

# What's new?

Dynamics 365 Finance & Operations (AI ERP)  
Release wave 1 - 2024

**Espen Stensaas**  
Technology Specialist, Finance & Operations







# Dynamics 365

Finance & Operations



Finance



Supply Chain  
Management



Project  
Operations



Commerce



Human  
Resources

# AI ERP



# Dynamics 365

Finance & Operations





# Dynamics 365

## Finance & Operations

**F&O – Tier 2 application development**

**Offline support for Dynamics 365 finance and operations virtual tables**



**Copilot**

**Enable support for asynchronous operation in dual-write functionality**

**One Dynamics One Platform**



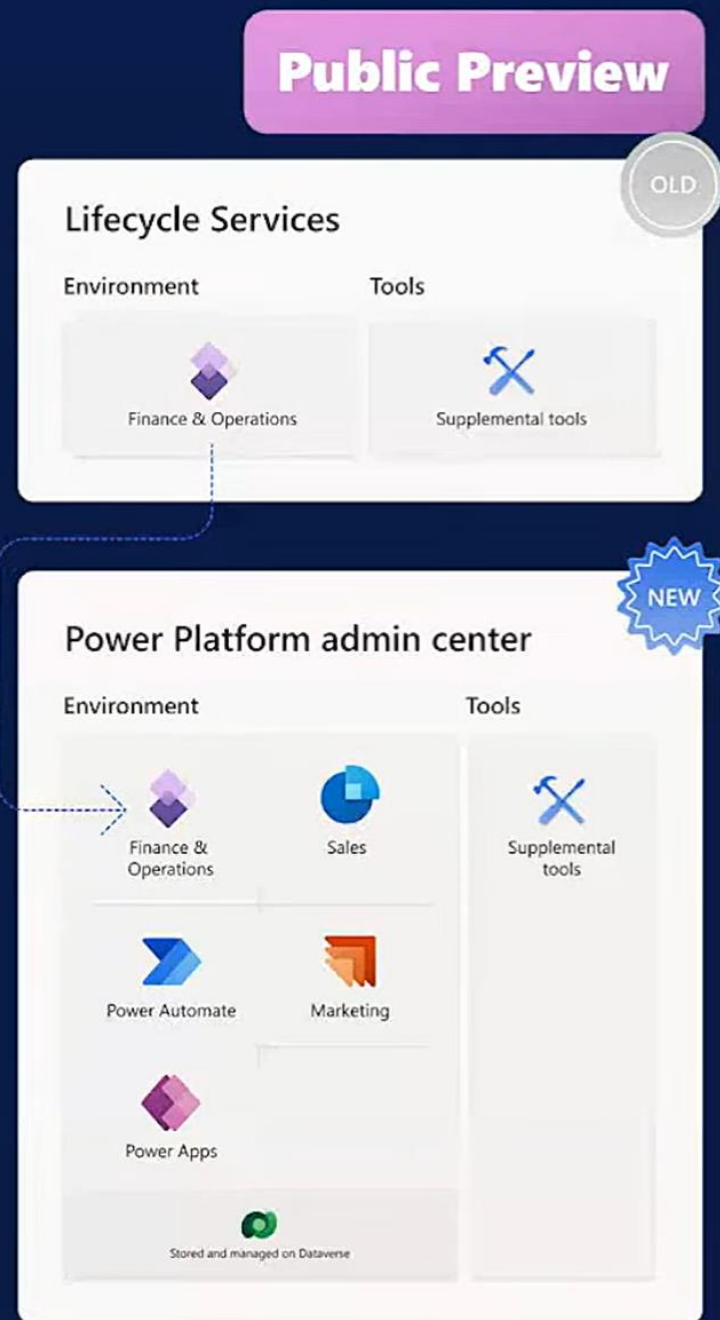
**AI Actions**



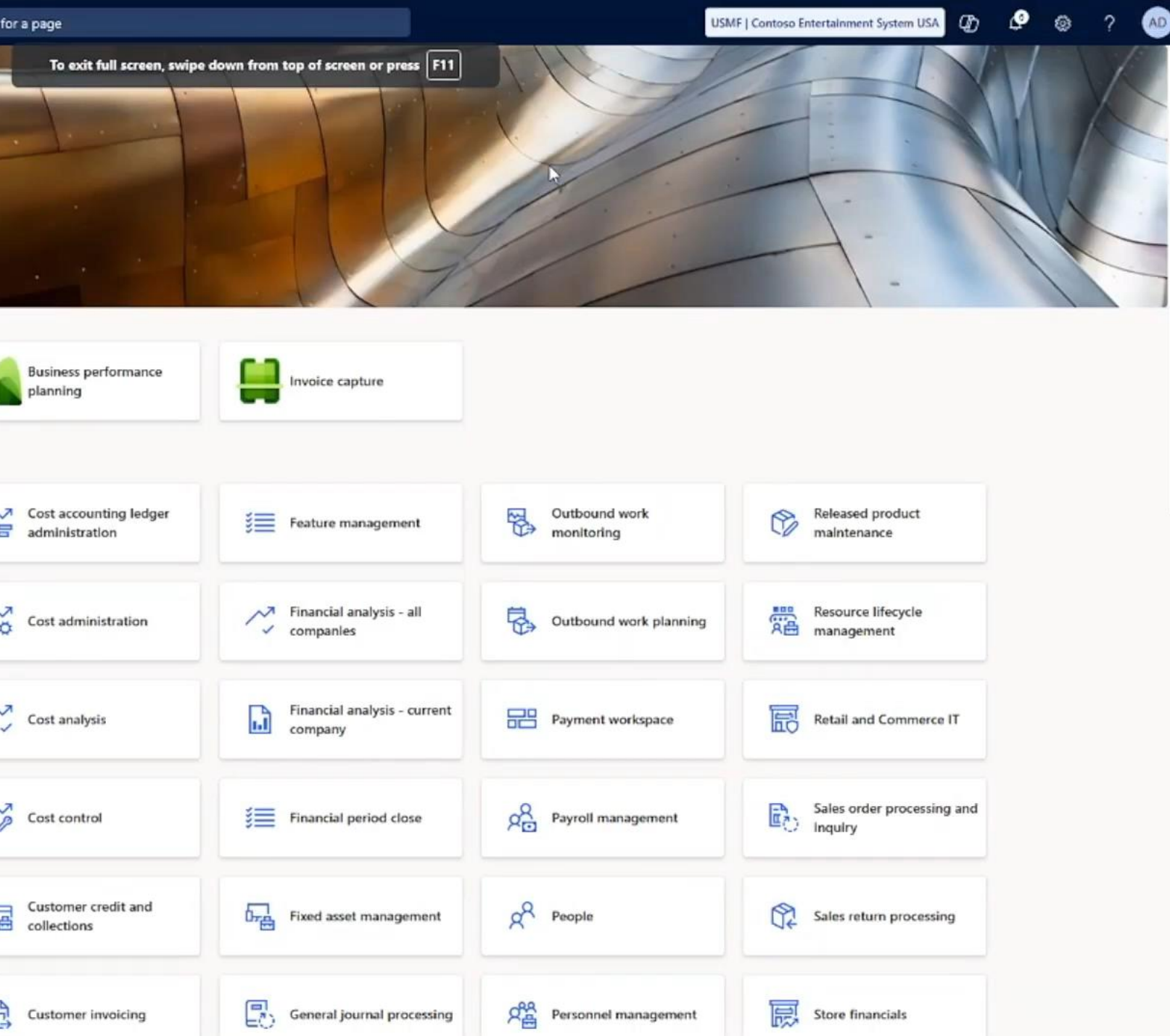
# One Admin, One Admin Center

## Finance and Operations runs on Dataverse

- Provides for a unified **environment lifecycle** as well as **application lifecycle**
- **Single admin portal** for managing low-code as well as business applications
- Robust automation support in **Connectors, CLI, PowerShell, and REST APIs**







F&O Copilot



AI Actions & Plugins



Dataverse



M365



Copilot  
Studio



CORP  
FINANCE



# Core Finance



# Dynamics 365 Finance

 **Copilot for Finance**

**Customer summary**

**Collection  
coordinator**

**Archive data**

**Vendor invoice center**

**Business Performance**





# Microsoft Copilot for Finance

Your everyday AI assistant for finance professionals

## Natural Language



Large Language  
Models (LLMs)



Web  
grounding



Microsoft Graph  
grounding



Enterprise-grade  
data protection



**ERP and Financial  
Systems**

Microsoft Dynamics 365 Finance  
Finance-specific actions, insight,  
and recommendations



Commercial data  
protection



The  
Internet



Microsoft 365  
Apps



Copilot  
Studio



# Microsoft Copilot for Finance

Accelerate business impact and reduce cost with a copilot in the flow of work.

GA Juni

Copilot for Finance is experienced in Microsoft 365 and connects to your financial systems

Sum of Amount	11/1/2023	12/1/2023	1/1/2024	2/1/2024	3/1/2024	4/1/2024	5/1/2024
Row Labels	Actual	Actual	Actual	Actual	Forecast	Forecast	Forecast
11/1/2023	\$ 30,940,442	\$ 30,608,026	\$ 35,214,349	\$ 28,567,057			
12/1/2023	\$ 1,468,420	\$ 6,228,510	\$ 2,300,302	\$ 6,257,544			
1/1/2024	\$ 4,020,395	\$ 3,142,797	\$ 6,843,719	\$ 6,297,544			
2/1/2024	\$ 8,102,267	\$ 2,287,059	\$ 7,811,933	\$ 5,043,853			
3/1/2024	\$ 4,742,563	\$ 7,511,302	\$ 2,698,274	\$ 2,044,802			
4/1/2024	\$ 8,137,609	\$ 5,812,170	\$ 7,834,842	\$ 2,044,802			
5/1/2024	\$ 4,441,188	\$ 5,004,188	\$ 7,726,359	\$ 2,517,071			
6/1/2024	\$ 21,353,224	\$ 26,398,174	\$ 22,498,159	\$ 25,144,511			
7/1/2024	\$ 1,571,927	\$ 729,393	\$ 1,767,547	\$ 988,806			
8/1/2024	\$ 1,616,199	\$ 1,931,286	\$ 585,231	\$ 1,054,967			
9/1/2024	\$ 1,234,329	\$ 274,757	\$ 598,882	\$ 907,969			
10/1/2024	\$ 52,463	\$ 937,842	\$ 1,403,186	\$ 517,754			
11/1/2024	\$ 381,560	\$ 622,243	\$ 801,886	\$ 1,458,221			
12/1/2024	\$ 1,854,117	\$ 664,358	\$ 980,614	\$ 1,210,106			
1/1/2025	\$ 488,578	\$ 1,331,378	\$ 1,437,766	\$ 1,629,287			
2/1/2025	\$ 1,398,781	\$ 1,685,580	\$ 272,555	\$ 143,228			
3/1/2025	\$ 1,026,940	\$ 157,262	\$ 1,829,845	\$ 1,382,503			
4/1/2025	\$ 194,710	\$ 1,189,551	\$ 1,141,490	\$ 1,080,365			
5/1/2025	\$ 1,707,882	\$ 1,942,299	\$ 1,433,354	\$ 1,070,295			

## Accelerate impact

Deliver new insight and reduce the time it takes to compile and analyze data

**Analyze variances**

Create summary report

Selected criteria and variances

**Criteria**

- February forecast varies from actuals more than 10%

**Variances**

- 2 pairs of variances have been identified that match this criteria.
- E9 F9**: The variance of \$755,705, representing an approximately 12% decrease. 1 2 Washington state sales was \$505,685 resulting in the biggest impact to actuals and driving difference to forecast. The second biggest contributor was Oregon. 2 references
- E12 F12**: In February 2024, the actual loan proceeds reached \$2,044,802, marking a variance of nearly 25% from the initially forecasted amount of \$1,635,842 for the same period. 1 2 The difference is due to the changes in "Lease and rent breakdown.xlsx". 2 references

AI-generated content may be incorrect

Edit summary Regenerate Add criteria

## Reduce cost

Drive efficiency by applying AI to optimize manual, labor-intensive processes

**Finance insights**

- Jane Cooper is the primary contact for the customer Fabrikam (US).
- Fabrikam specializes in crafting immersive and premium tea experiences, highlighting ethically sourced leaves and a diverse range of delicate flavors.

AI-generated content may be incorrect

Copy

**Customer**

- 358 overdue invoices. See details
- Fabrikam (US) Supply chain

**Contact**

Saved in SAP (1)

- Jane Cooper Fabrikam (US) Account manager

**Note**

New note



Northwind Cash Flow 2023 Q4

Search for tools, help, and more (Alt + Q)

FileHomeInsertSharePage LayoutFormulasDataReviewViewAutomateHelpDrawPivotTable

UndoRedoFont settings (Segoe UI, 12, Bold, Italic, Underline, Text Color, Background Color, Paragraph, Styles)

CommentsCatch upEditingShare

E828567057.4647619

Northwind Traders

Forecast vs Actuals

Cash flow

Sum of Amount	Column Labels												Grand Total
	2023				2024								
	Sep	Oct	Nov	Dec	Forecast	Jan	Feb	Mar	Apr	May	Jun		
Row Labels	Actual	Actual	Actual	Actual	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast		
Inflow	\$ 30,940,442	\$30,608,026	\$35,214,249	\$28,567,057	\$29,462,390	\$30,070,388	\$24,934,504	\$17,387,133	\$20,473,523	\$22,785,703	\$26,970,375	\$297,413,790	
Actual loan proceeds	\$ 4,742,563	\$ 7,513,302	\$ 2,698,274	\$ 2,044,802	\$ 1,935,842	\$ 7,248,951	\$ 1,170,729	\$ 1,283,643	\$ 2,394,287	\$ 2,678,370	\$ 5,528,318	\$ 39,239,081	
Incoming customer payments	\$ 4,026,395	\$ 3,162,797	\$ 6,843,719	\$ 6,857,213	\$ 7,619,934	\$ 6,745,103	\$ 6,929,477	\$ 1,418,492	\$ 1,985,337	\$ 4,377,912	\$ 2,950,909	\$ 52,917,288	
Interest, other income	\$ 8,102,267	\$ 2,287,059	\$ 7,811,033	\$ 5,043,858	\$ 4,849,863	\$ 8,163,324	\$ 2,283,242	\$ 4,443,671	\$ 3,835,523	\$ 7,295,447	\$ 1,352,365	\$ 55,467,652	
Local cash sales	\$ 1,468,420	\$ 6,228,510	\$ 2,300,202	\$ 6,297,544	\$ 7,053,249	\$ 2,211,727	\$ 3,351,033	\$ 2,374,627	\$ 5,863,876	\$ 2,077,950	\$ 3,658,728	\$ 42,885,866	
Other receipts	\$ 8,157,609	\$ 5,812,170	\$ 7,834,662	\$ 5,812,568	\$ 5,589,008	\$ 4,728,041	\$ 3,953,341	\$ 2,573,561	\$ 886,624	\$ 3,027,798	\$ 6,779,679	\$ 55,155,061	
Returns and allowances	\$ 4,443,188	\$ 5,604,188	\$ 7,726,359	\$ 2,511,073	\$ 2,414,493	\$ 973,242	\$ 7,246,682	\$ 5,293,139	\$ 5,507,876	\$ 3,328,226	\$ 6,700,376	\$ 51,748,842	
Outflow	\$ 21,353,294	\$26,399,174	\$22,499,150	\$25,164,531	\$24,741,141	\$20,239,536	\$20,753,235	\$25,414,047	\$28,106,576	\$24,981,684	\$19,802,836	\$259,455,204	
Advertising	\$ 1,571,927	\$ 729,393	\$ 1,767,547	\$ 988,806	\$ 950,775	\$ 393,665	\$ 1,301,347	\$ 785,597	\$ 193,435	\$ 1,687,427	\$ 1,714,425	\$ 12,084,344	
Commissions and fees	\$ 1,616,199	\$ 1,931,286	\$ 585,231	\$ 1,054,967	\$ 1,107,715	\$ 1,339,487	\$ 925,661	\$ 1,881,836	\$ 1,846,583	\$ 1,637,307	\$ 1,725,637	\$ 15,651,909	
Contract labor	\$ 1,224,329	\$ 274,757	\$ 598,882	\$ 907,969	\$ 873,047	\$ 1,286,271	\$ 1,226,480	\$ 1,573,157	\$ 820,761	\$ 1,101,962	\$ 341,725	\$ 10,229,340	
Employee benefit programs	\$ 552,463	\$ 937,842	\$ 1,403,186	\$ 511,754	\$ 492,071	\$ 325,931	\$ 1,151,418	\$ 393,953	\$ 293,706	\$ 1,847,965	\$ 1,268,742	\$ 9,179,031	
Insurance (other than health)	\$ 381,560	\$ 622,243	\$ 801,886	\$ 1,458,221	\$ 1,402,136	\$ 43,536	\$ 172,190	\$ 1,492,913	\$ 1,290,111	\$ 715,761	\$ 74,704	\$ 8,455,261	
Interest expense	\$ 1,854,117	\$ 664,358	\$ 980,614	\$ 1,210,106	\$ 1,163,563	\$ 1,499,784	\$ 1,629,730	\$ 1,721,656	\$ 990,142	\$ 931,590	\$ 1,867,258	\$ 14,512,918	
Materials and supplies (in COGS)	\$ 488,578	\$ 1,331,378	\$ 1,437,766	\$ 1,629,287	\$ 1,710,751	\$ 1,203,142	\$ 1,436,881	\$ 500,920	\$ 1,472,554	\$ 1,786,291	\$ 964,884	\$ 13,962,432	

Cash flow forecast

Workbook Statistics

Give Feedback to Microsoft

100%



# Archive data

## Transaction Data Lifecycle

### Live data

- Data that requires frequent access, ability to modify or remove and the needs to support a wide variety of search criteria.
- Live data will exist in SQL Azure at this stage.

### History data

- Over time, data is used for reference and/or analytics only and data cannot be modified. The access frequency and the variety of search criteria are greatly reduced.
- History data will remain in the SQL Azure database but cannot be modified.

### Long term data retention(LTDR)

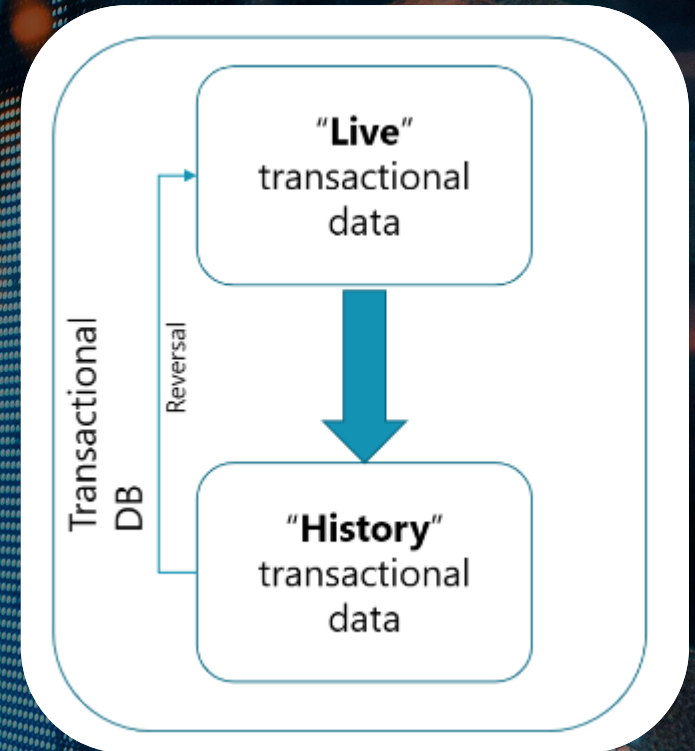
- Over more time, the need to reference this data or use it in analytics decreases. At this point, the customer decide to retain the data in LTDR
- At this stage, History data will be removed from AXDB and stored only in managed Data Lake (LTDR).

### Purge

- When data is no longer needed, even for the rare audits or analysis, the data can be completely removed from the system.
- The typical data lifecycle would have data being purged from Long-Term Retention.
- An additional scenario will be supported to purge data from History when Long Term Retention is not being utilized for a table(s).

Transaction Data

Transaction data in our ERP system has different characteristics over time.





# Vendor Invoice Center

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.



# Copilot



Pending vendor invoices

Standard view 

Number	Comp...	Invoice account	Name	Purchase order	Invoice received date	Invoice date	Imported i...	Last match status	Product receipt
INV175	usmf	1001	Acme Office Supplies	00000175	9/1/2023		0.00	Failed	PR175_1
INV200	usmf	1001	Acme Office Supplies		9/1/2023		0.00	Passed	

# Customer summary

On the customer page, this feature aggregates and analyzes data from various sources including customer invoices, payments, sales orders, sales agreements, outstanding invoices, and delayed order lines. This data can identify anomalies and potential risks.

The summarized information, which offers valuable insights into each customer's financial activities and insights, is displayed at the top of the customer page for easy access and review. This allows for proactive risk management and informed decision-making.

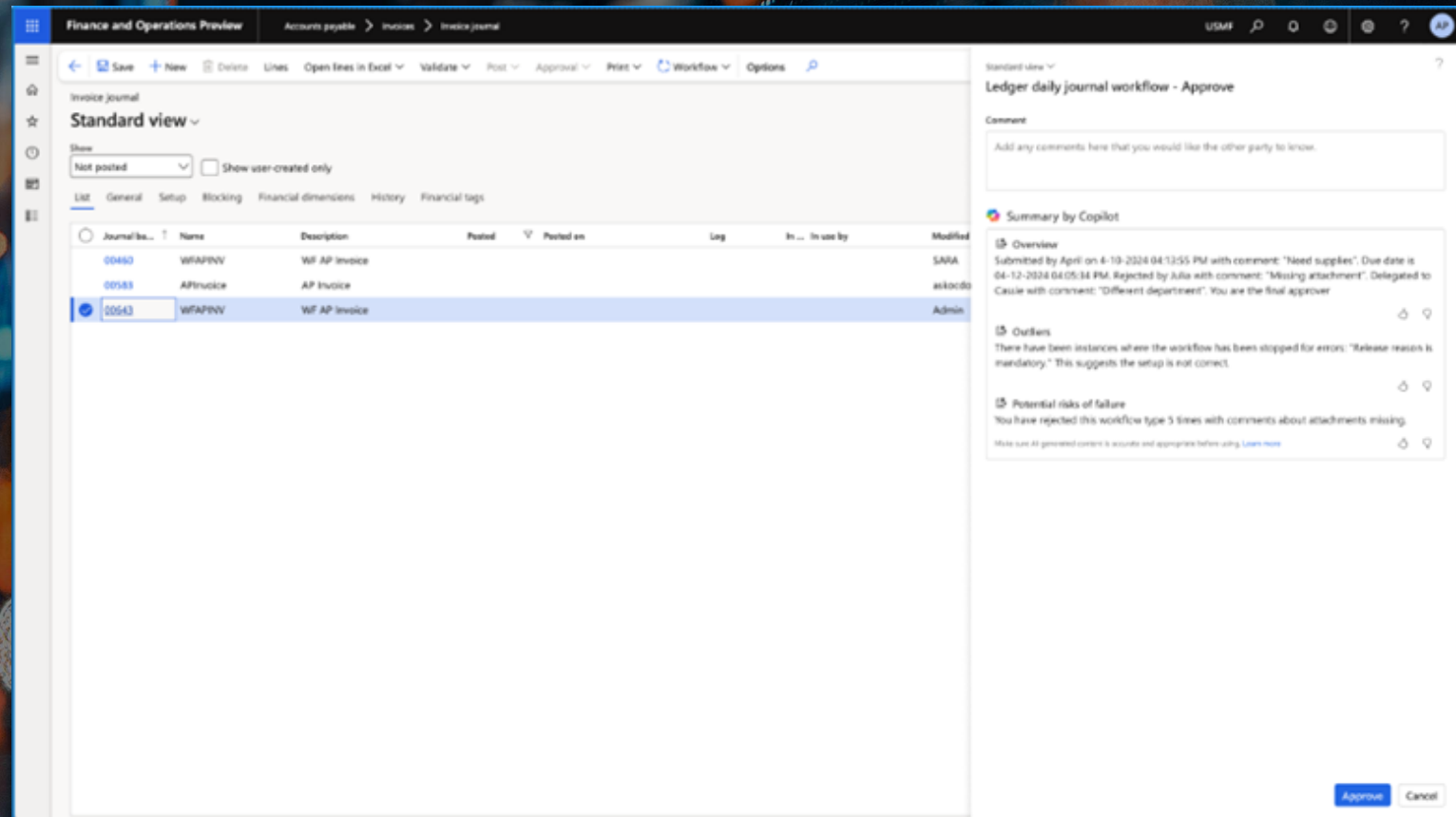
The screenshot displays a software interface for a customer summary. At the top, a navigation bar includes options like 'Edit', 'New', 'Delete', and various business functions. Below this, the page title is 'US-001: Contoso Retail San Diego'. A sidebar on the left contains icons for navigation. The main content area is divided into sections: 'Summary' and 'General'. The 'Summary' section contains three cards: 'Status' (customer has 23 posted invoices totaling 460,090 USD), 'Outliers' (invoice 1000010 with an outstanding balance of 196 USD), and 'Risks' (presence of 5 overdue invoices poses collection risks). The 'General' section is a table with columns for 'CUSTOMER', 'Name', 'Customer group', 'ORGANIZATION DETAILS', 'ABC code', and 'OTHER INFORMATION'. Below this, there are several expandable sections: 'Addresses', 'Contact information', 'Miscellaneous details', 'Sales demographics', 'Credit and collections', 'Sales order defaults', 'Payment defaults', 'Financial dimensions', 'Warehouse', and 'Invoice and delivery'. The bottom of the page shows a table with columns for 'INVOICE', 'Transaction sequence group', 'INVOICE', 'Mode of delivery', 'Destination code', 'SALES TAX', 'Price include sales tax', and 'INVOICING MATERIAL ID'.

CUSTOMER	Name	Customer group	ORGANIZATION DETAILS	ABC code	OTHER INFORMATION
Account	Contoso Retail San Diego	30	Number of employees	Normal	Address books
US-001	Search name	Classification group	ID	DSPE number	RetailCust
Type	Contoso Retail San D	Organization number	2601		Language
Organization		Payment priority			ISO-4217
					Plausibility name
					Known as



# Workflow approval with copilot summarization

Workflow approvers must navigate to the workflow history and then look through multiple entries to find the status of a given workflow. By using this summarization feature, approvers don't have to search for the submitter, the most recent status, comments, and the due date. Relevant history also gives more information about specific workflow types to improve the overall process



The screenshot displays the 'Finance and Operations Preview' interface for 'Accounts payable > Invoices > Invoice journal'. The main view is 'Standard view' for the 'Invoice journal' workflow. A table lists journal entries with columns for Journal No., Name, Description, Posted, Posted on, Log, In use by, and Modified. The entry with Journal No. 00563 is selected.

Journal No.	Name	Description	Posted	Posted on	Log	In use by	Modified
00460	WIFAPINV	Wif AP Invoice					SARA
00563	WIFAPINV	Wif AP Invoice					Admin

On the right, the 'Summary by Copilot' panel provides an overview of the workflow, including submission details, a list of outliers, and potential risks of failure. At the bottom right, there are 'Approve' and 'Cancel' buttons.



# Collections coordinator

Finance and Operations Preview

Search for a page

USMF

Contoso Entertainment System USA

Search people ...

< September 2023 >

Su Mo Tu We Th Fr Sa

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

Work items assigned to me

Cash advance request : Record ret...

Expense reports : Record returned

Catalog : catalog approval

Expense reports : Expense report a...

Cash advance request : Cash advan...

Approve travel requisition

Catalog : catalog approval

APPS

Business performance analytics (preview)

WORKSPACES

Bank management	Channel merchandising configuration validator	Customer payments	Financial analysis - current company	Optimization advisor	Project management	Store management
Benefits	Collections coordinator (preview)	Data management	Financial period close	Outbound work monitoring	Purchase order confirmation	Supply risk assessment
Budget planning	Commerce pricing and discount management	Data validation checklist	Fixed asset management	Outbound work planning	Purchase order preparation	System administration
Business document management	Compensation management	Distributed order management	General journal processing	Payment workspace	Purchase order receipt and follow-up	Task management
Business processes for human resources	Confirmed purchase orders with changes	Electronic reporting	Invoicing	Payroll management	Recruitment management	Vendor bidding
Business processes for payroll	Cost accounting ledger administration	Employee development	Learning	People	Released product maintenance	Vendor information
Cash overview - all companies	Cost administration	Employee self service	Leave and absence	Personnel management	Resource lifecycle management	Vendor invoice automation
Cash overview - current company	Cost analysis	Engineering change management	Ledger budgets and forecasts	Product readiness for discrete manufacturing	Retail and Commerce IT	Vendor invoice entry
Catalog management	Cost control	Expense management	Maintenance request management	Product readiness for process manufacturing	Sales order processing and inquiry	Vendor payments

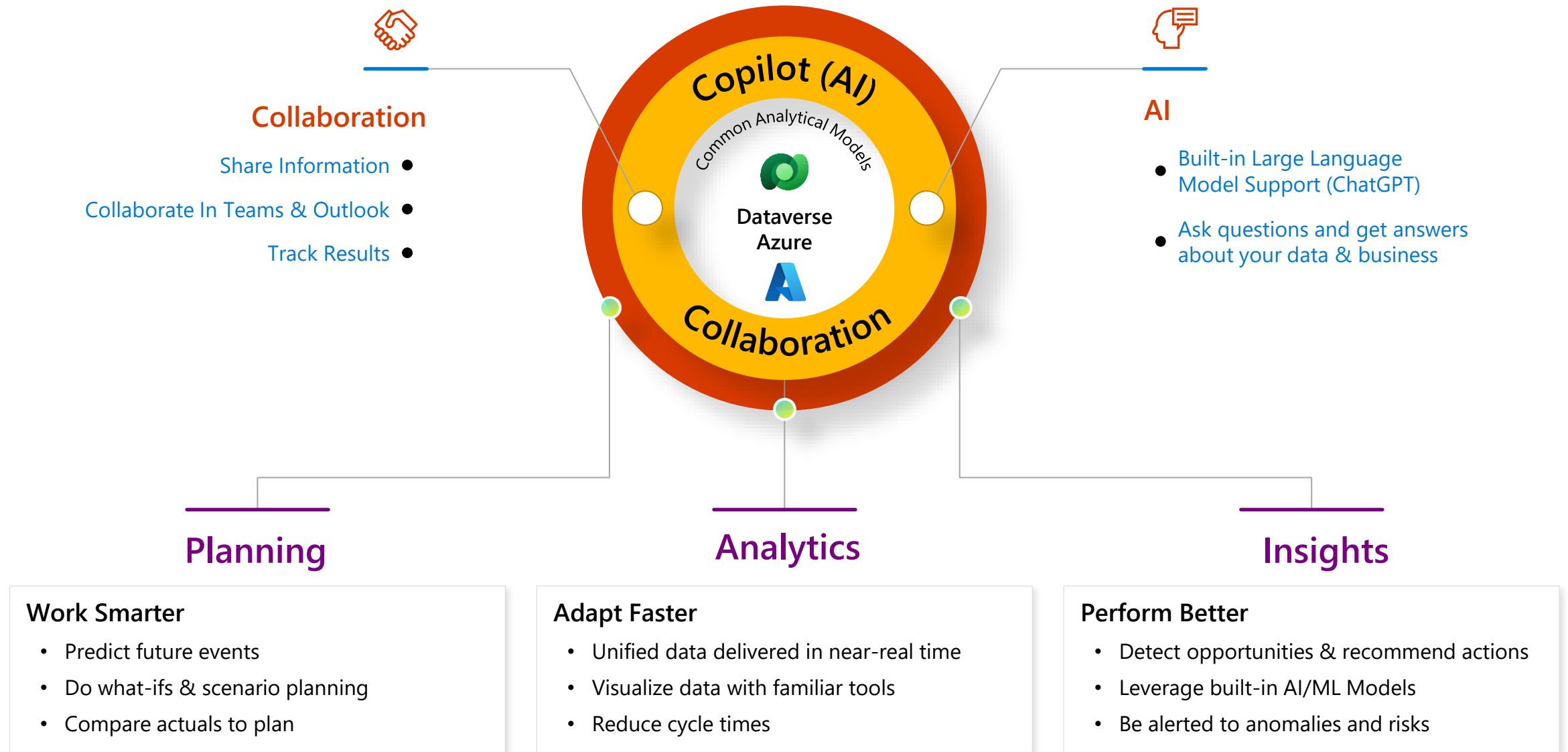




# Business Performance Management



# Enhance business performance management



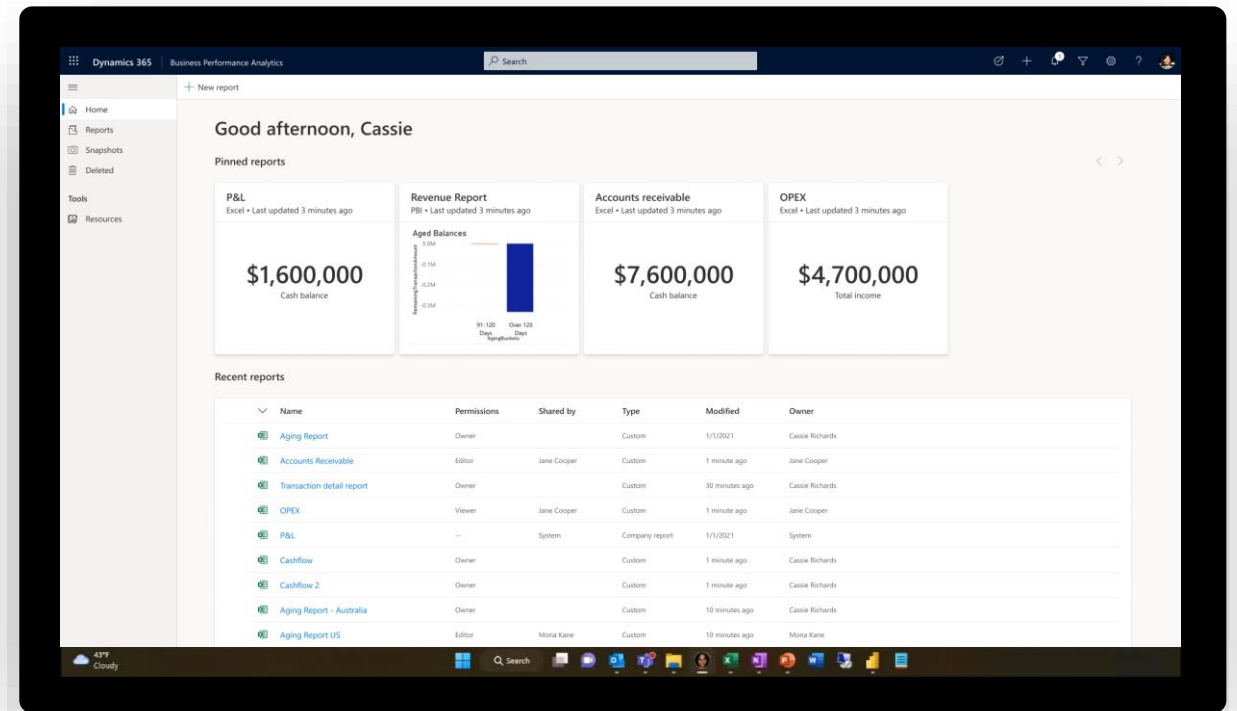


# Business performance analytics

Bring data and insights closer to the point of decision. Gain near-real time access to secure cloud-based self-service reporting delivered through familiar tools like Power BI and Excel.

Learn more from the blog: [Dynamics 365 Finance business performance analytics - Microsoft Dynamics 365 Blog](#)

*Announced: February 22, 2023*



AI and Analytics



Power BI



Excel

Power Platform



Power Apps



Power Automate

Common Data Model



Dataverse



Azure

Collaboration



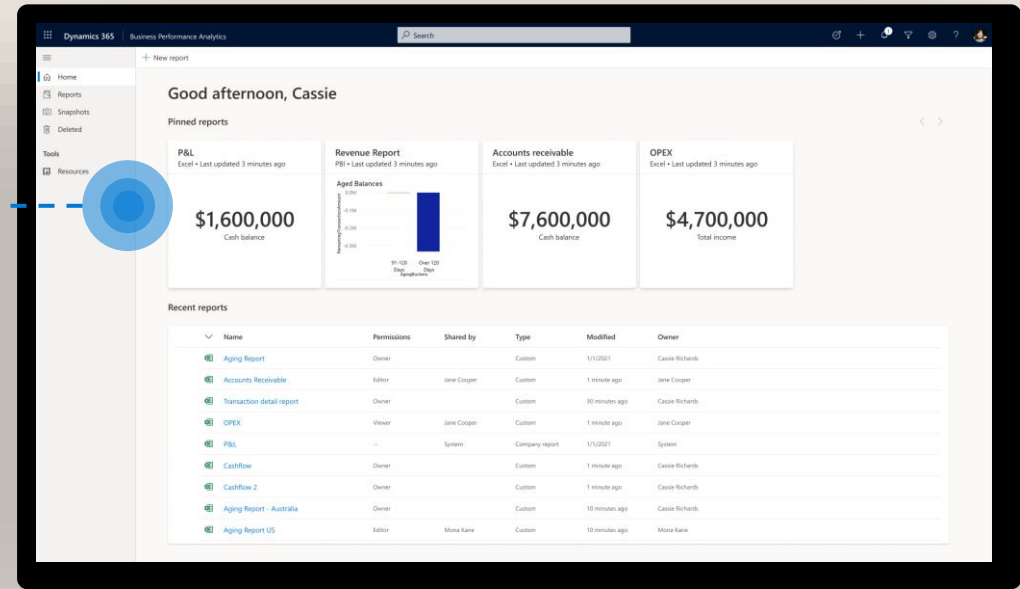
Teams

# Make analysis easy and more accessible

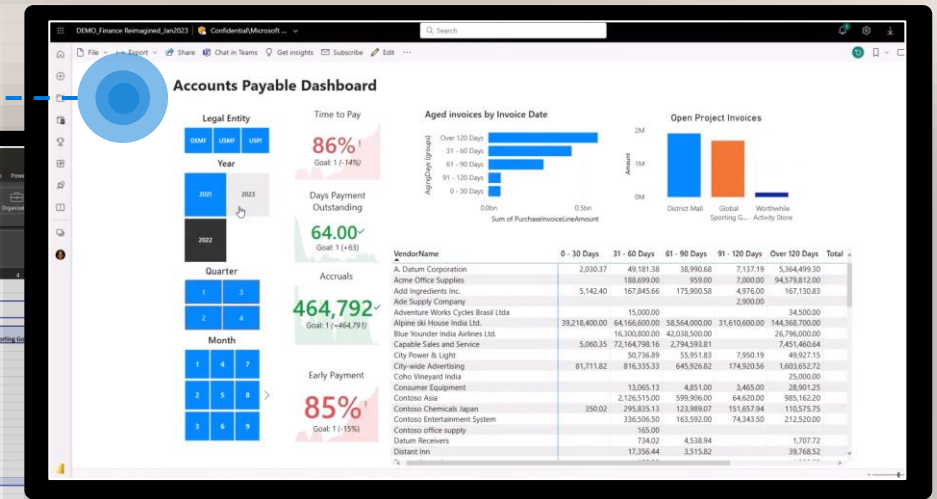
Delivered seamlessly through familiar and easy-to-use tools

Create, save, and share reports securely for easy collaboration

Enhance decision making with near-real time data and insights



Securely create, share, and collaborate with team members in the reporting hub



Visualize data your way—quickly analyze and drill down to the details with familiar tools like Excel & Power BI

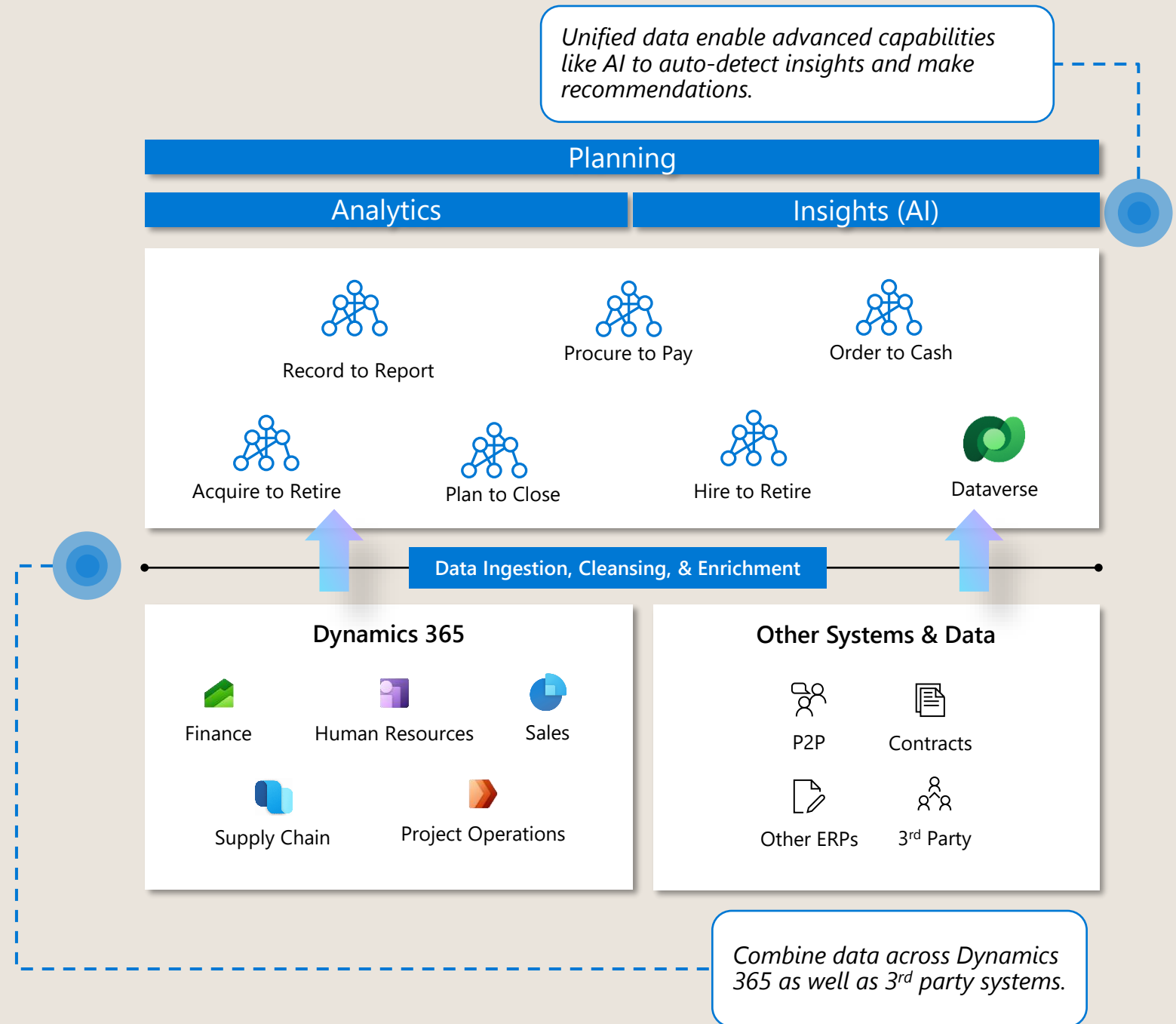


# Enhance visibility with unified data

Gain a complete view across business systems and processes

Streamline data ingestion, cleansing, and enrichment for enhanced usability

Lay the foundation for advanced planning, analytics, and AI



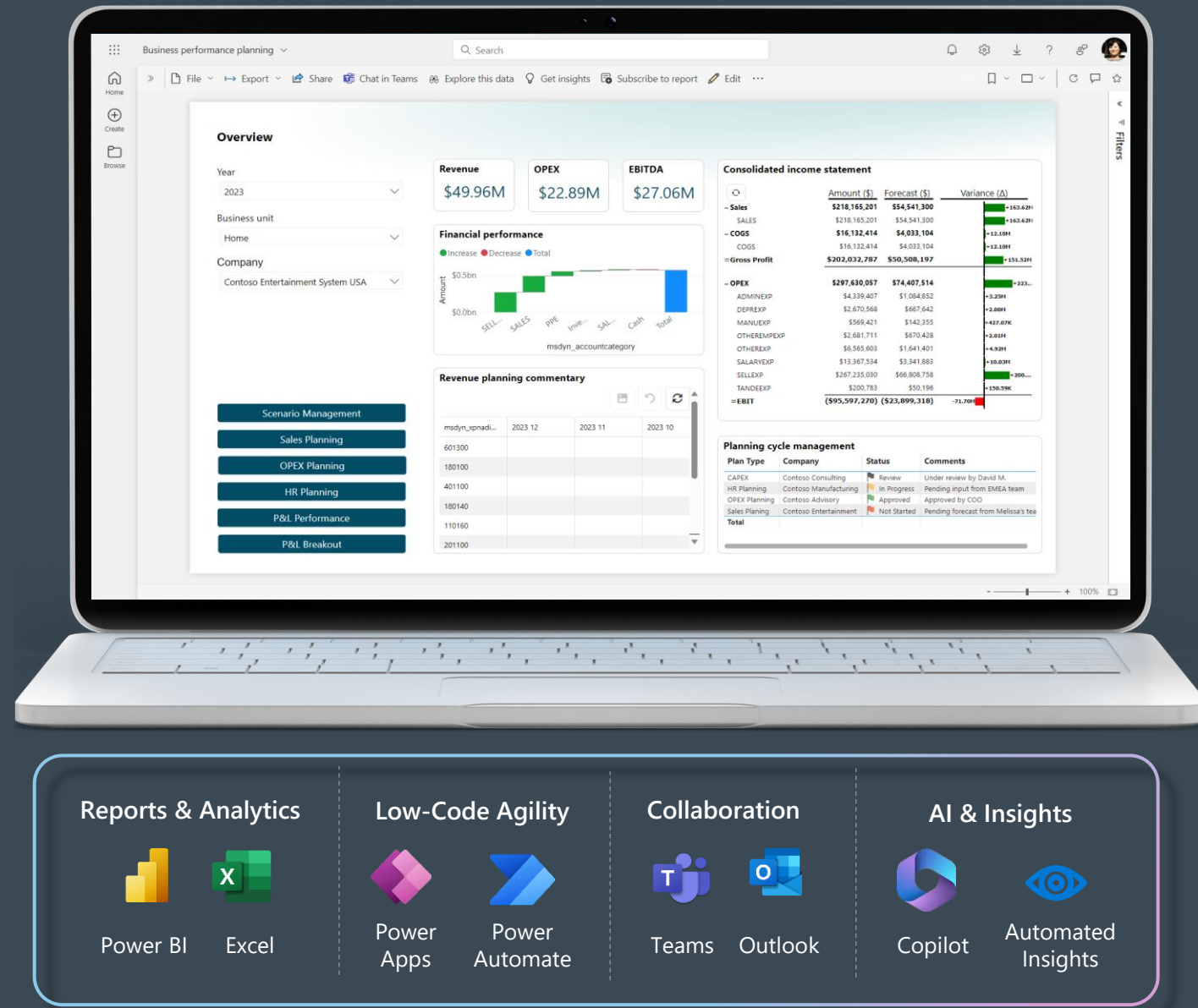
# Business performance planning

## Transform planning with the power of Microsoft

Encompassing crucial tasks of budgeting, forecasting, financial analysis, and corporate performance management—all from market leading business intelligence tools Microsoft Power BI and Excel.

AI guided experiences provide the ability to analyze vast amounts of data, uncover valuable insights, and enhance the accuracy of financial projections.

- Revenue planning
- Bottom-Up Planning
- Driver Based Planning
- Budgeting and Forecasting
- Long-range Planning
- M&A Valuation
- Cashflow planning
- **And many more...**





# Extend planning oversight and go beyond FP&A

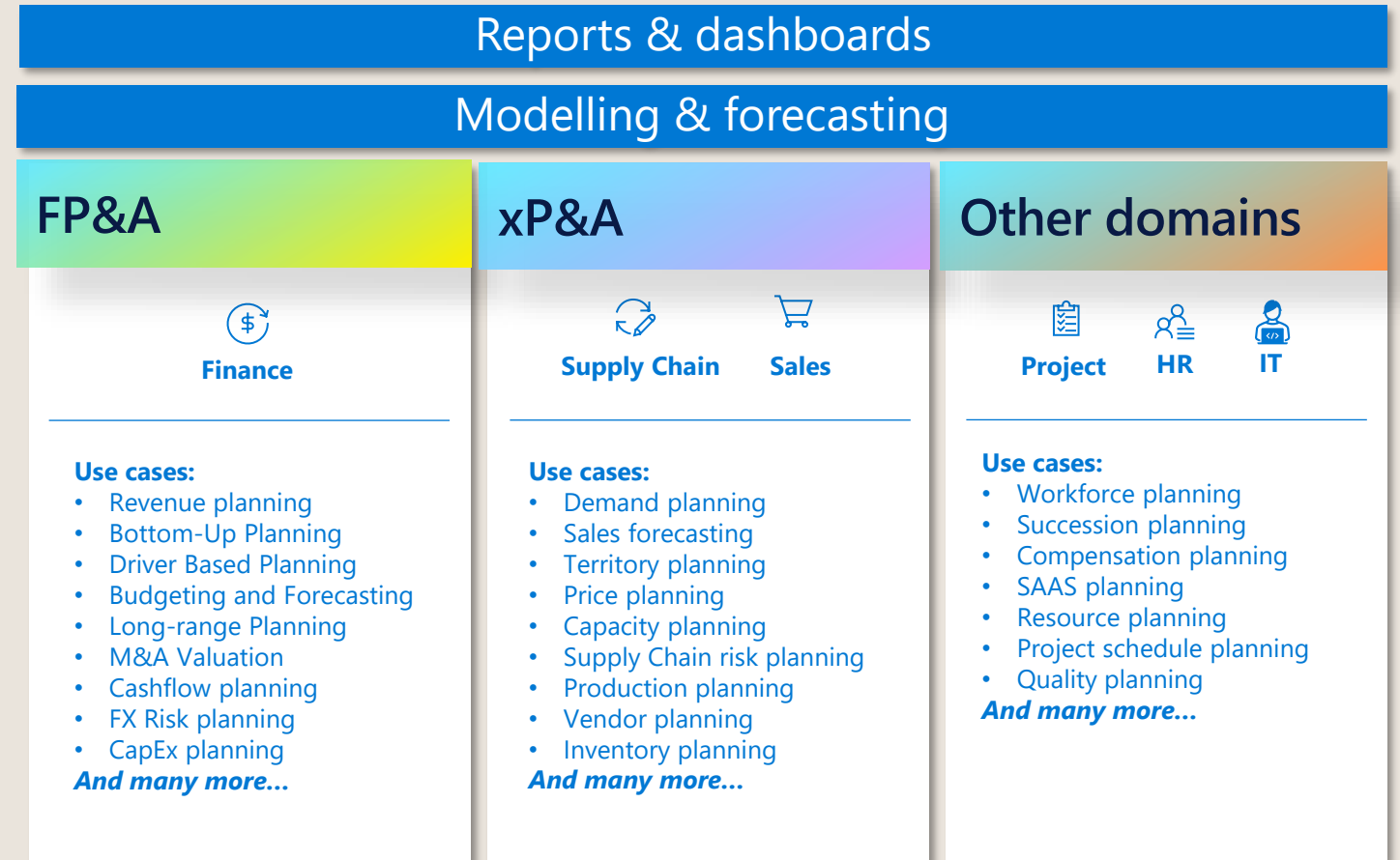
Fulfill core FP&A requirements  
finance teams rely on

---

Strengthen financial planning with  
Sales and Operations data

---

Harness advanced models and  
forecasting tools for key planning  
use cases

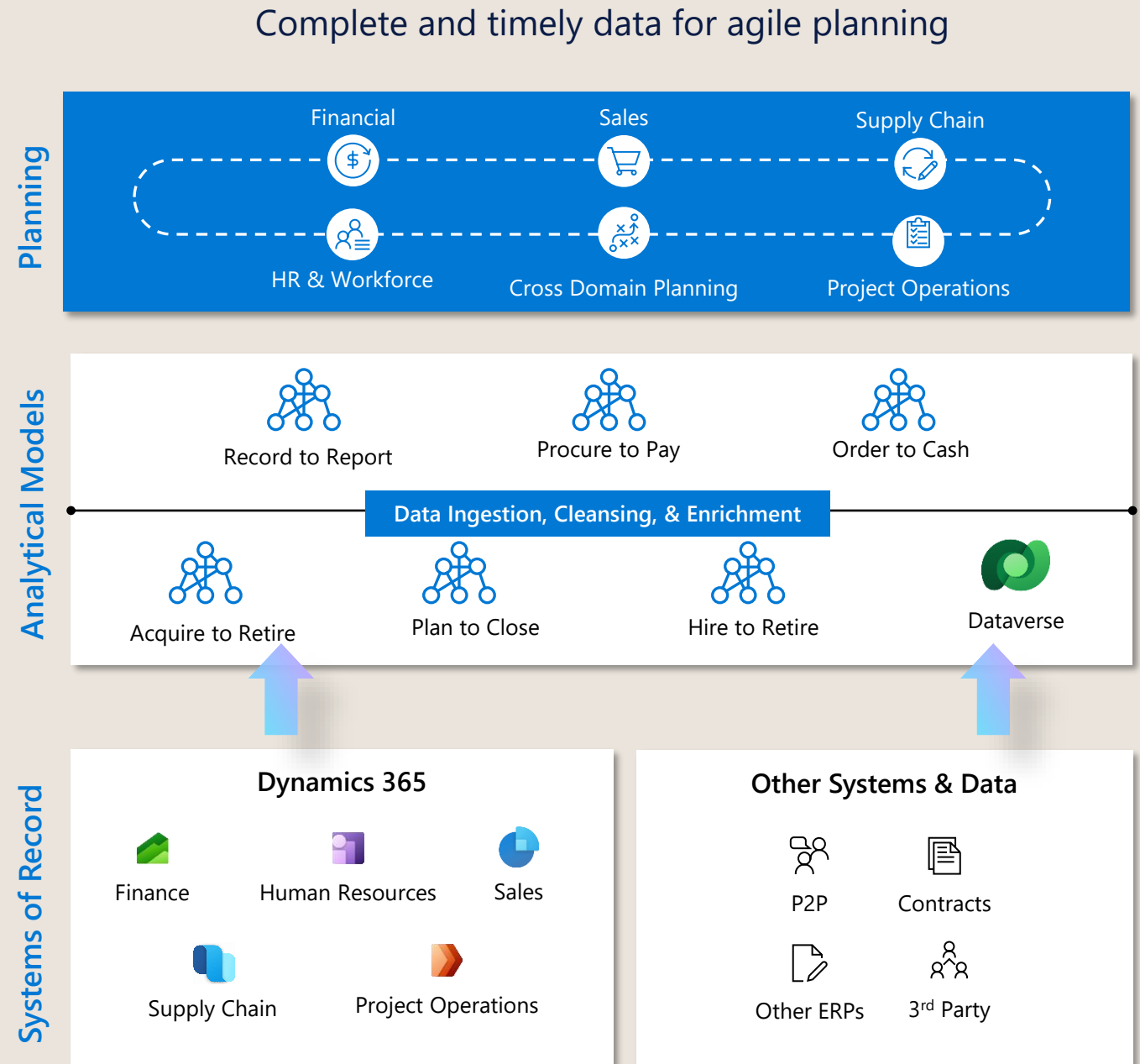


# Improve planning accuracy with complete and timely data

Enable comprehensive company-wide planning

Refresh plans with near-real-time data

Accelerate decision making with greater accuracy





The background is a blurred city street at night, featuring bokeh light effects from streetlights and buildings. A digital data visualization, resembling a line graph or stock market chart, is overlaid on the right side of the image. The chart has a blue line with orange peaks and valleys, set against a grid of small dots. The word "Demo" is centered in the middle of the image in a white, sans-serif font.

Demo





# Dynamics 365

## Supply Chain Management

Track and trace for manufacturing

Approvals Management  
App

Copilot for warehouse  
workers

Changes to confirmed purchase orders

Product bundles

Inventory mobile app

Inventory Visibility ↔ Commerce





# Dynamics 365 SCM Copilot

**Use artificial intelligence to  
summarize the downstream  
effects of changes to confirmed  
purchase orders.**





A large yellow shipping container is being hoisted by a crane at a port. The container is suspended in the air, and a truck is positioned below it. In the background, there is a tall stack of colorful shipping containers in shades of yellow, red, and blue. The sky is filled with soft, orange and yellow clouds, suggesting a sunset or sunrise. The word "Demo" is written in white text in the center of the image.

Demo



# Track and trace for manufacturing

Dynamics 365 Supply Chain Management now provides an effective, accurate, and performant process for tracking serial and batch numbers of components and finished goods. It helps make sure that manufacturers can comply with industry standards and regulations and helps ensure the quality of processes such as maintenance, warranty, and recalls.

The screenshot shows the 'Associate' screen in Dynamics 365 Supply Chain Management. The breadcrumb trail at the top reads: 'Associate • P000123 • D8101 Speaker'. Below this is a search bar with a magnifying glass icon and the text 'Search'. A progress indicator on the right shows a circular progress bar that is 2/3 complete, with the text '2 of 3' below it. The main content area displays a list of components with checkboxes for selection. The first component, 'D8101 Speaker', is selected. Below it are three sub-components: 'D81011 Tweeter M8101 3.32', 'D81012 Bass unit M8101 3.42', and 'D81013 BT control M8101 3.52'. Each sub-component has a checkbox and a serial number (SN) field. The bottom of the screen features a navigation bar with icons for 'Undo', 'Redo', 'Reset all', 'Supervisor access', 'Instructions', 'Expand BOM', 'Associate manually', 'Cancel', and 'OK'.

Component	SN	Status
D8101 Speaker	7827822...2872	Selected
D81011 Tweeter M8101 3.32	SN 9188871...1132	Selected
D81012 Bass unit M8101 3.42	SN 4444771...4567	Selected
D81013 BT control M8101 3.52		Not Selected



# Approvals Management app

Dynamics 365 Supply Chain Management now provides a mobile approval experience, which adds flexibility, efficiency, resiliency, and responsiveness to the approval process.

Purchase order

Purchase orders

Lines

☒ Select all

☒ Item number: A000112.26 CAD

Legal entity: usmf  
1 Pcs - 12.26 CAD / Pcs  
Purchase order: 00000127

☒ Item number: 1000899 USD

Legal entity: usmf  
1 ea - 899 USD / ea  
Purchase order: 00000128

☒ Item number: A000112 USD

Legal entity: usmf  
1 Pcs - 12 USD / Pcs  
Purchase order: 00000128

Complete

Return

Delegate

Request change

< Lande Packaging Supplies

Details

Attachments

Timeline

Accounting distribution details

Overview

[View workflow instruction](#)

Vendor account1002

Purchase order00000126

Subtotal amount12

End discount0

Tax amount0

Lines (1)

Item number: A000112 USD

Legal entity: usmf  
1 Pcs - 12 USD / Pcs

Total12 USD

Approve

Reject

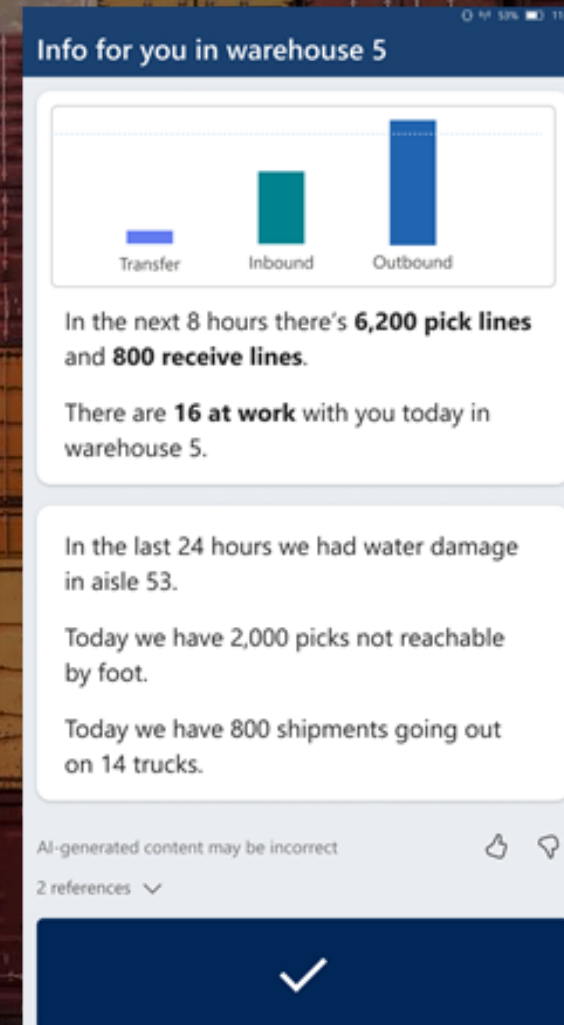
Delegate

Request change



# Copilot-generated screen for warehouse workers

Revolutionize the way warehouse workers engage with their daily tasks by providing a customized, intelligent overview of their workday directly on their mobile app's home screen. Generative AI ensures that workers are immediately aware of their specific duties, workloads, and task status. This targeted information enhances operational efficiency, reduces time spent on information retrieval, and optimizes resource allocation across the warehouse floor.





# Dynamics 365

## Human Resources

**Avoid duplication with Entra ID  
integration**

**Recruiting portal**



**Copilot to summarize data for employee self-service**



# Copilot to summarize data for employee self-service

In the employee self-service workspace, the summarization uses time-off transactions, balances, and requests to provide a summary of their time-off entitlement, what's been used, what's remaining, and if they will lose any time off. It also suggests when to take time off so they don't lose any of it to carryover rules

The screenshot displays the Dynamics 365 Finance employee self-service interface for Sara Thomas, Chief Financial Officer. The page is titled "Options" and includes a search bar. The user's profile information is shown at the top, including their name, title, and a link to "Edit personal details". The "My view" dropdown is set to "My information".

The main content area is divided into several sections:

- Copilot Summary:** A section titled "Time off" providing a summary of the user's time-off entitlement. It states: "You have 82 hours of PTO left. If you don't use it by the end of the year, you'll lose 23 hours at the beginning of 2025. You could use it in conjunction with the Memorial Day holiday coming up, extending your break through the long weekend. You've also used 5 sick days during this period and have 4 more remaining." A link to "See terms" is provided.
- Summary:** A section with four tiles: "43 Work items assigned to me", "2 Questionnaires assigned to me", "Company directory", and "Team absence calendar".
- My career information:** A section with multiple tiles:
  - Time Off Balances:** "No requests made", "Request time off", "View time off".
  - Expenses:** "22 Unattached expenses", "28 Unattached receipts".
  - Timesheets:** "No timesheets found for the current period", "My timesheets".
  - Tasks:** "0 Overdue tasks", "0 Tasks due today", "View tasks".
  - Courses:** "0 courses overdue", "0 courses due soon", "1 courses assigned", "View courses".
  - Certificates:** "Certified management accounts...", "Expired 1201 days ago", "View all certificates".
  - Next Scheduled Review:** "Review", "1", "Description: Performance review", "1 in progress", "0 Ready for review", "0 Final review".
  - Performance Goals:** "0 Not started", "0 On track", "0 Needs improvement", "View all goals".
  - Compensation:** "Show".
  - Attachments:** "0", "Manage attachments".
  - Benefits:** "Benefits self-service".







# Dynamics 365

## Project Operations

**Improve resource  
booking performance**

**Increase WBS limits to 1,500 tasks**



**Copilot generated project status report**

**Optimize resource  
requirement generation**

**Progress-based billing on fixed-price projects**



# Dynamics 365 Commerce



**Discover smart trends and patterns with Store insights**

**Enable self-checkout in Store Commerce app**

**Archive commerce transactions**

**Store commerce improvements**