



August 26 - 27, 2025

OHIO VALLEY

Copilot is cool, but...

TOP NEW FEATURES THAT ARE NOT COPILOT





Session Objectives

Identify and understand the latest features in Dynamics 365 CE and Power Platform that are not related to Copilot.

See real-world applications of new tools and updates through practical demos that show how they can improve business processes and user productivity.

Gain actionable insights on how to adopt and maximize these new capabilities within your organization to stay current and competitive.





Ashley Steiner

Business Applications MVP

- 15+ years' working with Dynamics 365 CE/CRM (since version 4.0)
- Specialize in CRM configuration, business process integration automation, and tool evaluation
- Dynamics 365 CE first-party apps and Power Platform experience
- *Awkward Silence* podcast host with Ed Gonzales



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Most Valuable
Professional





Session Agenda

- Sales & Marketing
- Customer Service
- Contact Center
- Field Service
- Project Operations (even though it falls under ERP)
- Power Automate
- Dataverse





Sales & Marketing





Seller Experience & Pipeline

Visualize and Work with Hierarchical Data from Multiple Tables

Dynamics 365 Sales
Public Preview: Aug 2025
GA: Oct 2025

- Replaces the deprecated legacy hierarchy control.
- Supports visualization of hierarchical relationships for single tables (multi-table support coming in v2).
- Helps sellers understand relationships between records more intuitively.

[See it in action](#)



Paid Event Registration in Real-Time Journeys

Dynamics 365 CIJ
Public Preview: Oct 2025

- Enables secure ticketing with flexible pricing tiers, discount codes, and QR code-enabled passes.
- Integrates with trusted payment providers for seamless checkout.
- Focused on event management and registration workflows, not Copilot-driven.

[See it in action](#)

Simplify forms by filtering choices based on previous answers

Dynamics 365 CIJ
GA: Sept 2025

- Filters form field options dynamically based on previous answers for a smoother user experience.
- Reduces irrelevant choices, improving speed, accuracy, and submission quality.
- Ideal for forms like quote requests where location-based routing is critical.

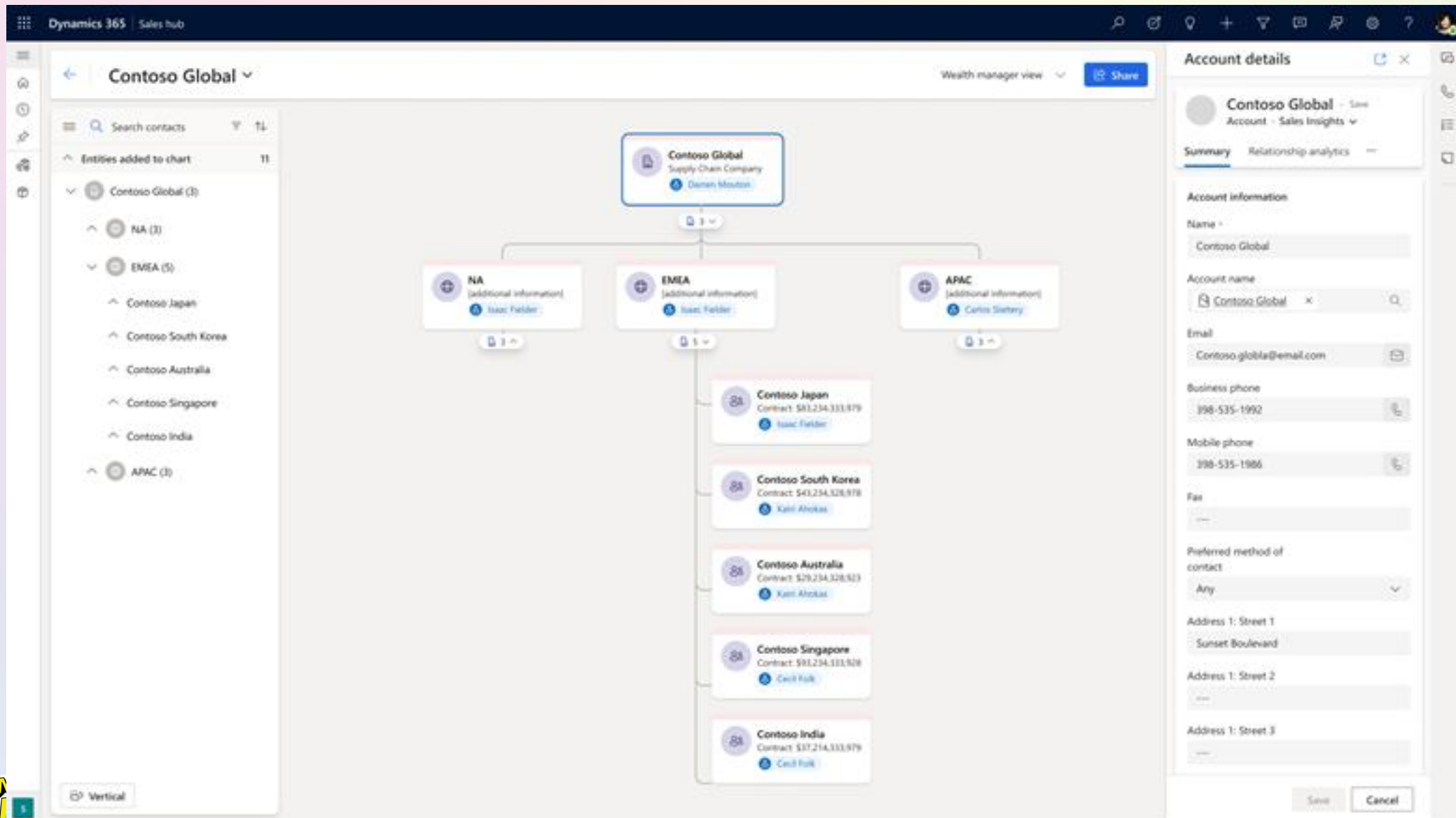
[See it in action](#)

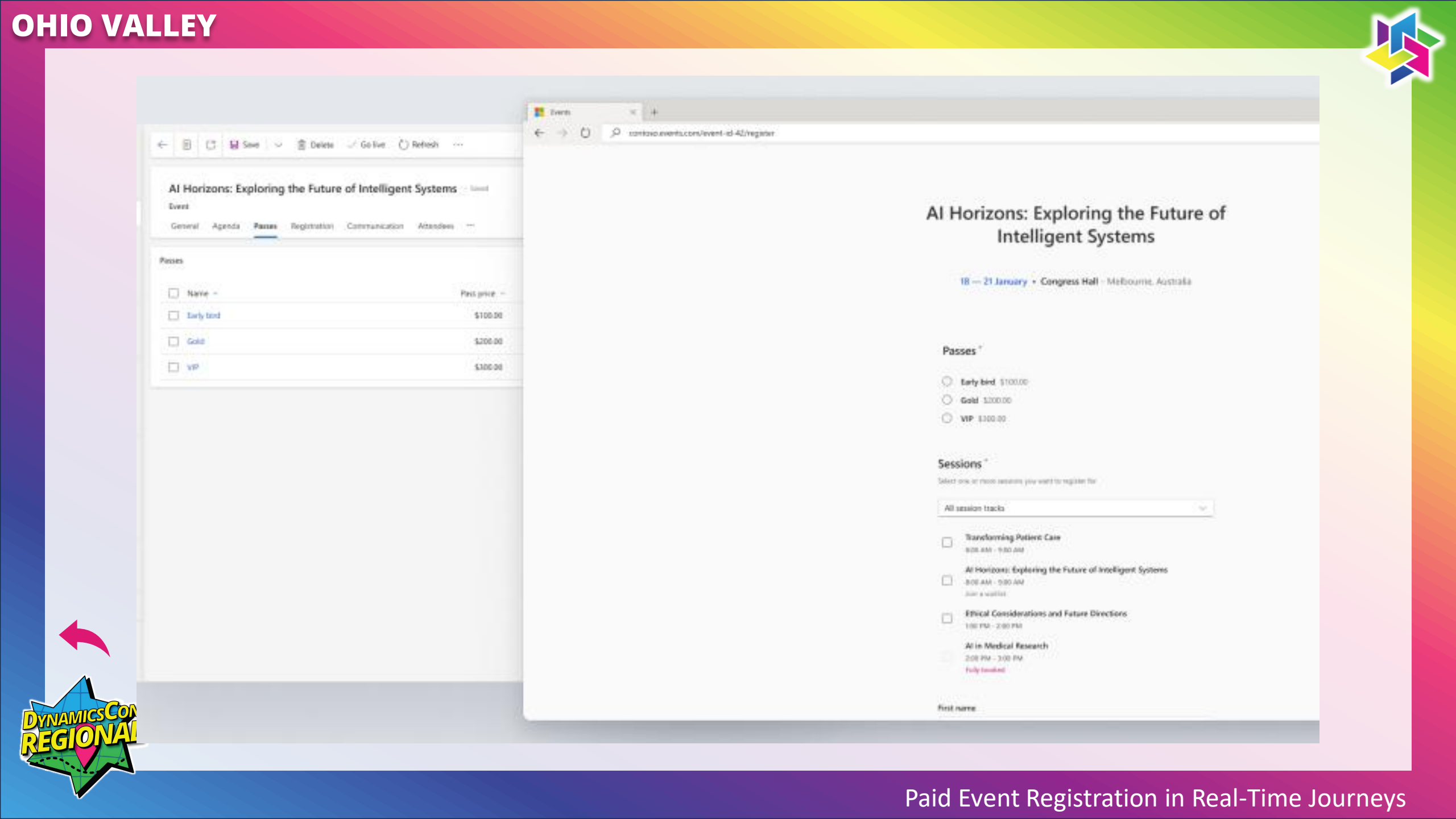
Efficient Header & Navigation Experience

Power Apps
Public Preview: May 2025
GA: Oct 2025

- Modern layout reduces clutter and improves usability
- Streamlined sitemap and condensed page headers save time
- Consistent design across devices boosts productivity

[See it in action](#)





← ↻ ⌂ Save ⌵ Delete ✓ Go live ⌛ Refresh ⋮

AI Horizons: Exploring the Future of Intelligent Systems Event

General Agenda **Passes** Registration Communication Attendees ⋮

Passes

<input type="checkbox"/> Name	Pass price
<input type="checkbox"/> Early bird	\$100.00
<input type="checkbox"/> Gold	\$200.00
<input type="checkbox"/> VIP	\$300.00

Events

← → ⌛ 🔍 contoso.events.com/event-id-45/register

AI Horizons: Exploring the Future of Intelligent Systems

18 — 21 January • Congress Hall • Melbourne, Australia

Passes*

☐ Early bird \$100.00

☐ Gold \$200.00

☐ VIP \$300.00

Sessions*

Select one or more sessions you want to register for

All session tracks

☐ Transforming Patient Care
8:00 AM - 9:00 AM

☐ AI Horizons: Exploring the Future of Intelligent Systems
8:00 AM - 9:00 AM
Join a waitlist

☐ Ethical Considerations and Future Directions
1:00 PM - 2:00 PM

☐ AI in Medical Research
2:00 PM - 3:00 PM
Fully booked

First name





Customer Insights - Journeys

Dynamics 365 Customer Insights - Journeys

Marketing form 1

Design Preview

Save Check content Publish

HTML Lead

Filter values

Define how to filter the values of the selected field. [Learn more](#)

Filter values of **Area of Interest** field

Based on answer to: **Select field**

- Level of Study
- Terms and conditions

Next Cancel

Submit

© 2021 (Company Name). All rights reserved.
(Legal Address), (Company Name/Location)

Edit field

Map user input to:

Area of Interest

Lead - Area of Interest (unassigned)

Placeholder text

Select the area

Default value

Select default value

Required

ON

Advanced

Action

Filter values

Add action to filter this field by another field. [Learn more](#)

+ Add action

Spacing



Simplify forms by filtering choices based on previous answers



Dynamics 365 Sales Hub

My Active Accounts

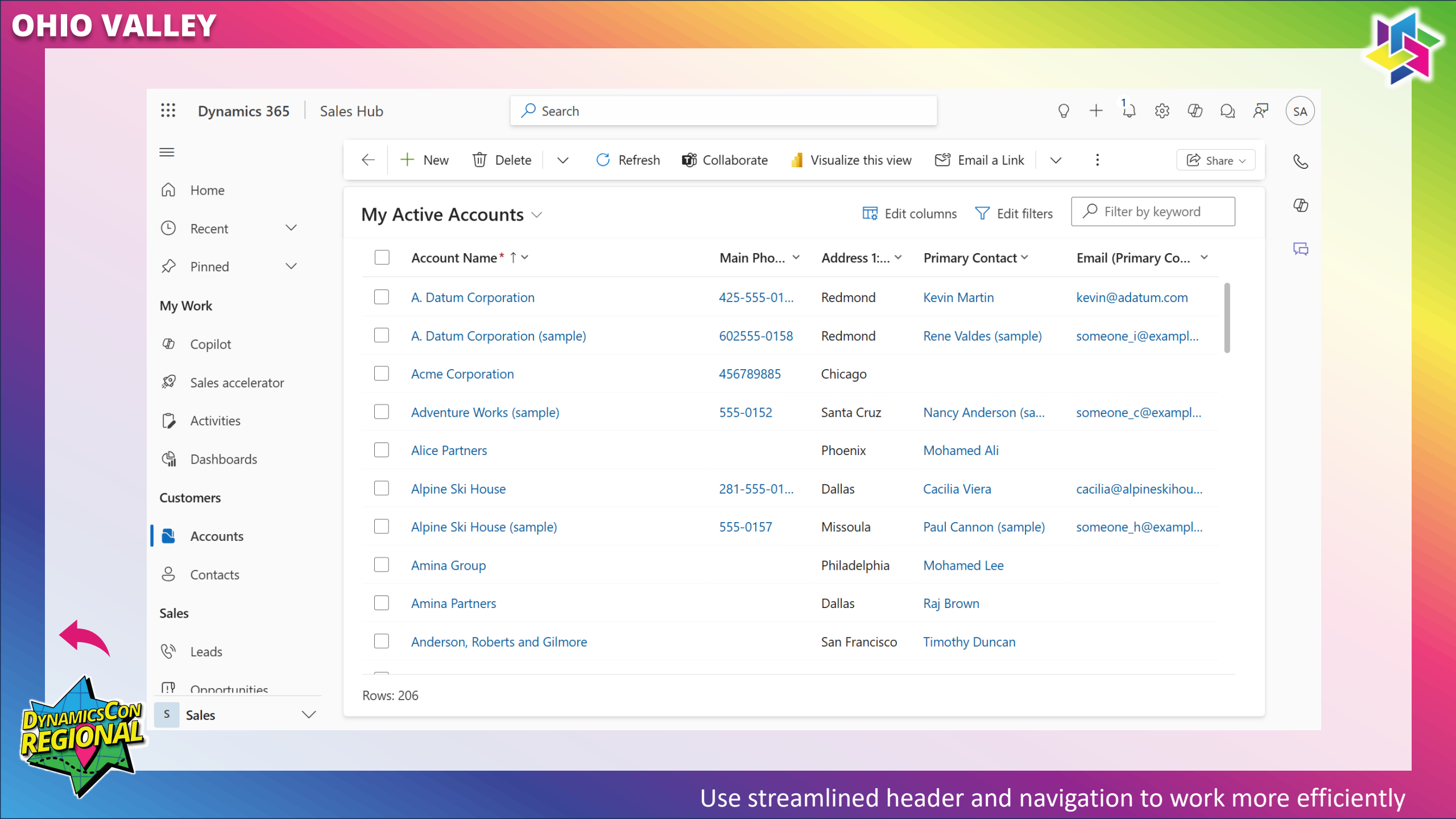
Ask about data in this table. Owner: Me Status: Active

Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
<input type="checkbox"/> A. Datum Corporation	425-555-0158	Redmond	Kevin Martin	kevin@adatum.com
<input type="checkbox"/> Alpine Ski House	281-555-0157	Dallas	Cacilia Viera	cacilia@alpineskhouse.com
<input type="checkbox"/> Fabrikam, Inc.	423-555-0103	Lynnwood	Haroun Stormonth	haroun@fabrikaminc.com
<input type="checkbox"/> Fourth Coffee	415-555-0179	San Francisco	Carole Poland	carole@contoso.com
<input type="checkbox"/> Northwind Traders	614-555-0121	Columbus	Heriberto Nathan	heriberto@northwindtraders.com
<input type="checkbox"/> Trey Research	619-555-0127	San Francisco	Alex Baker	alex@treysresearch.net

Rows: 6

- New
- Visualize this view
- Email a Link
- Flow
- AI Builder
- Run Report
- Excel Templates
- Export to Excel
- Import from Excel
- Quick Campaign
- Open Dashboards
- Show As
- Show Chart





Dynamics 365

Sales Hub

Search

Lightbulb

+

1

Settings

Help

SA

Home

Recent

Pinned

My Work

Copilot

Sales accelerator

Activities

Dashboards

Customers

Accounts

Contacts

Sales

Leads

Opportunities

S Sales

←

+ New

🗑 Delete

▼

🔄 Refresh

👥 Collaborate

📊 Visualize this view

📧 Email a Link

▼

⋮

🔗 Share

My Active Accounts

🔗 Edit columns

🔗 Edit filters

🔍 Filter by keyword

<input type="checkbox"/>	Account Name* ↑ ↓	Main Pho...	Address 1:...	Primary Contact	Email (Primary Co...
<input type="checkbox"/>	A. Datum Corporation	425-555-01...	Redmond	Kevin Martin	kevin@adatum.com
<input type="checkbox"/>	A. Datum Corporation (sample)	602555-0158	Redmond	Rene Valdes (sample)	someone_i@exampl...
<input type="checkbox"/>	Acme Corporation	456789885	Chicago		
<input type="checkbox"/>	Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sa...	someone_c@exampl...
<input type="checkbox"/>	Alice Partners		Phoenix	Mohamed Ali	
<input type="checkbox"/>	Alpine Ski House	281-555-01...	Dallas	Cacilia Viera	cacilia@alpineskihou...
<input type="checkbox"/>	Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@exampl...
<input type="checkbox"/>	Amina Group		Philadelphia	Mohamed Lee	
<input type="checkbox"/>	Amina Partners		Dallas	Raj Brown	
<input type="checkbox"/>	Anderson, Roberts and Gilmore		San Francisco	Timothy Duncan	

Rows: 206





Customer Insights - Journeys

Journey Orchestration via Marketing Interactions

GA: Jul 2025

- Trigger journeys using real-time interactions like “email link clicked”
- Branch paths based on customer responses for deeper personalization
- Increase engagement and conversions with timely, relevant messaging

Time Zone-Aware Quiet Times

GA: Jul 2025

- Set quiet hours by customer region and time zone
- Ensure compliance with local regulations and preferences
- Queue or delay messages based on journey-specific rules

[See it in action](#)

Multi-Trigger Journey Branching

GA: Jul 2025

- React to multiple interactions (e.g., opened, blocked, bounced) in one step
- Simplify journey logic with unified decision points
- Launch faster and scale with smarter, more targeted engagement

[See it in action](#)

Journey Step Analytics & Exits

GA: May 2025

- Track who entered and exited each journey step
- Understand drop-offs due to exclusions or unmet criteria
- Export up to 50,000 records for deeper analysis

[See it in action](#)

Web Interaction- Based Personalization

GA: Apr 2025

- Trigger journeys and tailor messages based on website activity
- Embed tracking scripts to capture clicks and engagement
- Use first-party data to personalize at scale while staying privacy-compliant





New Quiet Time Setting

Quiet Time Setting

General **Advanced**

Additional quiet times

Respect local regulations by setting up additional quiet time rules. You can create different quiet time rules for each state or country. Each rule gets its own conditions that must be met. The quiet time rule will be applied using the time zone of the audience member. If none of the conditions can be met, the default quiet times will apply. [Learn more](#)

Evaluation criteria

First, you'll need to define the fields to be evaluated for each rule, before creating a new quiet time. Set up up to two evaluation criteria. [Learn more](#)

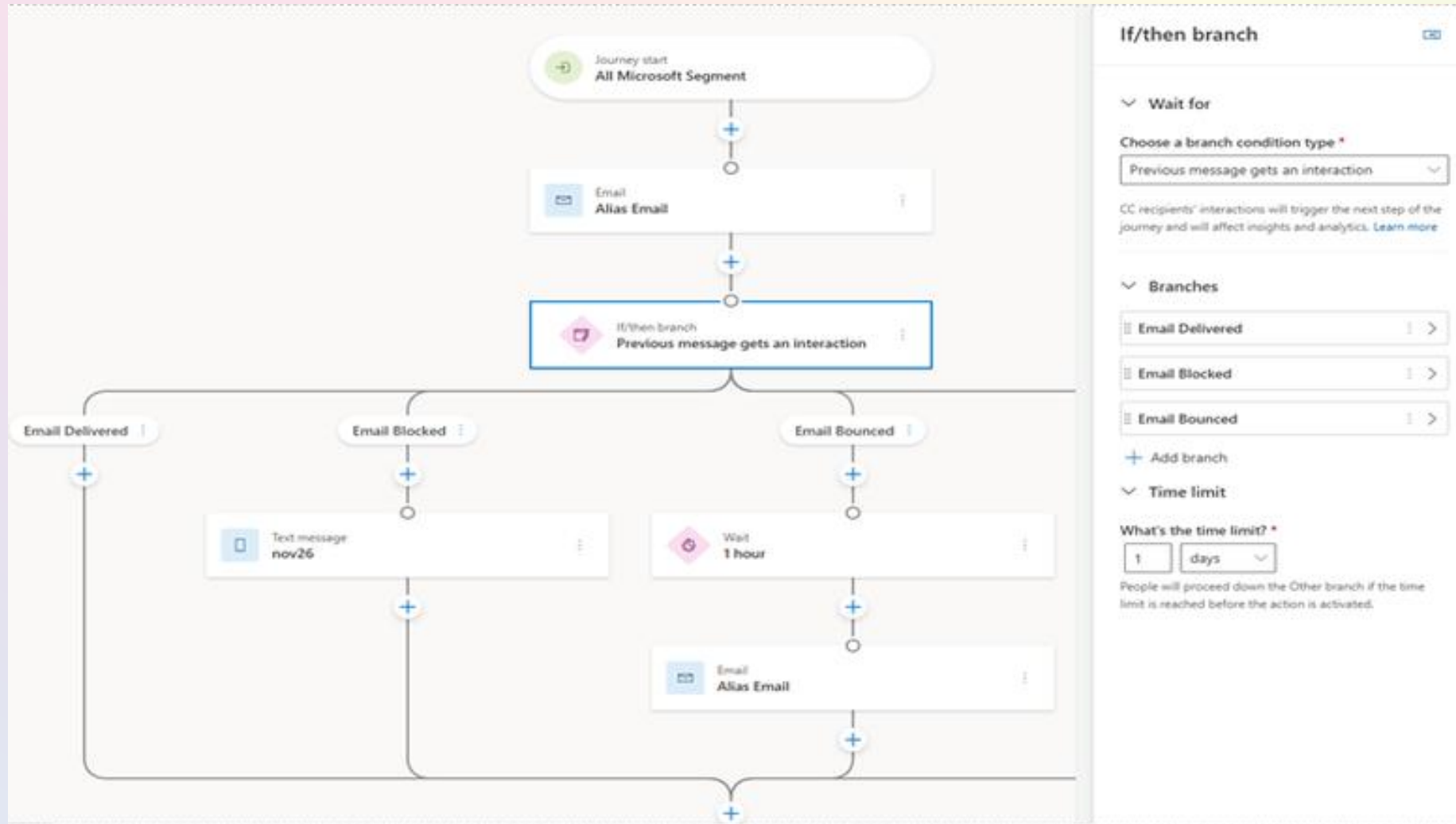
Name	Contact	Lead	CI-D Profile
Country	address1_country	address1_country	country
State	address1_stateorprovince	address1_stateorprovince	state

Texas

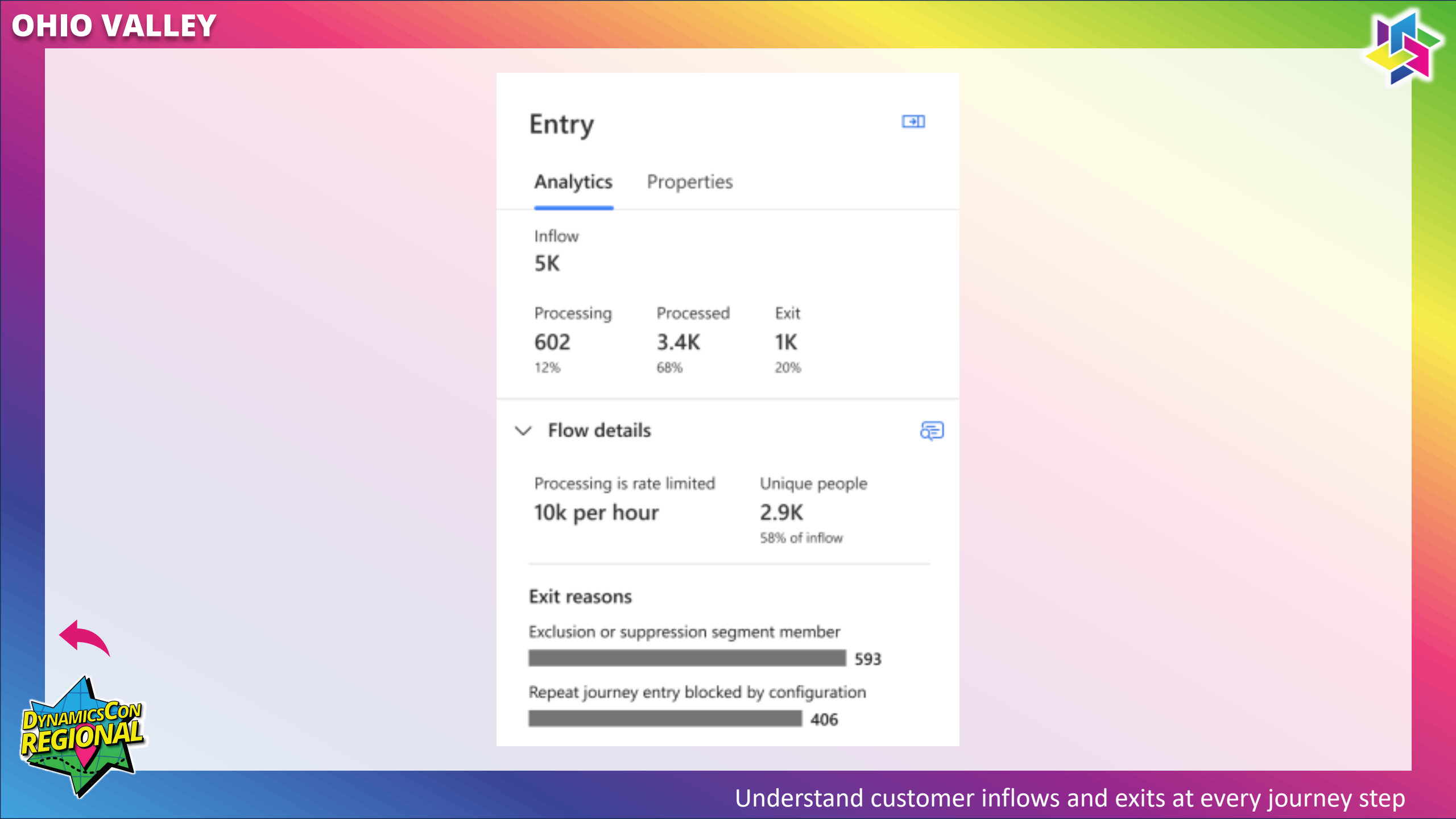
Purpose type	Channel	Quiet hours	Quiet dates
Commercial communication	All	Mon - Sat: 09:00 PM - 12:00 AM Mon - Sat: 12:00 AM - 09:00 AM Sun: 09:00 PM - 12:00 AM Sun: 12:00 AM - 12:00 PM	1/1/2025 1/15/2025 2/19/2025 5/27/2025 7/4/2025 9/2/2025 11/28/2025 - 11/29/2025 12/24/2025 - 12/25/2025
Transactional communication	Select channel		

Rhode Island





Tailor follow-up strategies by reacting to multiple customer actions at once



Entry



Analytics

Properties

Inflow

5K

Processing

602

12%

Processed

3.4K

68%

Exit

1K

20%

Flow details



Processing is rate limited

10k per hour

Unique people

2.9K

58% of inflow

Exit reasons

Exclusion or suppression segment member

593

Repeat journey entry blocked by configuration

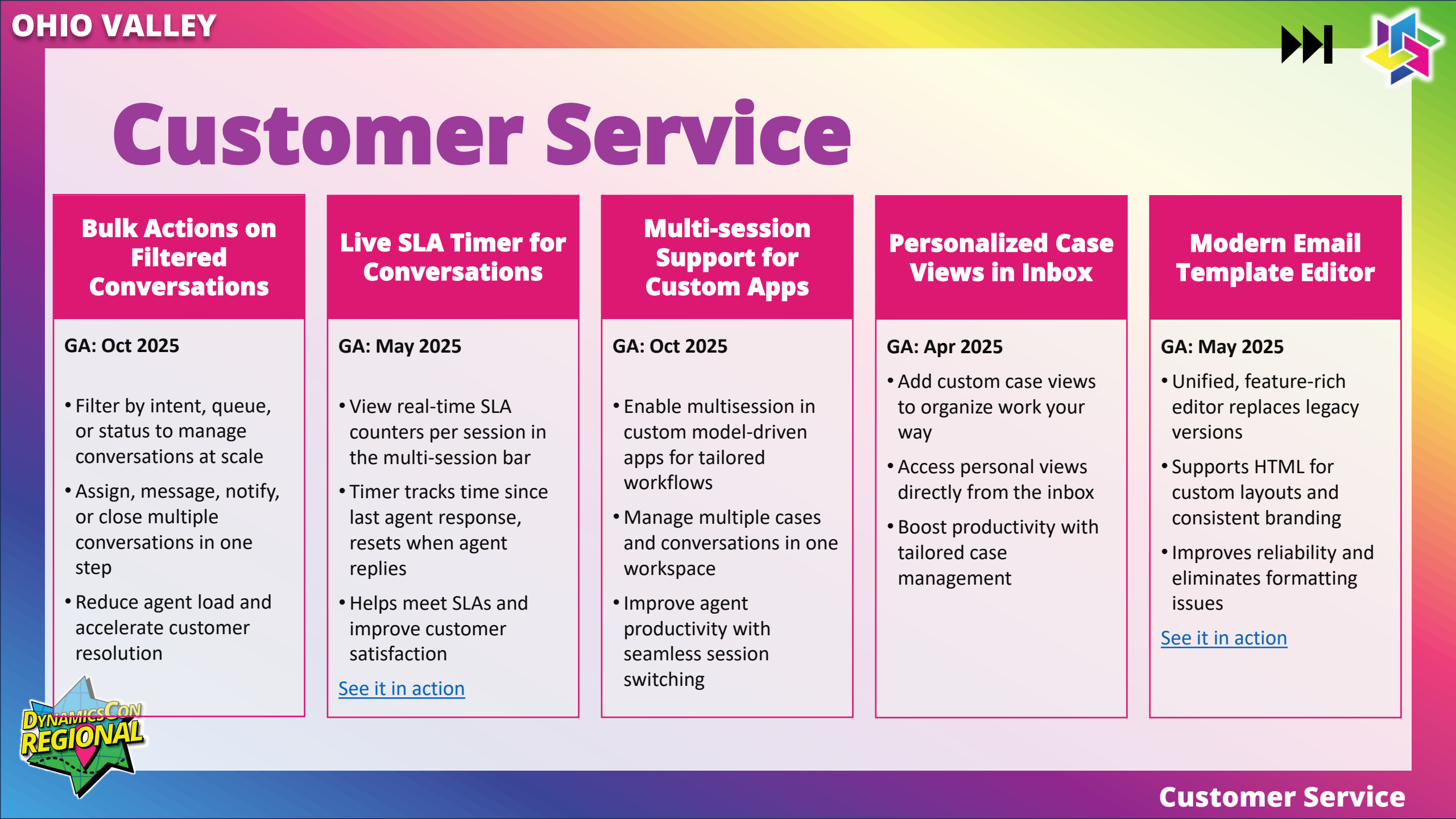
406





Customer Service





Customer Service

Bulk Actions on Filtered Conversations

GA: Oct 2025

- Filter by intent, queue, or status to manage conversations at scale
- Assign, message, notify, or close multiple conversations in one step
- Reduce agent load and accelerate customer resolution

Live SLA Timer for Conversations

GA: May 2025

- View real-time SLA counters per session in the multi-session bar
- Timer tracks time since last agent response, resets when agent replies
- Helps meet SLAs and improve customer satisfaction

[See it in action](#)

Multi-session Support for Custom Apps

GA: Oct 2025

- Enable multisession in custom model-driven apps for tailored workflows
- Manage multiple cases and conversations in one workspace
- Improve agent productivity with seamless session switching

Personalized Case Views in Inbox

GA: Apr 2025

- Add custom case views to organize work your way
- Access personal views directly from the inbox
- Boost productivity with tailored case management

Modern Email Template Editor

GA: May 2025

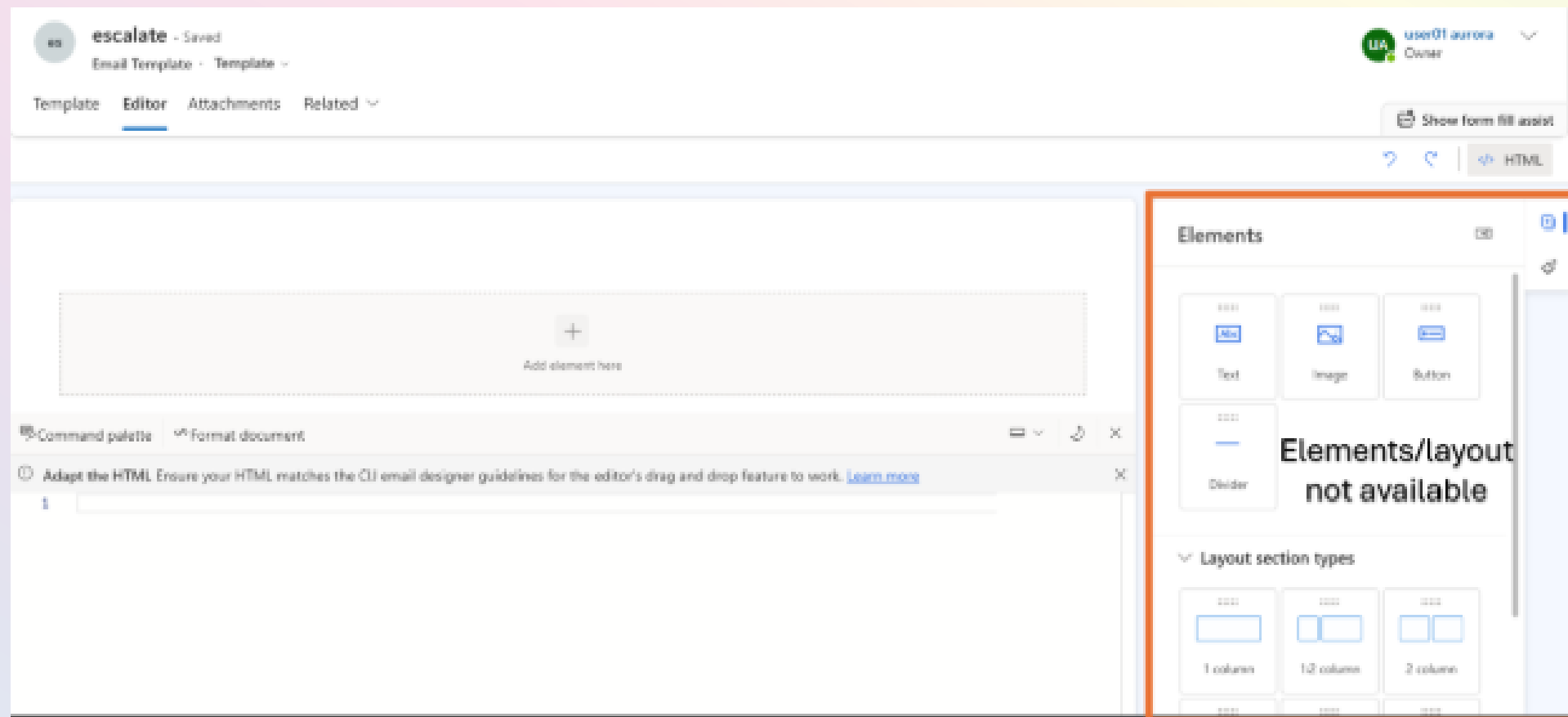
- Unified, feature-rich editor replaces legacy versions
- Supports HTML for custom layouts and consistent branding
- Improves reliability and eliminates formatting issues

[See it in action](#)





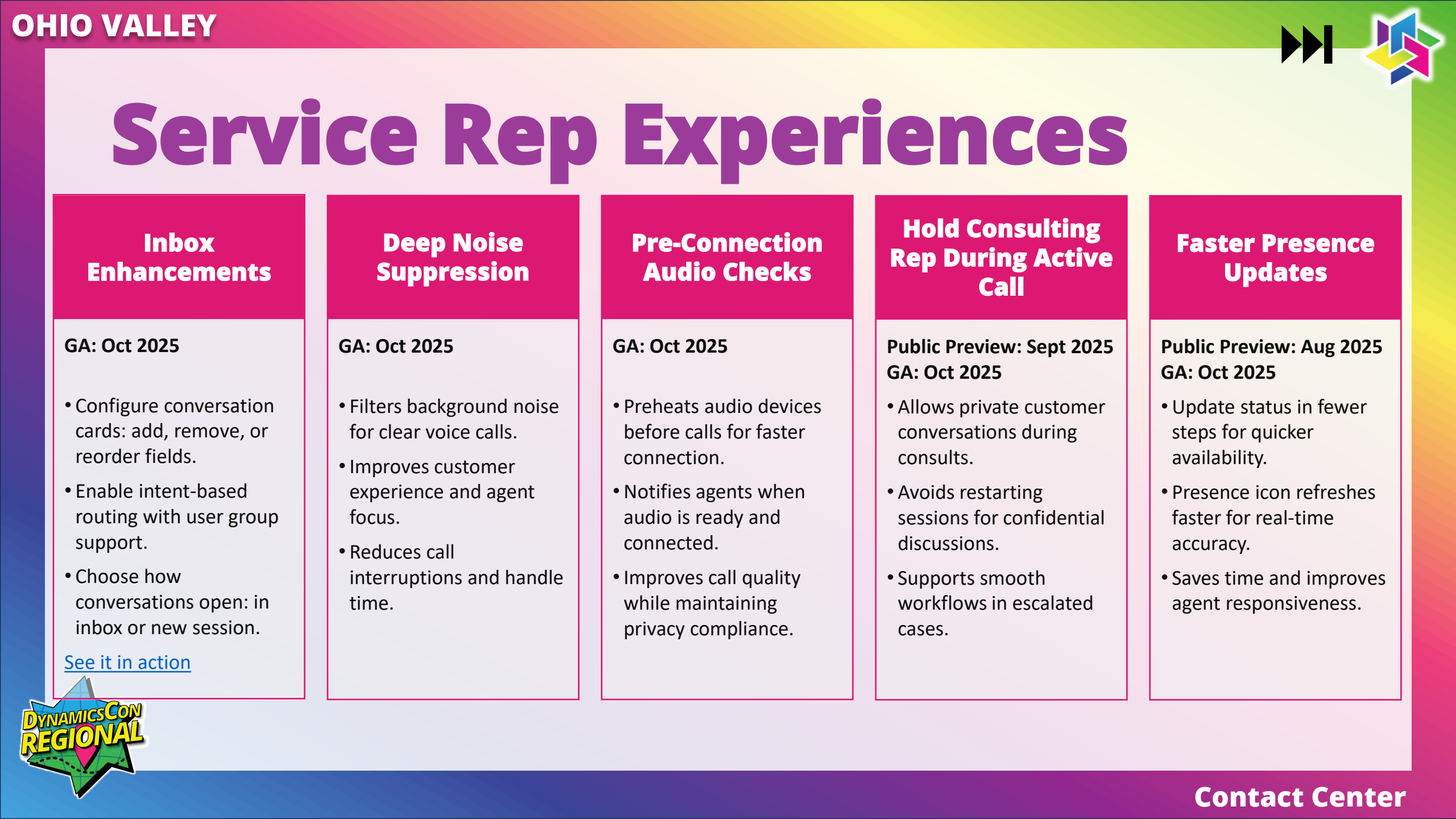
The screenshot displays the Dynamics 365 Customer Service interface. On the left, a 'Communication Panel' shows a list of conversations. The top conversation is with 'Claudia Mazzanti' at 10:30, with a 'Neutral' sentiment and an 'End' button. Below it are four more conversations, each starting with 'Hi' and 'Customer - 10:00 AM'. The right pane shows the 'New Conversation' details for Claudia Mazzanti. It includes a search bar with her name, a 'Customer Details' section with fields for Company Name (Fourth Coffee), Email (claudiamazzanti@crmdemo.dynamics.com), Mobile Phone, Address 1 (Seattle), and Preferred Method of Contact (Any). At the bottom, there are tabs for 'Pre-chat survey' and 'Device'.





Contact Center

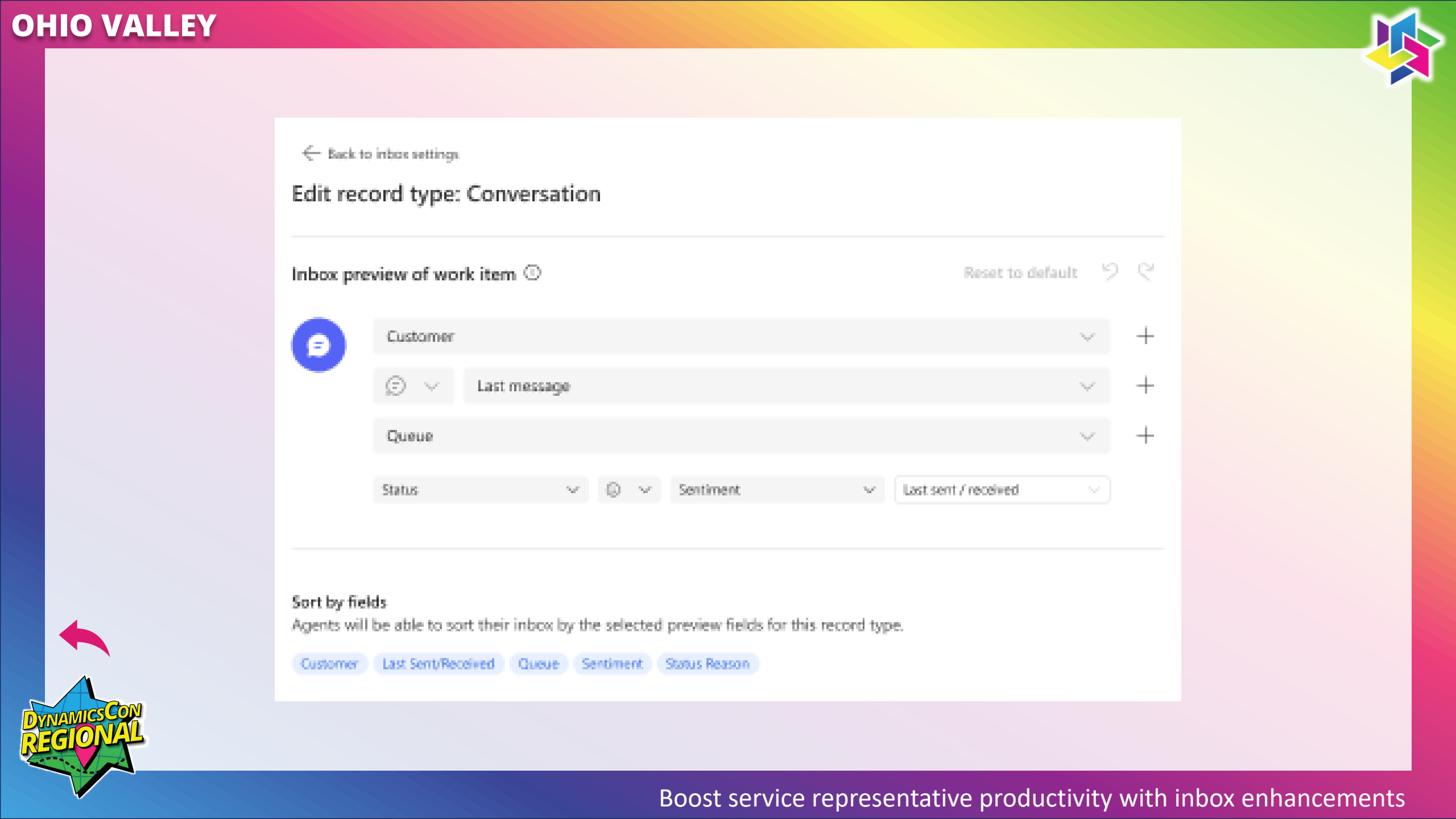




Service Rep Experiences

Inbox Enhancements	Deep Noise Suppression	Pre-Connection Audio Checks	Hold Consulting Rep During Active Call	Faster Presence Updates
<p>GA: Oct 2025</p> <ul style="list-style-type: none">• Configure conversation cards: add, remove, or reorder fields.• Enable intent-based routing with user group support.• Choose how conversations open: in inbox or new session. <p>See it in action</p>	<p>GA: Oct 2025</p> <ul style="list-style-type: none">• Filters background noise for clear voice calls.• Improves customer experience and agent focus.• Reduces call interruptions and handle time.	<p>GA: Oct 2025</p> <ul style="list-style-type: none">• Preheats audio devices before calls for faster connection.• Notifies agents when audio is ready and connected.• Improves call quality while maintaining privacy compliance.	<p>Public Preview: Sept 2025 GA: Oct 2025</p> <ul style="list-style-type: none">• Allows private customer conversations during consults.• Avoids restarting sessions for confidential discussions.• Supports smooth workflows in escalated cases.	<p>Public Preview: Aug 2025 GA: Oct 2025</p> <ul style="list-style-type: none">• Update status in fewer steps for quicker availability.• Presence icon refreshes faster for real-time accuracy.• Saves time and improves agent responsiveness.






[← Back to inbox settings](#)

Edit record type: Conversation

Inbox preview of work item ⓘ


Reset to default ⓘ ⓘ



Customer

▼

+



▼

Last message

▼

+


Queue

▼

+

Status

▼



▼

Sentiment

▼

Last sent / received

▼

Sort by fields

Agents will be able to sort their inbox by the selected preview fields for this record type.

Customer

Last Sent/Received

Queue

Sentiment

Status Reason





Contact Center

Protect Customer Data with Manual Masking

GA: Oct 2025

- Service reps can manually redact sensitive customer messages to prevent PII from being stored.
- Complements automatic masking rules for stronger data protection.
- Reinforces customer trust and privacy compliance across interactions.

Leverage Rich Media Messaging Across Channels

Public Preview: Oct 2025

- Admins can create rich media templates for live chat and WhatsApp, including forms, reply buttons, and adaptive cards.
- Agents use these templates to collect structured customer input quickly, reducing typing and improving self-service.
- Templates are channel-aware and integrate seamlessly into the Customer Service workspace and Copilot agent design.





Field Service





Optimize Resource Scheduling

Improved Display for Short Bookings

GA: Oct 2025

- Cleaner, more readable booking cards on the schedule board
- Icons and text no longer overlap
- Booking titles always visible, even in tight spaces

[See it in action](#)

Intuitive Zoom on Schedule Board

GA: Oct 2025

- Zoom centers on cursor for smoother navigation
- Natural zoom sensitivity prevents over-zooming
- Time scale slider shows clear, readable time ranges

Share a Schedule Board Tab

GA: Oct 2025

- Share tabs directly from settings—no need to open records
- Generate custom URLs to manage access and permissions
- Simplifies collaboration and coverage planning

Streamlined Terminology for Skills

GA: Oct 2025

- Consistent naming improves clarity and efficiency
- “Skill” renamed to “Characteristic”; “Proficiency Model” to “Rating Model”
- Aligns with Dataverse schema for better data consistency

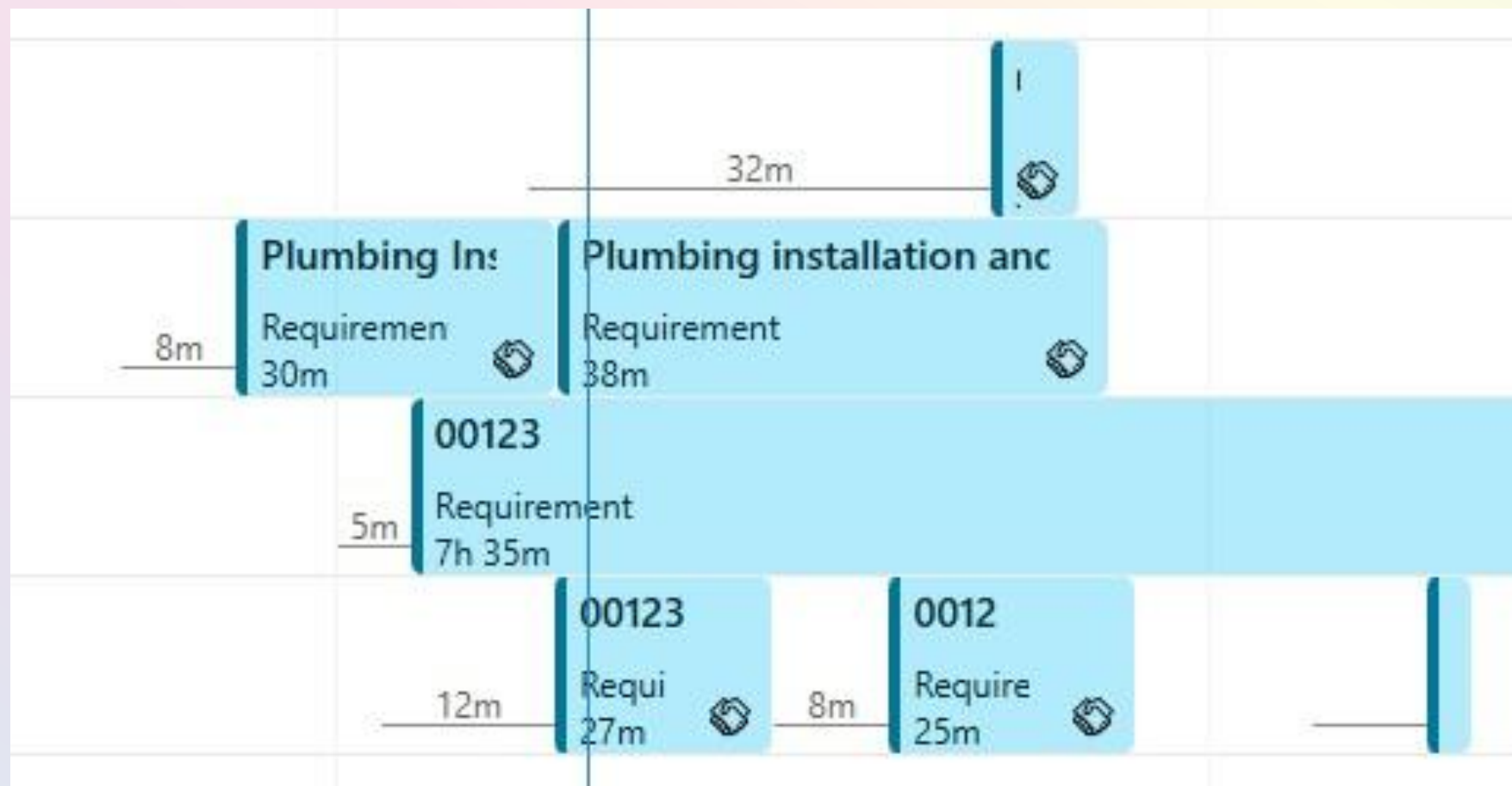
Enter Org Unit Locations by Address

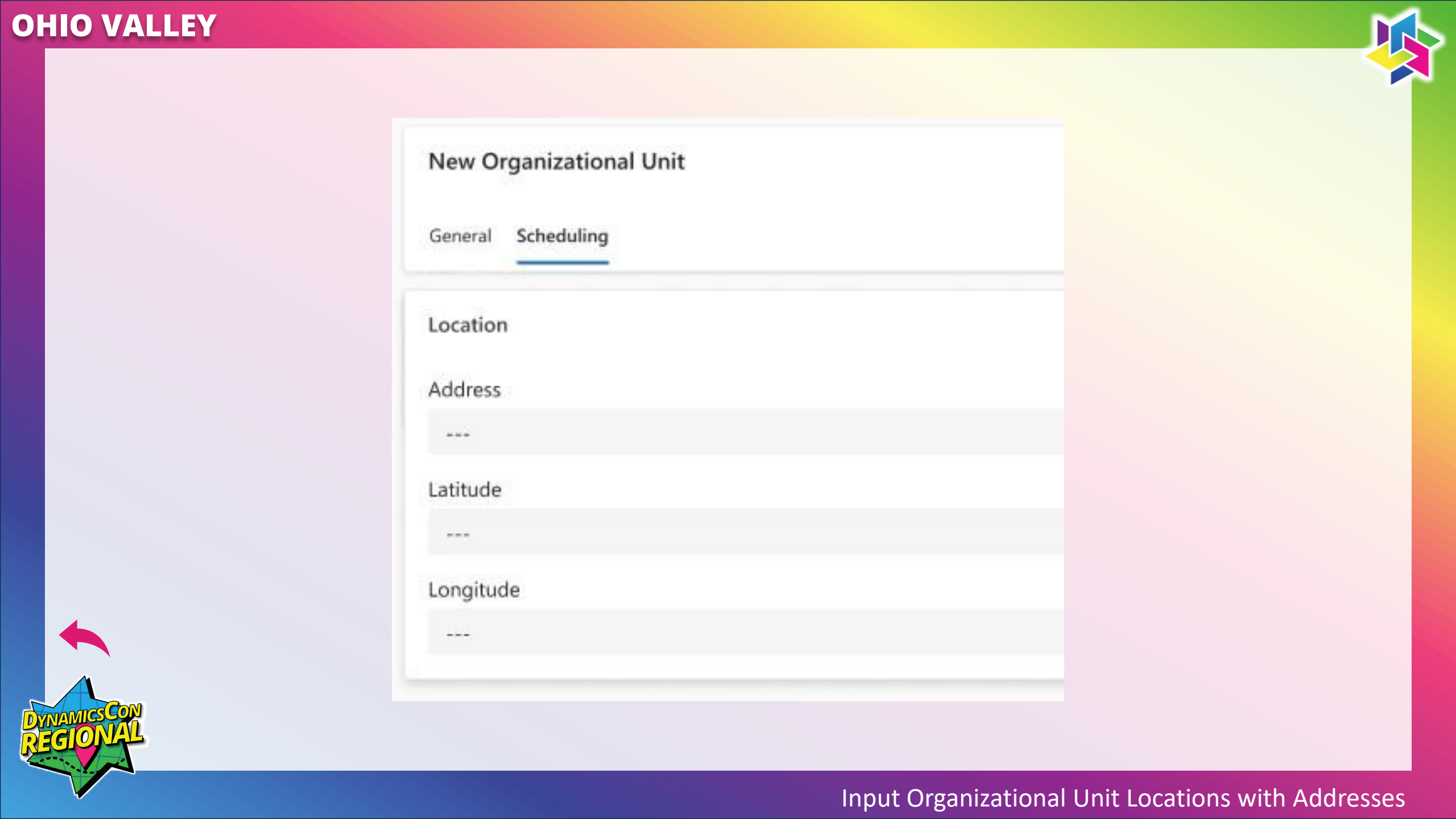
GA: Oct 2025

- Add addresses directly—no need to look up coordinates
- System auto-converts address to latitude/longitude
- Supports both address and manual coordinate input

[See it in action](#)







New Organizational Unit

General Scheduling

Location

Address

Latitude

Longitude





Field Service

Integrate Bookings with Outlook and Teams

GA: Oct 2025

- Field Service bookings appear directly in frontline workers' Outlook and Teams calendars.
- Real-time updates ensure workers always see the latest schedule changes.
- Familiar tools reduce training time and improve daily workflow efficiency.

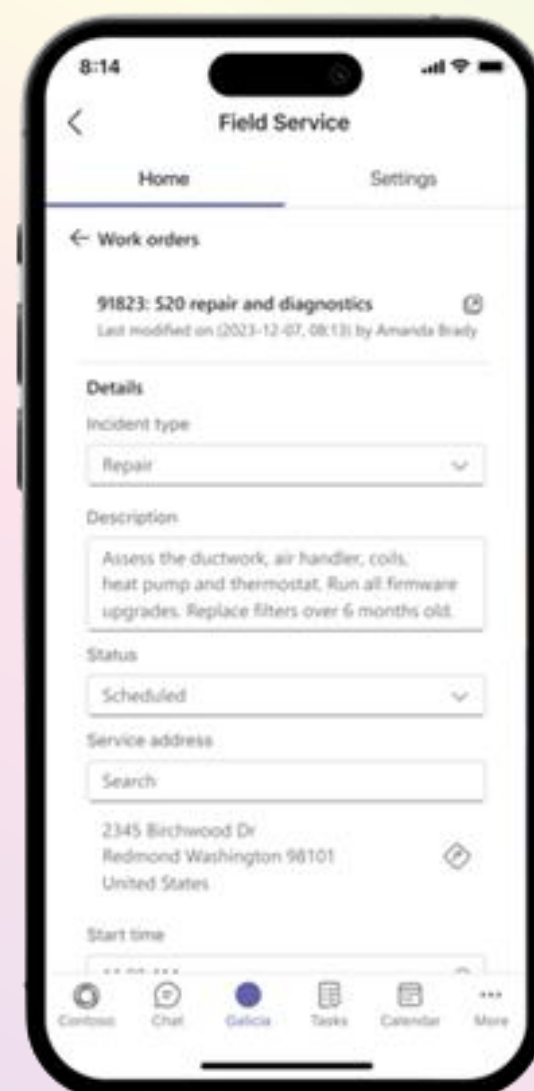
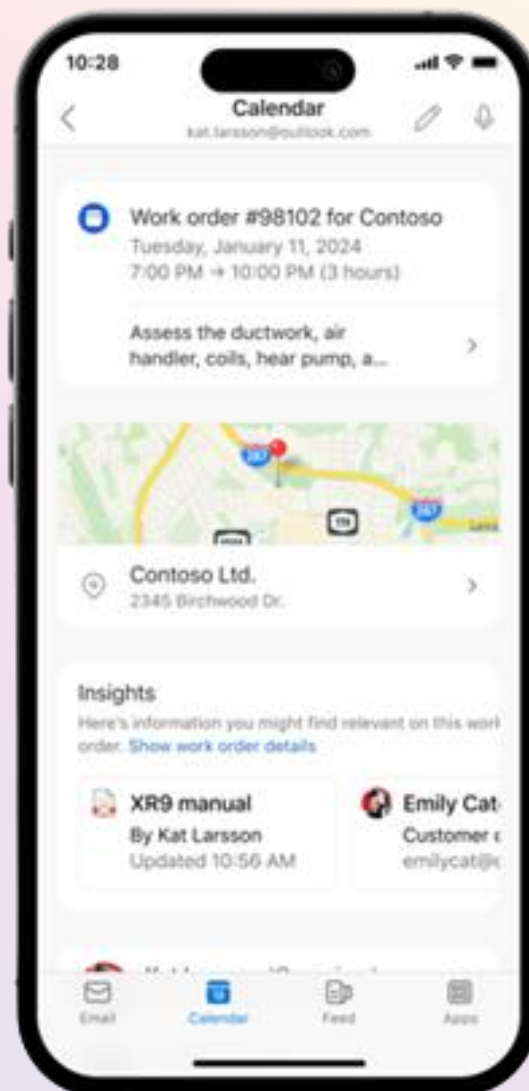
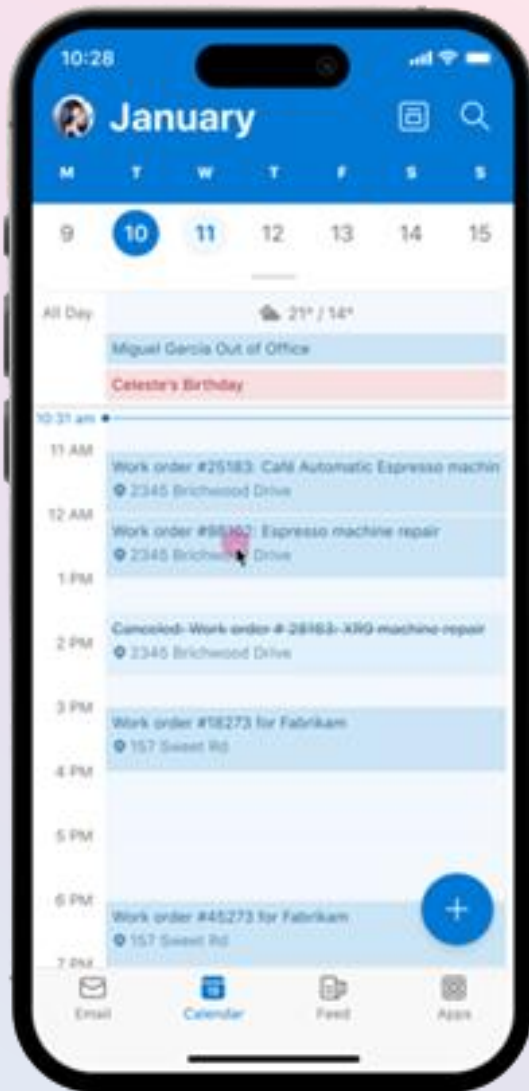
[See it in action](#)

Enhance Accessibility

GA: Dec 2025

- Subgrids now support full keyboard navigation with the new OneGrid component, replacing legacy grids.
- Users can sort, filter, and resize columns without a mouse, improving usability for keyboard-only workflows.
- Screen reader support for date fields ensures clear interpretation and smoother navigation for assistive tech users.







Project Operations





Project Operations

Time Zone-Agnostic Fields GA: May 2026

Resource Planning

Use in to avoid scheduling discrepancies across geographies (Public Preview: Sept 2025)

Projects & Project Tasks

Prevent date shifts by storing project start and end times without converting to GMT, ensuring consistency across integrations.

Project Planning

Use for project tasks to avoid scheduling conflicts and improve integration and accounting accuracy.

Expense Mobile App Enhancements

Phase 2 – GA: Oct 2025

Improved mobile expense workflows with redesigned report creation, better policy enforcement, and enhanced visibility for approvers.

Phase 3 – GA: Nov 2025

Streamline mobile expense reporting with category icons for faster selection and the ability to rename receipts for easier attachment management.

Phase 4 – GA: Jan 2026

Add financial dimensions directly in the mobile app to improve accuracy and support policy compliance during expense entry.





Project Operations

Enhanced UI for Approvals

GA: May 2026

- View time approvals in a calendar grid for faster review.
- Tabs and indicators show pending approvals by type.
- Simplifies navigation, saving time for project managers.

[See it in action](#)

Import Tasks from Existing Projects

Public Preview: Oct 2025

GA: Mar 2026

- Select and import tasks from one or more existing projects—no need to copy entire projects or enter tasks manually.
- Supports task reuse across projects, improving setup speed and reducing errors.
- Enhances flexibility by allowing task selection while respecting project task limits.

Delegate Project Approval

GA: Mar 2026

- Approvers can assign approval authority to another user for a specific project and time period.
- Helps prevent approval backlogs and delays in cash flow when approvers are unavailable.
- Offers a safer alternative to adding team members, avoiding unnecessary access and project limits.

Customize Task Details View

Public Preview: Sept 2025

GA: Mar 2025

- Replace the default iFrame-based pane with a customizable task form.
- View and edit essential attributes and custom columns directly in the task grid.
- Improve tracking and management of project tasks with tailored experiences.





AP

Approvals

Approvals

Time entries (0/600)

Expenses (24)

Materials (5)

Recall requests (0)

Time-off (32)

...

1/28 - 1/28

✓ Approve

⊗ Reject

⋮

<input type="checkbox"/> Group by: Project	Project	Task	NTE status	Resource	Billing type	Mon 1/28	Tue 1/29	Wed 1/30	Thu 1/31	Fri 1/31	Sat 1/31	Sun 1/31	Total
<input type="checkbox"/>	Installation at Adelphi (0) (Project)						\$6.00	\$4.00	\$4.00	\$4.00	\$4.00	\$0.00	\$0.00
<input type="checkbox"/>	Installation at	High level design	Not applicable	Timothy Estrada	Chargeable		\$0.00	\$0.00	\$0.00	\$0.00			16.00
<input type="checkbox"/>	Installation at	Low level design	Not applicable	Melissa Bowers	Chargeable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			24.00
<input type="checkbox"/>	Installation at	Development	Not applicable	Juliet Finch	Chargeable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40.00
<input type="checkbox"/>	Installation at	Front-end	Passed	Edward Rutledge	Chargeable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40.00
<input type="checkbox"/>	Installation at	Back-end	Passed	Georgette Bray	Chargeable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40.00
<input type="checkbox"/>	Installation at	Testing	Passed	Delores Omega	Chargeable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40.00
<input type="checkbox"/>	Installation at	Software testing	Passed	Anastasia Love	Chargeable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40.00
<input type="checkbox"/>	Installation at	Hardware testin	Failed	Cameron Williams	Chargeable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40.00
<input type="checkbox"/>	Installation at Adelphi (20) (Project)						40.00	40.00	40.00	40.00	40.00	\$0.00	\$0.00
<input type="checkbox"/>	Installation at	Network testing	Failed	Brenda Cooper	Chargeable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40.00
<input type="checkbox"/>	Installation at	Documentation	Failed	Albert Flores	Chargeable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40.00
<input type="checkbox"/>	Installation at	Telemetry	Failed	Courtney Henry	Chargeable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40.00
<input type="checkbox"/>	Installation at	Reporting	Failed	Devon Lane	Chargeable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40.00
<input type="checkbox"/>	Installation at	Market research	Failed	Courtney Henry	Chargeable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40.00





Power Automate





Power Automate

Track Automation Time & Cost Savings

GA: Oct 2025

- Define savings rules for cloud flows, desktop flows, and work queues.
- Automatically calculate time and money saved per automation run.
- View aggregated ROI in the Automation Center and Value Hub.

Easier Debugging for Condition Actions

GA: Dec 2025

- View detailed outputs of dynamic content and expressions used in condition actions.
- Quickly identify which part of a complex condition failed after a flow run.
- Saves time troubleshooting by showing true/false results alongside input values.

[See it in action](#)

Auto-Save for Flow Resiliency

GA: Mar 2026

- Automatically saves unsaved flows to browser storage during errors or outages
- Recover work even if the flow can't be saved or has validation issues
- Resume editing with the saved version and avoid rework

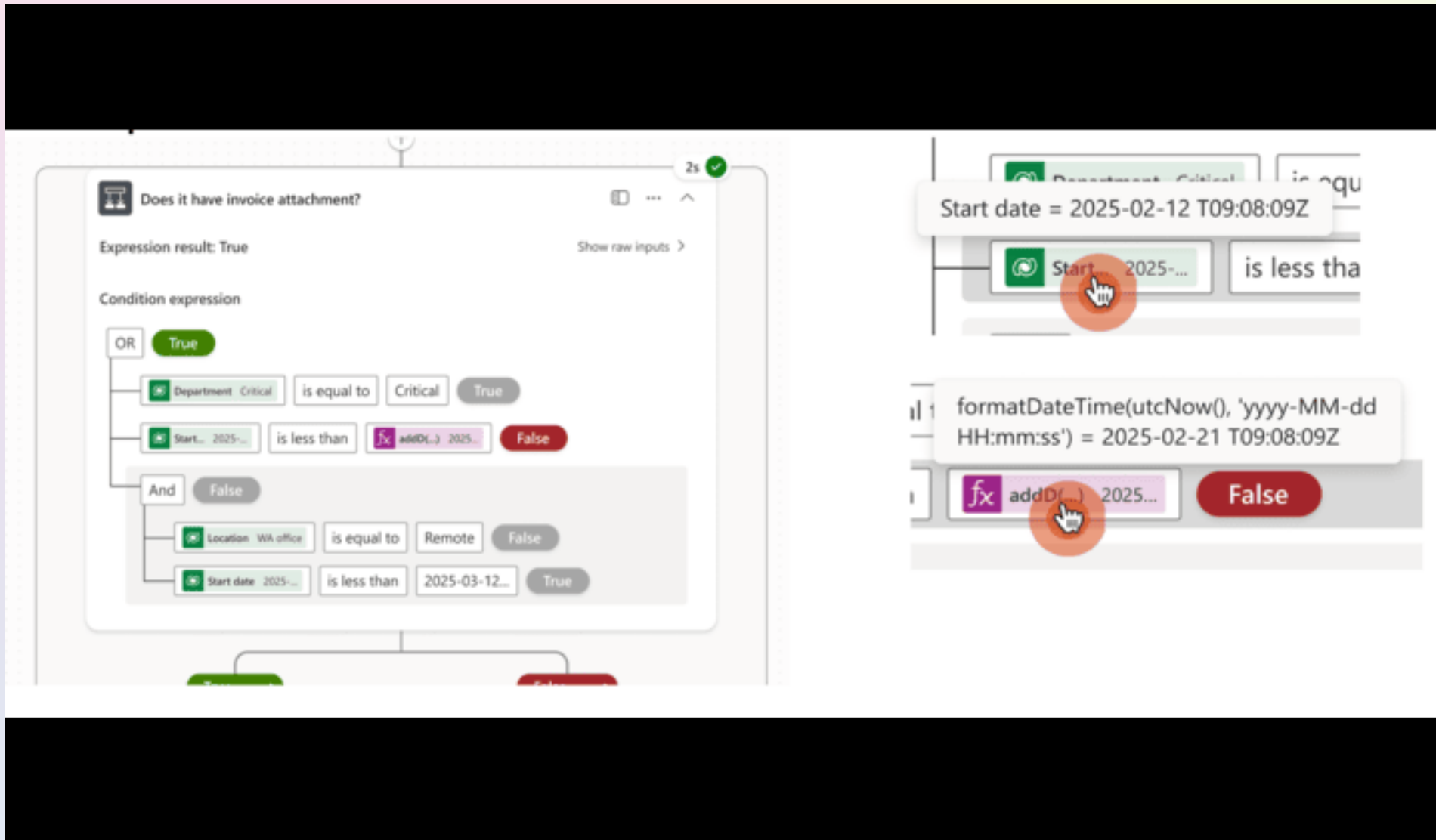
[See it in action](#)

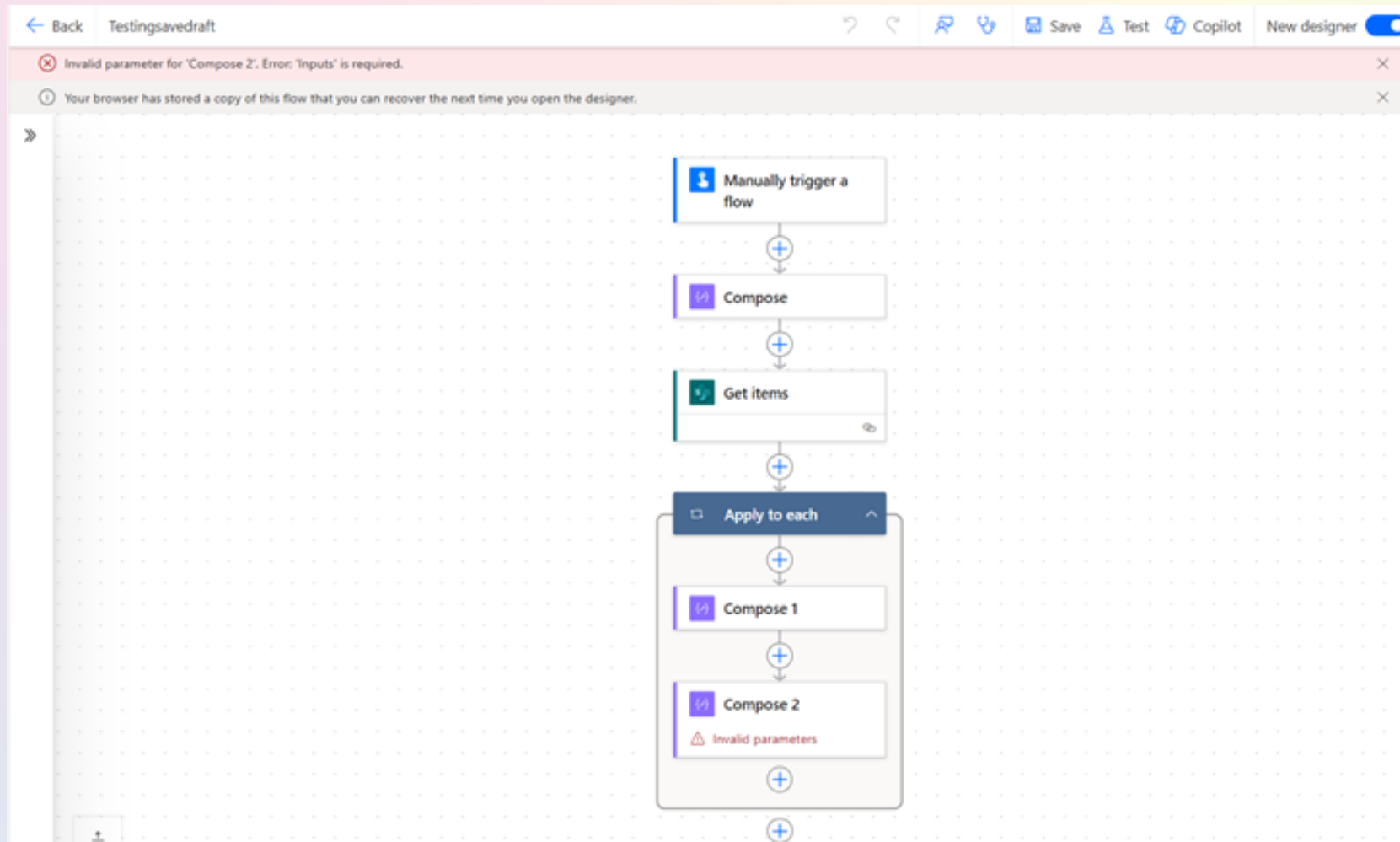
Customize Task Details View

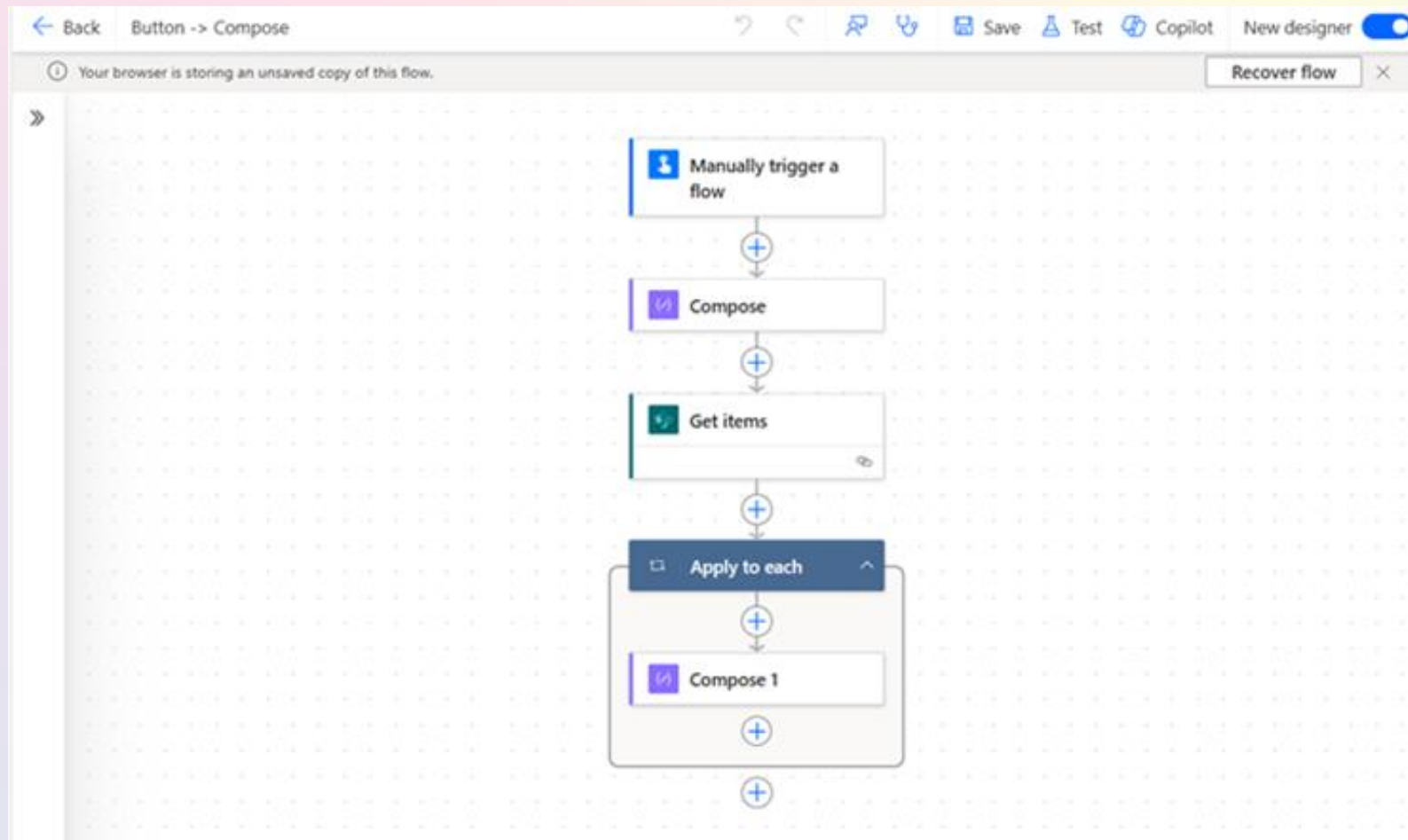
Public Preview: Sept 2025
GA: Mar 2025

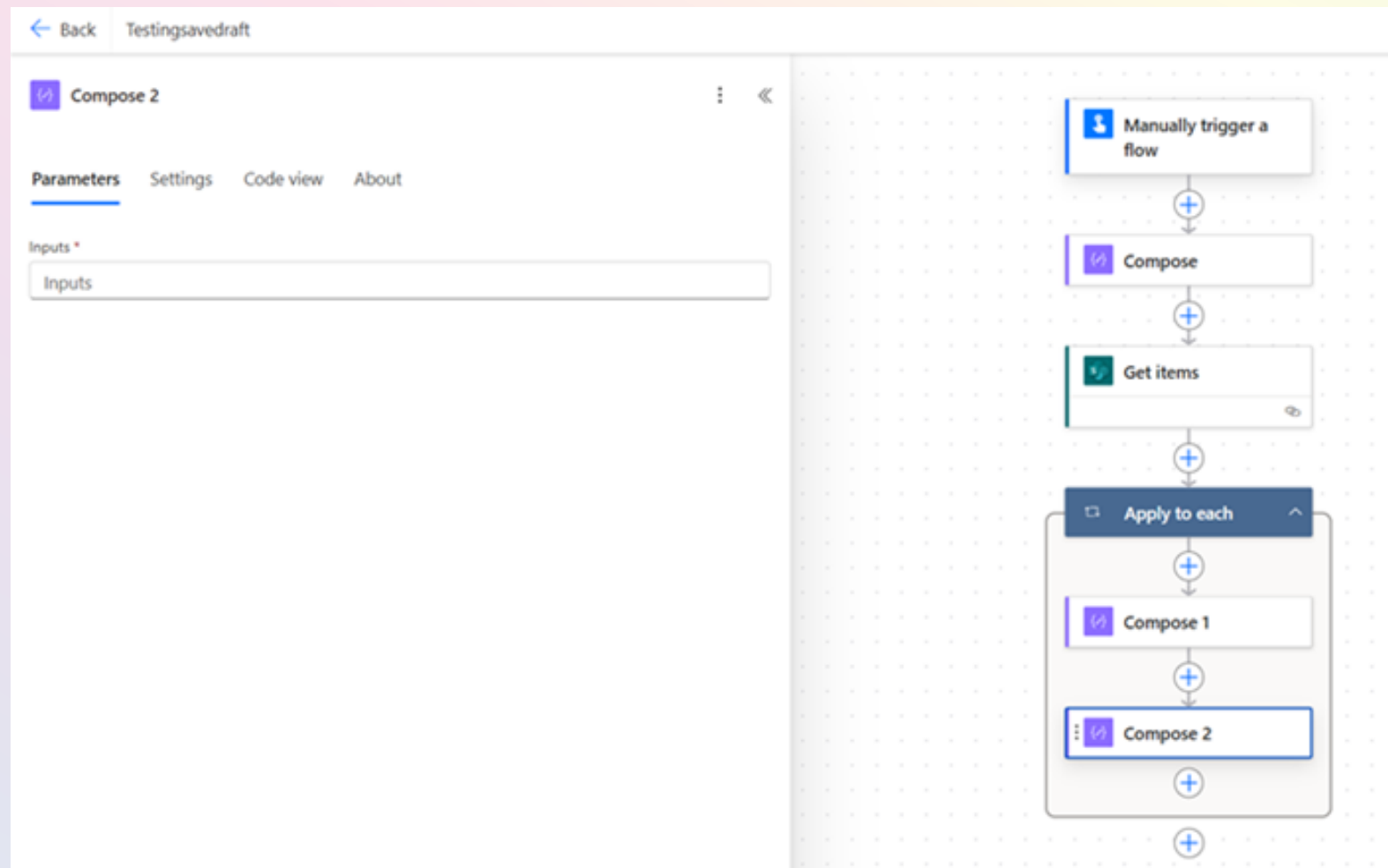
- Replace the default iFrame-based pane with a customizable task form.
- View and edit essential attributes and custom columns directly in the task grid.
- Improve tracking and management of project tasks with tailored experiences.













Dataverse





Dataverse

Restore Deleted Records within a Specific Timeframe

- Restore table records from any deletion scenario within a configurable timeframe.
- No engineering support needed—recover data via UI, APIs, or SDK.
- Supports both manual and automated deletions, improving data resilience.

GA: Oct 2025





Q&A





Stay in touch!

Ashley Steiner

ashley@ashleymsteiner.com

Connect with me on LinkedIn!



