



**DYNUG 2023**

Kurt Hatlevik

# Agenda

Personalisering, navigering, filtrering og sortering

«En Dynamics, En Plattform»

Fast Track implementation portal.

Financial Tags

Reporting HUB



# Personalisering, Navigering, Filtrering og Sortering

Kurt Hatlevik

# Personalisering - Arbeidssenteret

The screenshot shows the 'Arbeidssenteret' (Work Center) interface for Vitalia. The dashboard is organized into several sections:

- Header:** 'Finance and Operations Forhåndsvisning' with a search bar 'Søk etter en side' and user information 'DEN1 KH'.
- Left Sidebar:** Navigation menu including 'Startside', 'Favoritter', 'Siste', 'Arbeidsområder', and 'Moduler'.
- Search:** 'Search people ...' field.
- Calendar:** 'mars 2023' calendar view with the 11th highlighted.
- Workload:** 'Arbeidselementer som er tilordnet til meg' section with a sub-section 'Arbeidsoppdatering'.
- Dashboard Widgets:**
  - Kurt's Område:** 'Åpne salgsordrer' (11), 'Utenlandske kunder' (19), 'Red Alert', 'eCommerce', 'Arbeidsordrebehandling' (0 active).
  - Behandling av generell journal:** 'Alle som ikke er postert' (4).
  - Bestillingsklargjøring:** 'Godkjent uten bekreftet leveringsdato' (1).
  - Kundefakturer:** 'Salgsordrer på vent' (0), 'Salgsordrer som er sendt, men ikke fakturert' (0).
  - Salgordrebehandling og -spørring:** 'Forsinkede ordrelinjer' (11).
  - Behandling av salgsreturer:** 'Utløpte returordre' (0).
  - Kategori- og produktstyring:** 'Aktive sortimenter' (5).
  - Smart reservation:** 'Black sales order lines' (1), 'Red sales order lines' (0).
  - Bestillingsbekreftelse:** 'Åpne bekreftede bestillinger' (1), 'Bestillinger for vurdering' (0).
  - Kundebetaling:** 'Betalingsjournaler - ikke posterte' (32).
  - Prisings- og rabattstyring:** 'Aktive rabatter' (2).
  - Regnskapsperiodeavslutning:** 'Oppgaver over forfall' (36).
  - Vedlikehold av frigitt produkt:** (Link to work center).

Selskapslogo eller banner

Søk etter ansatte

Ende dato i sesjonen

Fra arbeidssenteret.

Arbeidsoppgaver fra arbeidsflyt

Link til arbeidssenter

# Vise oppgaver på Arbeidsflaten

Finance and Operations Forhåndsvisning  DEN1 KH

## Vitalia

fr

< mars 2023 >

ma	ti	on	to	fr	lø	sø
	1	2	3	4	5	
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

### Kurt's Område

Åpne salgsordrer	12
Utenlandske kunder	19

### Behandling av generell journal

Alle som ikke er postert	4
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### Kategori- og produktstyring

Aktive sortimenter	5
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### Regnskapsperiodeavslutning

Oppgaver over forfall	36
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### Behandling av salgsreturer

Utløpte returordre	0
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### Kundebetaling

Betalingsjournaler – ikke posterte	32
------------------------------------	----

### Salgsordrebehandling og -spørring

Forsinkede ordrelinjer	11
------------------------	----

### eCommerce

### Bestillingsbekreftelse

Åpne bekreftede bestillinger	1
Bestillinger for vurdering	0

### Kundefakturering

Salgsordrer på vent	0
Salgsordrer som er sendt, men ikke fakturert	0

### Smart reservation

Black sales order lines	1
Red sales order lines	0

### Arbeidsordrebehandling

Aktive arbeidsordrer	0
Aktive arbeidsordrer	0

### Bestillingsklargjøring

Godkjent uten bekreftet leveringsdato	1
---------------------------------------	---

### Prisings- og rabattstyring

Aktive rabatter	2
-----------------	---

### Vedlikehold av frigitt produkt

### Arbeidselementer som er tilordnet til meg

Arbeidselementer vises her etter at de er tilordnet til deg.

#### Oppgaver

Detaljhandel

Nye plakater i butikk	Forfalt 15.03.2023
Sjekk beholdning for påskevarer	Forfallsdato 1 dag
Ny avdeling for barn (Påske)	Forfallsdato 1 dag
Sjekk beholdning for Tyrkisk p...	Forfallsdato 18.03.2023
Sende nye bilder til khatlevik@...	Forfallsdato 10.08.2023

Demo

# Mer personalisering

The screenshot displays the SAP Finance and Operations Preview interface for customer '100001 : Bygg AS'. The main content area is divided into several sections: General, CUSTOMER, ORGANIZATION DETAILS, OTHER INFORMATION, Addresses, Contact information, Miscellaneous details, Sales demographics, and Credit and collections. A 'Personalize' menu is open over the 'Known as' field in the OTHER INFORMATION section, showing options: Hide, Required (checked), Show in header (checked), Skip, Edit page, and Remove. The 'Personalize this page' option is also visible at the bottom of the menu. The right sidebar contains 'Related information' (Primary address, Recent activity, Relationships, Statistics, Credit statistics) and a 'Refresh' button.

Section	Field	Value
CUSTOMER	Account	100001
	Type	Organization
GENERAL	Name	Bygg AS
	Search name	Bygg AS
ORGANIZATION DETAILS	Number of employees	0
	Organization number	941009697
OTHER INFORMATION	Address books	BGO;NOR
	Language	nb-NO
OTHER INFORMATION	Known as	Vi bygger alt
	Known as	Vi bygger alt
SALES DEMOGRAPHICS	Primary contact	
	Line of business	2100
SALES DEMOGRAPHICS	Employee responsible	
	Segment	
SALES DEMOGRAPHICS	Subsegment	
	Company chain	
SALES DEMOGRAPHICS	Sales district	Bergen
	Currency	NOK

Gjelder både Felter, grupper og menyer

Husk å lagre dine personaliseringer!

Search for a page

Save + New Delete Complete Sales order Sell **Pick and pack** Invoice Price Options

[Sales order details](#) | My Order creation

# 012626 : Basketball Stadium

Open order

Lines

**Sales order header**

Customer account <input type="text" value="1001"/>	<b>DELIVERY DATE</b> Requested ship date <input type="text" value="30.05.2023"/>	<b>DELIVERY ADDRESS</b> Address 456 Cranberry Street Andover, KS 67002 USA
Customer reference <input type="text"/>	Confirmed ship date <input type="text"/>	Delivery address <input type="text" value="Basketball Stadium"/>

**Sales order lines**

+ Add line Add products Remove Sales order line Inventory

Item number	Product name	Quantity	Unit	Unit price	Discount percent	Net amount	Line status	Requested ship date	Confirmed ship date
0001	Youth Accessory Combo Set	1,00	Ea	69,99		69,99	Open order	30.05.2023	
<b>Total</b>						Sum	Sum		
1 rows							<b>69,99</b>		



Search for a page

Customers | My view

# 1001 : Basketball Stadium

General 20 | -- | ^

CUSTOMER	Name	ORGANIZATION DETAILS	OTHER INFORMATION
Account 1001	Basketball Stadium	Organization number 11 22 33 44	Language en-us
	Customer group 20		

Addresses v

Contact information v

Sales demographics 1100 | -- | -- | -- | -- | USD v

Credit and collections -- | No | 12 000,00 ^

GENERAL	TOTAL CREDIT LIMIT
Mandatory credit limit <input type="radio"/> No	Credit limit 12 000,00
Unlimited credit limit <input type="radio"/> No	

Sales order defaults -- | -- | v

Payment defaults Net30 | -- | -- | v

Invoice and delivery -- | FOB | 10 | No-Tax | v

Sales order details | Standard view

# 012626 : Basketball Stadium

Open order

Lines Header

### Sales order header

Customer account 1001	Delivery address Basketball Stadium	Requested receipt date 30.05.2023	Customer requisition	Mode of delivery 10
Invoice account 1001	Address 456 Cranberry Street Andover, KS 67002 USA	Simulate delivery dates	Source	Expedite
<b>DELIVERY ADDRESS</b> Name Basketball Stadium	<b>DELIVERY DATE</b> Requested ship date 30.05.2023	Confirmed ship date	CONFOUNTS Manual discount percentage 0,00	<b>RETAIL</b> Loyalty card number
	<b>REFERENCE</b> Customer reference	Confirmed receipt date	<b>DELIVERY DETAILS</b> Ship complete No	<b>DISTRIBUTED ORDER MANAGEMENT</b> DOM Status Not processed

Information overload!

### Sales order lines

Variant number	Item number	Product name	Sales category	CW quantity	CW unit	Revenue s...	Revenue s...	Parent am...	Quantity	Unit	Delivery type
0001		Youth Accessory Combo S...							1,00	Ea	Stock

Search for a page

- Filter
- Basketball Stadium**  
1001
- Football Stadium  
1002
- Contoso Retail San Diego  
3001

Customer Sell Invoice Price General Options

All customers | My view

## 1001 : Basketball Stadium

20 | -- | Basketball Stadium

General		VIKTIG !!
<b>CUSTOMER</b>	Name	MVA nr(Sjekk BRREG!)
Account	<a href="#">Basketball Stadium</a>	11 22 33 44
1001	Customer group	<b>OTHER INFORMATION</b>
	20	Language
		<a href="#">en-us</a>

Credit and collections -- | No | 12 000,00

GENERAL	TOTAL CREDIT LIMIT
Mandatory credit limit	Credit (Ikke mer enn 20.000!)
<input type="radio"/> No	<u>12 000,00</u>
Unlimited credit limit(nix!)	
<input type="radio"/> No	

Addresses

Contact information

Sales demographics 1100 | -- | -- | -- | -- | USD

Sales order defaults -- | --

Payment defaults Net30 | -- | --

Invoice and delivery -- | FOB | 10 | No-Tax

### Filters

+ Add

Credit limit between

0

10000000

Organization number is not

""

Apply Reset

# Publisere personaliseringer

- Roller
- Fil

The screenshot shows a CRM interface with a table of Norwegian customers and a sidebar for publishing personalizations.

**Table: Norske kunder**

Konto	Navn	Kundegruppe	Valuta	Telefon
100001	Bygg AS	Domestic	NOK	+47 63 87 72 03
100005	Christopher AS	Domestic	NOK	48083839
100012	Royal Crown AS	Domestic	NOK	99 88 77 66
100013	Butikk AS	Domestic	NOK	469 51 245
100014	Sport AS	Domestic	NOK	22 78 28 78
100020	Halstein Helstein	Domestic	NOK	
100024	Center Goods AS	Domestic	NOK	+47 99 66 33 22
100027	Espen Sei AS	Domestic	NOK	
100061	Petter Smart	Domestic	NOK	
100063	Alexandru Test	Domestic	NOK	
100067	Kari Nordmann	Domestic	NOK	
100069	Espen Espensen2	Domestic	NOK	
100076	Øyvind Berg-Olsen	Domestic	NOK	
100092	Sport senteret	Domestic	NOK	51 80 12 26
100123	Kurt(inspirit) Hatlevik	Domestic	NOK	93240715
100124	Inspirit365 AS	Domestic	NOK	
100135	Vegard AS	Domestic	NOK	45612358
100137	Havn AS	Domestic	NOK	99663322
55224466	Santofini AS	Domestic	NOK	

**Publiseringssiden (til høyre):**

- Publisering til andre:** Navn: Norske kunder. Fortell mottakere om formålet med denne visningen: Norske kunder.
- Publisering som standardvisning:**  Ja
- Publisering til personer i disse rollene:** Legg til / Fjern. Roller: Sales manager (inkludert).
- Tilgang til juridisk enhet:**  Alle,  Bare gjeldende,  Bare valgte.
- Firma:** Fant ingenting å vise her.
- Knapper:** Publisere, Avbryt.

# Bruke Excel

The screenshot displays the Microsoft Excel interface with a data table and the Microsoft Dynamics Data Connection pane open on the right.

**Excel Interface:**

- File Name: Norske kunder.xlsx
- Search: Search
- Current Cell: B6 (Alexandru Test)
- Language: Norwegian (Norsk)

**Data Table:**

Kundekonto	Organisasjonsnavn	Kundegruppe	Valuta	Språk	Kredittgrense	Betalingsbetingelser	Betalingsmåte	Leveringsbetingelser	Leveringsmåte	Primær e-postadresse
100020	Halstein Helstein	Domestic	NOK	nb-NO	100000	Net30	ISO20022	CFR	Standard	
100024	Center Goods AS	Domestic	NOK	en-US	100000	Net30	ISO20022	EXW	Standard	
100027	Espen Sei AS	Domestic	NOK	en-US	100000	Net30	ISO20022	CFR	Standard	
100061	Petter Smart	Domestic	NOK	en-US	50000	Net30	ISO20022	CFR	Standard	
100063	Alexandru Test	Domestic	NOK	en-US	100000	Net30	ISO20022	CFR	Standard	albrujan@microsoft.com
100067	Kari Nordmann	Domestic	NOK	en-US	100000	Net30	ISO20022	CFR	Standard	
100069	Espen Espensen2	Domestic	NOK	en-US	100000	Net30	ISO20022	CFR	Standard	eholsen@inspirit365.com
100076	Øyvind Berg-Olsen	Domestic	NOK	nb-NO	100000	CreditCard	PAID	CFR	Pickup	
100092	Sport senteret	Domestic	NOK	en-US	2000000	Net30	ISO20022	EXW	02040	post@sport.no
55224466	Santofini AS	Domestic	NOK	en-US	100000	Net30	ISO20022	CFR	Standard	
100001	Bygg AS	Domestic	NOK	nb-NO	5000000	Net1	ISO20022	EXW	Standard	post@bygg.bo
100005	Christopher AS	Domestic	NOK	en-US	100000	Net30	ISO20022	CFR	Standard	
100012	Royal Crown AS	Domestic	NOK	en-US	100000	Net30	ISO20022	EXW	Postal	d365@demo.no
100013	Butikk AS	Domestic	NOK	en-US	800000	Net30	ISO20022	EXW	Standard	
100014	Sport AS	Domestic	NOK	en-US	100000	Net30	ISO20022	EXW	Nor	VAREMOTTAK@SPORTAS.NO
100123	Kurt(inspirit) Hatlevik	Domestic	NOK	en-US	99999	Net30	PAID	CFR	Standard	
100124	Inspirit365 AS	Domestic	NOK	nb-NO	100000	Net30	ISO20022	DDP	Post	khatlevik@inspirit365.com
100135	Vegard AS	Domestic	NOK	en-US	60000	Net30	ISO20022	CFR	Standard	Test@test.no
100137	Havn AS	Domestic	NOK	en-US	100000	Net30	ISO20022	CFR	Nor	hatlevik@hotmail.com

**Microsoft Dynamics Data Connection Pane:**

- Enhetsdatakilde: Kunder V3
- Enhetsalternativer: (None listed)
- Tilgjengelige felt: (None listed)
- Valgte felt:
  - CustomerAccount – Kundekonto
  - OrganizationName – Organisasjonsnavn
  - CustomerGroupID – Kundegruppe \*
  - SalesCurrencyCode – Valuta \*
  - LanguageCode – Språk
  - CreditLimit – Kredittgrense
  - PaymentTerms – Betalingsbetingelser
  - PaymentMethod – Betalingsmåte
  - DeliveryTerms – Leveringsbetingelser
- Skribebeskyttet:  (unchecked)
- Skribebeskyttet for nye poster:  (checked)

# F11

- Fullskjerm
- Få fokus på det du jobber med.

# URL tips 1

<https://xxxxx.sandbox.operations.eu.dynamics.com/?cmp=USRT&mi=CustTableListPage&lng=nb-no&hideSplash=true&limitednav=true&embedded=true>

The screenshot shows a Dynamics CRM interface for 'Salgsordre' (Sales Orders). The table lists various orders with columns for Salgsordre, Kundekonto, Kundenavn, Ordretype, Status, Valuta, Bekreftet forsendel..., Leveringsmåte, Leveringsbetingelser, Sperre, and R... B... The row for order 101750 is highlighted. A small black diamond is visible in the 'Sperre' column for order 101742. A search bar with the text 'Filter' is located above the table. The browser's address bar shows the URL from the previous block.

Salgsordre	Kundekonto	Kundenavn	Ordretype	Status	Valuta	Bekreftet forsendel...	Leveringsmåte	Leveringsbetingelser	Sperre	R... B...
101730	100137	Havn AS	Salgsordre	Åpen ordre	NOK	07.01.2023	Nor	CFR		
101732	100137	Havn AS	Salgsordre	Åpen ordre	NOK		Nor	CFR		
101733	100137	Havn AS	Salgsordre	Åpen ordre	NOK		Nor	CFR		
101737	100014	Sport AS	Salgsordre	Åpen ordre	NOK		Nor	EXW		
101740	100123	Kurt(inspirit) Hatlevik	Salgsordre	Åpen ordre	NOK		Standard	CFR		
101742	100137	Havn AS	Salgsordre	Åpen ordre	NOK		Nor	CFR	◆	
101743	100123	Kurt(inspirit) Hatlevik	Salgsordre	Åpen ordre	NOK		Standard	CFR		
101746	102	Default customer Oslo	Returordre	Åpen ordre	NOK		Standard	CFR		
101747	100022	Kurt (hotmail) Hatlevik	Returordre	Åpen ordre	NOK		Standard	CFR		
101748	100022	Kurt (hotmail) Hatlevik	Returordre	Åpen ordre	NOK		Standard	CFR		
101750	101	Default customer Bergen	Returordre	Åpen ordre	NOK		Standard	CFR		

density=30  
(touch)

density=21  
(Kompakt)

theme=4



# URL tips 2

xxxx.sandbox.operations.eu.dynamics.com/?cmp=USRT&debug=true

The screenshot displays the Dynamics 365 Finance and Operations Preview interface. The main window shows a list of customers under the 'Vitalia' entity. The selected customer is 'Christopher sin lead' with account number 100005 and phone number 48083839. The right sidebar provides performance metrics for the current action, 'ProcessEventData', showing a total time of 73ms and a total server time of 73ms. Below the performance metrics is a history table listing various interactions and their durations.

Konto	Navn	Kundegruppe	Valuta	Telefon
100001	Bygg AS	Domestic	NOK	+47 63 87 72 03
100005	Christopher sin lead	Domestic	NOK	48083839
100012	D365 Demo Customer	Domestic	NOK	99 88 77 66
100013	Butikk AS	Domestic	NOK	469 51 245
100014	Sport AS	Domestic	NOK	22 78 28 78
100020	Halstein Helstein	Domestic	NOK	
100024	Center Goods AS Hei Ansgar	Domestic	NOK	+47 99 66 33 22
100027	Espen Sei	Domestic	NOK	
100061	Petter Smart	Domestic	NOK	
100063	Alexandru Test	Domestic	NOK	
100067	Kari Nordmann	Domestic	NOK	
100069	Espen Espensen2	Domestic	NOK	
100076	Øyvind Berg-Olsen	Domestic	NOK	
100092	Sport Tvedtsenteret	Domestic	NOK	51 80 12 26
100123	Kurt(inspirit) Hatlevik	Domestic	NOK	93240715
100124	INSPIRIT365 AS	Domestic	NOK	
100135	Vegard sin kunde	Domestic	NOK	45612358
100137	Havn AS	Domestic	NOK	99663322
55224466	Test sales account	Domestic	NOK	

**Performance**

73 ms  
Total time  
Total client (ms) 0  
Action: ProcessEventData  
Total server (ms) 73

Client 0 ms  
Server 73 ms  
Client 0 ms

**History**

Interaction	Duration
ProcessEventData	73ms
nps	1,08s
ChangeSelectedIndex	640ms
Client	124ms
PropertyChangeInter...	552ms
CreateForm	243ms
ProcessEventData	76ms
GetFormInteraction	4,46s
HtmlImport HtmlImp...	90ms

**Server calls**

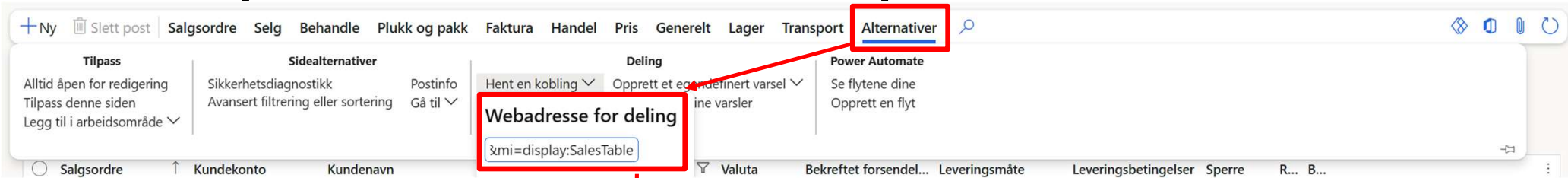
Interaction	Duration
-------------	----------

**Server performance counters**

**SESSION INFORMATION**  
Session ID: 68a5890a-840a-45e5-9f5a-81e61556f325  
Search timestamp: 2023-03-16T15:32:03.894Z



# URL tips 3 – URL direkte til en post



The screenshot shows the Dynamics 365 navigation bar with the following menu items: Ny, Slett post, Salgsordre, Selg, Behandle, Plukk og pakk, Faktura, Handel, Pris, Generelt, Lager, Transport, and Alternativer. Below the navigation bar, there are several tabs: Tilpass, Sidealternativer, Deling, and Power Automate. The 'Deling' tab is active, and a red box highlights the 'Webadresse for deling' field, which contains the text '&mi=display:SalesTable'. A red arrow points from this field to the URL below.

<https://xxxxsandbox.operations.eu.dynamics.com/?cmp=USRT&prt=initial&mi=display:CustTableListPage&pageType=Details&q=BgAAABgJ6uRBMUfugx%2fuXYiYHoFnNo3cOiNI5a35FIQHx0mixqX%2fBnPjTzOh2A1IDacb8J0JhNDG%2fSMbhzBqRNkHNqh3%2fIVsAm5NhqeCjYEAJChX4m%2fbYr4qUwjV5z%2fGL%2b5Rb9VvRKmsF9s908kHwsvAbzZluAth4%2f95u3hzGBXr4ihebVZeCuyY%2fD02nBeOrwyfXCkTNEA7F%2bt%2bFPKckdH78aQPpTRA%2fhwzLcASZQoV4v9sZJg5tOH32PlrSjGHNI0vXXpN6GBLpu6%2fa2Tj3Fy201tqF4n1Gq56RZqOaEDSIhv68ib24%2baBy%2bUXbFF236xrnPQhLVpKWf8j6zvJQ2WdiuVbvJrlejBJPSWCeY2H46vdsThJWz%2fQB7YRypBFJz4GjrcA5UKDKszEHmDordkbPG97reR%2fsQYrHawAWHbyO6blhk1z3OV3fdae5XY9rLhnJbl9r7jd81C9XZiZezNxZqtzMKgKQmwxC8wuMriUJAARNPlaRzpdHoqd6cJNlrzsMguJZ1ozp3%2bO7MXUgZlB7OY8R%2bWnhSL9fNw5wDO6CFQU8ZqkKAGInKb4qQCRCgDPDoepulTy6il6XKGcposAFL2NSNeB9peFoWnYOIOlcWjEa%2f%2befMp6X4d%2fwduteDorWWK39GgP6tzRK6jCvo1z1uKofJM1S74batP7Bofd54jIud95OXo0%2bfDDFtBUxbluyIrvNeVgkvbqUq%2b2Fm2Los0U0vclTmF3i1NJRQIneP%2fDVInSyyMuXgmyIJYdTdOYyvXourneLYOyrXB9Ikakp7muOhNu13%2bD7klACLevWoW%2bKbbalPKdpzp%2fJfmejGaiXHq3rP%2bU1LsIBYbJW6mN0jrX1%2fJqWz%2fPDN2yXyDxucKxqVPC1Frg99MOcYK5pVJrc%2bnBCa>

# Release planner

- <https://experience.dynamics.com/releaseplans/?app=Finance+and+Operations+cross-app&status=planned>

The screenshot displays the Dynamics 365 Release Planner interface. At the top, the header reads "Dynamics 365 and Microsoft Power Platform Release planner" with search and feedback options. Below the header, there are tabs for "All release plans" and "My release plans". The main content area is divided into three sections: "Planned" (15 upcoming features), "Coming soon" (4 upcoming features), and "Try now" (18 new features). The "Planned" section is expanded to show features for "Mar 2023" and "Feb 2023". The "Feb 2023" section is further expanded to show three features:

- Improvements to the grid control**: Public Preview Feb 6, 2023.
- Incremental visual refresh of the Finance and Operations apps user experience**: Public Preview Feb 6, 2023. This feature includes a detailed description: "The increased alignment in the look and feel of the user experience in Finance and Operations apps compared to other Microsoft apps in Office 365 and Dynamics 365 aims to make the Finance and Operations experiences easier to learn and use and ultimately improve user satisfaction." and a "Learn more" button.
- New extension methods to improve handling of default queries with saved views**: Public Preview Feb 6, 2023.

On the left side, a navigation menu lists various Dynamics 365 apps, with "Finance and Operations cross-app" highlighted. The right side of the interface includes a "What's new" search bar and a "Feedback" button.



# Implementation portal

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- Nomination
- Help & Support
- Knowledge Articles
- Help
- Contact Us
- Privacy & Cookies

Home / Projects / Contoso Implementation

## Contoso Implementation

Summary Project Profile Implementation Guidance (188) Project Users

[View/Edit Project Details](#)

LCS. GO-LIVE DATE  
05/27/2023

LCS ID  
12135832

Which of the following Dynamics 365 Customer Service features are you implementing or planning to implement:

- Universal resource scheduling
- Core customer service (case management/queues/SLA)
- Omnichannel for Customer Service
- Virtual Agent for Customer Service
- Customer Service Insights
- Workforce management (WFM)

[Submit](#) [Dismiss](#) ? Tell us more so that we are able to provide more tailored/targeted guidance Why this is important?

REVIEWS

[+ Create New Go Live Readiness Review](#)

- Success by Design Phase | Implement** New

The Implement phase is the second phase in the Success by Design framework. It is described in 8 chapters in the implementation guide, with each providing a deep dive on a specific implementation topic.
- 2023 Release Wave 1 | Dynamics 365 Commerce** New

The 2023 release wave 1 plan covers all new functionalities planned to be delivered to market from April 2023 to September 2023. In this article, you'll find the product overview and what's new and planned for Dynamics 365 Commerce.
- Dynamics 365 Commerce | Channels overview** New

This article presents an overview of channels in Microsoft Dynamics 365 Commerce. It includes information about the tasks that you must complete both before and after you set up each channel.
- Dynamics 365 Finance | Asset leasing overview** New

This article lists the help topics that are available for Asset leasing, and includes links to specific topics. Asset leasing is an advanced capability for managing, tracking, and automating financial transactions for leased assets in Microsoft Dynamics 365 Finance.

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### Contoso implementation

Summary Project Profile **Implementation Guidance (69)** Project Users

[View/Edit Project Details](#)

---Select a product---

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<p><b>Success by Design Phase   Implement</b> <span>🔖 ✕</span> <b>New</b></p> <p>The Implement phase is the second phase in the Success by Design framework. It is described in 8 chapters in the implementation guide, with each providing a deep dive on a specific implementation topic.</p>	<p><b>Dynamics 365 Human Resources   2022 release wave 5</b> <span>🔖 ✕</span> <b>New</b></p> <p>The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for Dynamics 365 Human Resources.</p>	<p><b>Success by Design   Chapter 1   Introduction to Implementation...</b> <span>🔖 ✕</span></p> <p>Microsoft believes that every business is in the business of creating great customer experiences. To achieve that, business applications must do more than just run your back office, marketing, or supply chain, or even field operations as discrete entities. Organizations need to...</p>	<p><b>Checklist   Prepare for go live</b> <span>🔖 ✕</span> <b>New</b></p> <p>Go live is a critical milestone during a deployment, every plan and test is validated at this stage. This checklist helps you identify key activities for go-live readiness and underpins important aspects like best practices, tips and tricks, and how to avoid common...</p>
<p><b>Dynamics 365 Commerce   Channels overview</b> <span>🔖 ✕</span> <b>New</b></p> <p>This article presents an overview of channels in Microsoft Dynamics 365 Commerce. It includes information about the tasks that you must complete both before and after you set up each channel.</p>	<p><b>Dynamics 365 Finance   Asset leasing overview</b> <span>🔖 ✕</span> <b>New</b></p> <p>This article lists the help topics that are available for Asset leasing, and includes links to specific topics. Asset leasing is an advanced capability for managing, tracking, and automating financial transactions for leased assets in Microsoft Dynamics 365 Finance.</p>	<p><b>Dynamics 365 Finance   Public sector overview</b> <span>🔖 ✕</span> <b>New</b></p> <p>You can enable business processes that are common to both the public and private sectors, such as budgeting, purchasing, accounts payable, and accounts receivable tasks. Use the Public sector functionality to meet the rules, r...</p>	<p><b>Dynamics 365 Human Resources   Task management</b> <span>🔖 ✕</span> <b>New</b></p> <p>Task management lets you create tasks that must be completed to hire (onboard), terminate (offboard), and transfer (transition) employees. Task management uses the concept of checklists. A checklist is of a list of onboarding, offboarding, or transition tasks. Task...</p>
<p><b>Dynamics 365 Human Resources   System requirements</b> <span>🔖 ✕</span> <b>New</b></p> <p>This article lists the system requirements for Microsoft Dynamics 365 Human Resources. It also outlines the countries and regions where Human Resources is available, and information about languages and localization for Human Resources data.</p>	<p><b>Power Platform &amp; Power Automate   Deprecations</b> <span>🔖 ✕</span></p> <p>The announcements and deprecations described in this article apply to Power Apps and Power Automate. Admins and IT professionals can use this information to prepare for future releases. This article was first published on June 27, 2017.</p>	<p><b>Finance and operations apps   Integration patterns and practices</b> <span>🔖 ✕</span> <b>New</b></p> <p>This article describes integration patterns, integration scenarios, and integration solutions and best practices.</p>	<p><b>Finance and Operations apps   Performance troubleshooting usin...</b> <span>🔖 ✕</span> <b>New</b></p> <p>This article describes how you can troubleshoot and mitigate performance issues using the tools available in Microsoft Dynamics Lifecycle Services (LCS).</p>
<p><b>Dynamics 365 Commerce   Testing and performance issues</b> <span>🔖 ✕</span> <b>New</b></p>	<p><b>Template   Cutover Strategy Workshop</b> <span>🔖 ✕</span></p>	<p><b>Microsoft Power Platform   Working with the admin portals</b> <span>🔖 ✕</span></p>	<p><b>Microsoft Power Platform   General platform guidance</b> <span>🔖 ✕</span></p>

Demo

# Financial tags

## Financial tags - Release 10.0.32

### Financial tags

- Selskapsspesifikke verdier
- Ingen validering ved postering
- Kan endres etter postering
- Kan ikke slettes, men kan deaktiveres. Hindrer heller ikke sletting av referanseverdier.
- Kan arves fra journalhode til journallinjer
- Bruk til mer flyktig nummerering
- Kan ikke inkluderes i dimensjonssett
- Har minimal påvirkning på ytelse i ulike prosesser
- Kan brukes i rapportering

### Financial dimensions

- Globale verdier / Selskapsspesifikke verdier
- Validering ved postering mot bl.a. kontostruktur
- Kan ikke endres etter postering
- Dimensjonsverdier som har vært i bruk kan ikke slettes.
- Kan arves fra journalhode til journallinjer, men også fra masterdata som kunder/leverandører/anlegg
- Kan inkluderes i dimensjonssett
- Kan ha påvirkning på ytelse i ulike prosesser
- Kan brukes i rapportering

Tags er et alternativ til dimensjoner, men **foreløpig** bare i hovedbok.

Microsoft.com:

[Differences between financial tags and financial dimensions - Finance | Dynamics 365 | Microsoft Learn](#)



# Financial tags

Det kan opprettes tags med tilhørende verdier før tag'en aktiveres.

Finance and Operations Preview

General ledger > Chart of accounts > Financial tags > Financial tags

The Activate financial tag configuration job is added to the batch queue.

← Save + New **Tag values** Activate Options 🔍

Financial tags

Standard view ▾

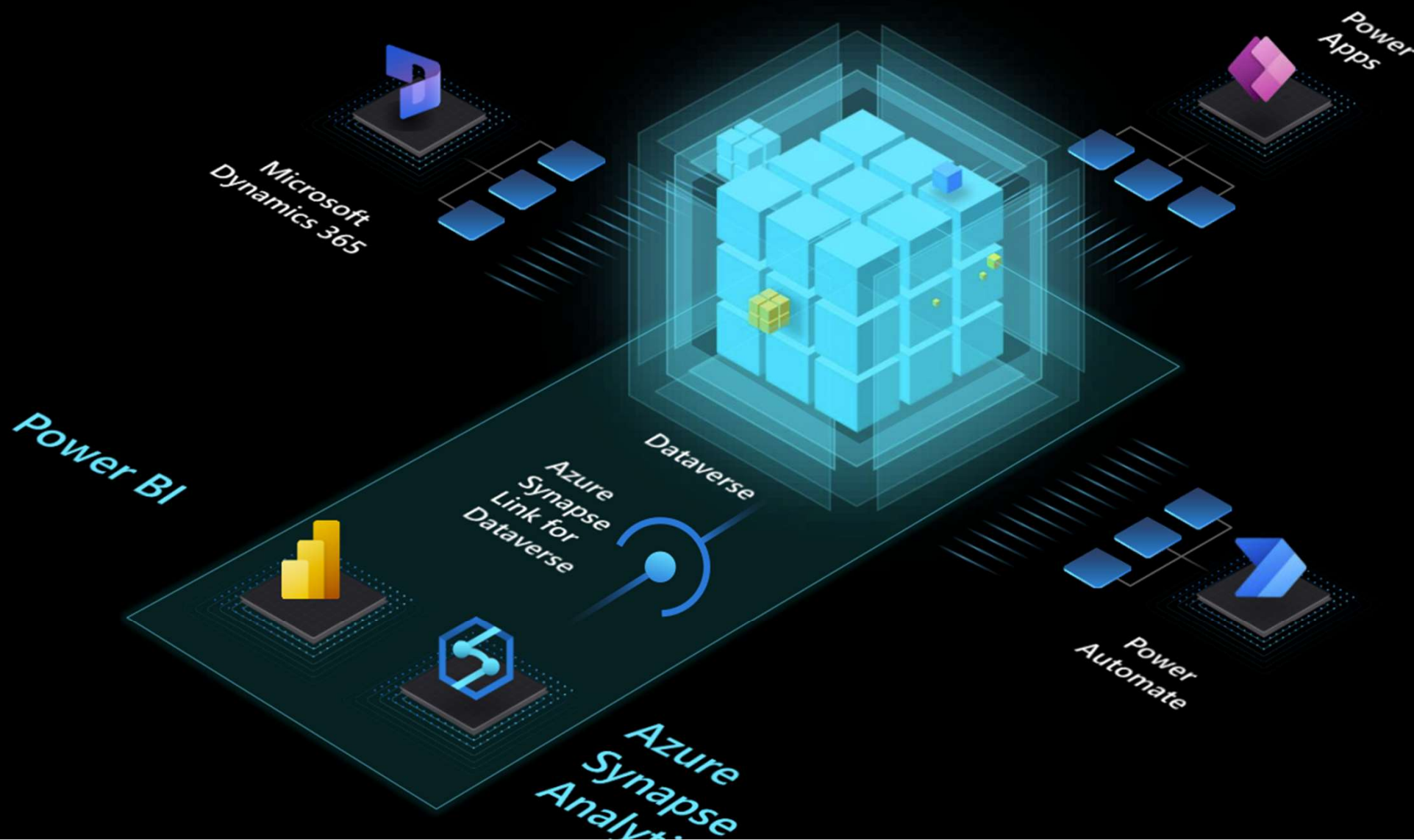
🔍 Filter

Financial tag	Value type	Active	Use values from
Person	List	✓	Workers
Spesifikasjoner	Custom list	✓	
Biler	Custom list	<input checked="" type="checkbox"/>	
Prosjektgruppe	List	✓	Project groups





**Reporting HUB**



# Synapse link for Dataverse - Direct integration with Microsoft Fabric - Private Preview

## **Private preview**

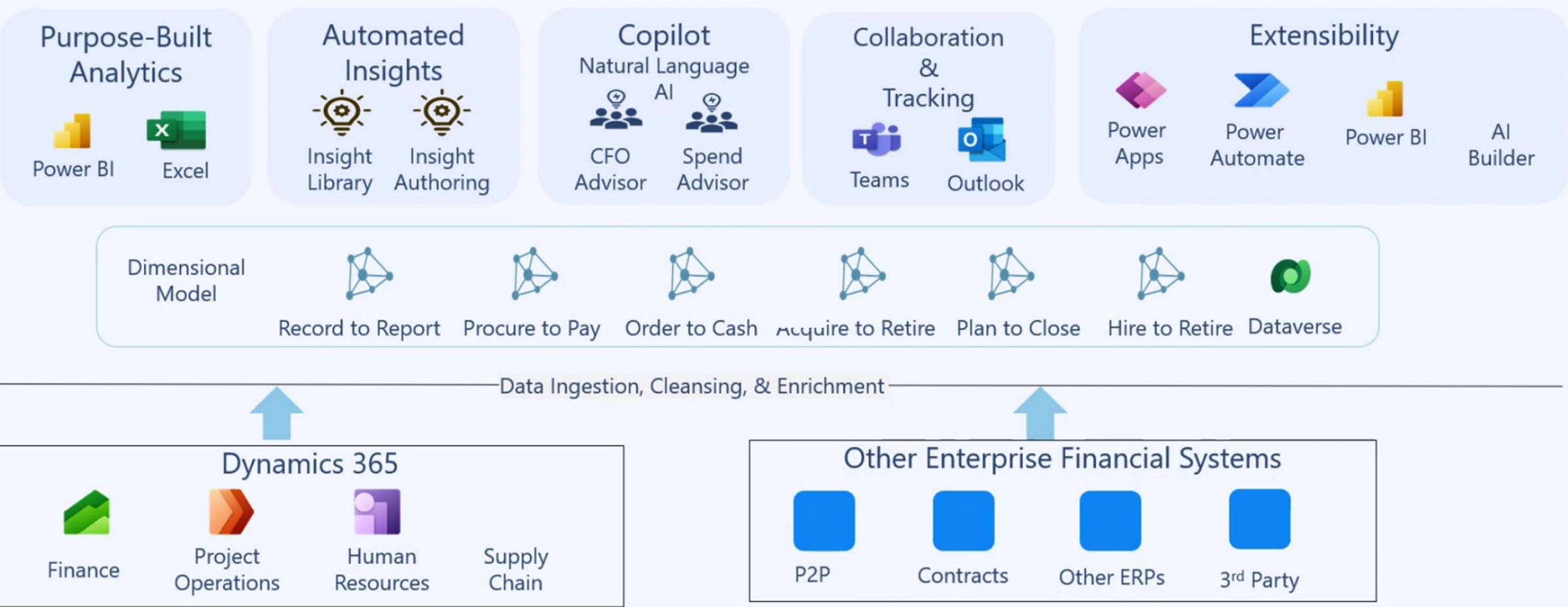
Thank you for your interest in previewing "View in Microsoft Fabric" feature in Microsoft Dataverse.

Coming later this year to every Dynamics 365 customer, "View in Microsoft Fabric" automatically makes all your Dynamics 365 data available for analysis in Microsoft Fabric without having to copy data, build ETL pipelines, or use third-party integration tools. This feature is currently available in private preview.

## **Who is this preview for?**

Customers that are already using Dynamics 365 or PowerApps with Dataverse can preview this feature. You must also have Microsoft Fabric preview features enabled.

# One Product, Seamlessly Integrated with Dynamics, Extensible to 3<sup>rd</sup> Party Systems






- Data explorer
- Reports
- Administration
  - Administration home
  - Dimensions
  - Dimension groups
  - Roles
  - Users

## Administration home

### About business performance analytics

Business performance analytics is your one stop for data, reports, analytics and insights. Enhance your business decision-making with automated performance analytics that allow slicing and dicing data across business processes.

[View documentation](#)



### Validate your data

Validate that data from Dynamics 365 Finance is available in Business performance analytics by viewing Microsoft reports. You can also cross-check these Microsoft reports against Dynamics 365 Finance reports.

[View Microsoft reports](#)

## Security

### Set up dimensions to secure

Set up the dimensions for which you would like to secure access to data. If you do not secure a dimension, all users can access the values in that dimension.

[Set up dimensions](#)

### Set up dimension groups

Dimensions groups allows you to group together dimensions values for data security. Dimension groups can be assigned to users to control which dimension values they can view.

You must select dimensions to secure before you can complete this task.

### Set up roles

Set up roles that control who can access Microsoft reports.

You must select dimensions to secure before you can complete this task.



Data explorer

- Reports
- Administration
  - Administration home
  - Dimensions
  - Dimension groups
  - Roles
  - Users

Show Chart + New report Refresh

### Microsoft reports


Edit columns Edit filters Filter by keyword

Name ↑	File type	Type	Modified On	Owner
<a href="#">Balance sheet</a>	Power BI	Microsoft	4/18/2023 3:26 PM	# Business performance analyt..
<a href="#">Budget vs. actual</a>	Power BI	Microsoft	4/18/2023 3:27 PM	# Business performance analyt..
<a href="#">Financial performance</a>	Power BI	Microsoft	4/18/2023 3:26 PM	# Business performance analyt..
<a href="#">General ledger dimension details</a>	Power BI	Microsoft	4/18/2023 3:27 PM	# Business performance analyt..
<a href="#">General ledger transaction details</a>	Power BI	Microsoft	4/18/2023 3:26 PM	# Business performance analyt..
<a href="#">Profit and loss</a>	Power BI	Microsoft	4/18/2023 3:26 PM	# Business performance analyt..
<a href="#">Trial balance</a>	Power BI	Microsoft	4/18/2023 3:26 PM	# Business performance analyt..

# Roadmap: Business Performance Analytics General Availability

Dynamics 365  
  
 Finance

Systems of Record

  
 Dataverse





Record to Report (GL & Budget)    Procure to Pay

Order to Cash    Acquire to Retire





Unified Analytical Models

Core Capabilities



**GL & Budget Analytics**

- GL Explorer 
- Trial Balance 
- Budget Overview 
- Budget Reservation 







**Procure to Pay**

- Vendor Aging 
- Vendor Balance 
- Purchase Received 
- Expense Report Aging 





**Order to Cash**

- Customer Aging 
- Customer Balance 

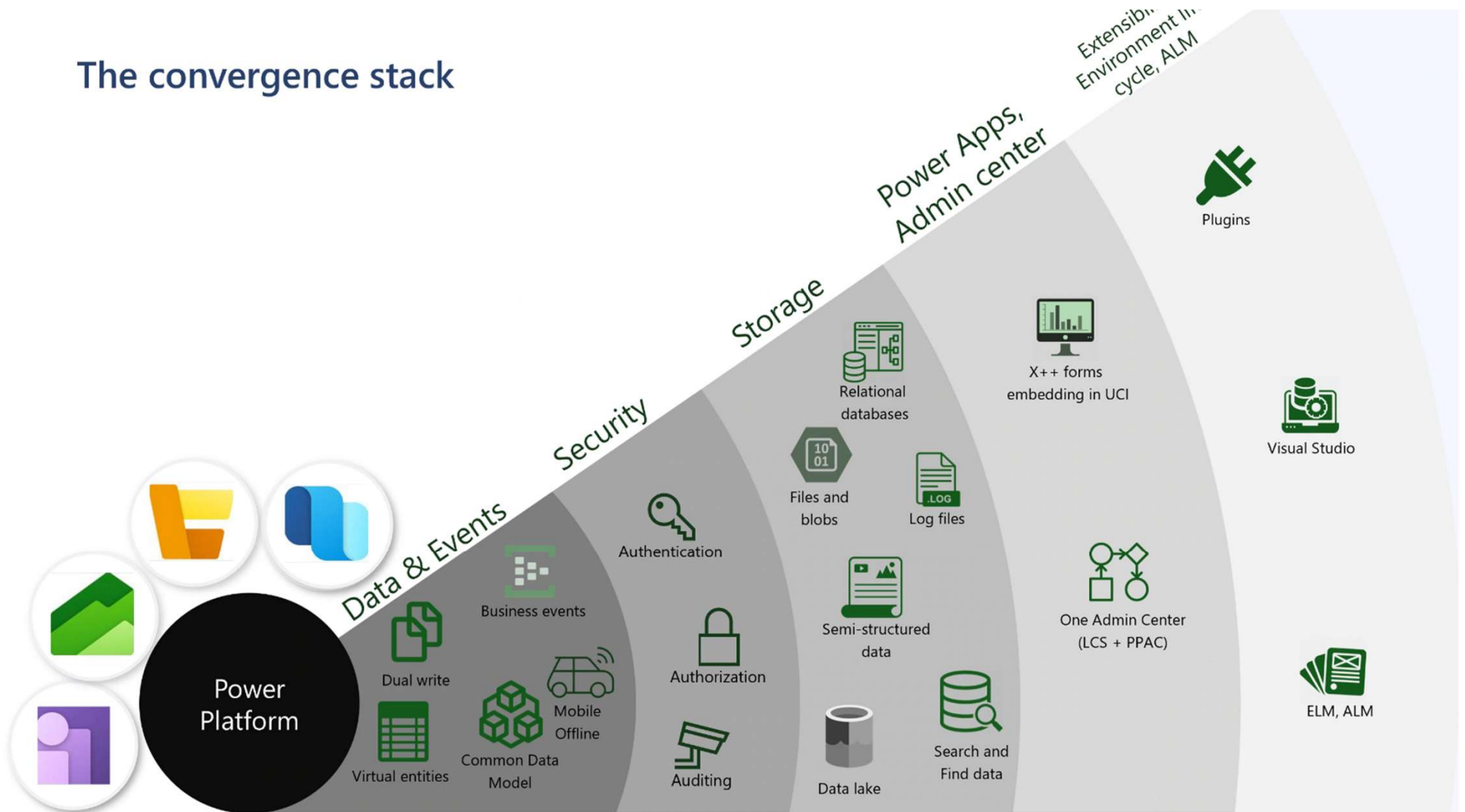
**Acquire to Retire**

- Fixed Asset Rollforward 
- Fixed Asset Transactions 
- Sales tax report 
- Revenue Waterfall 
- Fixed Asset Rollforward 
- Lease Transaction 

**Extensibility**

- Power Apps 
- Power Automate 
- Power BI 
- AI Builder 

# The convergence stack

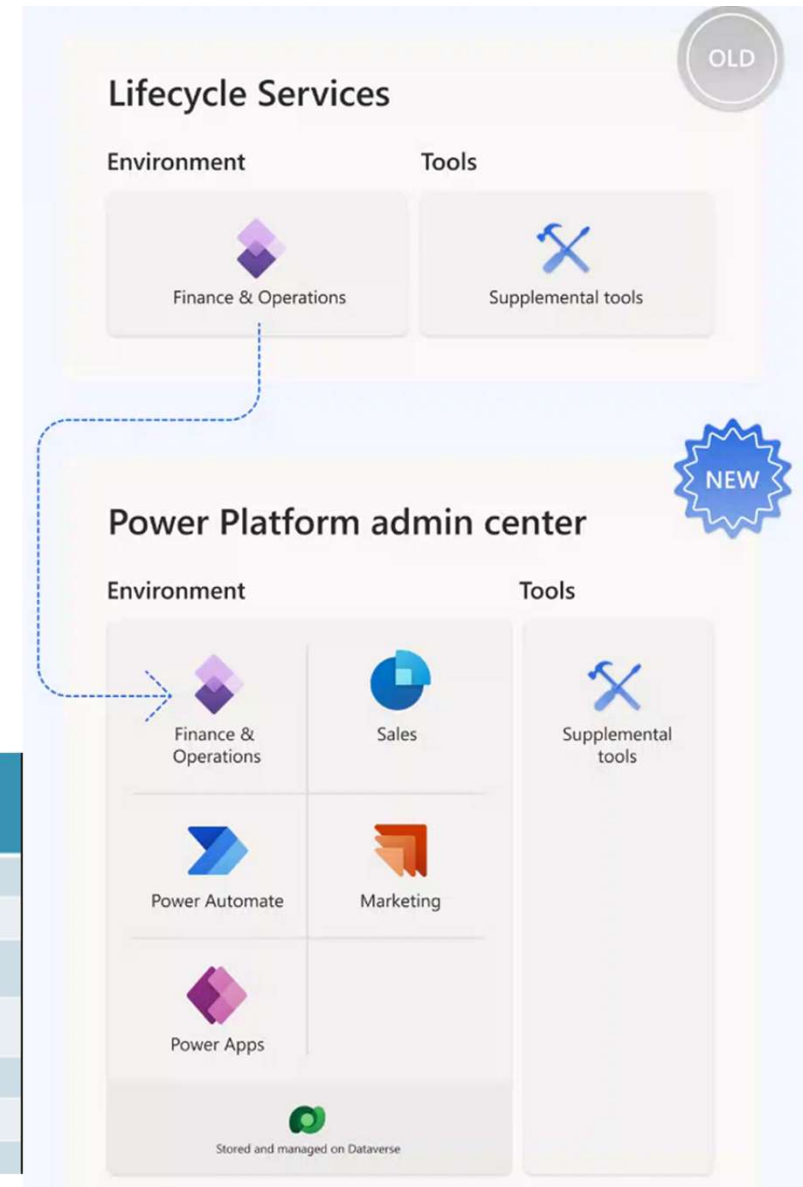


## One Admin -

F&O som en app,  
Ikke ett miljø

- Samme administrasjon og utrulling som andre Dynamics 365 apps
- Utrulling på en helt ny platform innen Dataverse
- Støtte for funksjoner som kopi, backup, restore
- Tilgjengelig i Power Platform Admin Center og tilgjengelig via PowerPlatform API

Lifecycle Operation	LCS Terminology	PPAC Terminology	Supported in LCS API?	Supported in Power Platform API / Tools?
Create	Deploy	Provision	No	Yes
Copy	Database Refresh	Copy	Yes	Yes
Backup	Database Export	Backup (Custom & System-defined)	Yes	Yes
Restore	Point-in-time restore	Restore (Custom & System-defined)	No	Yes
Reset	N/A	Reset	No	Yes
Convert to Production	N/A	Convert to Production	No	Yes
Delete	Deallocate / Delete	Delete	No	Yes



# Infrastructure re-imagined

F&O has been re-imagined on top of the Dataverse stack. It can be installed in an environment template or ad-hoc on an existing Dataverse environment.

**Add database**

This operation is subject to [capacity constraints](#)

**Language \***  
English (United States)

Default language for user interfaces in this environment

**URL**  
A unique domain name will be generated. Click [here](#) to enter a custom domain

**Currency \***  
USD (\$)

Reports will use this currency

**Enable Dynamics 365 apps?**  
In addition to Power Apps. [Learn more](#)  
 No

**Deploy sample apps and data?**  
 No

**Security group**  
Restrict environment access to people in this security group. Otherwise, everyone can access. [Learn more](#)  
[+ Select](#)

**Save** **Cancel**

in center

Install app Open AppSource Refresh

Environments > abc > Dynamics 365 apps

Check the status of Dynamics 365 apps and manage them across your org. [Learn more](#)

Name ↑	Status
Agent Productivity Tools	Installed
appprofilemanager	Installed
Cards for Power Apps (preview)	Update available
Dynamics 365 ContextualHelp	Installed
Dynamics 365 Customer Voice	Update available
Dynamics 365 CXP Sales	Update available
Dynamics 365 Sales, Enterprise Edition App	Installed
Environment variables	Installed

**Install Dynamics 365 Finance and Operations Provisioning App**

**Name**  
Dynamics 365 Finance and Operations Provisioning App

**Description**

**Publisher**  
Microsoft Dynamics 365

**Package(s)**

Name	Version	Terms of service
msdyn_FinanceAndOperationsProvisioningAp...	1.0.2218.2	<a href="#">Terms of service</a>

I agree to the terms of service

# Admin & Licensing Workstream Roadmap



\*Timelines above focused on Finance and Operations **cloud** apps. F&O OnPrem, AX2012, Business Central, CRM OP2OL scoped to **SUNSET LCS** phase.

## LINK

**Entry:** N/A  
**Exit:** This milestone is completed when we support both ability to Link F&O to a new Dataverse environment as well as Link F&O to an existing Dataverse environment.

## TRY

**Entry:** N/A  
**Exit:** This is completed when we onboard 100% of Finance & Operations apps via trial provisioning (Finance, Supply Chain, Commerce, Project Operations). This is inclusive of add-ins where required for Trials by specific applications.

## OPERATE

**Entry:** Provisioning is available for any Finance and Operations apps as Trials.  
**Exit:** This is completed when all of the ELO and ALM capabilities are generally available, as well as Success by Design project management capabilities.

## MIGRATE

**Entry:** Operate milestone is completed, and customer communications have been sent alerting to LCS deprecation (not decommission).  
**Exit:** This is completed when all Finance and Operations cloud customers are migrated off of Lifecycle Services. Other SKUs like AX2012, LBD, and so on will be planned during this semester and acted on in future semester.

## SUNSET LCS

**Entry:** Phase runs parallel to MIGRATE and focuses on the non-F&O cloud apps and tools hosted by LCS.  
 This milestone will have its own "Operate" and "Migrate" phases.  
**Exit:** This is completed when LCS is decommissioned.

# Collapse Operations in to Dataverse entitlements

Operations Database -> Dataverse Database

Operations File -> Dataverse File

## When

During migration  
to PPAC

100%

By end of 2025

1.75GB+

Per User  
Entitlement

---

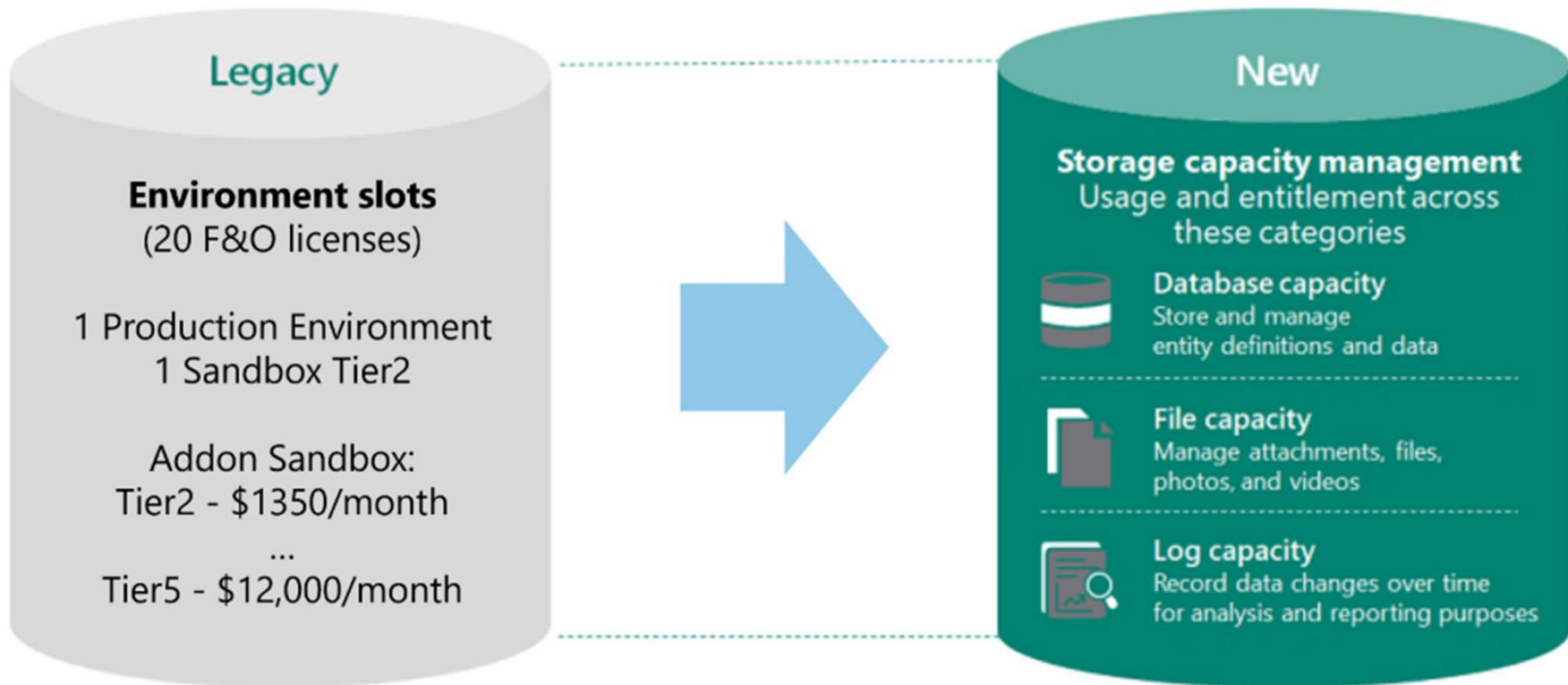
## Desired outcomes

1. Combine / sum the like entitlements together, no more F&O specific entitlements.
2. Provide actionable, robust reporting
3. Provide in-product data archival and purging capabilities for F&O
4. Provide advanced copy options to help reduce proliferation of data across environments

Demo



# Moving from environment-based model to capacity model



## But what about compute and tiers?

- Calculate a performance tier based on total number of user licenses purchased
  - Deploy all Sandbox and Production environments equally
  - No more expectation gap between UAT and PROD
- Deprecate Sandbox Tiers 2-5 in the catalog ( stop EA purchases and move month to month )
  - Tiered concepted retires with LCS, but the environment will migrate to PPAC

# What makes up a user license?

## Base license (ex: Finance, Supply Chain, Commerce)

<p><input checked="" type="radio"/> Included <input checked="" type="radio"/> Partially included <input type="radio"/> Not included</p>	<b>Dynamics 365 Finance Microsoft FTE only</b> <small>YOU OWN THIS</small> Free
<b>Business apps</b> Boost employee productivity with apps that help your organization automate processes, plan and track projects, create workflows, and more.	
∨ Included apps	●
>  Flow ⓘ	Flow for Dynamics 365
>  PowerApps ⓘ	✓
<b>Dynamics</b>	
∨ Included apps	●
Regulatory services ⓘ	✓
Dynamics 365 for Retail	--

## Entitlements per user

- 250MB of Dataverse Database
- 1.5GB of Operations Database
- 2GB of Dataverse File
- 4GB of Operations File
- Power Platform Requests