes No

Create product information faster with Copilot

Article • 01/25/2024

ⓘ Important

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Expand table

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

Business value

In a business landscape that changes fast, companies often need to evolve the portfolio of products they sell. Whether it's a handful of new products, modifications to existing products, or entire new product lines and categories, it's often time consuming to create and manage product (item) information. Copilot can significantly reduce this effort and accelerate the time to market for new products to meet customer demand. This means more time for you to focus on what matters most, your business. Copilot is the AI-powered assistant for work that boosts creativity and improves productivity for Business Central users.

Feature details

Because product (item) information in Business Central is spread out across several tables, creating and managing this information can be a time-consuming task. The effort involves looking up information based on existing items, pasting values, and ensuring the new product is ready to transact. Creating variants, dimensions, units of measure, and other item-related information also takes time that delays market readiness for new products.

Copilot can help you create item-related information based on similar items. To begin with, Copilot can suggest the following item-related information:

- Variants
- Units of Measure
- Substitutions
- Dimensions

When you manage a product and work with the pages that manage this information, Copilot offers assistance by suggesting the data. Powered by AI, Copilot finds similar products (items) and suggests meaningful data for the related tables.

Not only does this assistance reduce the time it takes to create a product, but it also ensures that your products are ready to transact faster than ever before.

> ⓘ **Note**
>
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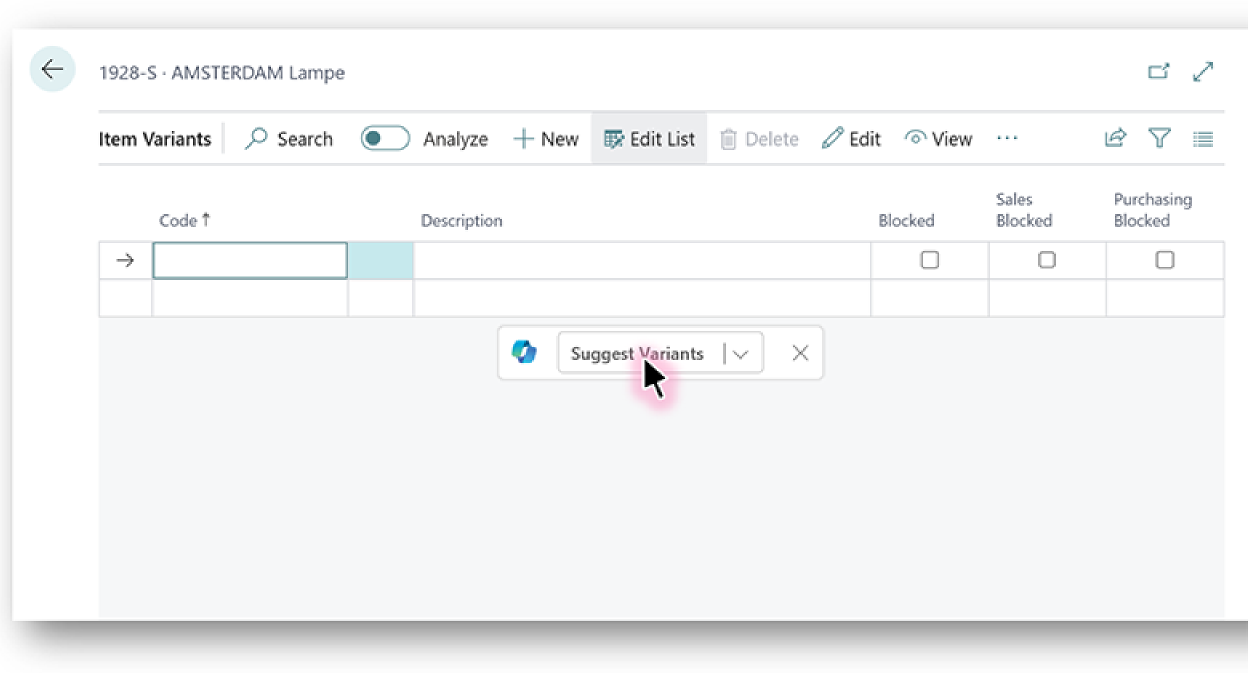

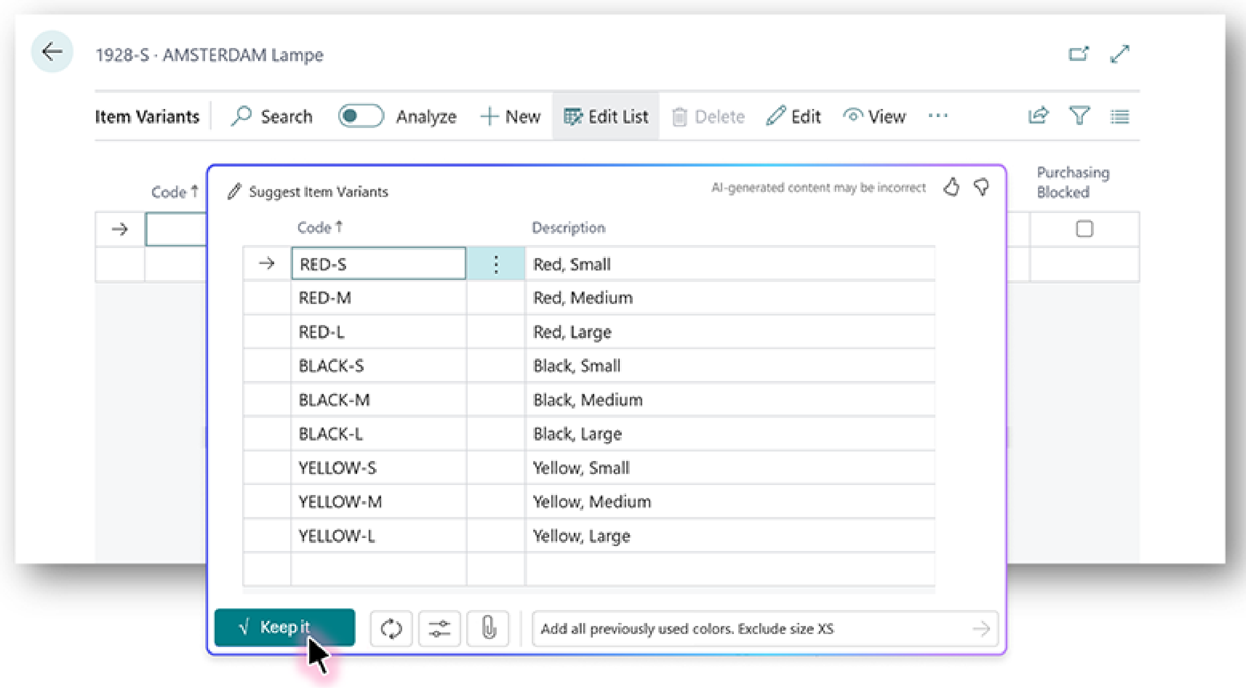

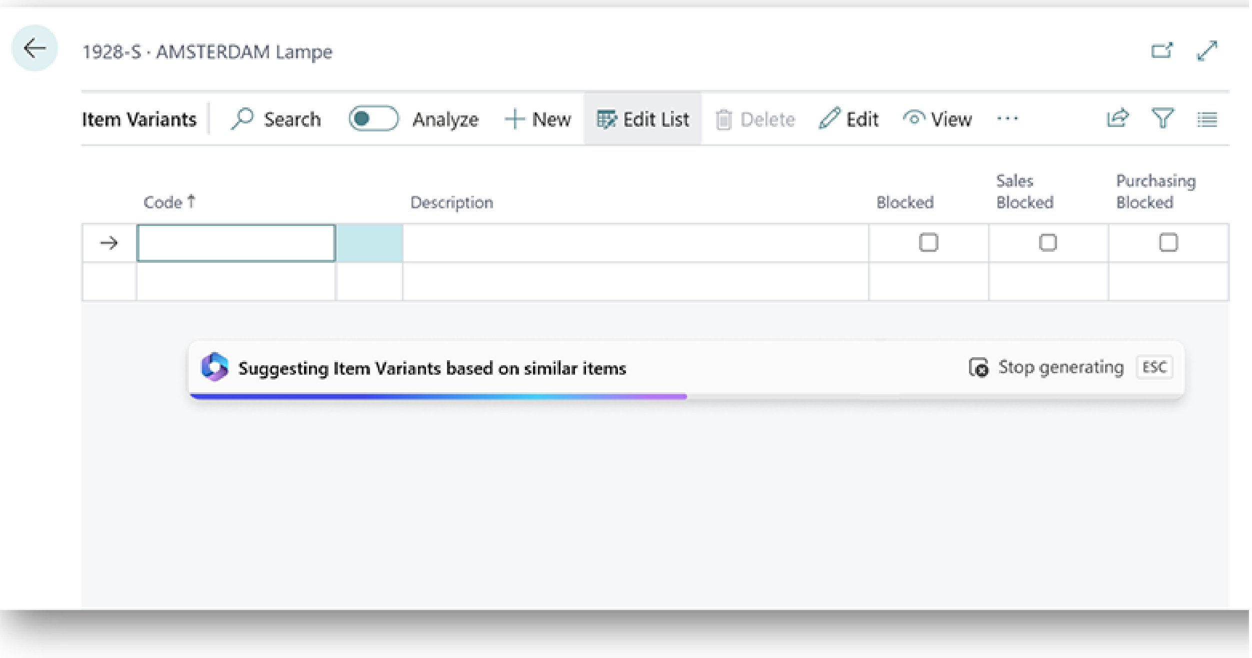

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Tell us what you think

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Feedback

Was this page helpful? Yes No

Create sales lines easily with Copilot

Article • 01/25/2024

ⓘ Important

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Expand table

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

Business value

The introduction of Copilot in Business Central adds a significant enhancement to the sales document processes. It expedites the creation of sales documents and minimizes time spent on repetitive tasks and lookups. With its ability to accept various input methods, including free text, files, or prebuilt prompts, Copilot understands the input and can use it to create sales lines. This Copilot assistance drives operational efficiency in creating and managing sales documents and contributes to potential revenue growth by getting sales documents into the hands of the customers faster. Copilot is the AI-powered assistant for work that boosts creativity and improves productivity for Business Central users.

Feature details

In this Business Central release, Copilot can suggest and assist with creating sales lines on sales documents like **Sales Quote**, **Sales Order**, and **Sales Invoice** based on structured input or natural language. This drastically relieves the user of manual input and drives operational efficiency.

Versatile input methods: Copilot can accept various input methods, including free text, files, or prebuilt input prompt suggestions. This flexibility allows users to interact with the system in a way that is most convenient for them, further enhancing efficiency.

Intelligent processing: Leveraging advanced AI capabilities, Copilot understands the input provided and uses it to suggest sales lines. This intelligent processing eliminates the need for manual data entry, reducing the likelihood of errors, and saves time. Additionally, Copilot can suggest sales lines based on sales recency and frequency of the given customer of the sales document.

> **Note**
>
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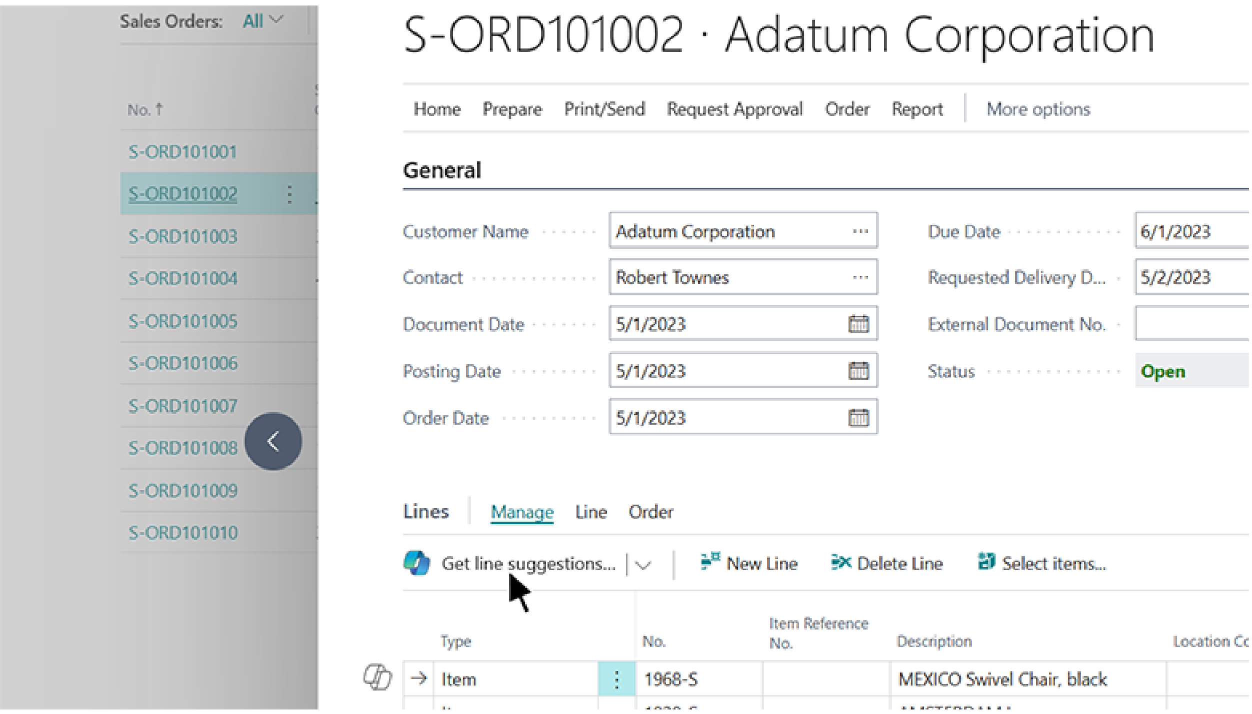
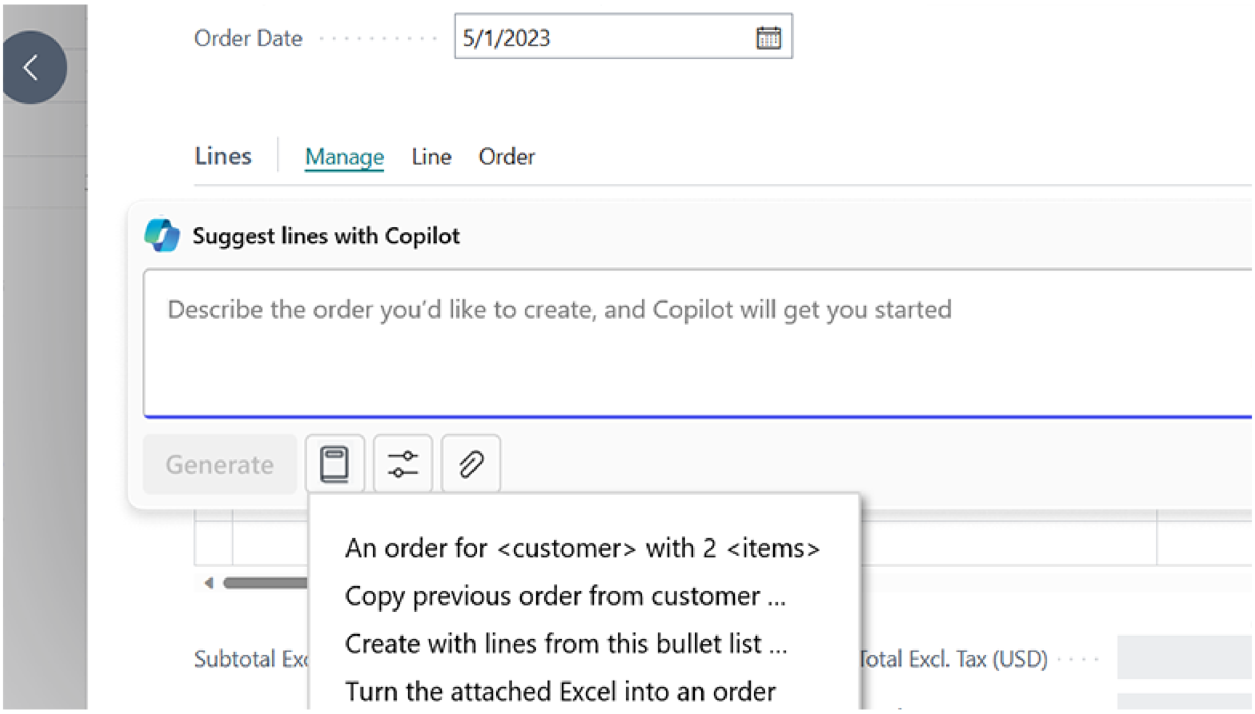
> - AI-generated content may be incorrect.





Geographic areas

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

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

Tell us what you think

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Feedback

Was this page helpful? Yes No

Extend Copilot using richer development tools

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Developer tools for Copilot in Business Central empower partners to bring generative AI experiences to their extensions.

Feature details

The developer tools for Copilot in Business Central include signature UI elements, an AI module for connecting to Azure OpenAI Service with your own service key, guides, sample, and telemetry. For more information about the toolkit, see Easily integrate generative AI with your AL solutions.

With 2024 release wave 1, developers can take advantage of the following opportunities in their extensions:

Enhancements to the prompt dialog

- New Copilot-branded action icons are contextually displayed to draw attention to your Copilot capabilities and launch your prompt dialogs.
- Placeholder text displayed within multiline input text fields can be used to provide concise prompt instructions and help users get started.
- Add one or more prompt guides that act as prompt templates to help users understand the breadth of prompts that your prompt dialog accepts.

- Turn the prompt dialog into a drop target, so that users can easily drag and drop files as part of prompt input.

Enhancements to AI module

- Support for calling AI functions and defining function hierarchies.
- When registering your AI capabilities, provide information about supported languages for customer administrators to easily identify.
- More accurate token counts when AI-powered features use Azure Open AI GPT models.

Coming later during the wave

- The ability for users to refine generative output by prompting directly on the prompt dialog content output screen.

Get started with developer tools

- Overview for developers
- AI transparency note

Tell us what you think

We're excited to have you with us on our Copilot journey.

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at aka.ms/bcIdeas, or join the discussion on the Dynamics 365 Business Central Development Viva Engage network (formerly Yammer) to help us shape the future of AI in Business Central.

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Feedback

Was this page helpful? Yes No

Get to insights faster with Copilot-generated analysis tabs

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Copilot is the AI-powered assistant for work that boosts creativity and improves productivity for Business Central users.

Copilot can help reduce the time it takes to identify trends and anomalies in your business data by enabling you to express your analysis as a simple sentence, and without ever leaving Business Central.

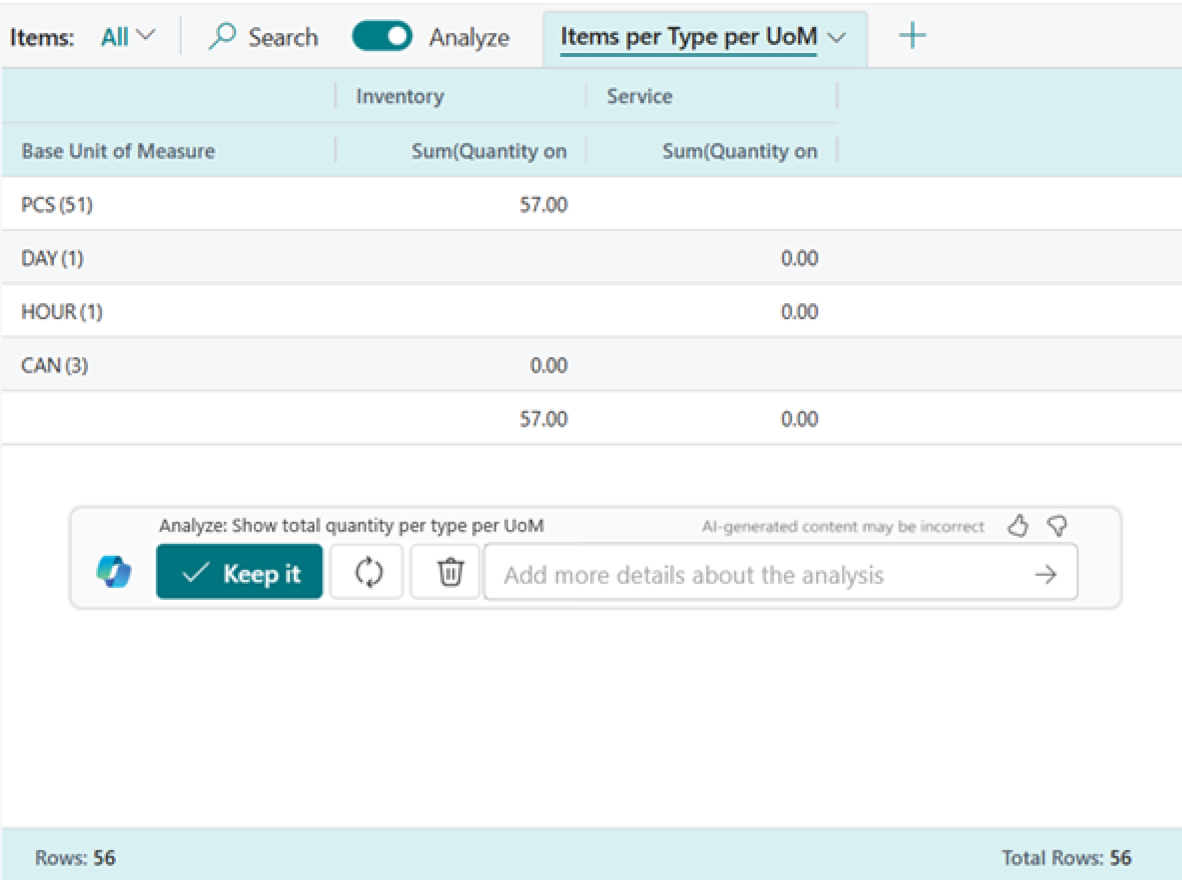
By describing how you want to structure your data analysis, such as “show me vendors by location sorted by amount of purchases,” you can quickly get to insights instead of spending time on the clicks and keystrokes needed to construct analysis views. This feature can help you make informed decisions and take action based on the insights you gain from your data. For example, you can use this feature to identify which vendors are supplying each of your warehouses, and then take steps to optimize your supply chain or negotiate better deals with your vendors.

Feature details

There are several ways that Copilot can speed up your analyses:

- **Create**: Starting from any list in Business Central, put Copilot to work by providing keywords or a description, indicating the columns, groups, pivots, filters or sorting

that you want to use to present fields from the table. Copilot uses AI to understand your desired layout, and helps you refine and build upon the generated analysis when you provide more keywords. Copilot also suggests a name for your new analysis tab.
- **Update**: Quickly adjust an existing analysis tab by expressing your desired changes in natural language.
- **Explain**: Copilot summarizes the information presented in the analysis tab as a concise sentence—a useful reminder or quick overview whenever your coworkers share analyses with you.



This feature can be accessed from the specific list page that you want to analyze. Copilot can work with most fields that are already present on the list page and corresponding table, including summing up totals, but cannot create new fields or correlate data across tables.

ⓘ Note

- This feature is available as a production-ready preview for production and sandbox environments in any country localization, with the exception of Canada. Production-ready previews are subject to supplemental terms of use. For more information, see **Supplemental terms of use for Dynamics 365 preview**.

- While in preview, this feature is available in English only. When using other languages, users must change their language from **My Settings** to experience this feature.
- AI-generated content may be incorrect.

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Geographic areas

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

- Germany
- Norway
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- South Africa
- Switzerland
- United Arab Emirates
- United States
- Europe
- Asia Pacific
- United Kingdom
- Australia
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Feedback

Was this page helpful? Yes No

Map e-documents to purchase order lines with Copilot

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

As procurement processes become more digital, the e-documents feature in Business Central plays a key role in automating the vendor invoice reception and processing. Copilot can assist in this process by improving the mapping and matching of vendor invoices to purchase orders. This reduces time-consuming tasks that would normally include extensive search, lookup, and data entry. The benefit is compounded by the fact that vendor invoices often don't relate exactly with purchase orders, in which case Copilot is better positioned to identify the corresponding purchase orders. Enhanced matching capabilities particularly benefit small and midsized organizations that need efficient document tracking for purchase order lines. Copilot is the AI-powered assistant for work that boosts creativity and improves productivity for Business Central users.

Feature details

In the initial release of the **e-document** app, we introduced fundamental scenarios for e-documents for the entire sales process. However, there's a need for enhancements and automation in handling the received documents, especially in the context of purchase processes. Copilot refines how you manage e-documents in the purchase process, particularly with respect to purchase orders. The e-documents framework lets you specify the type of purchase document to create for each vendor when you receive e-invoices from them. Previously, the only option was to create a purchase invoice, either as a document or a general ledger journal.

You can now update an existing purchase order in Business Central with the information received in the e-invoice.

Identify purchase orders

First, you can identify the purchase orders that you can automatically match.

Map lines

New mapping functionality lets you automatically match on e-invoice lines with purchase order lines. Copilot also provides additional matching intelligence to improve the matching.

After they're matched and mapped, Business Central updates the matched purchase order with the relevant receipt information to ensure the right quantities are received on the order lines.

Geographic areas

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

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

Was this page helpful? Yes No

Introduce Power Automate Copilot integration with Business Central

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Copilot is the AI-powered work assistant that boosts creativity and improves productivity for small and medium-sized organizations.

Building Power Automate flows without predefined templates can be a mundane and complicated process. With Copilot in Power Automate, this process is much smoother because flows can be built based on just the natural language input from the user.

Feature details

This feature integrates Copilot in Power Automate with Business Central, so that you can start creating automation flows based on natural language. When such flows are opened in Power Automate for further refinement, you can take advantage of the Copilot experience in Power Automate.

Copilot in Power Automate allows open-ended and conversational experiences while authoring flows that use your Business Central data. You can ask questions and get assistance to improve and change those flows. Copilot stays with you in your flow and helps you build, set up, and run an automation on your behalf through a comfortable chat experience. Copilot takes your input and provides either documentation, links, or answers in the Copilot chat pane. But most important, it makes changes to the structure of the flow based on your natural language description.

This feature helps you streamline business processes and improve productivity by shortening the path to automation.

> **Note**
>
> - This feature is available as a production-ready preview for production and sandbox environments in any country localization, with the exception of Canada. Production-ready previews are subject to supplemental terms of use. For more information, see **Supplemental terms of use for Dynamics 365 preview**.
> - This feature needs to be enabled in **Feature Management**.
> - While in preview, this feature is available in English only. When using other languages, users must change their language from **My Settings** to experience this feature.
> - AI-generated content may be incorrect.

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Geographic areas

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

- Germany
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- Europe
- Asia Pacific
- United Kingdom
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Feedback

Was this page helpful? Yes No

Country and regional

Article • 01/25/2024

ⓘ Important

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

Business Central continues to become available to businesses in more countries and regions. This expansion happens largely through partner-led localizations. Our partners create and maintain apps for specific countries and regions, and publish their apps on AppSource. In combination with built-in language offerings, Business Central is available to serve customers in more than 155 countries and regions worldwide. Additionally, in the countries where Microsoft is responsible for the localization, we provide updates for all regulatory features.

Feedback

Was this page helpful? Yes No

Automate IRS 1099 Form submission in US

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

The 1099 form is a set of documents mandated by the Internal Revenue Service (IRS) in the United States. The upcoming update streamlines the process with automated delivery of 1099 forms through an integration with the IRS. This automation also applies to automated delivery to vendors.

Feature details

Business Central's updated support for 1099 forms streamlines the process by automatically generating new 1099 documents when calculations are performed. Documents with the IRS 1099 calculation will have headers and lines, where each document also maintains an archive. You can make the relevant adjustments and modify the status of the document, such as **Open**, **Released**, **Printed**, **Sent**, **Reported**, **Approved**, or **Rejected**. Some statuses can be changed manually, while others are set based on specific actions, including **Printed** or **Sent**. Business Central also adds a new setup table with boxes and other detail configurations for specific periods. Each organization has the flexibility to update new values without overwriting setup information from previous years.

After a document is created and the manual adjustments are complete, you can initiate the automatic delivery of form substitutes by email, if vendors are configured to receive

1099 forms through email channels. If email isn't feasible, you can manually print substitutes (no usage of original forms by IRS) and send them. It's important to know that 1099 copies will be based on templates that you can change the structure of even before Microsoft provides the update. Microsoft won't change reports on a yearly basis, but will update templates with new information, making full support much better and easier. As 1099 will use documents and the system will keep them archived, you can set the **Retention Policy** to remove outdated documents.

You'll be able to submit the forms through the integration with the IRIS system that tracks status updates from the IRS. If the form is successfully received, the document status changes to **Approved**. If the form isn't successfully received or some issues exist, it gets the status **Rejected** and is updated with the rejection information from the IRIS system.

This updated capability is provided as an extension that replaces the existing capability. It adds a more user-friendly experience by improving the workflow efficiency and delivering additional value to users.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your ideas

Thank you for submitting these ideas:

- 1099's on blank paper
- 1099 update as an extension instead of incorporating in version upgrades
- 1099 Print to Blank paper
- 1099 Forms - print without using IRS preprinted forms
- Adjust 1099 Annual Cumulative Amounts by Vendor
- Add ability to have DBA name and legal name so IRS 1099 vendor reports are legal.
- 1099 Improvements

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

Feedback

Was this page helpful? Yes No

Enable additional countries and regions

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Additional countries will be enabled to leverage the benefits of Business Central's cloud-based business management software solution.

Feature details

We're expanding Business Central to more countries and regions through partner-led localizations. Our partners create the relevant localization apps and publish them to AppSource. In combination with the built-in language offerings, we are making Business Central online available to serve customers in 170-plus countries and regions worldwide.

Tell us what you think

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Feedback

Was this page helpful? Yes No

Development

Article • 01/25/2024

ⓘ Important

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

To empower AL developers and increase their productivity, we've laid the foundation for introducing namespace support in the platform and application. Namespace support makes it easier to structure apps, create better object names, and avoid identifier clashes. As apps mature, the need to refactor is inevitable, so we've added the ability to move ownership of a table and its data between extensions. Additionally, developers can hide specific variable data so that other parties can't access it during debugging, which protects internal data.

When it comes to data analysis and reporting, developers have more control. For example, you can turn off Analysis Mode on pages and specify how to embed content from Power BI.

Consultants and developers can easily open Visual Studio Code for a production or sandbox environment to investigate and understand objects across installed extensions, view code for owned extensions, and perform troubleshooting—all without having to set up Visual Studio Code manually. Similarly, we've improved profiling from the client and Visual Studio Code so it's easier to find database-related performance issues.

AppSource publishers can sell through CSPs, and better handling for AppSource runtime packages gives seamless development and troubleshooting across app dependencies for publishers and resellers.

Feedback

Was this page helpful? Yes No

Debug the System application

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Have you missed being able to debug into the System application? Many have, and with the recent introduction of the SecureText data type, we will enable debugging of the System application, benefiting both development and troubleshooting of applications, as well as Open Source contributions to the System application itself.

Feature details

With this, you'll be able to step into the System application code base when debugging to understand code flow and inspect variables, unless these are protected by the new SecureText type.

Having access to debug the System application helps both during development and troubleshooting of AppSource and customer-specific applications, as well as with contributing to the System application itself via https://github.com/microsoft/ALAppExtensions.

Feedback

Was this page helpful? Yes No

Define extension objects in same app as their base object

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and 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 2024	Apr 2024

Business value

By allowing the segmentation of objects into base functionality and extended functionality, it becomes possible to define extensions to objects in the same app as the object itself. This provides an option to group related functionality in smaller contributions and makes it easier to later move these to a separate app as part of refactoring.

Feature details

With this new feature, it's possible to define both the base object and extension objects in the same app. For instance, a table and a table extension can be defined within the same app.

In metadata, extension objects remain separate, as before, so each extension object still requires its own object ID in the used range. The key change is that they can now reside in the same extension/app as the base object. In the case of tables, table extensions that reside in the same app as the base table will be merged into that table in the database schema—resulting in no companion table extension.

This feature is applicable to all extensible object types; for example, page, table, report, enum, and permission set objects.

The capability is enabled by default when targeting runtime version 13.0.

Feedback

Was this page helpful? Yes No

Handle multiple file uploads and file drop zones

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

Business value

The ability for AL developers to handle multiple file uploads and designate different page parts as file drop zones in Business Central provides greater flexibility and usability. This enhancement benefits developers working on applications or customizations that require multifile upload functionality and adds value to organizations by improving productivity and the user experience.

Feature details

Developers can handle multiple file uploads and designate different page parts as file drop zones.

This improvement empowers AL developers to create more flexible and user-friendly interfaces within Business Central. Designating specific page parts as file drop zones lets people upload multiple files at the same time, which improves efficiency.

This feature is particularly valuable for developers working on applications or customizations that require users to upload multiple files simultaneously. By allowing users to drag and drop files onto designated page parts, developers can streamline the file upload process and simplify data entry.

The following example designates a group and field as file drop zones by referencing the ProductImageUpload action in the FileUploadAction property. The FileUploadAction action's AllowMultipleFiles property lets developers specify whether an action can handle a single file, or multiple files. The AllowedFileExtensions property allows developers to specify the file types that people can drag to a drop zone. After you drag one or more files to a group or field on a HappyDragAndDrop page, the OnAction trigger in the FileUploadAction property is called with the list of files.

AL

```
> page 50102 HappyDragAnddropPage
> {
>     PageType = Card;
>     SourceTable = item;
>     UsageCategory = Administration;
>
>     layout
>     {
>         area(Content)
>         {
>             group(GroupName)
>             {
>                 FileUploadAction = ProductImageUpload;
>
>                 field(name; 'Name')
>                 {
>                     FileUploadAction = ProductImageUpload;
>                 }
>             }
>         }
>     }
>
>     actions
>     {
>         area(Processing)
>         {
>             fileUploadAction(ProductImageUpload)
>             {
>                 Caption = 'Upload product Image';
>
>                 AllowMultipleFiles = false;
>                 AllowedFileExtensions = '.jpg', '.jpeg', '.png';
>
>                 trigger OnAction(files: List of [FileInfo])
>                 var
>                     currentFile: FileInfo;
>                     stream: InStream;
>                 begin
>                     foreach currentFile in files do begin
>                         currentFile.CreateInStream(stream);
>                         // Code here to handle the file
>                         Message('%1 has a length of %2',
```

```
currentFile.FileName, stream.Length);
>                     end;
>                 end;
>             }
>         }
>     }
> }
```

Tell us what you think

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Feedback

Was this page helpful? Yes No

Remove friction when working with external app dependencies

Article • 01/25/2024

ⓘ Important

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Expand table

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

Business value

For resellers who develop per-tenant extensions for customers, or for publishers who create AppSource apps, it isn't uncommon for them to build on the work by other publishers, and thereby take a dependency on these. However, in order to develop or test, they need access to the AppSource apps they depend on.

Today, this involves a tedious manual process where resellers and publishers with dependencies must contact publishers owning the applications they depend on and ask for symbols to develop against or runtime packages to test with. This is not only required once, but continuously as new versions of the Business Central first-party applications and the publishers' applications versions emerge, making the whole process tedious, time-consuming, and error-prone.

In this version we plan to unblock developing and compiling against external applications in containers and test in online sandboxes.

Feature details

In this release we plan to allow resellers and publishers to download symbols for AppSource applications to use these to develop against on-premises and in containers.

In addition, we also plan to provide GitHub actions to make it easy to provision online sandboxes with the required applications installed to run tests on.

Feedback

Was this page helpful? Yes No

Use AL-controlled barcode scanning for all scenarios

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and 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 2024	Apr 2024

Business value

The barcode scanner in the mobile app increases productivity for warehouse users because they can scan barcodes using the dedicated barcode scanner. This enables new warehouse scenarios in Business Central, and opens new opportunities for partners to create advanced experiences with barcode scanners.

Feature details

The capabilities included in the new Business Central mobile app introduced in the last release weren't fully available for all scenarios in Business Central online.

Now, all scenarios are fully ready and enabled for both Business Central online and on-premises. These scenarios include event-driven barcode scanning using compatible high-end laser scanners on devices running Android OS. To learn more about the scenarios, go to Adding barcode scanning to the mobile app.

The following are additional details about the new capabilities:

- There's a new way to use client extensibilities via control add-ins. Developers must declare AL *usercontrol* on their pages using the APIs provided for the control add-ins (see the GitHub link below).

- It's important to note that compared to the existing control add-ins, the new ones don't have a UI, which means that there isn't an *iFrame* embedded on the page or any visual indicator. Additionally, no scripting or styling functionality can be provided either.
- Update your code to uptake this functionality and use the control add-ins.
- Mobile device is using Business Central mobile app version 4.0 or later. To download the latest version, go to https://aka.ms/bcmobileapp .
- Dedicated barcode scanners must be running Android 11 or later.

For more guidance, go to GitHub repository with the Camera Barcode Scanner Provider .

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas .

Feedback

Was this page helpful? Yes No

Use in-client page scripting tool for acceptance testing

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected 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 2024	Apr 2024

Business value

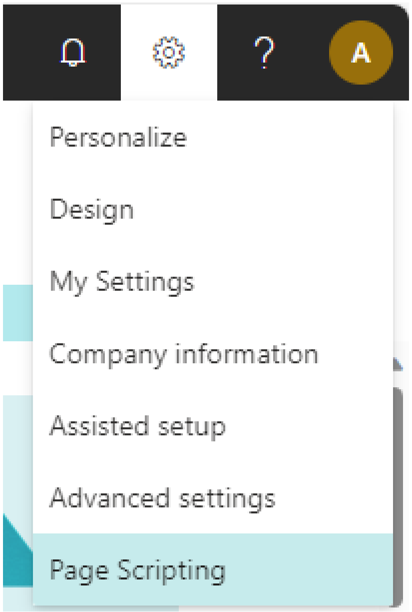
With the page scripting tool, customers and consultants can easily record and replay user acceptance tests directly in the Business Central web client.

Feature details

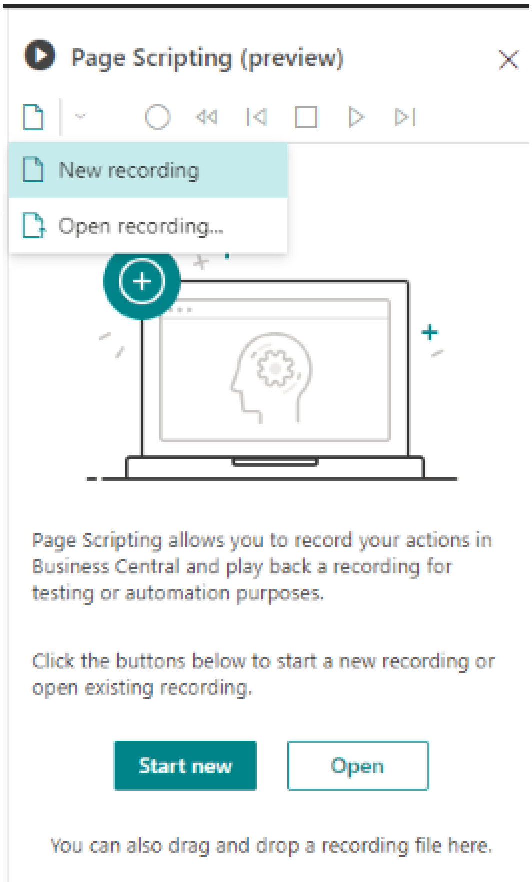
The page scripting tool in the Business Central web client allows you to record your actions, such as opening pages or entering data, and replay them. You can save the recording and share it with others for future playback. An important use case for the tool is capturing and executing user acceptance tests, which is also the initial focus for this release wave.

Open the tool

In the web client, the page scripting tool is accessed from the **Settings** menu (cog wheel icon). The **Page Scripting** action, however, only appears if you have record or playback permission to use the tool.



The **Page Scripting** pane opens on the right, where you're asked whether to start a new recording or to open an existing one to inspect or replay it.



Record

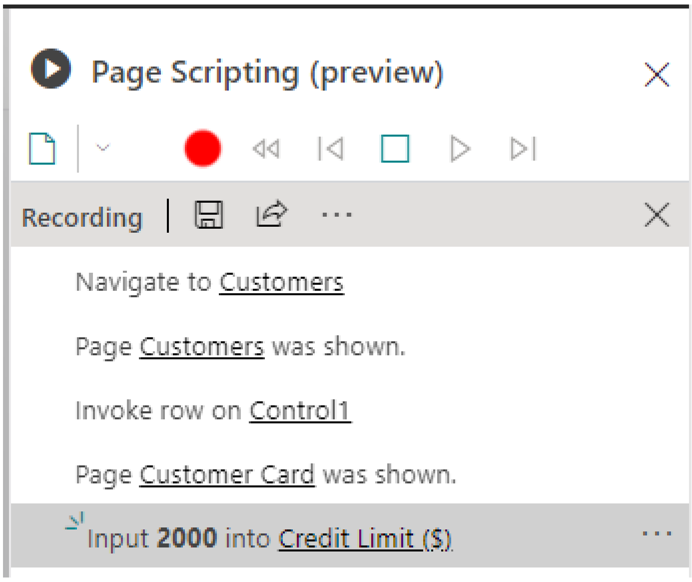
To start recording your actions (in other words, start a user acceptance test), select **Start new** or select **New** > **New recording** in the toolbar at the top of the pane. Once recording starts, as indicated by a solid red circle in the toolbar, perform the actions you want to capture.

The page scripting tool will capture your on-screen interactions and the resulting actions, such as pages opening or closing, selections, data entry, and so on.

During recording, it's possible to delete the last captured step.

To stop the recording, use the **Stop** button in the toolbar. To resume to record more steps, select the round **Start recording** button in the toolbar.

The following figure illustrates some captured steps and toolbar (while recording).

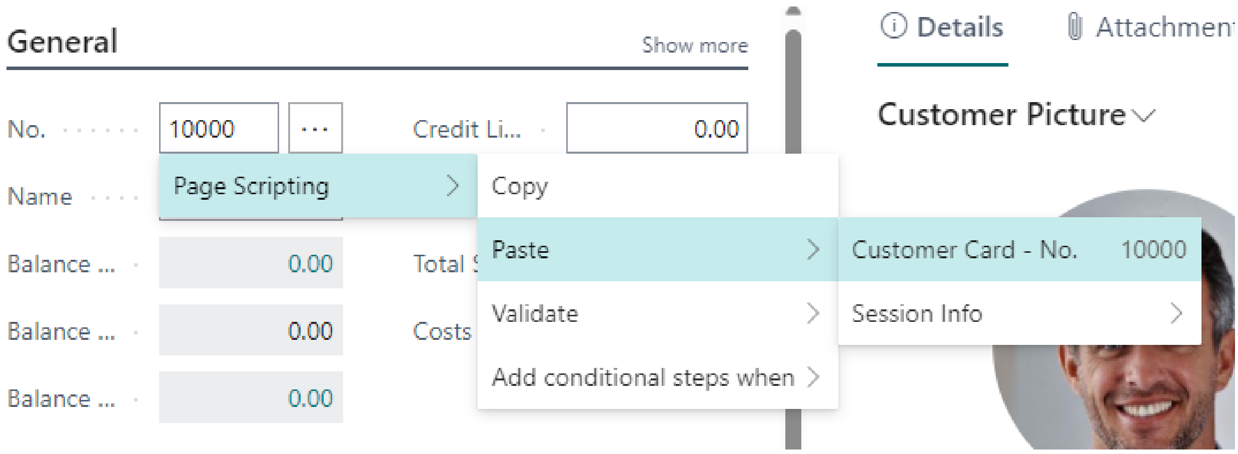


Options for capturing steps

During recording, you can manually insert special steps by right-clicking a page control, like a field, and selecting an appropriate option. These options are explained in the following sections.

Copy to and paste from clipboard

The page scripting tool comes with its own clipboard that lets you copy field values and then, for example, insert them in other fields, use them in expressions, or use them to validate results. To copy and paste during recording, right-click a page control and select **Copy** or **Paste** from the context menu.

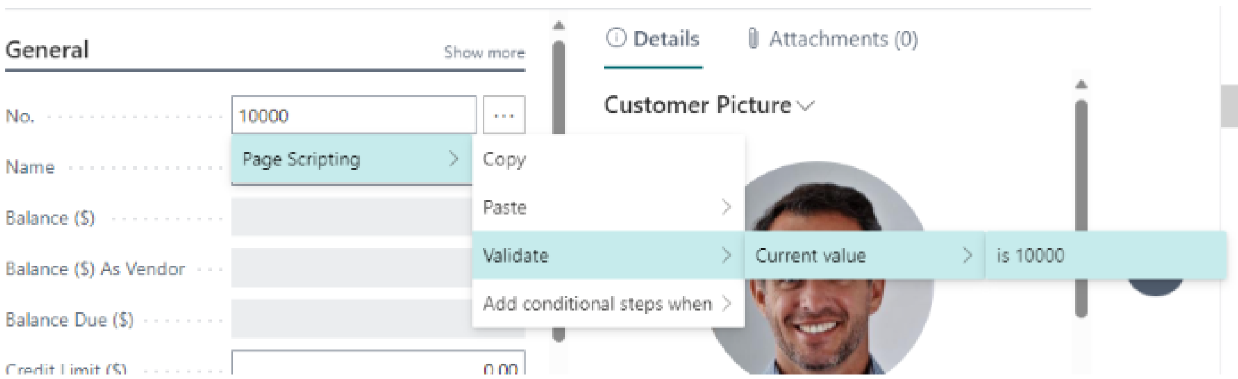


Paste session info

When recording, you have access to session information, such as the user ID. This allows you to, for example, set filters based on the current user. To insert the user ID, right-click a control in the page and select **Paste** > **Session Info** > **User ID**. For an example, see the previous image.

Validate a given outcome

During the recording, you can insert validation steps to check the outcome when playing back the recording. To do this, right-click a control, such as a field or cue, and select **Validate** in the context menu. This inserts a validation step with the current value. If you want to change the value that's validated, you can go to the validate step in the **Page Scripting** step list, select the context menu **...**, and select **Properties**.



Make some steps conditional

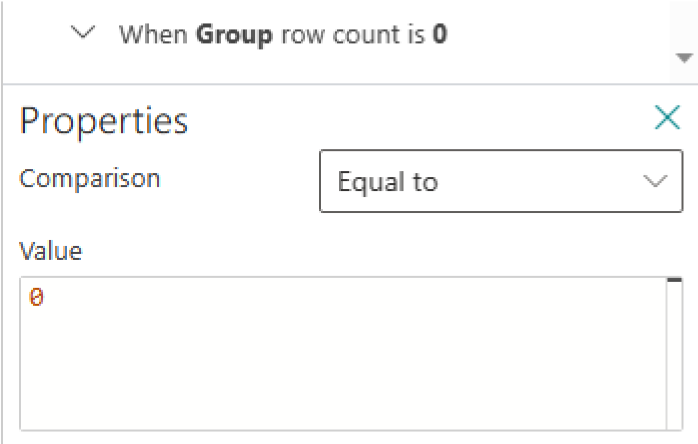
Another option during the recording is to insert a conditional branch step. For example, suppose you only want some steps done during playback if there are no current rows in a list.

To insert a branch of conditional steps, right-click a page control, select **Add conditional steps when**, and then select an option.

After the conditional step has been inserted, you can add more steps that should be performed if the condition is met.

To end the condition branch, select **End scope** in the **Page Scripting** steps list.

The actual condition can be changed by selecting the condition step in the Page Scripting step list, expand the properties, and set the comparison rule and value.

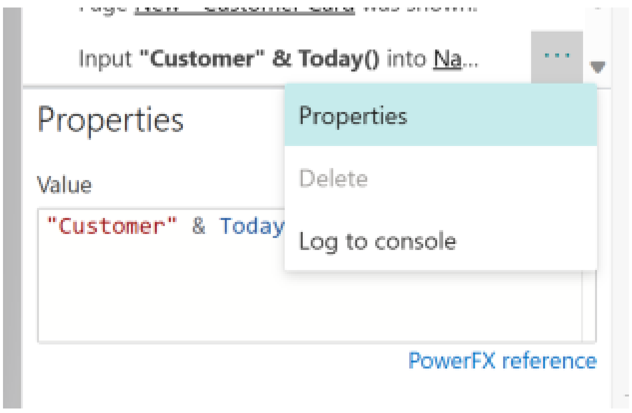


Edit captured steps

During recording, as well as playback, you can edit a captured step in the **Page Scripting** pane using the context menu **...** on the step. The options in the context menu depend on whether you're in the record or playback mode and the kind of step. Some of the options are explained in the following sections.

Properties

Some steps have properties, which include things like conditional steps or validation steps. You can see the properties for a step by selecting the **Properties** option from the context menu on a step.



Using expressions in properties

Values and conditions can use expressions for simple calculations. Power Fx is used as the expression language. There's a link to the Power Fx expression reference documentation in the UI.

Besides the Power Fx functions, three top-level objects are available:

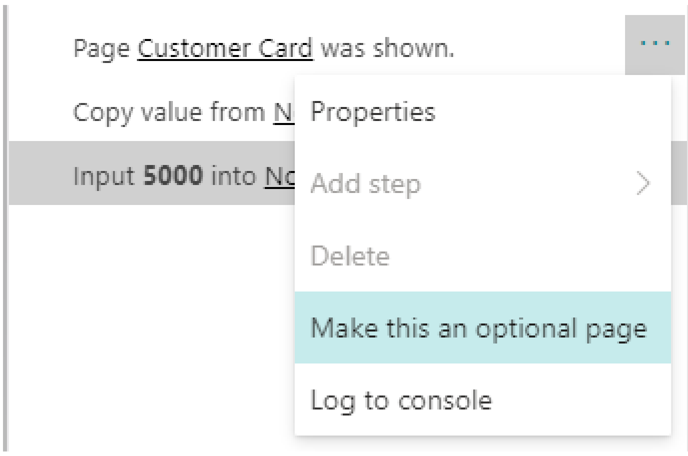
- `Clipboard` for access to the current entries copied in the recording.
- `Parameters` for access to the value of any parameters passed to this recording.
- `SessionInfo` for session information like current user ID.

Here are a couple of examples:

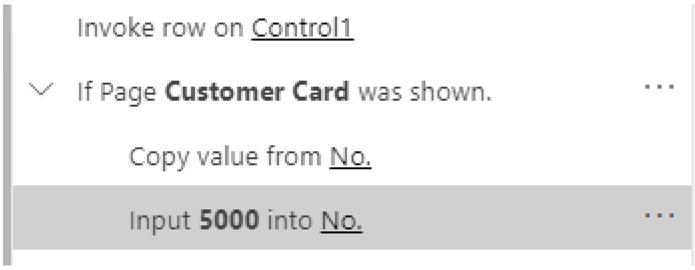
- To validate that a previously copied value is incremented in a validate step, use the expression `"Clipboard.'SO Processor Activities - ReadyToShip' + 1"`
- To generate a "random" name to use in an input step, use the expression `"Customer " & Today()`.

Handle optional pages

Sometimes a page doesn’t always show in a recorded flow because it depends on data or settings. An example is the confirm dialog shown when closing a sales order. To handle this, you can make the page an optional page, which means that the steps under the page will only be run if the page is shown. To make a page optional, go to the **Page Scripting** step list, select the recorded step named **Page X was shown**, select the context menu **...**, and select **Make this an optional page**.



The steps that occur on the page are indented to indicate that they’re optional, depending on page being shown.



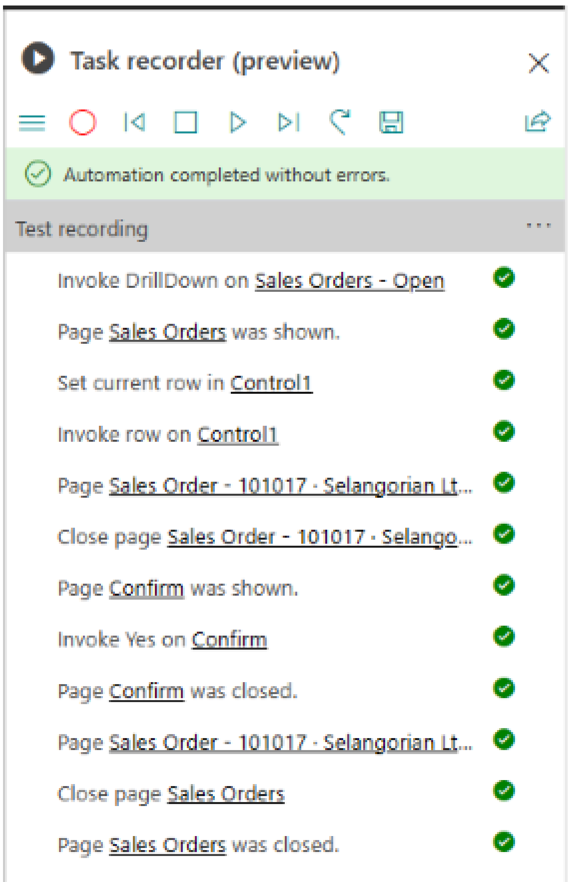
Playback

To play a recording, whether you just captured it or you opened it from a file, select the **Play** button in the toolbar.

During playback, you can do the following actions:

- Go forward or backward a single step by using **Forward** and **Backward** buttons in the toolbar. When stepping backward, changes aren't undone, though. You have to undo changes manually.
- Go back to the beginning of the recording.
- Run the recording as far as a given step. To do this, select the context menu **...** and then select **Run to here**.

As the steps are played back, the tool records whether they completed successfully (green check mark) or failed (red exclamation mark) and provides the result of any steps that validate a result.

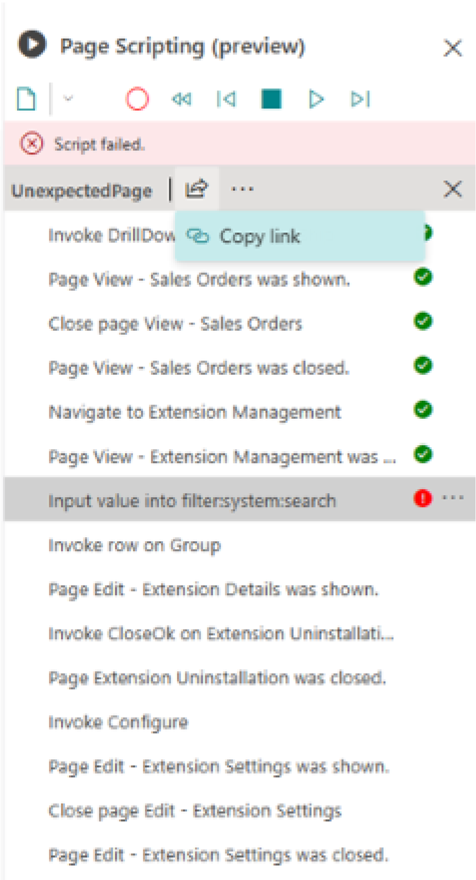


Save a recording

You can save the recording from the toolbar. This creates a YAML file that you can download, share, edit, and reopen for playback.

Share a recording

You can share a recording as a link by selecting **Share** in the toolbar. The link includes the full recording and its playback result. In the following example, the playback has failed halfway through the recording.



Supported capture actions

The page scripting tool is focused on capturing actions coming from executing AL code. The tool isn't a generic HTML automation tool. Therefore, it can't automate elements such as control add-ins (like charts), embedded Power BI or Power Apps, or anything outside of the Business Central web client experience.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Use the OData V4 IN operator in web service queries

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (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 2024	Apr 2024

Business value

Integrators can now use OData IN operator when querying Business Central web services. This can simplify OData queries and therefore make integrations easier to develop.

Feature details

Prior to this release, a developer who wanted to query an OData endpoint—for example, to query an API for a (short) list of Customer numbers—would have to write a filter expression such as `$filter=CustomerNo eq '10000' or CustomerNo eq '20000' or CustomerNo eq '30000'`.

With this release, they can just write `$filter=CustomerNo IN ('10000','20000','30000')` by using the OData IN operator.

Feedback

Was this page helpful? Yes No

Write flexible and performant code with NumberSequences

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (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 2024	Apr 2024

Business value

Improvements to NumberSequences date type streamline the development and execution of code that creates and manages number sequences in the database, resulting in increased efficiency and speed.

Feature details

This release offers the following improvements to the NumberSequences data type:

- New Restart operation

  Prior to this release, a number sequence had to be deleted and recreated to restart it. Now, a new Restart operation simplifies and speeds up this process. The operation has the following syntax:

  AL

  ```
  Restart(name: text; seed: BigInteger; CompanySpecific: bool)
  ```

- New RangeStart operation

A new RangeStart operation allows developers to request multiple values from the number sequence at once, meaning no gaps, and fewer SQL round-trips. The operation has the following syntax:

```AL
  RangeStart : = Range(name: text; count: integer; CompanySpecific: bool);
```

- Improved Next, Current, and Exists operations

  These operations are now 8 to 32 percent faster.

Feedback

Was this page helpful? Yes No

Governance and administration

Article • 01/25/2024

ⓘ Important

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

We're giving Business Central administrators more tools for managing environments, apps, and data migrations. The goal is for administrators to be self-sufficient, able to solve their customer needs, and handle a wide variety of administrative scenarios.

- More granular administrator roles to give more control over the access granted to (delegated) administrators.
- Improved processes for minor update releases.
- The ability to link Business Central and Power Platform environments to set up integrations consistently and to apply Power Platform environment settings to Business Central.
- The ability to cancel Cloud Migration replication runs.

Feedback

Was this page helpful? Yes No

Allow customers to consent to Microsoft Support accessing their data

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Customers can fulfill their data privacy requirements and get support from Microsoft in a way that ensures their explicit consent.

Feature details

In the Power Platform admin center, administrators can create lockbox policies that apply to Power Platform and Dynamics 365 environments so that our customers can review and approve or reject access requests from Microsoft engineers in response to a customer-initiated support ticket, or a problem identified by Microsoft. With 2024 release wave 1, lockbox policies in the Power Platform admin center now apply to Business Central environments as well.

Customers can choose to enable lockbox on their Microsoft Entra tenant to:

- Increase security and privacy of their data in the cloud.
- Have more visibility and control over who accesses their data and for which purposes.
- Comply with regulatory or organizational requirements for data access governance.

Feedback

Was this page helpful? Yes No

Audit Business Central operations in Microsoft Purview

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

This feature provides administrators with a unified and comprehensive view of their organization's operations so they can better monitor and audit events across multiple Microsoft services.

Feature details

In 2024 release wave 1, auditable events occurring in Dynamics 365 Business Central environments are emitted to Microsoft Purview, allowing administrators to monitor and audit events across Business Central and other Microsoft services in a single place.

Tell us what you 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

Control partner access per environment

Article • 03/06/2024

ⓘ Important

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

Business value

Business Central customers with multiple environments are often working with many partners to support each environment. With this feature, customer administrators can now easily and efficiently control partner access to environments. This feature simplifies partner management by allowing administrators to assign partner tenants to each environment.

Feature details

In 2024 release wave 1, we're introducing new environment settings in the Business Central admin center that enable internal administrators to control which environments delegated users and multitenant apps from partner tenants can access and administer. Internal administrators can specify the tenant IDs of partners that should be able to access each environment. Delegated users and multitenant apps accessing or administering the environment must belong to an *allowlisted* tenant. This feature is optional, and if no tenants are allowlisted for an environment, delegated users and multitenant apps will be able to access and administer the environment as they did before. This feature only affects the use of the admin center API by multitenant apps that have been authorized within the admin center.

Thank you for your ideas

Thank you for submitting these ideas:

- Splitting Admin role and User role of Delegated users
- BC Admin Center: restrict BC env. access per Group and/or User

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

Feedback

Was this page helpful? Yes No

Copy companies with Dataverse integration safely

Article • 03/06/2024

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

Business value

Administrators in small or medium-sized companies often wear multiple hats and do many different tasks. It's important that you can efficiently and safely copy companies if you integrate with Dataverse or Dynamics 365 Sales, reducing the risk of data inconsistencies and saving you valuable time. This enhancement streamlines your workflow so you can focus on strategic tasks, driving your business forward.

Feature details

When an administrator copies companies in an environment that has Dataverse or Dynamics 365 Sales integration enabled, Business Central clears the following settings while copying to the target company:

- Dataverse and Dynamics Connection Settings to ensure that integration correctly re-initiates in the target company.
- Integration records to ensure that the target company doesn't point to records that are coupled in the source company.
- Integration synchronization jobs to stop synchronization background jobs.
- Integration synchronization errors to clean synchronization errors, it they exist, because they point to errors in source company and would just be considered noise in the target company.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Encrypt data at-rest with customer-managed encryption key

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

This capability will allow customers to meet their data and privacy policy according to the standard privacy guidelines.

Feature details

With Dynamics 365 Business Central 2024 release wave 1, customers will gain the ability to encrypt their environment database using their own encryption key. This feature, also known as customer-managed key (CMK), provides enhanced data protection and compliance for your business data. With CMK, you can use your own Azure Key Vault key to protect and control access to the key that encrypts your environment database. This gives you more flexibility and control over your encryption keys, such as the ability to rotate, revoke, or restore them.

This feature will be administered in the Power Platform admin center, and will require the Business Central environment to be linked to a Power Platform environment. Enabling CMK on a Power Platform environment linked to a Business Central environment will apply the same CMK policy on the Power Platform and Business Central environments.

Feedback

Was this page helpful? Yes No

Link Business Central environments to Power Platform environments

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Link your Business Central to a Power Platform environment from the admin center to provide a default target environment for integrations and apply Power Platform environment settings to your Business Central environment. This simplifies the integration process and reduces the need to specify the target environment for each integration.

Feature details

Business Central integrates with many different Power Platform and Dynamics 365 products in various ways. In 2024 release wave 1, Business Central administrators are able to link a Business Central environment to a Power Platform environment from the Business Central admin center. This capability provides the following benefits:

- The Business Central environment will inherit settings that are enabled on the linked Power Platform environment in the Power Platform admin center, such as customer-managed encryption keys.
- The linked Power Platform environment will provide a default target environment for any integrations set up between Business Central and other Dynamics 365 and Power Platform products, such as Dynamics 365 Sales and Power Automate.

Business Central environments can only be linked to Power Platform environments that are in the same Azure geography and are of the same type (production or sandbox). Linking environments isn't a permanent operation, meaning it's possible to unlink and relink environments. Environment lifecycle operations, such as updating or deleting an environment, on each of the linked environments is administered separately.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Use linked environment in Dataverse integration

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Businesses want to keep their data safe and secure within their privacy boundary, and especially when their business management application integrates with other apps. By linking Business Central and Dataverse environments, you'll not only achieve those considerations, but also give your administrators an easier way to create and maintain your integrations with other Dynamics 365 apps.

Feature details

In the Business Central admin center, you can link your Business Central environment to your Dataverse environment. Business Central can use the information from the link to make it easier, and more secure, to integrate with other Dynamics 365 apps, such as Sales and Field Service. For example, the linked Dataverse environment URL is available by default on the Dataverse Connection Setup page and when you run the Dataverse Integration assisted setup guide. Administrators can connect to the linked environment with confidence, less friction, and a streamlined workflow.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

View and filter users with additional user details

Article • 03/06/2024

ⓘ Important

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

Expand table

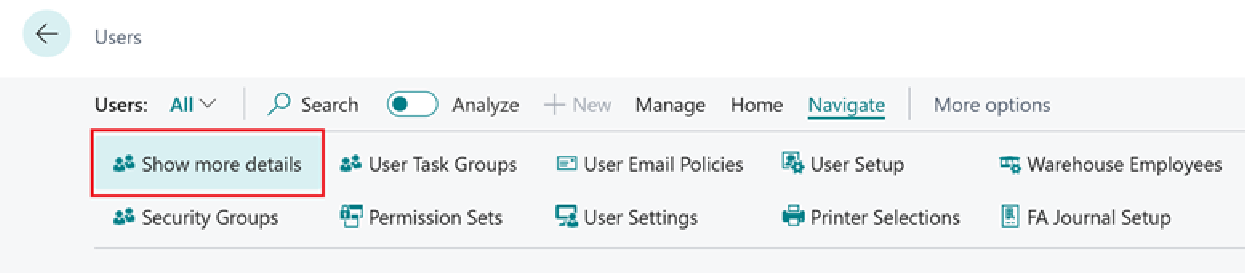
Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

Business value

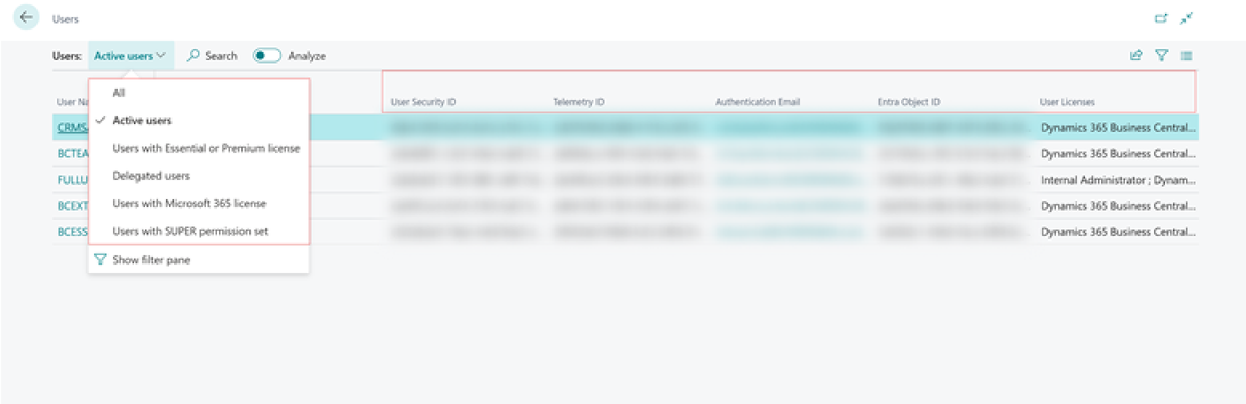
Additional user details and technical data helps administrators be more effective when they handle user requests and resolve issues.

Feature details

You can view additional details about users on the **Users** page by choosing the **Show more details** action.



The **Users** details page offers multiple views that administrators can filter. For example, an administrator might want to view all users with a Microsoft 365 license, or users who are assigned to the SUPER permission set.



Additional information such as user security, telemetry, and Microsoft Entra object IDs helps administrators quickly find users who have access to Business Central through external identifiers.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas .

Feedback

Was this page helpful? Yes No

Legislation

Article • 01/25/2024

ⓘ Important

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

Business Central offers updates to regulatory features based on popular requests for improvements and ever-changing requirements from local authorities. To give our customers peace of mind and enable them to focus on their core business, we automate many processes and ensure that features comply with the regulations set by government agencies. For example, if local regulations require that you create vouchers that serve as proof of transactions and a detailed audit trail, you can automate the process. Business Central can automatically generate and attach vouchers to general ledger entries, so that accountants can rest assured that they're compliant, without extra steps. The retention policy features let you specify how long you need to store vouchers before you clean them up, giving you more control over the amount of data you store.

We're working to make regulatory features a standard part of Business Central, so that we can deliver improvements out of the box across the countries and regions where they're relevant. For example, the E-documents module is a foundation that supports processes for sales and purchase invoicing, and it's easy for partners to extend by building country-specific apps for e-invoicing.

Feedback

Was this page helpful? Yes No

Achieve sustainable compliance with Business Central

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Apr 2024	May 2024

Business value

This feature enables you to collect and report on your sustainability activities. The solution is the foundation that will be used for compliance with the European Union's Corporate Sustainability Reporting Directive (CSRD) and other ESG standards.

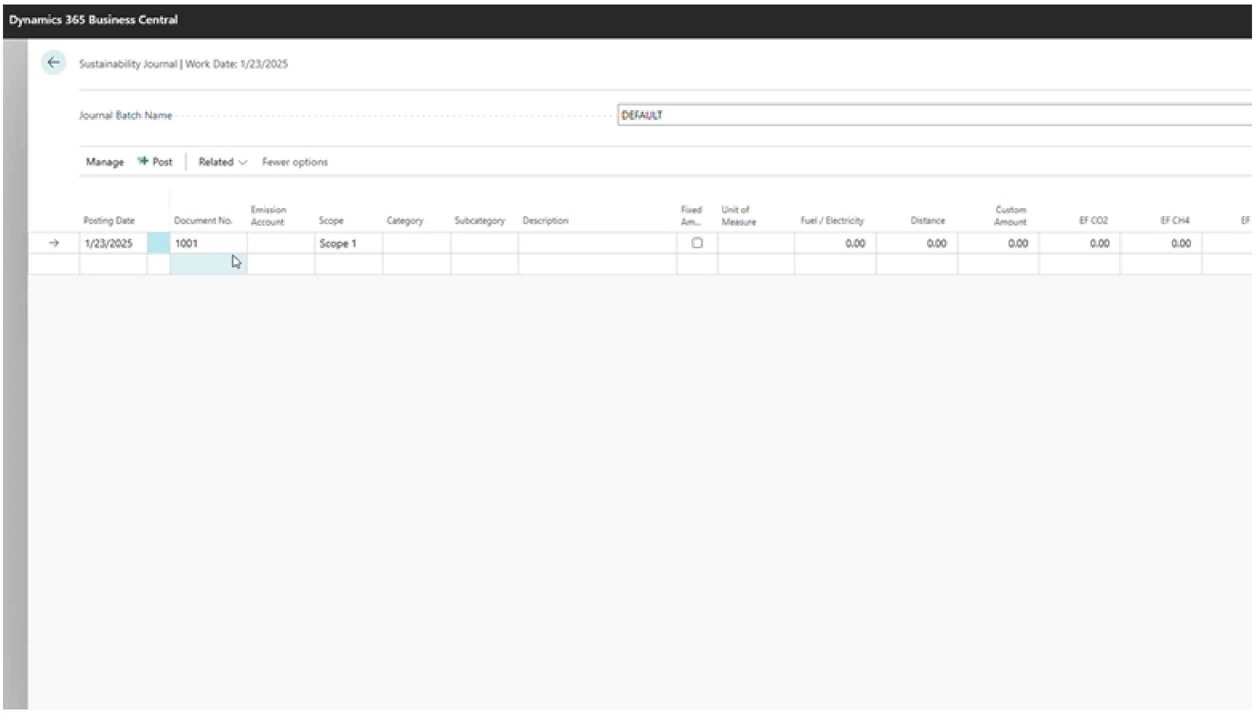
Feature details

We're introducing a groundbreaking feature focused on sustainability reporting. This new, easily extendable functionality lets you record and report on a wide spectrum of sustainability information, encompassing both qualitative and quantitative aspects, and forward-looking and retrospective data. You can also leverage the feature to actively reduce emissions, making it a valuable tool for small and midsized organizations seeking to comprehensively report on sustainability initiatives.

This feature ensures compliance with the European Union's CSRD, which requires companies to report on the sustainability of their activities. The CSRD introduces a heightened requirement for reporting, impacting approximately 50,000 companies in the European Union—more than four times the number covered by the previous Non-Financial Reporting Directive (NFRD), which the CSRD supersedes. However, the solution will be built to ensure that ESG compliance aligns with other standards.

You can use **Sustainability Journals** and **Recurring Sustainability Journals** to record data, based on the **Chart of Emission Accounts**. You can use different emission groups, subgroups, and formulas to make the collection of emissions as easy as possible. This feature also has **Sustainability Entries** where data is recorded and used for reporting. It's important to understand that Business Central supports other emissions besides carbon footprint.

You can benefit from streamlined business processes and enhanced productivity, irrespective of your current stage in the sustainability journey. The initial release lays the foundation for future expansion and automation, promising ongoing advancements in the functionality.



Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Thank you for your idea

Thank you for submitting this idea:

- CO2 calculation per unit

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

Feedback

Was this page helpful? Yes No

Automate country of origin listed for item tracking code in Intrastat reporting

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	May 2024	Jun 2024

Business value

This feature enables users to include the country of origin in item tracking. This enhancement is poised to increase productivity by automatically inheriting the country of origin for items in sales documents from corresponding purchases, eliminating the need for manual intervention. This information will later be used in Intrastat reporting.

Feature details

Intrastat currently uses **Country of Origin** from the **Item Card**. However, it's common that users are buying the same item from different countries. The new Intrastat solution in Dynamics 365 Business Central improves the usage of country of origin by allowing users to set up a **Country of Origin** on an **Item Tracking Code**. With this new approach, the **Country of Origin** for **Items** in sales documents automatically inherits values from corresponding purchase documents based on the **Item Tracking Code** setup, such as lot number or serial number. This eliminates the need for manual intervention and potential mistakes. With this information, **Intrastat** reporting will be faster and more accurate.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

See VAT date in posting previews

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	May 2024	Jun 2024

Business value

This feature provides better overviews, compliant accounting and reporting, and increased productivity related to VAT details.

Feature details

With this feature, you can view the **VAT Date** when you post previews in documents and journals. When a document is posted, the **VAT Date** field is visible in **VAT entries** and in **G/L entries**. Now, you can see the **VAT Date** before you post, when you run the **Posting Preview** action. This feature is a continuation of the VAT improvements based on user and partner feedback.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas .

Feedback

Was this page helpful? Yes No

Reporting and data analysis

Article • 01/25/2024

ⓘ Important

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

In the modern world, data has become an invaluable resource, forming the foundation of decision-making and progress across all sectors. Recent advances in AI technology and data analytics tools bring radically new ways for businesses to distill complex information into actionable intelligence, reveal hidden patterns 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

Discover report and data analysis content easily

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

End users can now discover report and data analysis content, including queries, reports, and Power BI pages, by using navigational search (Tell Me) or the new report explorer page. This feature minimizes the effort it takes to find report and data analysis content, making it more accessible and user-friendly.

Feature details

Business Central comes with many options for reporting, business intelligence (BI) dashboards, and data analysis. This release makes this content much easier to discover through search and a new report explorer page.

In the search experience, we include the title and description from teaching tips (if defined by the developer), so that users can better decide whether the report, page, or query is what they're looking for to solve their analytics need.

The role explorer has explanations on all entries, so that when you hover over a report, page, or query, you'll find:

- The title and description from the teaching tip (if defined).
- You can open the report, page, or query in a new browser tab without closing the explorer view.

- An icon that helps you decide whether this is a report that delivers Excel or PDF files, whether the page is a Power BI report, or whether the query supports data analysis.

Feedback

Was this page helpful? Yes No

User experiences

Article • 01/25/2024

ⓘ Important

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

Business Central offers a broad portfolio of user interfaces that enable our customers to work with their data from anywhere, and on any device. User interfaces include an installable desktop app, a browser-based web app, and mobile apps. Whether you need to enter data at high speed, casually update entries, or analyze relational data, Business Central offers numerous features that are easy to get started with and powerful when needed.

Every release includes enhancements to usability, accessibility, performance, and reliability. In this release wave, we're boosting efficiency when you're working with actions across selections in lists of records and viewing summarized data to help you easily fix data entry mistakes.

Feedback

Was this page helpful? Yes No

Access worksheet pages from mobile phones

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected 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 2024	Apr 2024

Business value

Expanding access to more Business Central areas from a mobile device is essential these days as more users are choosing this way of working. Until now, you couldn't open worksheet pages from your phone. Now you can, making it more convenient to work with Business Central from anywhere using the device of your choice.

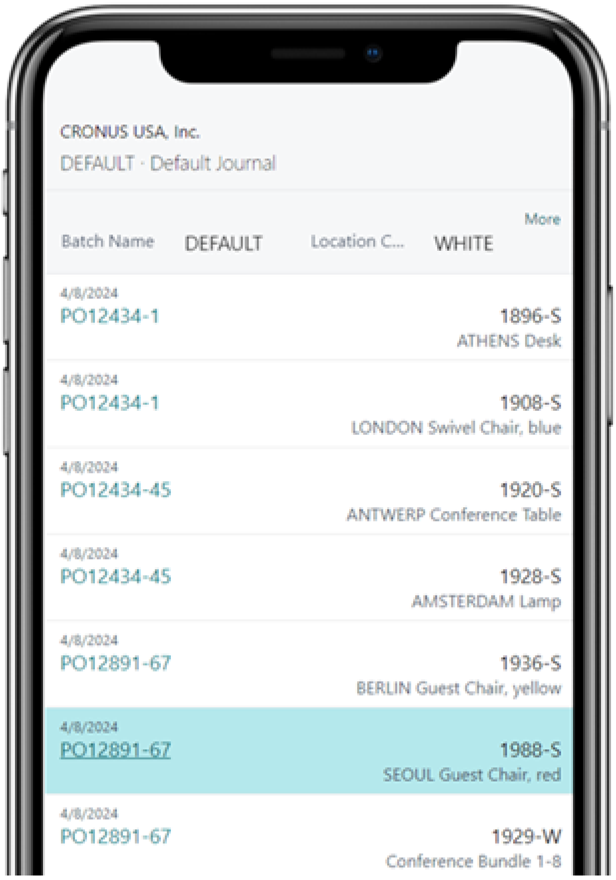
Feature details

With this feature, we've enabled special, simplified access to pages of the type 'worksheet' from mobile phones. Previously, this page type was only available on the Business Central mobile app from tablets or desktops.

Using a method similar to document pages, worksheet pages are rendered in a simplified version that includes a shortened header section, all worksheet lines, and a footer summary section.

To edit data, simply tap the desired area, make changes, and confirm using the Save or Back button. This feature allows even complex worksheet pages to be easily operated on mobile phones.

This feature requires Business Central version 24.0 or later and applies to Android phones and iPhones.



Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Use actions to navigate and highlight or fix platform-generated errors

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

Business value

We're making it easier for you to help yourself when something goes wrong in Business Central. Error messages provide actions that take you to the page, or even a specific field on a page, so you can quickly resolve the issue. The actions provide value to organizations by enhancing productivity and ensuring smooth workflows.

Feature details

We've enhanced the user experience by making it easier to understand, go to, and resolve errors that come from the platform. Previously, when an error occurred, you had to manually go to the relevant page or area to address the issue.

The error messages that the Business Central platform generates are now easier to read and understand because they no longer contain field names. However, messages still contain the full technical details, including field names, in the Detailed error message section. Select the **Copy details** icon on inline validation errors or in an error message to access the technical information.

Actions on error messages take you directly to the page or field that's causing the error, so you don't have to take time to find them on your own. Just choose the action in the error message and Business Central will take you to the appropriate location to resolve the error.

There's also a highlighting feature that indicates the relevant field, so you can quickly identify and focus on the areas that need attention. By scrolling the field in the view, you can easily find and fix the issues and enjoy a more efficient and streamlined workflow.

If you're developer, when you call the TestField method and don't pass in the ErrorInfo object, Business Central automatically generates the link to a page where a user can correct the issue. Business Central first gets the lookup or drill-down page for the record, and then finds the card page or lookup page and adds a navigation link to that card page. Business Central doesn't add a link in the following situations:

- If the error is on the page that's currently open.
- If the user doesn't have permission to modify the underlying record.

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Share error details to get help from another user

Article • 01/25/2024

ⓘ Important

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

Expand table

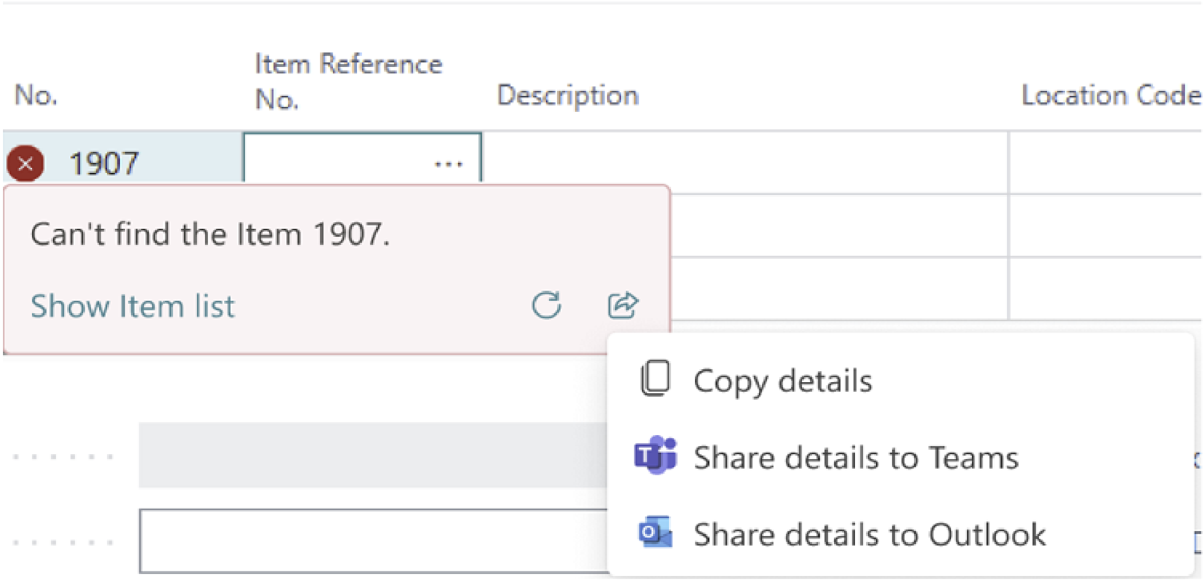
Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

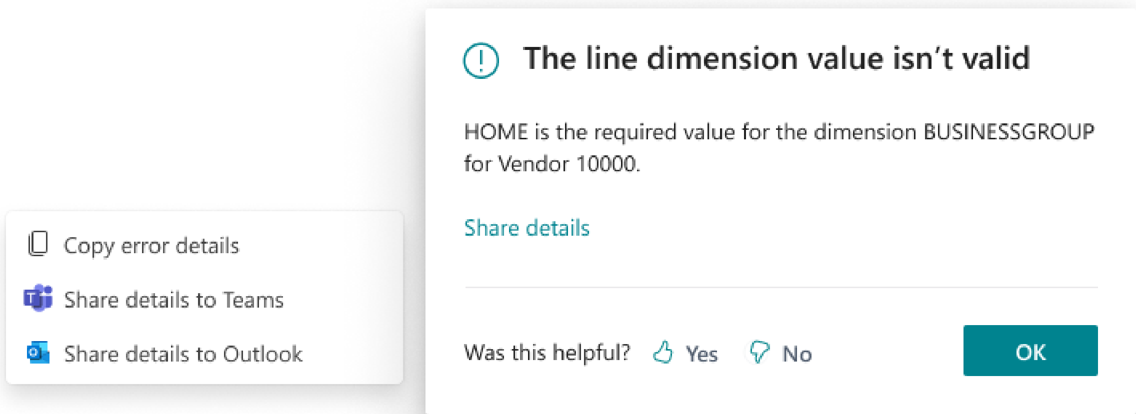
Business value

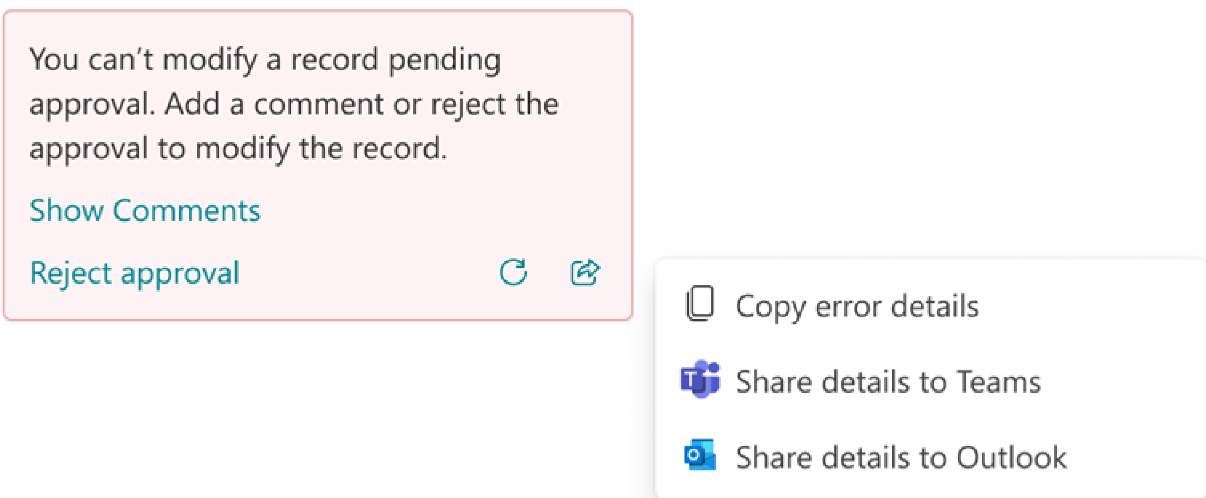
By facilitating collaboration and knowledge sharing, we're enabling teams to work together more effectively and efficiently. You can leverage the expertise of colleagues or subject matter experts to overcome obstacles and minimize downtime. The ability to share error details in Business Central enhances collaboration and problem-solving capabilities.

Feature details

When you're blocked by an error, you can quickly and easily share the error details with colleagues, subject matter experts, or other users to get assistance. The details include the exact error message, error code, and other information that's helpful when troubleshooting an error. By sharing the error details, you can effectively communicate the specific issue you're facing, which helps your colleagues provide targeted support and guidance.


No.
Item Reference No.
Description
Location Code
1907
Can't find the Item 1907.
Show Item list
Copy details
Share details to Teams
Share details to Outlook


The line dimension value isn’t valid
HOME is the required value for the dimension BUSINESSGROUP for Vendor 10000.
Share details
Was this helpful?
Yes
No
OK
Copy error details
Share details to Teams
Share details to Outlook


You can’t modify a record pending approval. Add a comment or reject the approval to modify the record.
Show Comments
Reject approval
Copy error details
Share details to Teams
Share details to Outlook

Tell us what you think

Help us improve Dynamics 365 Business Central by discussing ideas, providing suggestions, and giving feedback. Use the forum at https://aka.ms/bcideas.

Feedback

Was this page helpful? Yes No

Use drag and drop to attach multiple files

Article • 01/25/2024

ⓘ Important

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

Expand table

Enabled for	Public preview	General availability
Users, automatically	Mar 2024	Apr 2024

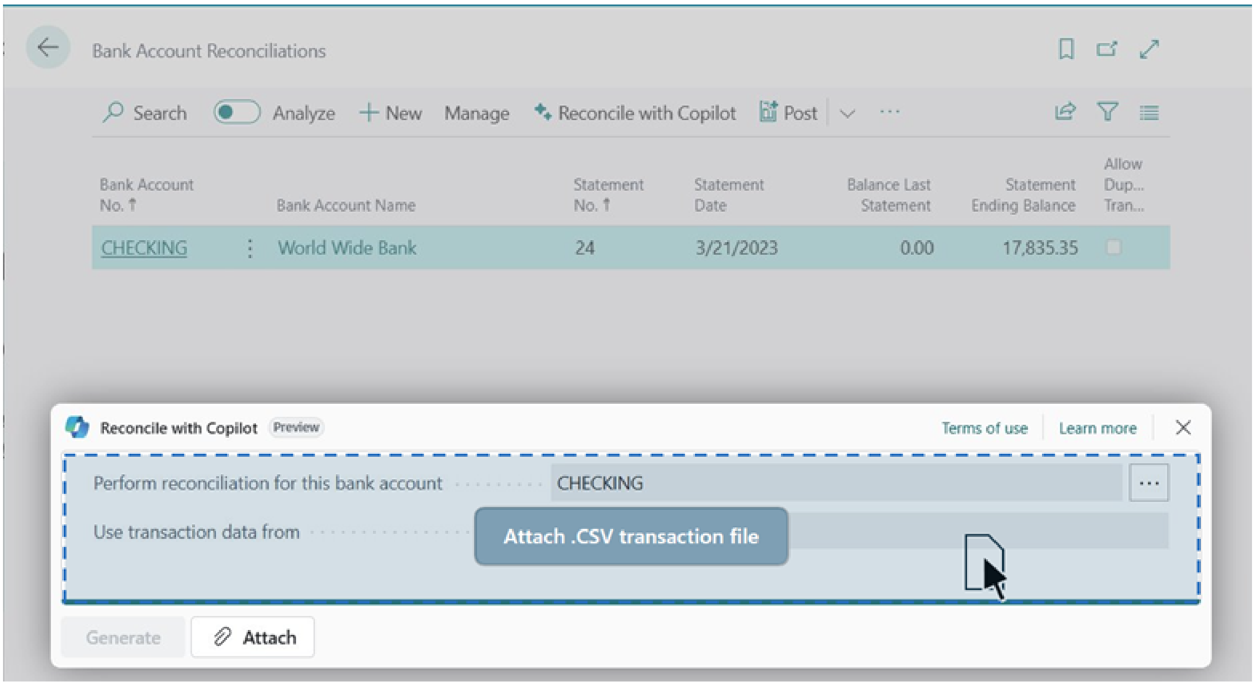
Business value

Drag and drop functionality to attach multiple files to Business Central records makes it easier to manage files. This feature benefits users who work with multiple files, and adds value to organizations by enhancing data organization and accessibility.

Feature details

You can conveniently drag multiple files at the same time to attach them to records in Business Central. Select multiple files, and then just drag them to the drop targets.

This improvement is particularly beneficial if you often work with multiple files and need to associate them with a specific record. The ability to attach several files at the same time eliminates the need to manually upload files one-by-one, which provides a more efficient and user-friendly experience.



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Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Guides in 2024 release wave 1

Article • 01/25/2024

ⓘ **Important**

The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Guides**.

Overview

Dynamics 365 Guides is a mixed-reality application that displays step-by-step holographic instructions right where the work happens, enabling employees to learn and perform complex tasks quickly. Guides helps reduce errors, increase safety, close knowledge gaps, and strengthen skills. You can improve training and processes because it adapts to your work in real time.

Guides seamlessly works with Microsoft Teams, providing comprehensive remote support scenarios. Frontline technicians can collaborate with remote experts in real time, sharing their live view and getting immediate guidance with mixed-reality annotations. This combination empowers technicians to troubleshoot and resolve issues faster, reducing downtime and improving overall productivity. Organizations with geographically dispersed teams get instant collaboration and support without the need for costly travel or delays.

Authors can easily create guides without 3D or programming skills by using a simple PC app or a HoloLens app. Operators use guides on HoloLens in training and on the job to get guidance while they work in a heads-up, hands-free style. Trainers and managers can analyze usage data to optimize their workflows, ensuring that both Guides and Teams contribute to a more efficient and effective work environment.

For the coming wave, Dynamics 365 Guides introduces several new capabilities and enhancements throughout the application. Guides adds support for Azure Remote Rendering to the application, which makes it significantly easier to use any 3D asset on HoloLens. We're investing to improve support for web content that enables customers to display content and workflows from their traditional systems of record and extend them into mixed reality. Lastly, Guides content on mobile devices becomes generally available through a seamless integration with Dynamics 365 Field Service.

Investment areas

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

Check out the release plan

For application administrators

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

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

Get the most out of Guides

Expand table

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

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Guides

Article • 01/25/2024

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

For a list of the previous wave's release plans, go to 2023 release wave 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.

Expand table

Feature	Enabled for	Public preview	General availability
Easily import 3D models in Guides	Users by admins, makers, or analysts	Apr 2024	-
Connect Guides to your system of record	Admins, makers, marketers, or analysts, automatically	-	Apr 2024

- You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

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

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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

Connect Guides to your system of record

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Customers can connect their guides to their systems of record, making it easy for operators to submit input collected while completing guide steps.

Feature details

Guides authors can create special step types that make it possible for operators to record input such as machine status, error codes, problem reports, completed tasks, and knowledge assessments.

The input collected is saved to Guides' Dataverse storage, which can then be processed with tools like Power Automate to automatically send it to the organization's custom records storage. It can also be used to trigger notifications, initiate business processes, and streamline business workflows.

Feedback

Was this page helpful? Yes No

Dynamics 365 Guides on Government Community Cloud High

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (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 2024

Business value

Dynamics 365 Guides on Government Community Cloud (GCC) High enables Guides to be used by federal government agencies and defense contractors that have strictly regulated requirements for handling sensitive information.

Feature details

The GCC High environment provides compliance with US government requirements for cloud services. In addition to enjoying the features and capabilities of Guides including Teams collaboration on top of Microsoft Power Platform, organizations benefit from the following features that are unique to GCC High:

- Your organization's customer content is logically segregated from customer content in the commercial services from Microsoft.
- Your organization's customer content is stored within the United States.
- Access to your organization's customer content is restricted to screened Microsoft personnel.
- GCC High complies with certifications and accreditations that are required for US Public Sector customers.

Feedback

Was this page helpful? Yes No

Easily import 3D models in Guides

Article • 01/25/2024

ⓘ Important

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Expand table

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

Business value

Azure Remote Rendering removes authoring effort by making it easy to bring any 3D model, basic or complex, into a guide. This feature uses the computing power of Azure to render models in the cloud and then streams video to the device, enabling operators to interact and collaborate with 3D content.

Feature details

Azure Remote Rendering is now supported in Guides, enabling you to show and use high-quality models that would otherwise exceed the capabilities of the HoloLens 2 device. With an Azure Remote Rendering subscription, the rendering workload for complex models is offloaded to high-end GPUs in the cloud so that operators and author can incorporate highly detailed models without compromising on app performance.

Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Customer Insights - Data in 2024 release wave 1

Article • 01/25/2024

ⓘ **Important**

The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Insights - Data**.

Overview

https://aka.ms/ReleaseHighlight/2024W1/CustomerExperience

Dynamics 365 Customer Insights - Data unifies customer profiles from various data sources, enriches them with Microsoft's unique data assets and creates powerful AI-driven predictions, segments, and measures. It enables a deep understanding of every customer by providing a holistic, up-to-date view with unmatched time to insights. You can activate this data across channels, departments, and devices to deliver personalized customer experiences at every touchpoint.

Customer expectations of the kinds of experiences they want continue to rise, and delivering exceptional experiences is crucial to business success. This requires efficient data gathering, insightful data analysis, and strategic data usage.

In this release, our focus is on three key areas:

- **Unify sales and marketing**: We're making data ingestion easier. Our aim is to transform disparate customer data into actionable insights swiftly, creating an enriched, comprehensive view of every customer to empower sellers and marketers to deliver more personalized experience. You can enhance your customer understanding by seamlessly capturing marketing interactions, deriving insights and engaging customers while complying with data and privacy regulations for each of your brands or LOBs.
- **Real-time data personalization**: We're ensuring that you can individualize your customer experiences based on their real-time engagement. Thanks to real-time segment updates, real-time web tracking, and the ability to personalize every

touchpoint based on customer behavior, you can enhance conversion rates and build long-lasting relationships.

- **Generative AI and Copilot**: We're revolutionizing data exploration with generative AI and Copilot in Customer Insights. By revealing key insights and identifying potential audiences within seconds, Copilot in Customer Insights empowers your business to achieve new heights of success.

Our goal is to allow your teams to focus less on data integration, more on creating value and predicting what your customers will need next. Bring customer experiences to life in extraordinary ways by fostering loyalty and driving business growth.

Review the official product documentation and training for Dynamics 365 Customer Insights.

Investment areas

Real-time personalization

Get a unified customer profile that contains the latest customer interactions so you can personalize each experience. Respond to customer needs in the moments that matter, raise the likelihood of conversion with better understanding and real-time capabilities.

Unify sales and marketing

Tear down data silos and gain a ubiquitous understanding of your customers through a unified view of data across the organization and improve your business outcomes across marketing, sales, and service.

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

Check out the release plan

For application administrators

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

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

Get the most out of Customer Insights - Data

Expand table

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

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

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Customer Insights - Data

Article • 01/25/2024

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

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Real-time personalization

Meet your customers where they are by capturing, updating, and harmonizing data from various sources and in real time.

Expand table

Feature	Enabled for	Public preview	General availability
Use automation to manage segments and measures	Admins, makers, marketers, or analysts, automatically	Jun 2024	-
Instrument and test real-time events faster with a developer portal	Admins, makers, marketers, or analysts, automatically	Apr 2024	-
Personalize omnichannel experiences with no code using Optimizely	Admins, makers, marketers, or analysts, automatically	-	Apr 2024
Elevate customer experiences in real time	Admins, makers, marketers, or analysts, automatically	-	Apr 2024
Create moment-based experiences with real-time segments	Admins, makers, marketers, or analysts, automatically	Jul 2024	-

Unify sales and marketing

Build customer loyalty with a unified platform and ambient insights that unify sales and marketing.

Expand table

Feature	Enabled for	Public preview	General availability
Move specific configurations between environments	Admins, makers, marketers, or analysts, automatically	-	Apr 2024
Increase control and flexibility when attaching to data in Microsoft Dataverse	Admins, makers, marketers, or analysts, automatically	-	May 2024
Enable organizations to cross-sell while protecting customer data	Admins, makers, marketers, or analysts, automatically	Jun 2024	Sep 2024
Generate insights from marketing interactions	Admins, makers, marketers, or analysts, automatically	May 2024	Jul 2024
Use Microsoft OneLake as a data source and destination	Admins, makers, marketers, or analysts, automatically	May 2024	-

- You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

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Feedback

Was this page helpful? Yes No

Real-time personalization

Article • 01/25/2024

ⓘ Important

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Get a unified customer profile that contains the latest customer interactions so you can personalize each experience. Respond to customer needs in the moments that matter, raise the likelihood of conversion with better understanding and real-time capabilities.

Feedback

Was this page helpful? Yes No

Accelerate time to insights with data in Delta Lake format

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and 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 2024	Jun 2024

Business value

Your customer data updates constantly, with rapidly changing signals like online activities and mobile interactions. When a traditional data warehouse is used to generate customer insights, this leads to increased time to insight with each update while the volume of unprocessed signals keeps growing. Longer queues result in slow or stale insights. With native support for Delta Lake storage format in Customer Insights, you can now accelerate processing times even with a higher volume of fast-changing data updates. Get customer profiles and associated insights updated more frequently and react to customer engagements based on the most current information available. This empowers you to create the most relevant and personalized experiences for your customers and the most up-to-date and timely insights for your business users.

Feature details

One of the key values of the Delta Lake format is the ability to track changes over time to the data. With native support for the Delta Lake table format in Customer Insights, you can now take advantage of Delta Lake incremental data updates to accelerate processing in Customer Insights - Data.

It is typical for customer profile data to only change by a few percent each day. Instead of reprocessing the entire data set every day, Customer Insights - Data can process just the changed source data for unification in the Delta format, saving time and getting you results faster. This improvement happens automatically when all the tables are in the Delta format. No configuration or change is required.

Incremental processing is also implemented for unification, segments, measures, activities, and predictions.

> **Note**
>
> In this initial release, incremental unification requires that all source tables involved in the unification process use the Delta format. Any tables ingested to Customer Insights - Data using the Delta Lake connector will be in the Delta format. Starting in February, tables imported using the Dataverse connector will also be in the Delta format.

Feedback

Was this page helpful? Yes No

Elevate customer experiences in real time

Article • 01/25/2024

ⓘ Important

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Expand table

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

Business value

As customers engage with your business, they constantly provide signals about their interests and preferences, such as adding a product to a cart, viewing your pricing quote, signing up for a trial, and more. It's crucial to build on these signals as they happen so you can deliver the right experience at the right time.

With Customer Insights, you can now ensure customer profiles and associated insights are updated in real time based on these signals, allowing you to provide the most targeted and personalized experience as they engage with your website or mobile app. This empowers you to foster loyalty, increase engagement, enhance satisfaction, and drive higher conversion rates.

Feature details

Customer Insights helps you collect web interactions in real time, enabling personalized experiences and a deeper understanding of your customers' needs and preferences.

This capability includes the following features:

- **Real-time web tracking**: Ensure that your customer data is ingested in real time with a tracking script that can be added to your website. Capture high-intent signals such as "viewed pricing page," "added item to the cart," or "downloaded e-book" in real time.

- **Real-time unknown profiles**: Capture web data from all your visitors even if they're not authenticated and let the system automatically create unknown profiles in real time.
- **Real-time unknown-to-known**: Merge unknown profiles into known profiles in real time, so you can always have the 360-degree view of your customers.
- **Real-time web personalization**: Leverage our APIs to read your customer data, including segment memberships, web events, or demographic data in real time to personalize the web experience for your visitors.

Feedback

Personalize omnichannel experiences with no code using Optimizely

Article • 01/25/2024

ⓘ Important

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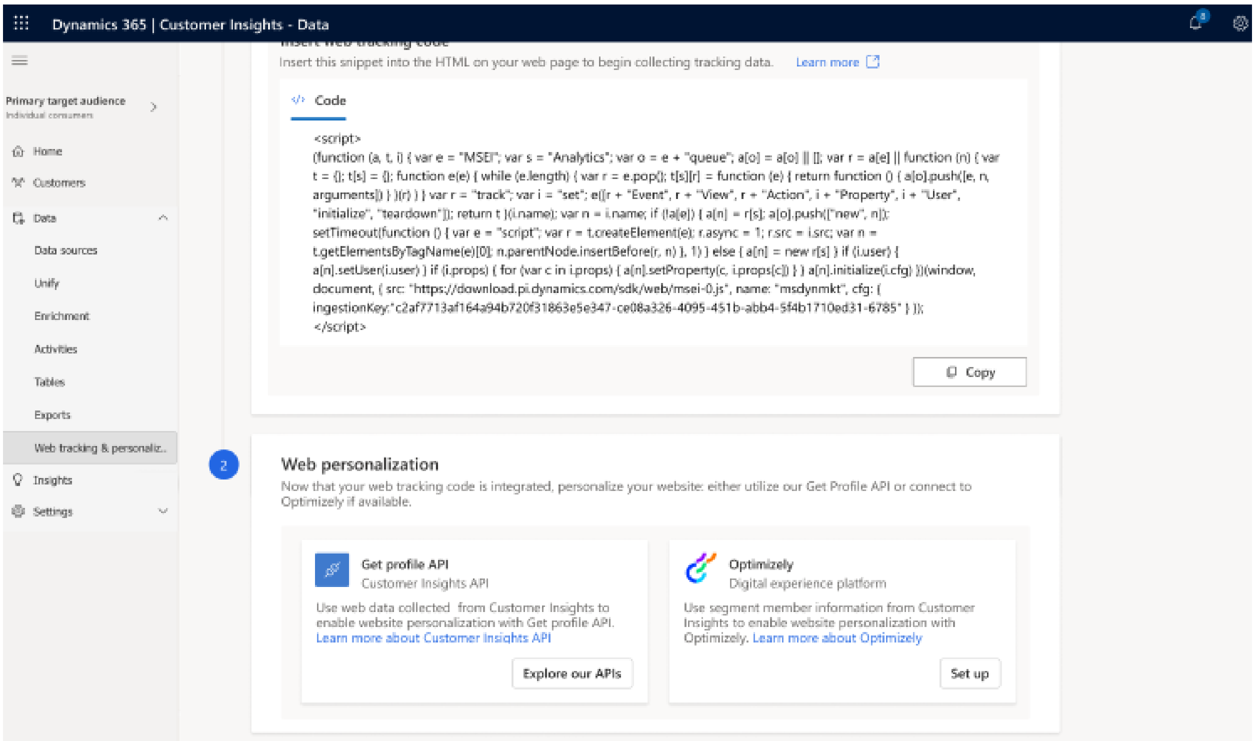
Expand table

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

Business value

Customer Insights and Optimizely now unlock omnichannel personalization and experimentation capabilities, enabling marketers and citizen developers to personalize every customer touchpoint with no code or prior expertise required. By combining insights and segments from Customer Insights with Optimizely audiences, you can create experiences that are tailored to your customer's browsing activity, their loyalty, past engagement history, and other real-time signals. Moreover, you can continue the conversation or re-target your visitors by delivering the same consistent experience through customer journeys, based on which Optimizely treatment cohort the customer was part of.

Feature details



- Easily configure a connection to and from Optimizely with Customer Insights - Data.
- Consume Customer Insights - Data segments within Optimizely.
- Run experiments or campaigns based on your Customer Insights - Data segments in Optimizely.
- Use experimentation and interaction data from Optimizely in Customer Insights - Data.

Feedback

Was this page helpful? Yes No

Use automation to manage segments and measures

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

As your Dynamics 365 Customer Insights usage increases, so does the number of segments and measures. Large numbers of segments and measures can result in longer system refresh times, which delay time-sensitive insights.

Customer Insights now automatically deactivates segments and measures based on their usage to ensure your active segments and measures refresh faster. As an admin you get to control the retention period that applies and can support your organization to scale confidently.

Feature details

When you have large numbers of segments and measures, as an admin, you can't determine which are needed and which are not. Campaigns could be one-time campaigns where the segments or measures are not needed after a period of time.

When the segment or measure isn't used anywhere else after the retention period, it is automatically deactivated by the system. This moves compute resources to the segments and measures that are active, which results in faster system refresh and thus faster time to insights.

You can reactivate such segments or measures if needed or opt out of automatic management entirely.

Feedback

Was this page helpful? Yes No

Unify sales and marketing

Article • 01/25/2024

ⓘ Important

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

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

Enable organizations to cross-sell while protecting customer data

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Protecting critical customer data is paramount in a privacy-first world. Companies with multiple lines of business (LOB) need to effectively cross-sell and generate more revenue across brands and LOBs, while ensuring that no sensitive data leaks across LOB boundaries.

With Dynamics 365 Customer Insights – Data, you can optimize your customer experience and your business performance, while meeting your unique privacy needs. You can enable your LOBs to work together on shared customer profiles, while managing data access and privacy aligning with your organizational structure. Ensure that users in one LOB can only access profiles that have engaged with that LOB and the data that's relevant to their business. At the same time, you can ensure that cross-company groups such as IT/analytics/data science can derive insights from the customers' full engagement across LOBs or brands. Further, you can minimize compliance risks by using built-in data segregation and insights features across your organization.

Feature details

This feature brings the following capabilities:

- Unify your customer profiles by respecting data separation and your organizational structure while sharing profiles with your LOBs.
- Protect critical customer data and provide access to LOBs based on their contribution to the shared customer profiles.
- Gain insights into specific brands and maintain the bigger picture from a business perspective.

Example: Imagine a health insurance and a credit issuer as two lines of business in their parent organization. While they share the same customers, the credit issuer LOB isn't expected to see the social security number, and the health insurance doesn't need to access the credit score of their shared customers. Protect your critical customer data with the highest standards and enable cross-selling and revenue growth across your LOB.

Feedback

Was this page helpful? Yes No

Generate insights from marketing interactions

Article • 01/25/2024

ⓘ Important

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

Expand table

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

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 execution system and 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 re-targeting scenarios, advertising to customers on major platforms if they don't engage with your messages, consequently increasing their conversion rates.

Feature details

Seamlessly integrate marketing interaction data from Customer Insights - Journeys into Customer Insights - Data without the need to set up manual data pipelines. These interactions are linked to unified customer profiles, enabling you to create segments and insights based on a customer’s engagement with their marketing campaigns.

- Easily discover and use marketing interaction while creating segments, enhancing the personalization of engagement strategies.
- Predict customer churn by analyzing email engagement patterns and proactively strategize retention strategies.
- Determine customers who aren't engaging with emails and create an ad re-targeting strategy.

Feedback

Was this page helpful? Yes No

Govern data access with role-based access control

Article • 03/06/2024

ⓘ Important

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

Expand table

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

Business value

Implementing data access controls is important in many situations, including multigeo and multibrand scenarios. Role-based access control (RBAC) allows administrators to regulate access to customer profiles, segments, and measures based on business units. Because these controls are applied to the data in Microsoft Dataverse, the integrity of those controls propagates to all other Dynamics 365 and Power Platform applications automatically. This functionality allows admins to execute rules quickly and easily for complex data management. It not only saves valuable implementation time, but also ensures that data is available only for the intended users, which increases security and control over data.

Feature details

Data access definitions are made in Dataverse and therefore flow into other applications built on top of Dataverse, such as Dynamics 365 applications. Depending on the user role, administrators and business users have different permissions and access rights.

Administrators:

- Own and manage the global data estate of an organization.

- Configure business units (logical groupings of related business activities) in the Power Platform admin center.
- Configure deduplication and unification of customer data within business units (not across business units).
- Define data mappings to assign business unit ownership based on identifiers such as associated brand or geographic location.
- Have access to segments and measures created for global and business unit usage.

Business users:

- Have access to records belonging to their business unit and can’t access or share data from other business units.
- Have access to and control of Dynamics 365 Customer Insights segments and measures in their business unit.
- Can activate segments for use in other Dynamics 365 and Power Platform applications.

Feedback

Was this page helpful? Yes No

Increase control and flexibility when attaching to data in Microsoft Dataverse

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Significant improvements to the Microsoft Dataverse connector allow you to import large Dataverse tables into Customer Insights - Data. Select the tables, columns, and even rows that you want with new row filters, saving time and effort.

Feature details

The Dataverse connector is being updated to make it the best choice for importing tables from Dataverse to Customer Insights - Data.

- Performance improvements allow you to import large Dataverse tables into Customer Insights - Data smoothly, removing previous scale and performance limits.
- You have full control to select just the Dataverse tables you want to use in Customer Insights. No more read-only mandatory table selections.
- Select only the columns you want to process and output in Customer Insights - Data.
- Apply filters to exclude inactive records, or to only include records added or modified since a specific date, or within a rolling time period such as 1 year.
- Tables imported via the Dataverse connector and unified are automatically linked to the unified CustomerProfile table.

Feedback

Was this page helpful? Yes No

Protect customer data by controlling who can see it

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (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 2024

Business value

Businesses often face the difficult paradox of managing customer data privacy while still empowering their employees with the insights they need to serve those customers better.

With Customer Insights, you can now do both confidently. You can protect your customers' personal data by restricting access and visibility of certain data fields in the customer profiles, while still ensuring that data can be used for generating insights needed across sales, service, and marketing. This enables everyone in your company to safely use the most important insights, while ensuring that your customers can trust you with data you can then use to better personalize their experience.

Feature details

- Restrict visibility of customer profile fields for Dataverse roles.
- Customer Insights follows the field level restrictions setup in Dataverse, so you don't have to manage these for every Dynamics 365 app separately.
- Marketing contributors can continue to build segments in Customer Insights based on the restricted fields without seeing the data of the field, such as the email address, in Dataverse and in Customer Insights.

- Users can continue to use the fields to generate segments, measures, and other insights or create personalized journeys and contents. However, they will not see any data in those fields.

Feedback

Was this page helpful? Yes No

Use Microsoft OneLake as a data source and destination

Article • 01/25/2024

ⓘ Important

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

Expand table

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

Business value

Dynamics 365 Customer Insights helps generate insights from all your customer data stored in your data lakehouse, whether it's built using Azure Delta Lake or the new OneLake. When you use Customer Insights together with Fabric, you can focus on generating the insights you need while cutting costs, reducing the effort and time needed to move, integrate, and transform customer data from any source.

With this you also unlock additional benefits: You increase agility in decision-making with up-to-date insights using the generated insights not only across various Dynamics 365 applications but also for data warehousing, data sharing, and advanced analytics/ML scenarios directly through Fabric—all without the need for expensive data movement or ETL.

Feature details

- Build your customer data platform by adding Customer Insights on top of Fabric. If you already use Customer Insights as your CDP, attach your data in OneLake to Customer Insights.
- Explore and select data stored in OneLake to be included in Customer Insights workflows.

- Save time with OneLake Delta format. No need for separate data formatting in full or upserts folders. Customer Insights seamlessly harnesses Delta Lake capabilities for OneLake interactions.
- Access the insights generated in Customer Insights - Data in OneLake with downstream analytics workloads while centrally governing the data.

Feedback

Was this page helpful? Yes No

Plan and prepare for Dynamics 365 Customer Insights - Journeys in 2024 release wave 1

Article • 01/25/2024

ⓘ **Important**

The 2024 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2024 to September 2024. In this article, you'll find the product overview and what's new and planned for **Dynamics 365 Customer Insights - Journeys**.

Overview

https://aka.ms/ReleaseHighlight/2024W1/CustomerExperience

Dynamics 365 Customer Insights - Journeys brings together the worlds of customer experience, generative AI, and marketing automation, empowering businesses to orchestrate end-to-end, personalized journeys across all touchpoints to strengthen relationships and earn loyalty.

Customers demand digital and in-person experiences throughout the purchase journey. They expect seamless, exceptional, and personalized experiences at every touchpoint. This necessitates analyzing a large amount of data to gain a deep understanding of customers, robust alignment between sales and marketing, and the ability to orchestrate personalized journeys across the customer lifecycle.

In this release, our focus is on three key areas:

- **Generative AI and Copilot**: We're transforming the way you work to enhance your productivity. With Copilot as your AI companion, you can specify the outcomes you're looking to drive and Copilot will leverage the power of data and AI to generate audiences, content, images, journeys, and more, allowing you to curate, edit, and launch your project in record time.
- **Engaging customers in moments that matter**: We're introducing new ways to reach your customers and we're increasing scale and throughput so you can connect with them at exactly the right time. We bring you capabilities to easily

optimize journeys and measure success so you can ensure that every interaction hits the mark.

- **Unifying sales and marketing**: We continue to break down data silos between your departments, fostering collaboration between your sales and marketing teams. Thanks to granular lead qualification, sellers and marketers can maximize the opportunity pipeline and increase win rates by addressing leads when they're the most likely to buy.

Our goal is to equip you with an unparalleled suite of tools to enhance your productivity in delivering great customer experiences. We want to empower you to understand your customers deeply, reach out to them in innovative ways, and consistently refine your journeys for optimal results, ultimately boosting your performance to new heights.

For official product documentation and training for Dynamics 365 Customer Insights, see: Dynamics 365 Customer Insights documentation - Dynamics 365 Customer Insights | Microsoft Learn

Investment areas

Moments that matter

Understand your customers' expectations and identify the most effective channels and touchpoints to trigger interactions that will successfully engage customers in the moments that matter.

Unify sales and marketing

Bring your sales and marketing teams closer so they can stop working in silos, eliminate execution gaps, and remove redundancies by collaborating to effectively drive more revenue together.

To learn more about the entire set of capabilities being delivered during this release wave, **check out the release plan for Dynamics 365 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.
Product updates	Stay up to date on latest product updates.
Release calendar	Know important release milestones.
Licensing	Improve your understanding of how to license Customer Insights - Journeys.
Product documentation	Find documentation for Customer Insights - Journeys.
User community	Engage with Customer Insights - Journeys experts and peers in the community.
Upcoming events	Find and register for in-person and online events.
Product trials	Get started with Customer Insights - Journeys.

Feedback

Was this page helpful? Yes No

What's new and planned for Dynamics 365 Customer Insights - Journeys

Article • 01/25/2024

This topic lists features that are planned to release from April 2024 through September 2024. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to Microsoft policy.

For a list of the previous wave's release plans, go to 2023 release wave 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.

Moments that matter

Respond to customers' expectations in real time to engage them in moments that matter.

Expand table

Feature	Enabled for	Public preview	General availability
Reach your customers at the right moment with send scheduling	Admins, makers, marketers, or analysts, automatically	Apr 2024	Jul 2024
Optimize engagement and increase conversion rates with email A/B testing	Admins, makers, marketers, or analysts, automatically	-	Apr 2024
Reach customers quickly with 10x increased throughput	Admins, makers, marketers, or analysts, automatically	-	Sep 2024
Easily reference copies of sent emails in the timeline	Admins, makers, marketers, or analysts, automatically	-	Apr 2024
Capture responses from external, third-party forms	Admins, makers, marketers, or analysts, automatically	-	Apr 2024

Feature	Enabled for	Public preview	General availability
Prevent duplicate emails to contacts that share an email address	Admins, makers, marketers, or analysts, automatically	-	Apr 2024
Collect extra customer information without creating custom attributes	Admins, makers, marketers, or analysts, automatically	Jul 2024	-
Boost customer confidence with branded links for email and content	Admins, makers, marketers, or analysts, automatically	Apr 2024	-
Provide varied experiences in one journey using journey split tiles	Admins, makers, marketers, or analysts, automatically	-	Jul 2024
Get faster insights at scale with auto-management of segments, measures	Admins, makers, marketers, or analysts, automatically	Jun 2024	-
Instrument and test real-time events faster with a developer portal	Admins, makers, marketers, or analysts, automatically	Apr 2024	-
Improve engagement and compliance with double opt-in	Admins, makers, marketers, or analysts, automatically	Apr 2024	Jul 2024
Ensure messages go to the right contact email address	Admins, makers, marketers, or analysts, automatically	-	May 2024
Understand and optimize journeys with customer flow analysis	Admins, makers, marketers, or analysts, automatically	-	Apr 2024
Improve reliability of insights with advanced bot protection	Admins, makers, marketers, or analysts, automatically	-	Jun 2024
Build and test journeys before deploying to production	Admins, makers, marketers, or analysts, automatically	-	Jun 2024
Easily manage customer consent from contact and lead forms	Admins, makers, marketers, or analysts, automatically	-	Jun 2024
Engage customers with personalized messages based on website interactions	Admins, makers, marketers, or analysts, automatically	-	Jun 2024

Unify sales and marketing

Accelerate revenue and increase lifetime value through seamless experiences that unify sales and marketing.

Expand table

Feature	Enabled for	Public preview	General availability
Qualify leads and route to sales when buying is likely	Admins, makers, marketers, or analysts, automatically	-	Apr 2024

- You are able to opt into some features as part of early access on February 5, 2024, including all mandatory changes that affect users. To learn more, go to Early access FAQ.

Description of **Enabled for** column values:

- **Users, automatically**: These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically**: These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts**: These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

For a list of the countries or regions where Dynamics 365 business applications are available, go to the International availability guide. For more information about geographic areas and datacenters (regions), go to the Dynamics 365 and Microsoft Power Platform availability page.

Feedback

Was this page helpful? Yes No

Copilot and AI innovation

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has 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 assistant, Copilot in Customer Insights automates manual tasks and helps you be more creative, ultimately leading to better business outcomes

Feedback

Was this page helpful? Yes No

Take campaigns from concept to launch using Copilot

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may 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 2024	-	-

Business value

Defining campaigns and creating high-performing assets to achieve campaign goals can be a time-consuming and difficult task. Now, Copilot transforms the way you create campaigns, enhancing your productivity. To create a campaign, describe the outcomes you're looking to drive or provide a creative brief. Copilot leverages the power of data and AI to generate audiences, content, images, journeys, and more, allowing you to curate, edit, and launch your project in record time.

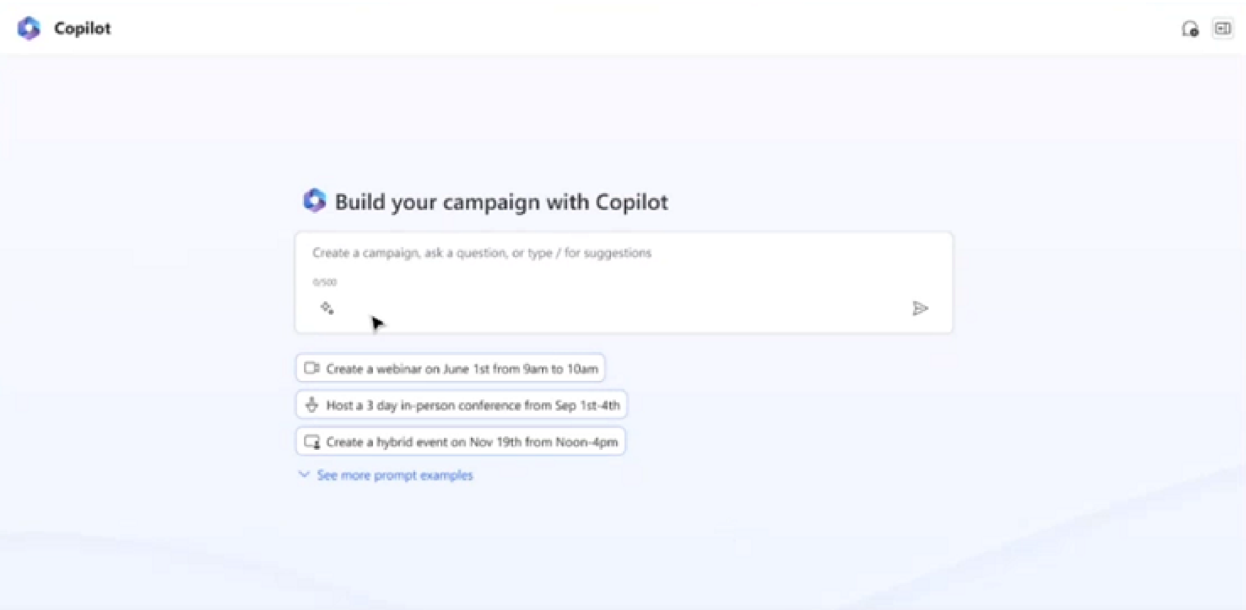
You'll save countless hours by using Copilot to create a connected solution that you can update to achieve the goals that you've defined. Rest assured that you'll always be in the loop to refine, approve, and complete the campaign before it goes out to your customers.

Feature details

Simply use your brief or describe your project and its objectives using everyday words. Based on Customer Insights data and your project description, Copilot automatically generates audiences, messages, images, and journeys that you can further refine and go live with. Enhance your productivity and creativity with an AI-first user interface that enables you to do it all:

- View all of your campaign assets in one place, making it easy to manage them.
- Automatically create a brand profile from your company's website to ensure that all content (including Copilot-suggested) is on-brand.
- Get suggested audiences based on your campaign objectives and prior campaigns.
- Let Copilot help you create engaging emails; use content suggestions and content rewrite, adjust tone, change layout, and more.
- Use the power of AI to get image suggestions, generate new images, or refine and edit existing images that match your message and brand.
- Generate suggested journeys designed to deliver your goals that you can further refine.
- Export all essential details of your campaign in one document so you can easily share it with your stakeholders for review and approval.

Sign up to be one of the first to preview and experience the new capabilities.



Feedback

Was this page helpful? Yes No

Moments that matter

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see **Microsoft policy**). Learn more: **What's new and planned**

Understand your customers' expectations and identify the most effective channels and touchpoints to trigger interactions that will successfully engage customers in the moments that matter.

Feedback

Was this page helpful? Yes No

Boost customer confidence with branded links for email and content

Article • 01/25/2024

ⓘ Important

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Expand table

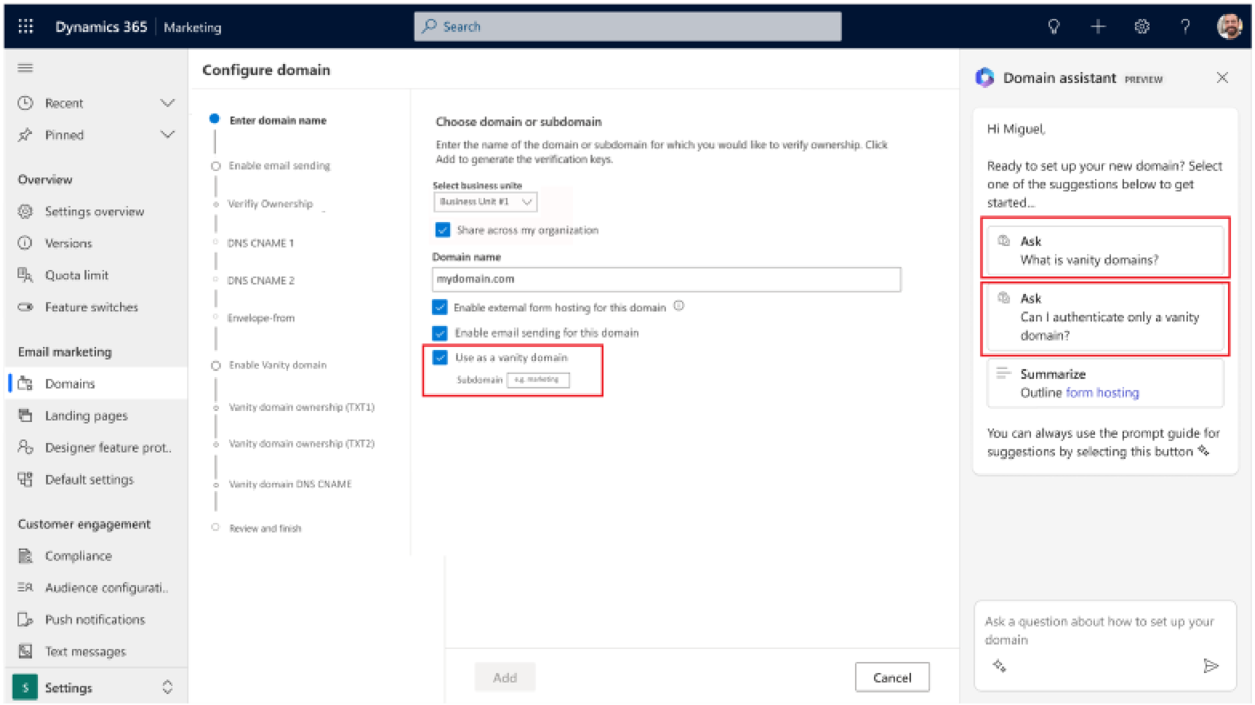
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2024	-

Business value

Links are the gateway to your landing pages, offers, and content. However, automatically generated URLs look unprofessional and suspicious, and they can lower your click rates and conversions. Now you can customize links to show your company name, increasing customers' trust and improving brand recognition and campaign performance.

Feature details

- Set up your vanity link (or custom link) while you authenticate your domain.
- Leverage step-by-step Copilot guidance to easily authenticate your vanity domains.
- Once authenticated, you can use vanity domains to:
  - Display URLs in your emails.
  - Host digital assets, forms, event registration pages, and your preference center.



Feedback

Was this page helpful? Yes No

Build and test journeys before deploying to production

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Jun 2024

Business value

In an ever-evolving world of complex customer experience transformation, marketers need to create and test experiences in preproduction or test environments before moving them to production environments. To aid this movement of assets, you can now use Power Platform solutions and a robust application lifecycle management (ALM) framework. This offers an unparalleled avenue for moving assets between organizations with precision, efficiency, and minimal manual intervention.

With ALM, moving assets such as triggers, segments, and journeys to a production environment post-testing and fine-tuning in a development environment is seamless and predictable, providing your business with the assurance needed to avoid unintended triggers and activities.

Feature details

- Test your customer journeys in testing and preproduction environments and easily move them to production in a published state using Power Platform solutions.
- Upgrade your solutions with the latest version of the journey assets and move them to production to ensure that you're using the latest version of the assets in the customer journey in production.

Feedback

Was this page helpful? Yes No

Capture responses from external, third-party forms

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

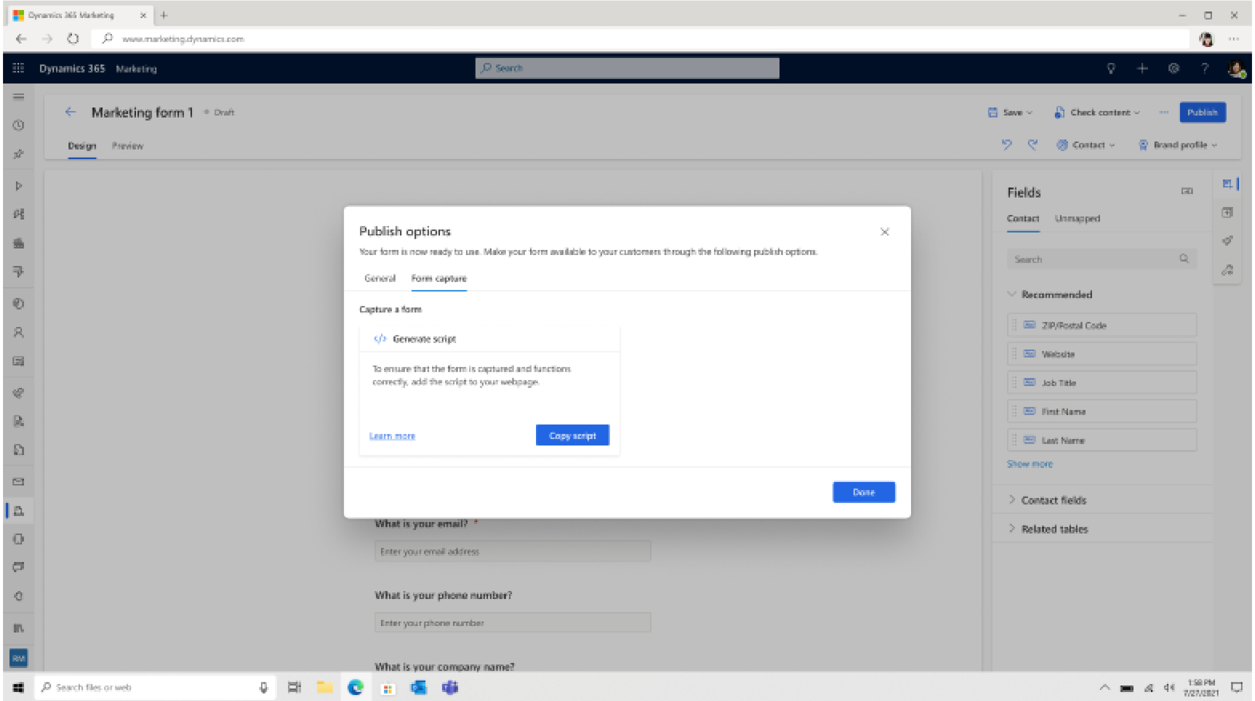
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2024

Business value

Maximize the potential of your external custom-built forms and generate more leads and contacts for your business without the need to recreate them in Customer Insights – Journeys (real-time journeys). Capture submissions from any third-party form on your website and automatically create new leads or contacts in Customer Insights – Journeys. This empowers you to better understand your audience, target them more accurately, and follow up effectively.

Feature details

- Capture form submissions from any external form and use them to create new leads or contacts in Customer Insights – Journeys.
- Easily create JavaScript with mapping of your form fields to existing entity attributes.
- Embed the capture script into multiple pages containing the same form.



Feedback

Was this page helpful? Yes No

Collect extra customer information without creating custom attributes

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

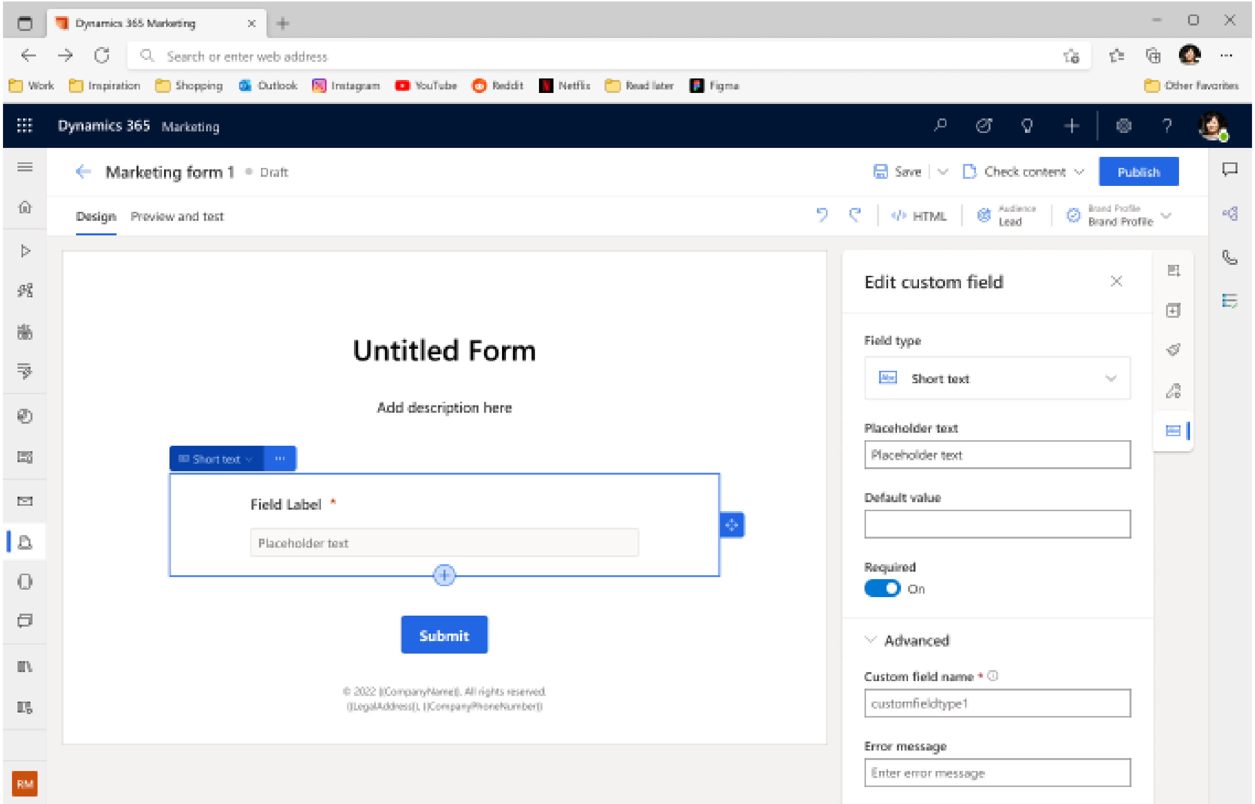
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jul 2024	-

Business value

Easily gather additional information about your customers by creating any kind of question directly in the form editor without having to create new custom attributes for your lead or contact entity. For example, you can create fields to ask, "What is your meal preference?" or create contest questions to increase your customer satisfaction and retention.

Feature details

- Use custom fields to capture additional or temporary information like meal preference or an answer to a contest question.
- To use custom form fields, simply drag and drop them from the toolbox to the form canvas and edit the label and properties as you wish.
- The answer is stored only as part of the form submission, so you can access the value any time without polluting your data.



Feedback

Was this page helpful? Yes No

Easily manage customer consent from contact and lead forms

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

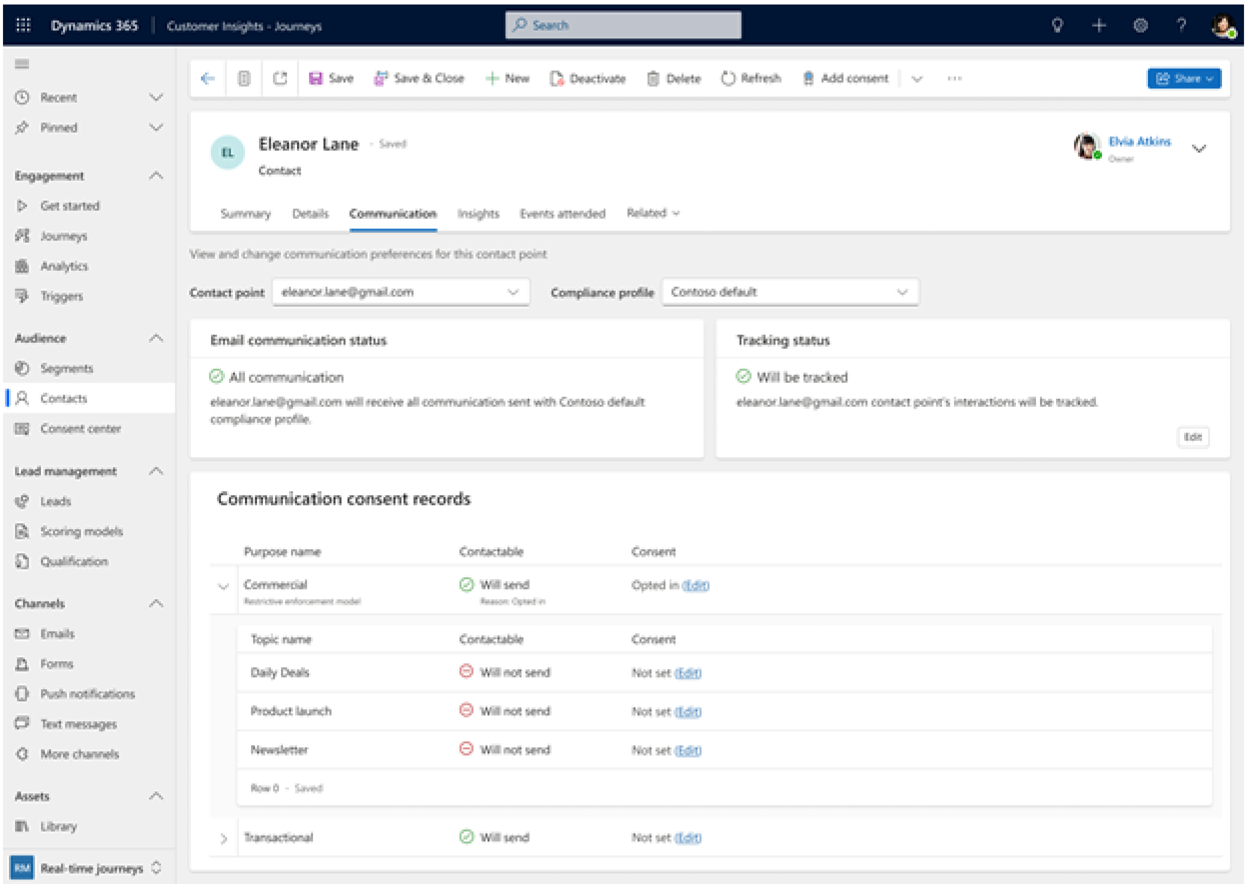
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Jun 2024

Business value

Enhanced contact and lead forms allow you to quickly see and update customer consent, helping you effortlessly manage what types of messages are sent to your customers. This comprehensive view gives you one place to manage consent across every channel and line of business for your organization. Quickly see if a customer has opted out of all commercial communication from your business. Explore which topics a contact has opted into or out of receiving across all channels: email, text, and custom channels. Get a complete understanding of each contact and lead's consent preferences in one easy-to-use screen.

Feature details

- Get a summary view of the consent provided by each contact or lead to understand if the customer is contactable.
- Easily modify the consent for a contact or lead's email addresses, phone numbers, and custom channels directly from the contact or lead forms, giving you control over the type of messages sent to the customer on each channel.
- Drill down into the consent provided to each compliance profile configured for your organization, giving you the ability to understand the customer's consent for each line of business.



Feedback

Was this page helpful? Yes No

Easily reference copies of sent emails in the timeline

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see **Microsoft policy**). Learn more: **What's new and planned**

Expand table

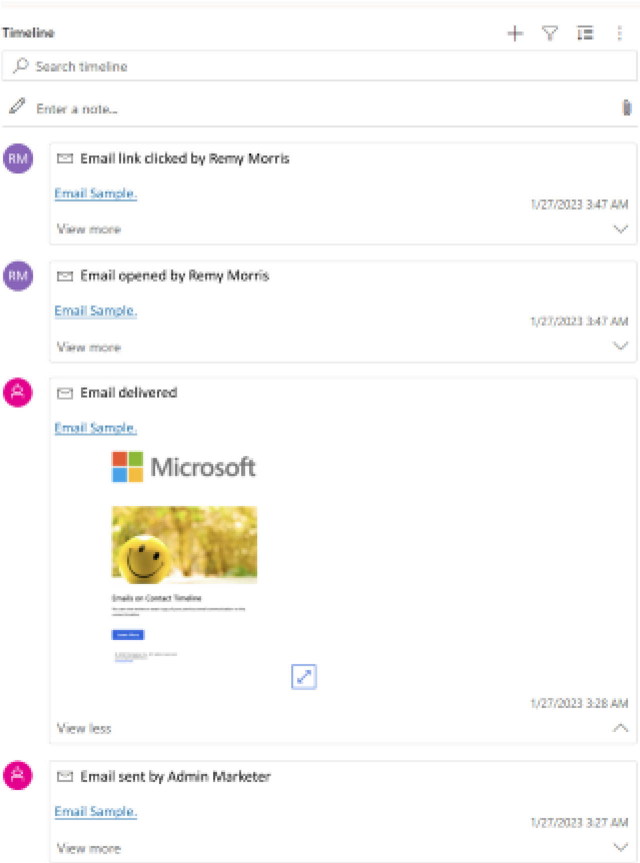
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2024

Business value

Understanding your company's customer interactions is key to improving your customer experience. Now you can deepen customer understanding by viewing exact copies of sent emails, allowing you to build more personalized experiences. Reviewing sent emails improves your overall visibility, compliance, and auditing.

Feature details

- See exact copies of emails sent in the contact and lead timelines.
- Review the output generated by advanced personalization features such as conditional content.
- Adjust storage of archived emails to meet your business needs.



Feedback

Was this page helpful? Yes No

Engage customers with personalized messages based on website interactions

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Jun 2024

Business value

With Customer Insights - Journeys, you can now track and leverage your customers' online behavior to deliver personalized experiences across your digital channels. For example, you can boost conversions and customer loyalty by sending tailored offers after customers visit your website and show interest in a product or service. Furthermore, by tracking additional data about customers' online journeys, you can get valuable insights into your customers' preferences and needs and easily measure your campaign's effectiveness.

Feature details

- Easily generate a tracking script and embed it in your website.
- Use web interaction triggers to build personalized customer experiences.
- Get a holistic view of your customer engagement across touchpoints leveraging first-party data, protecting your customer privacy, and complying with data privacy regulations.

Feedback

Ensure messages go to the right contact email address

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see **Microsoft policy**). Learn more: **What's new and planned**

Expand table

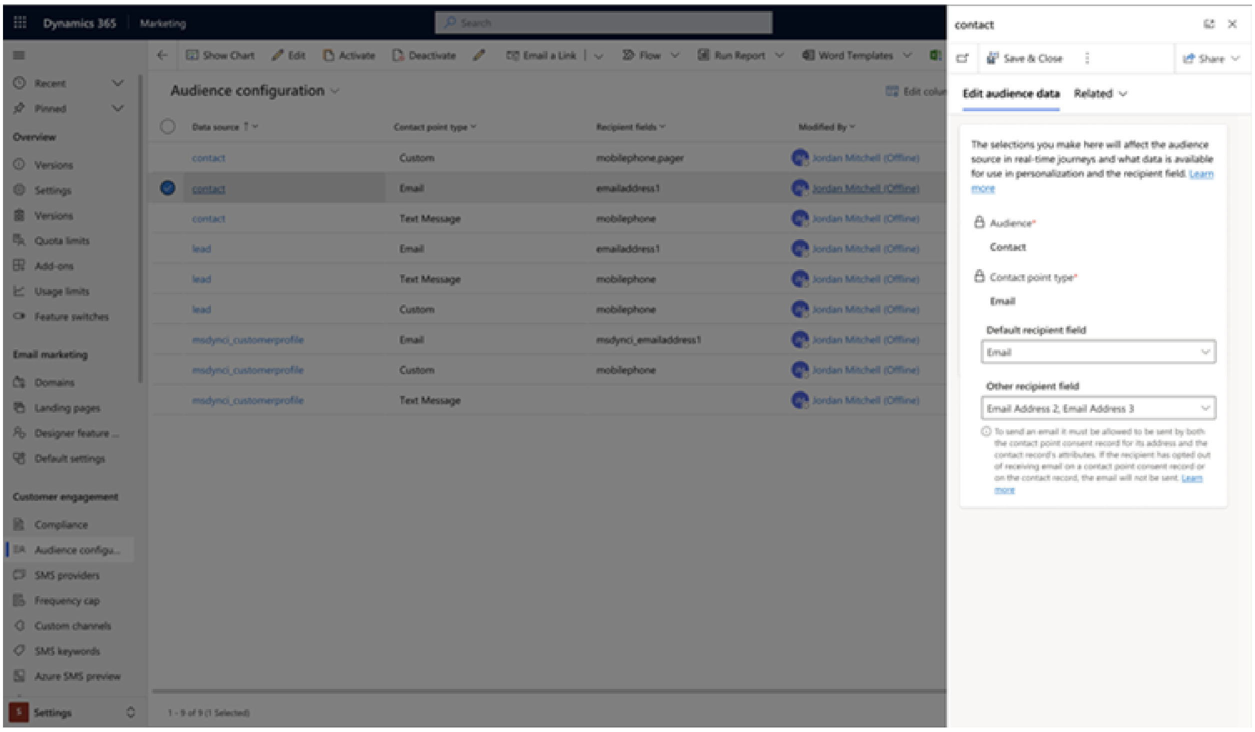
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	May 2024

Business value

It's critical that your messages are delivered by the right channel at the right time. Often, you'll need to pick the correct email address among the several you may have for a contact. Now you can choose which of a contact's email addresses to target in your journeys. For example, some email messages may be more appropriate for a contact's work email address, whereas others may best target a personal email address. Now, you have full control over which email address to send email messages to, enabling you to reach your customers where they're most likely to see your messages and take action.

Feature details

- Administrators can add multiple alternative email recipient fields to a contact's audience configuration in addition to setting a default email recipient field.
- Marketing professionals can pick which email address field to use for their messages during journey creation, allowing them to target a specific email address of a contact.
- Choose whether consent is synced between contact point consent records and the contact's consent attributes with a new feature switch, giving you control over how consent is checked for your emails in Customer Insights – Journeys.



Feedback

Was this page helpful? Yes No

Get faster insights at scale with auto-management of segments, measures

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Jun 2024	-

Business value

As your Dynamics 365 Customer Insights - Data and Customer Insights - Journeys footprint, activities, and usage grow, so does the number of segments. A high number of segments results in longer refresh times for the whole environment, resulting in a longer time requirement for insights.

Customer Insights now intelligently deactivates, disables, or pauses segments based on usage, letting your active and ready-to-use segments refresh faster and enabling you to scale confidently. As an admin, you can turn automatic segment management on or off and set the retention period that is applied.

Feature details

When you have large numbers of segments and measures, as an admin, you can't determine which are needed and which are not. A lot of the campaigns could be one-time campaigns where the segments or measures are not needed after a period of time.

When the segment or measure isn't used anywhere else after the retention period, the system can now automatically deactivate it. This moves compute resources to the segments and measures that are active, which results in faster system refresh and thus faster time to insights.

Users can reactivate segments or measures if needed.

Feedback

Was this page helpful? Yes No

Improve engagement and compliance with double opt-in

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

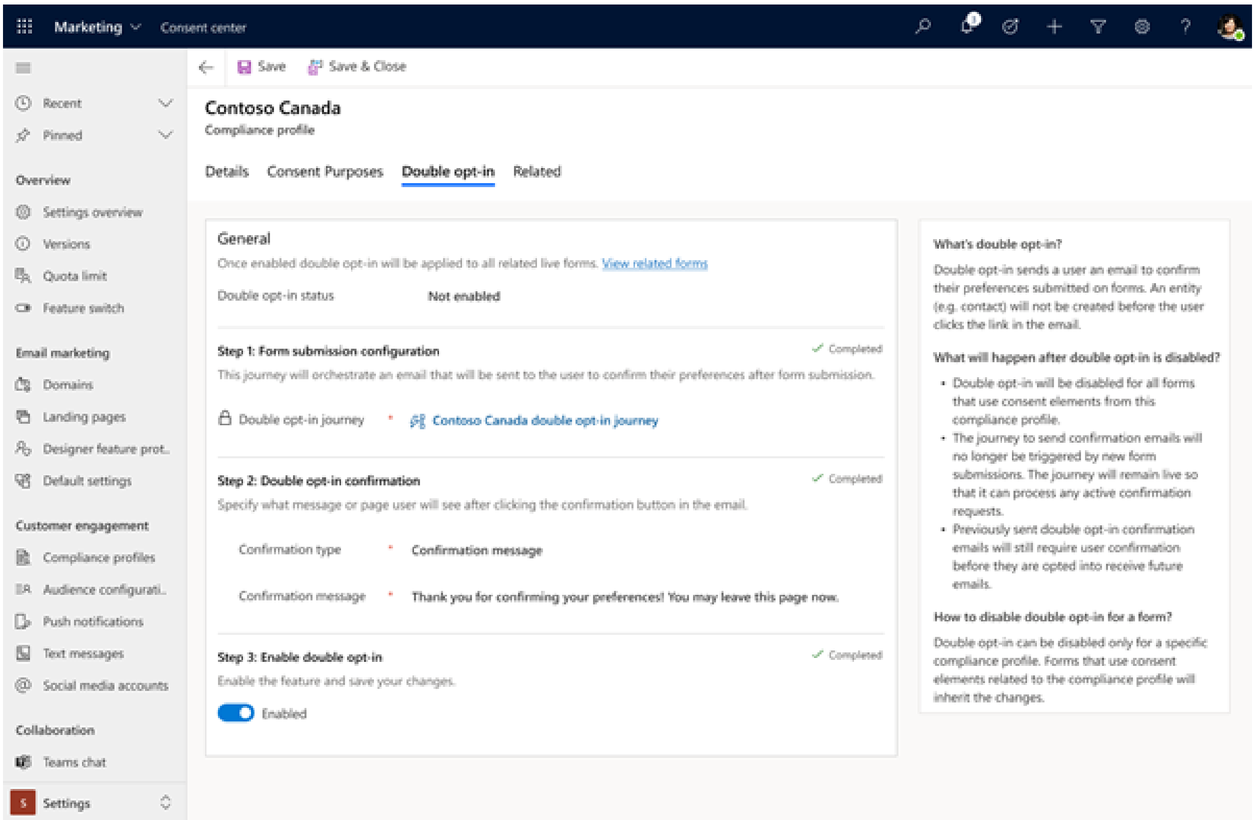
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2024	Jul 2024

Business value

Double opt-in is a valuable tool for email marketing, ensuring a high-quality, engaged subscriber base by requiring users to confirm their subscription through a follow-up email. This process not only reduces spam complaints and bounce rates but also enhances sender reputation and supports compliance with data protection regulations. By implementing double opt-in, marketers can cultivate a more effective email marketing strategy, leading to increased open and click-through rates and a better overall brand experience for subscribers.

Feature details

- Administrators can enable double opt-in at a compliance profile level and easily enforce double opt-in flow for all the forms using the compliance profile.
- Use familiar concepts like triggers and journeys to orchestrate the double opt-in process, allowing you to customize the process to meet your business needs.
- New contacts (or leads) won't be created until the customer has confirmed their opt-in, keeping your contact and lead lists free of bad data.



Feedback

Was this page helpful? Yes No

Improve reliability of insights with advanced bot protection

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Jun 2024

Business value

In today's world, ensuring the integrity of your data and the efficiency of your operations is paramount. Advanced bot protection in Customer Insights - Journeys empowers your business to thrive by safeguarding your business processes. Improve your business decisions with the confidence of knowing that the data you collect is accurate and represents real human interactions. With bot protection, you not only enhance the quality of your insights but also elevate the customer experience by minimizing disruptions caused by malicious bots.

Feature details

- **Prevent bot clicks on your emails**: Avoid inflated engagement metrics, incorrectly triggered journeys, and skewed analytics.
- **Protect web forms visits, clicks, and submissions**: Web forms can be targeted by bots looking to submit spam or malicious content. Bot protection helps ensure that only legitimate form submissions are recorded and no journey is triggered falsely.
- **Ensure accurate event attendance**: Event check-ins can be targeted by bots looking to falsely inflate attendance metrics. Bot protection helps ensure that only real attendees are recorded.

Feedback

Was this page helpful? Yes No

Optimize engagement and increase conversion rates with email A/B testing

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see **Microsoft policy**). Learn more: **What's new and planned**

Expand table

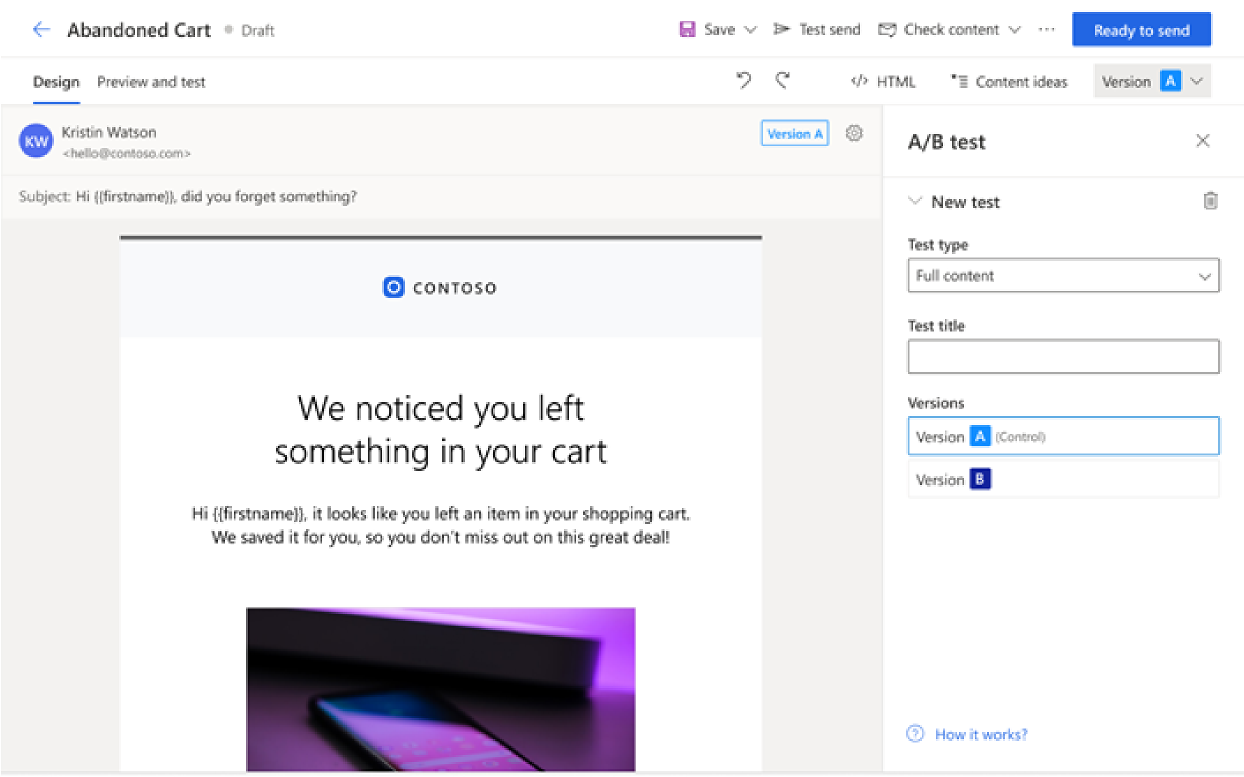
Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2024

Business value

In real-time journeys, compare and test variations of your emails on different subsets of your recipients and analyze how they interact with each to determine which variation performs better. Easily create alternate email versions by changing elements such as the subject, body, or from the address directly in the Customer Insights - Journeys email editor, optimizing content for your audience.

Feature details

- Define different types of A/B tests changing the subject, from email address or email body.
- Preview and test-send version A and version B of your email.
- Easily identify a winner and analyze the results of the A/B test in journey and email insights.



Feedback

Was this page helpful? Yes No

Prevent duplicate emails to contacts that share an email address

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see **Microsoft policy**). Learn more: **What's new and planned**

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2024

Business value

Effective email management is crucial for maintaining strong customer relationships and ensuring your business's success. By enabling email deduplication, you can ensure that even if your data has multiple contacts with the same email address, your message will be sent only once to your customers, keeping their inboxes clutter-free and preserving your brand reputation.

Feature details

- Enable or disable email deduplication for real-time segment-based journeys.
- Ensure that each message is sent just once to each unique email address for segment-based journeys.
- Review duplicated email addresses in journey analytics.

Feedback

Was this page helpful? Yes No

Reach customers quickly with 10x increased throughput

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Sep 2024

Business value

In an increasingly digital and interconnected world, businesses are learning that the key to winning over customers lies in capturing their attention in the most crucial moments. Businesses must deliver the right experience, tailored and timely, effectively engaging customers when it matters most. This often involves delivering millions of personalized messages within a span of just a few hours.

With this release, you can reach customers faster by delivering up to 20 million personalized interactions per hour for segment-based journeys. This ensures that your marketing messages reach your target audience promptly, improving the chance of quick responses and immediate customer engagement.

Additionally, you can react to customers' behaviors in moments that matter with up to 500,000 interactions per hour for trigger-based journeys. This allows you to connect with customers at pivotal moments, making your outreach more timely and relevant and amplifying the effectiveness of each interaction.

Feature details

- Reach your customers faster by sending up to 20 million interactions per hour using batched journey scenarios.

- Reach your customers at moments that matter using event triggers up to 500,000 interactions per hour.
- Increased throughput is enabled automatically in this release.

Feedback

Was this page helpful? Yes No

Reach your customers at the right moment with send scheduling

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	Apr 2024	Jul 2024

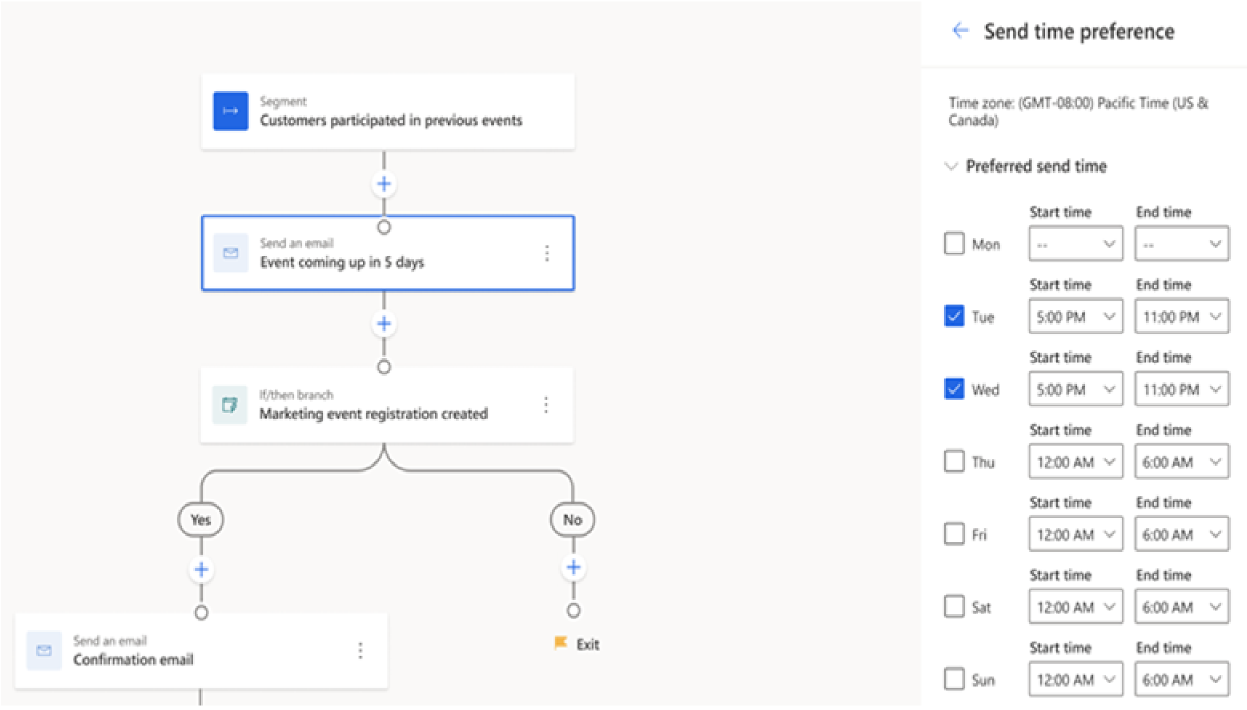
Business value

Delivering messages at the right time can increase customer engagement, conversion rates, and revenue. Send scheduling in real-time journeys ensures that your messages reach your customers when they're most likely to take action. Easily schedule messages to be sent only during specific time windows in a day or specific days of the week to increase their impact. Align your communications with customers' habits, preferences, and their most active hours to increase engagement.

You can also use send scheduling to ensure your messages are delivered during times when your business is ready to respond to customer actions, such as when a call center is open or when sales representatives are available.

Feature details

- Add specific send windows during the day and days of the week to message tiles within journeys.
- Messages outside of the send times are held until the next send time window.
- Send times continue to respect quiet times and frequency caps.



Feedback

Was this page helpful? Yes No

Scale your business with confidence with 300M maximum monthly interactions

Article • 03/06/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may 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 2024

Business value

Reach up to 100 million contacts or leads and send up to 300 million messages per month in real-time journeys. Added capacity empowers you to deliver personalized experiences at scale and delight customers in new ways. Additional interactions help you grow your business, whether you're increasing your customer base in new markets, reaching additional geographies, promoting new products, or expanding your prospective customer pipeline to reach higher sales targets.

Feature details

- Reach up to 100 million marketing contacts (up more than 3 times from the previous 30 million contact limit). Marketing contacts only include those that you engage with through interactions such as emails, SMS, and push notifications.
- Deliver up to 300 million monthly interactions (through email messages, SMS, push, or custom channels). This is up 3 times from the previous 100 million outbound interaction limit.
- Create segments of up to 100 million marketing contacts.

- Engage with customers in near real time with a 30-second response time. (The response time is the time from a trigger being activated to a message being sent in a single-step customer journey. The actual message delivery time varies depending on the recipient's email server, the message-sending channel used, and other factors.)

Feedback

Was this page helpful? Yes No

Provide varied experiences in one journey using journey split tiles

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see **Microsoft policy**). Learn more: **What's new and planned**

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Jul 2024

Business value

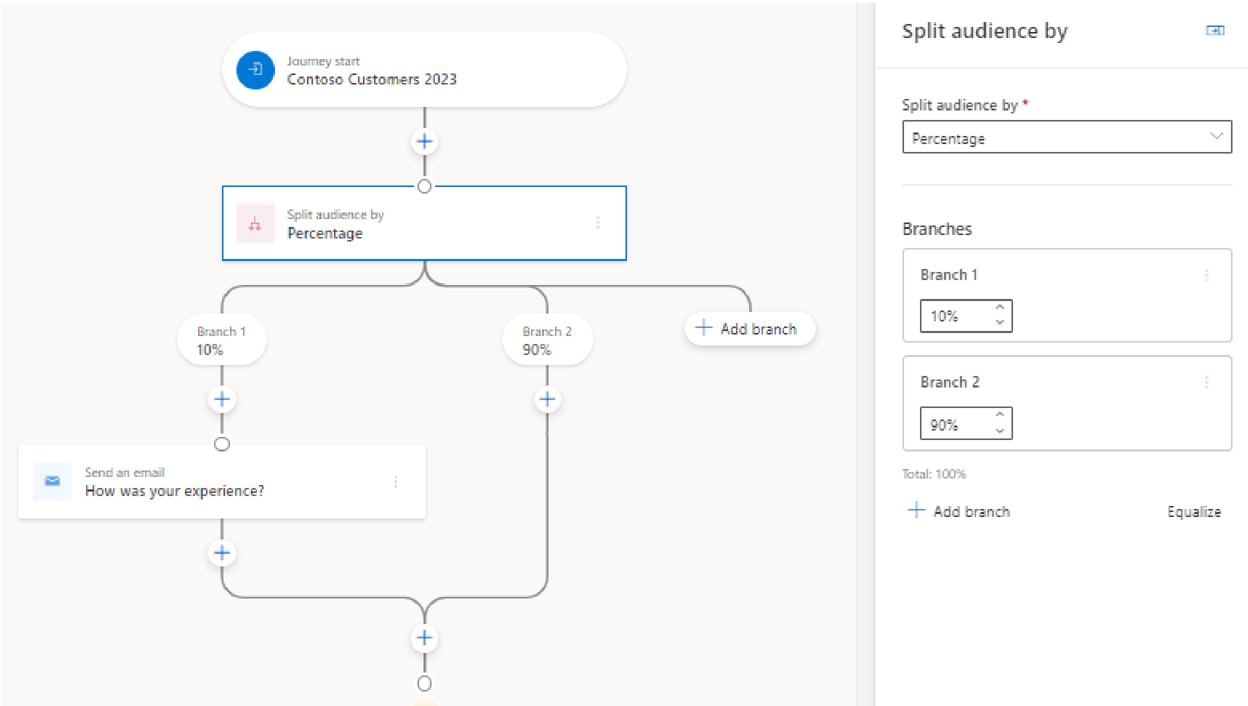
When you want customers to have different experiences in one journey, you need to divide them into groups. While this is possible today using attribute branches or segments, sometimes the number of customers in each branch is more important than what those customers have in common. For example, you may want to send a survey out to a random subset of your customers for feedback, something that would be time-consuming to configure today.

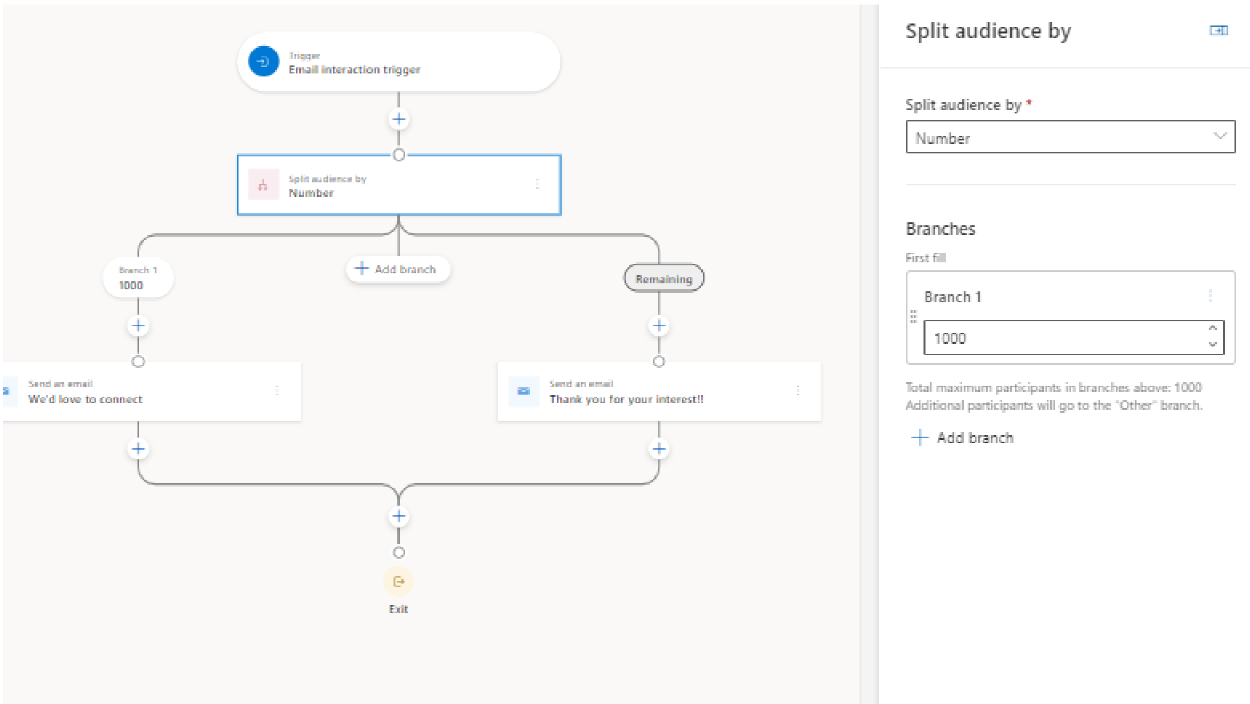
The new journey split tile allows you to split your audience into branches so you can provide a subset of your audience with unique experiences, whether that be a survey, a new type of experience to test, or a first-come promotional offer. You can split your audience by percentages (for cases where you need randomness) or by number (for cases where you want to deliver specific experiences to a set number of people).

Feature details

The journey split tile creates branches in your journey to split up the participant population and provides them with different experiences. You can either split by percentage or by number, each of which supports up to 25 branches.

- **Split by percentage**: Breaks the audience up randomly into the percentages associated with each branch. The random assignment is done for each participant individually, therefore, this works best for larger populations (more than 2,000 participants). This option is useful for scenarios that need randomness, such as sending an experience survey to a subset of your customers.
- **Split by number**: Fills up branches from left to right based on how many participants are configured to go down each branch. This is best for scenarios that need specific numbers of participants, such as offering a promotion for the first 1,000 customers that sign up for a newsletter.





Feedback

Was this page helpful? Yes No

Unify sales and marketing

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see **Microsoft policy**). Learn more: **What's new and planned**

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

Qualify leads and route to sales when buying is likely

Article • 01/25/2024

ⓘ Important

Some of the functionality described in this release plan has not been released. Delivery timelines may change and projected functionality may not be released (see Microsoft policy). Learn more: What's new and planned

Expand table

Enabled for	Public preview	General availability
Admins, makers, marketers, or analysts, automatically	-	Apr 2024

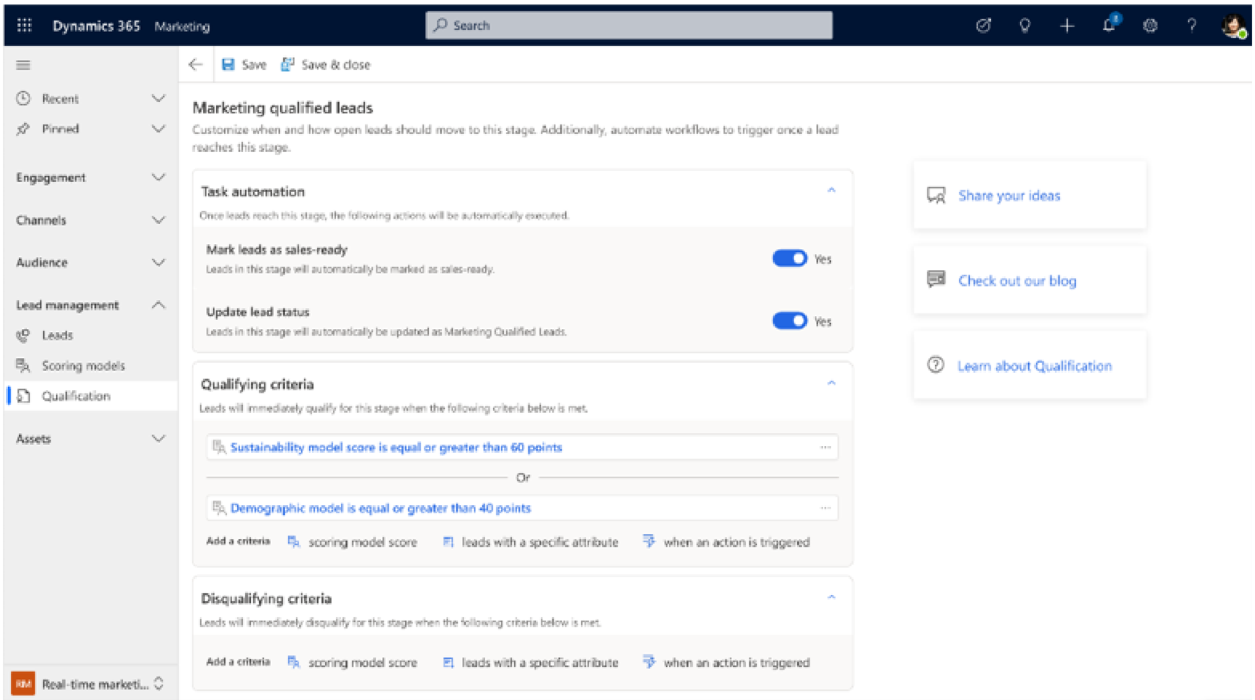
Business value

Scoring models, already available in Dynamics 365 Customer Insights - Journeys, are one of the many signals that help you qualify and hand off a lead to sales. With this release, you can create more flexible, granular lead qualification criteria based not only on scores but also on other signals that indicate a prospect's likelihood to buy such as their "fit" with your Ideal Customer Profile (ICP), their "intent to buy," "recency," and "engagement."

By identifying opportunities exactly when prospects are most likely to buy, your marketing and sales teams can now maximize the opportunity pipeline and increase win rates, together.

Feature details

- Define lead qualification criteria using multiple signals: **fit** (based on a lead's profile), **intent** (for example, filling out a marketing form or watching a demo), **recency** (when the lead was created), and **engagement** (lead score crossing a certain threshold).
- Take automated action every time a lead hits certain qualification criteria.



Feedback

Was this page helpful? Yes No

Dynamics 365 Implementation Portal

Article • 01/25/2024

ⓘ **Important**

Some of the functionalities described on this release plan has not yet been released. Delivery time may change and projected functionality may not be released (see **Microsoft policy**).

ⓘ **Note**

Checkout the what's new in the portal. **Share your feedback** and help us improve.

Overview

Dynamics 365 Implementation Portal is a tool to help customers and partners drive their Dynamics 365 implementations toward a successful launch. The portal provides contextual implementation guidance and risk mitigation practices for a project's different workloads and apps. It has been primarily used to support customer implementations within the FastTrack for Dynamics 365 program but is now available to all customers as a Unified self-service experience.

By onboarding a project to the Implementation Portal, customers will get access to direct guidance aligned with the Success-by-Design implementation framework recommended by the FastTrack and product engineering teams.

In 2024 release wave 1, we will continue to bring more value and improvements to several areas, as follows:

Onboarding projects made easier:

- A new and improved wizard will be made available for users to onboard their projects to the Implementation Portal;
- Partners will be able to onboard projects on behalf of customers, with customer consent steps included;
- The creation of test/demo projects will be possible, to allow users to learn and try out the features;
- Project Profiles will be enabled for creation during the pre-sales phase;

Enhancements in Implementation Guidance will bring:

- Enhancements in the guidance provided in context of the project profile, improved personalized experiences, based on user preferences and persona;
- A new concept of **Deployments** will be introduced: for projects that have gone live with some Applications, it will be possible to logically group environments into a single deployment with multiple characteristics (Applications, Workloads, Environment type and others) and have all the Guidance and Reviews processes scoped to it;
- Business Processes included within on Project Profiling: to align with industry standards and better guidance;

Expanding Project Profiling to Include Business Processes: Project Profiles will be extended from the list of Products and Features being implemented, to also include the Business Process workloads being implemented. This will help drive mor targeted implementation guidance.

Improved Project Review Experience, including Solution Blueprint Review, with the ability to execute on Projects in the Pre-Sales Phase.

Introducing Telemetry Insights:

- A new concept focused on detecting and surfacing optimization opportunities paired with actionable guidance by environment;
- Telemetry results will be surfaced as areas requiring attention are detected;
- Next step guidance will be presented based on results specific to product, implementation phase, environment and customer usage pattern;

For **Partner Center of Excellence** Members: exporting capabilities, better navigation and visibility for projects, allowing better collaboration across projects and their implementation teams.

Implementation CoPilot will expand its scope and capabilities: introducing new assisted scenarios for Project activities, proactive prompts and notifications for findings and suggested actions.

New Nomination Process for Partners: a new process to nominate a project to Fasttrack will be introduced, providing better clarity on the process and visibility for stakeholders.

See also

[Dynamics 365 Implementation Portal documentation](#)
[Microsoft Dynamics 365 Implementation Guide](#)

Feedback

Was this page helpful? Yes No

Deprecation of Dynamics 365 apps

Article • 01/25/2024

A feature or capability that's deprecated is one that we intend to remove in a future release. The feature or capability will continue to work and will be fully supported until it's officially removed. After it's removed, the feature or capability will no longer work. Deprecation notifications can span a few months or years.

We encourage you to use this information, along with the release plans, to prepare for future releases. This notice is intended to give you sufficient time to plan and update your code before a deprecated feature or capability is removed.

- A deprecated feature is not in active development and may be removed in a future update.
- A removed feature is no longer available in the product.

For the current lists of Dynamics 365 deprecations, visit:

- Sales
- Customer Service
- Field Service
- Finance and operations apps
- Universal Resource Scheduling
- Healthcare accelerator
- Financial services accelerator
- Business Central - Base App
- Business Central - Platform - Clients, Server, and Database
- Customer Insights
- Dynamics 365 for Customer Engagement

Other deprecations

For the lists of other deprecations, visit:

- Important changes (deprecations) coming in Power Apps and Power Automate
- Important upcoming changes (deprecations) in canvas apps
- Important upcoming changes and deprecations in Power Pages
- Microsoft Cloud for Financial Services

See also

- Release plans for Dynamics 365, Power Platform, and Cloud for Industry
- Microsoft Lifecycle Policy

Feedback

Was this page helpful? Yes No

Microsoft Power Platform: 2024 release wave 1 plan

Article • 03/06/2024

The Microsoft Power Platform release plan for the 2024 release wave 1 announces the latest updates to customers as features are prepared for release. You can browse the release plan here online (updated throughout the month), view it in the Release planner, or download the document as a PDF file, which is updated with every publish. The plan for 2024 release wave 1 covers new features for Power Platform releasing from **April 2024** through **September 2024**.

Download the 2024 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 2024 release wave 1 have been summarized in a separate release plan and a downloadable PDF.

The Microsoft Cloud for Industry features coming in the 2024 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

2024 release wave 1 overview

Microsoft Power Platform enables users and organizations to analyze, act on, and automate the data to digitally transform their businesses. Microsoft Power Platform today comprises five products: Power BI, Power Apps, Power Pages, Power Automate, and Microsoft Copilot Studio. It also includes the AI Builder add-in. The 2024 release wave 1 release contains hundreds of new features across Power Platform applications, including Power BI, Power Apps, Power Pages, Power Automate, Microsoft Copilot Studio, and AI Builder, as well as Microsoft Dataverse 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 is focusing on integrating Copilot to accelerate app development with AI and natural language, enhancing user reasoning and data insights in custom apps. The team is also simplifying the creation of modern apps through contemporary controls, responsive layouts, and collaboration features. Additionally, they're facilitating enterprise-scale development, enabling makers and admins to expand apps across the organization with improved guardrails and quality assurance tools.

Power Pages

Power Pages interactive Copilot now supports every step of site building to create intelligent websites - design, page layouts, content editing, data binding, learning, chatbot, accessibility checking and securing the site. Connect to data anywhere with the OOB control library and secure the website with more insights at your fingertips.

Power Automate

Power Automate is bringing Copilot capabilities across cloud flows, desktop flows and process mining. This will allow customers to use natural language to discover optimization opportunities, build automations, quickly troubleshoot any issues, and provide a delightful experience in managing the automation estate. For enterprise-scale solutions, maintenance is made easier with improved notifications on product capabilities.

Microsoft Copilot Studio

Microsoft Copilot Studio brings native capabilities for extending Microsoft Copilots, General Availability for Generative Actions, and geo-expansions to UAE, Germany, Norway, Korea, South America, and South Africa. We are also introducing rich capabilities to integrate with OpenAI GPT's, along with new channels such as WhatsApp and software lifecycle capabilities such as topic level import/export and RBAC.

AI Builder

AI Builder invests in three key areas: Prompt Builder for GPT prompts, Intelligent Document Processing with new features and models, and AI Governance improvements, including enhanced capacity management and data policies. These initiatives aim to empower users with advanced Generative AI, streamline document processing, and strengthen governance across AI models within Power Apps.

Microsoft Dataverse

Microsoft Dataverse continues to make investments focusing on enhancing maker experience by improving app building productivity infused with Copilot experiences, seamless connectivity to external data sources and AI-powered Enterprise Copilot in Microsoft 365.

Governance and administration and pro development

Governance and administration continues to provide more tools and insights for Admins to get the most from the Power Platform. In this wave we are introducing new capabilities to help customers manage their low code assets at scale and introducing several new security capabilities to help govern a highly secure platform.

Pro development offers a rich spectrum of extensibility points and tooling capabilities that provide code-first developers with great experiences for Power Platform application development. These experiences enable enterprises to iterate faster and establish fusion development as a new standard where low-code and code-first developers can collaborate and build without limits.

Key dates for the 2024 release wave 1

These release plans describe functionality that may not have been released yet. Delivery timelines and projected functionality may change or may not ship (go to Microsoft policy).

Here are the key dates for the 2024 release wave 1.

Expand table

Milestone	Date	Description
Release plans available	January 25, 2024	Learn about the new capabilities coming in the 2024 release wave 1 (April 2024 – September 2024) across Microsoft Power Platform, Dynamics 365, and Microsoft Cloud for Industry.
Early access available	February 5, 2024	Test and validate new features and capabilities that will be a part of the 2024 release wave 1, coming in April, before they get enabled automatically for your users. You can view the Microsoft Power Platform 2024 release wave 1 early access features now.
Release plans available in 11 additional languages	February 19, 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,

Milestone	Date	Description
		Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish.
General availability	April 1, 2024	Production deployment for the 2024 release wave 1 begins. Regional deployments will start on April 1, 2024.

Just like the previous release waves, we continue to call out how each feature will be enabled in your environment:

- **Users, automatically** – These features include changes to the experience for users and are enabled automatically.
- **Admins, makers, or analysts, automatically** – These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts** – These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

You can get ready with confidence knowing which features will be enabled automatically.

We've done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We're looking forward to engaging with you as you put these new services and capabilities to work, and we're eager to hear your feedback as you dig into the 2024 release wave 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

Was this page helpful? Yes No

Microsoft Cloud for Industry: 2024 release wave 1 plan

Article • 01/25/2024

The Microsoft Cloud for Industry release plan for the 2024 release wave 1 announces the latest updates to customers as features are prepared for release. You can browse the release plan online (updated throughout the month) or download the information as a PDF file, which is updated with every publish. The plan for 2024 release wave 1 covers new features for Microsoft Cloud for Industry releasing from **April 2024** through **September 2024**.

Download the 2024 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 2024 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 2024 release wave 1 have been summarized in a separate release plan as well as a downloadable PDF.

2024 release wave 1 overview

The 2024 release wave 1 for Microsoft Cloud for Industry brings new innovations that provide you with significant capabilities to transform your business. The release contains several new features across Microsoft Cloud for Industry applications, including Microsoft Cloud for Healthcare, Microsoft Cloud for Nonprofit, Microsoft Cloud for Retail, Azure Data Manager for Agriculture and Microsoft Cloud for Sustainability.

Microsoft Cloud for Healthcare

Microsoft Cloud for Healthcare provides capabilities to manage health data at scale and makes it easier for healthcare organizations to improve the patient experience, coordinate care, and drive operational efficiency. For the 2024 wave 1 release we will focus on adding functionality to improve clinical and operational insights, and to accelerate innovation by reducing development time and costs of FHIR applications with low-code tools.

Microsoft Cloud for Nonprofit

Microsoft Cloud for Nonprofit made Community Training generally available globally on December 7th. This is an Azure-powered platform enabling organizations to build equity in skilling and deliver training to communities of any size, anywhere in the world through its mobile-optimized and customizable, white-label style platform. Community Training can be used by nonprofits and community programs to empower facilitators, train communities and volunteers, and to deliver education, health, or volunteer services in the field utilizing organizational-created content, with learner tracking and assessments, all while supporting low-bandwidth functionality for offline learning. This solution is part of Microsoft Cloud for Nonprofit, in our "deliver programs in time and at scale" narrative and will be available in both a nonprofit SKU and a commercial SKU for other sectors. Additionally, Microsoft released new functionality in Microsoft Cloud for Nonprofit, specifically an AI-powered model called Likelihood to donate built into Fundraising and Engagement. The AI model utilizes an organization's donor information to support a nonprofit's understanding of who is most likely to give to programmatic initiatives based on an array of donor characteristics, including past donations, event interactions, and more. Utilizing the model can support the development of donor segments, helping nonprofits target interactions based on their needs and donor giving patterns currently and into the future. Finally, we will be releasing the French localized version of Fundraising and Engagement allowing for greater functionality and global use.

Microsoft Cloud for Retail

Microsoft Cloud for Retail investments for 2024 release wave 1 will light up additional capabilities for our customers but will heavily index on driving improvements to existing in-market solutions. We will invest in bringing additional improvements to our below in-market solutions

- Store Operations Assist: investments to drive more synergy and integration with Modern Work frontline worker applications and address customer feedback and requests.
- Smart Store Analytics: bring Smart Store Analytics on Microsoft Fabric and enhance data analysis and help users navigate through complex data, interpret patterns, and generate insights.
- AI shopping assistant: investments to drive improved personalization for consumers.
- Retail data solutions in Microsoft Fabric: investments for additional retail specific connectors, AI and machine learning , as well as generative AI models, flexibility with retail data model deployments and uptake of new features from Microsoft Fabric.

Microsoft Cloud for Sustainability

Microsoft Cloud for Sustainability delivers Microsoft and partner solutions across four solution plays to empower organizations in their sustainability efforts. These are - enable ESG data intelligence, deliver sustainable IT systems, improve ESG performance and unlock sustainable growth. This release reflects our commitment to expand the depth and breadth of our offering with new and enhanced features in Microsoft Sustainability Manager to meet customers sustainability requirements and enhance time to value.

Azure Data Manager for Agriculture

Azure Data Manager for Agriculture extends the Microsoft Intelligent Data Platform with industry-specific data connectors and capabilities to connect farm data from disparate sources, enabling organizations to use high-quality datasets and accelerate the development of digital agriculture solutions. With the 2024 Release Wave 1, we're providing key enhancements for analytics scenarios to align with leading industry standards. Enhanced ability for data set curation, compatibility with industry leading analytics services, more powerful geospatial scenario support and repeatable data transformation workflows all work together to provide rich new analytics and AI capabilities.

Key dates for the 2024 release wave 1

These release plans describe functionality that may not have been released yet. Delivery timelines and projected functionality may change or may not ship (go to Microsoft policy).

Here are the key dates for the 2024 release wave 1.

Expand table

Milestone	Date	Description
Release plans available	January 25, 2024	Learn about the new capabilities coming in the 2024 release wave 1 (April 2024 - September 2024) across Microsoft Cloud for Industry, Dynamics 365, and Microsoft Power Platform.
Release plans available in additional languages	February 19, 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.

Milestone	Date	Description
General availability	April 1, 2024	Production deployment for the 2024 release wave 1 begins. Regional deployments will start on April 1, 2024

Just like the previous release waves, we continue to call out how each feature will be enabled in your environment:

- **Users, automatically**– These features include changes to the experience for users and are enabled automatically.
- **Admins, makers, or analysts, automatically**– These features are meant to be used by administrators, makers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts**– These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.

You can get ready with confidence knowing which features will be enabled automatically.

We have done this work to help you—our partners, customers, and users—drive the digital transformation of your business on your terms. We are looking forward to engaging with you as you put these new services and capabilities to work, and we are eager to hear your feedback as you dig into the 2024 release wave 1.

Let us know your thoughts. Share your feedback in the Microsoft Power Platform community forum. We will use your feedback to make improvements.

Feedback

Was this page helpful? Yes No

Dynamics 365: 2023 release wave 2 plan

Article • 02/13/2024

The Dynamics 365 release plan for the 2023 release wave 2 announces the latest updates to customers as features are prepared for release. You can browse the release plan here online (updated throughout the month), view it in the release planner, or download the document as a PDF file, which is updated with every publish. The plan for 2023 release wave 2 covers new features for Dynamics 365 releasing from **October 2023** through **March 2024**.

Download the 2023 release wave 2 PDF for Dynamics 365 or select the option at the bottom of the table of contents.

The Microsoft Power Platform features coming in the 2023 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

The Microsoft Cloud for Industry features coming in the 2023 release wave 2 have been summarized in a separate release plan as well as a downloadable PDF.

2023 release wave 2 overview

The 2023 release wave 2 for Dynamics 365 brings new innovations that provide you with significant capabilities to transform your business. The release contains hundreds of new features across Dynamics 365 applications, including Marketing, Sales, Customer Service, Field Service, Finance, Supply Chain Management, Project Operations, finance and operations cross-app capabilities, Human Resources, Commerce, Business Central, Guides, and Customer Insights as well as Microsoft Sales Copilot and Microsoft supply chain platform and its supporting products.

Marketing

Dynamics 365 Marketing will bring enhancements to Copilot features empowering marketers to quickly create new experiences and will bring unprecedented levels of personalization to email content, images, and layouts. Additionally, B2B dashboards and directly assigning leads to the right rep will align marketers and sellers, enabling them to act as a unified team across the buying journey.

Sales

Dynamics 365 Sales will focus on enabling sales organizations to prioritize and manage digital sales processes through enhanced sequence capabilities. We will allow users to assign and monitor lead assignment status with enhanced lead assignment capabilities by providing recommendations, summarizing data, retrieving information, and performing actions in context and within the flow of work.

Microsoft Sales Copilot reimagines how sellers work by continuing to deliver and enhance generative AI capabilities like email thread summarization, recommended CRM updates, sales email composition, CRM entity summarization, sales meeting summarization, and real-time sales tips. Additionally, further enhancements to collaboration spaces will extend beyond the creation of structured teams/channels and deliver sales copilot experiences that support sales teams during deal progression and shorten the time to close for sellers.

Service

Dynamics 365 Customer Service will continue to empower agents to work more efficiently through Copilot capabilities, Join me on Teams, visual enhancements to the agent workspace, ability to see live chats and voice calls in Inbox, and personalizing the size of the conversational control. Additionally, we are making enhancements to the voice channel, improvements to call dialer, and routing calls to agents with the longest idle time.

Dynamics 365 Field Service updates will include new capabilities for frontline workers, service managers, and dispatchers. We are delivering several top requests such as converting quotes to work orders, enhancing inspections, and evolving our resource scheduling capabilities.

Finance and Supply Chain

Dynamics 365 Finance is focused on enhancing organizations' visibility into their data, continued enhancements for AP and bank statement automation, and expanding out-of-the-box country coverage in LATAM. Additionally, the team will deliver further automation of complex tax scenarios and e-invoicing requirements for more countries and provide organizations the ability for business model expansion and agility.

Supply Chain Management continues to improve and optimize business processes to deliver the agility and resilience needed for businesses to thrive in an increasingly complex business environment. The sales and procurement processes will be further enhanced, manufacturers will enjoy greater flexibility, and warehouse processes related to counting, customer returns, and product receipts will be improved.

Dynamics 365 Project Operations is investing in enhancements to services procurement scenarios and project contracting and new functionalities and scenarios in pricing models will support the evolving patterns in the service-centric economy. Additionally, improvements to intelligent resource recommendations will provide suggestions based on experience, cost and utilization across employees and subcontractors.

Finance and operations cross-app capabilities continues to invest in capabilities that apply to all finance and operations apps, including Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations.

Dynamics 365 Human Resources will be improving recruiting experiences with functionally rich and intuitive experiences that target recruiters, candidates, and hiring managers. We will expand the HCM ecosystem to include learning management system integration through public APIs leveraging Dataverse along with expanding our payroll partner network.

Commerce

Dynamics 365 Commerce is leveraging the power of AI to enable the effortless creation of engaging product content for digital commerce sites. New B2B investments allow distributors to view, accept, and reject orders from a centralized dashboard that enables B2B sellers, distributors, and buyers to all work in the same place.

SMB

Dynamics 365 Business Central will focus on core functionality to help companies manage their intercompany and consolidations across environments. We will continue to enhance our Copilot capabilities and will further improve our warehouse capabilities, create more Power Automate templates, and provide developers with more capabilities for automating testing of dependent apps.

Guides

Dynamics 365 Guides is bringing several new capabilities and enhancements including Object Anchors, Azure Remote Rendering, and availability on Government Community Cloud High. Additionally, we are focusing on features allowing seamless integration with systems of record allowing customers to build mixed reality workflows that are integrated with their business data.

Customer Insights

Dynamics 365 Customer Insights is enhancing our Copilot features to allow you to ask questions in simple words, to quickly receive insights, and act on these immediately. New capabilities in real-time data management will provide the latest view of your customers, and easy access to insights within Dynamics 365 apps will allow your team to deliver seamless, personalized experiences across the customer's lifecycle.

Key dates for the 2023 release wave 2

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Here are the key dates for the 2023 release wave 2.

Expand table

Milestone	Date	Description
Release plans available	July 18, 2023	Learn about the new capabilities coming in the 2023 release wave 2 (October 2023 - March 2024) across Dynamics 365, Microsoft Power Platform, and Microsoft Cloud for Industry.
Early access available	July 31, 2023	Test and validate new features and capabilities that will be part of 2023 release wave 2, coming in October, before they are enabled automatically for your users. You can view the Dynamics 365 **2023 release wave 2 early access features now**.
Release plans available in additional languages	August 7, 2023	The Microsoft Power Platform and Dynamics 365 release plans are published in 11 additional languages: Danish, Dutch, Finnish, French, German, Italian, Japanese, Norwegian, Portuguese (Brazilian), Spanish, and Swedish. Microsoft Cloud for Industry release plans are published in 4 additional languages: French, German, Dutch and Spanish.
General availability	October 1, 2023	Production deployment for the 2023 release wave 2 begins. Regional deployments will start on October 1, 2023.

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