CONVERGENCE | AI + ERP

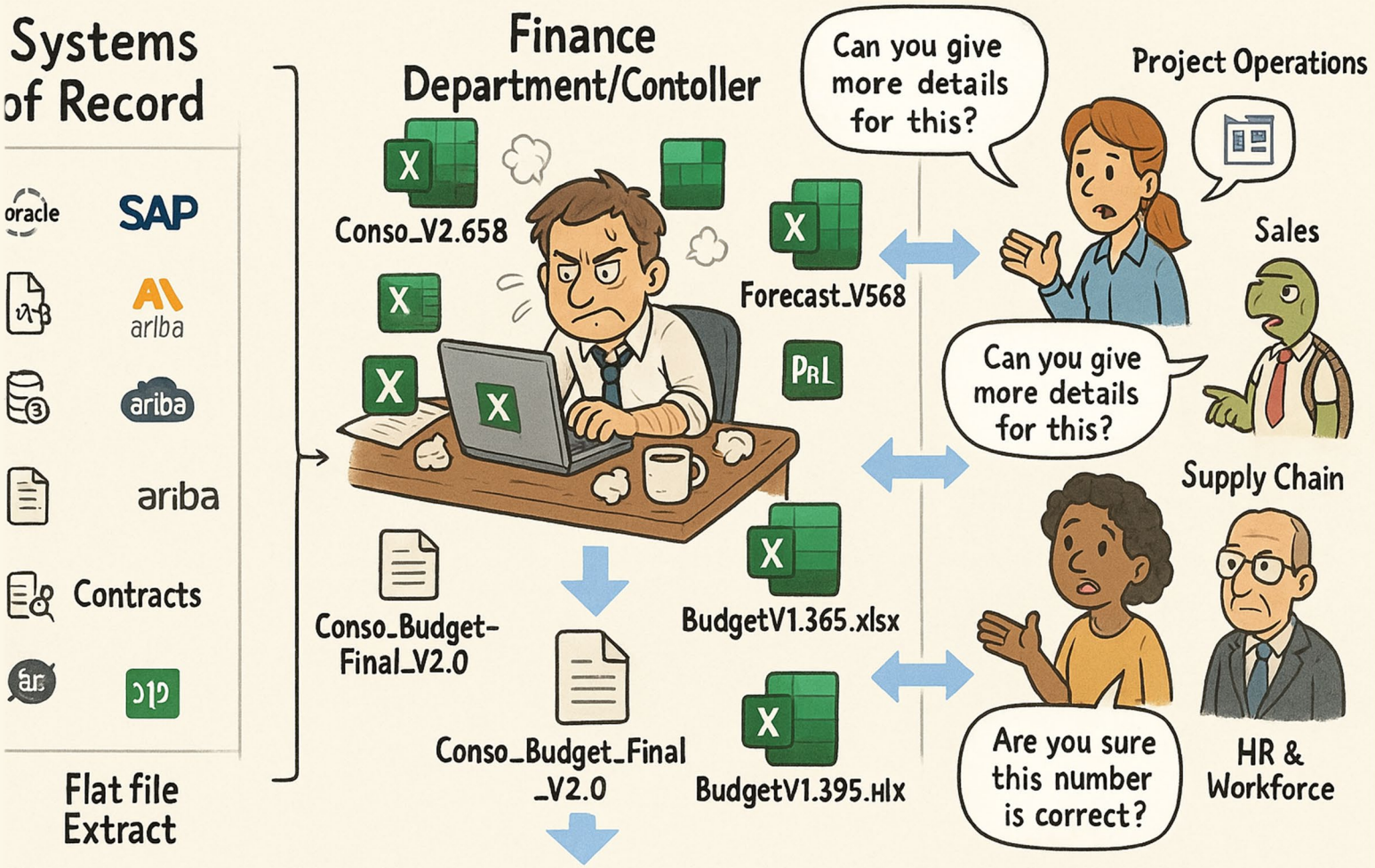
MIAMI | 2025

Dynamics 365 Finance Business Performance Planning

Sponsored By Microsoft

Hosted By DYNAMICS USER GROUP

Today's Planning Process



Classified as Microsoft Confidential

Our perspective

Deliver a collaborative and integrated planning solution that connects Operations to Financials, providing unmatched insights and actionable plans

01

Leverage interconnected information

Make informed decisions that fully capitalize on an organization's data and provide true extended planning

02

Optimize collaboration

Streamline the planning process and minimize effort; ultimately achieving optimal efficiency for the organization

03

Transform plans into action

See insights and seamlessly drive these insights back into daily operations

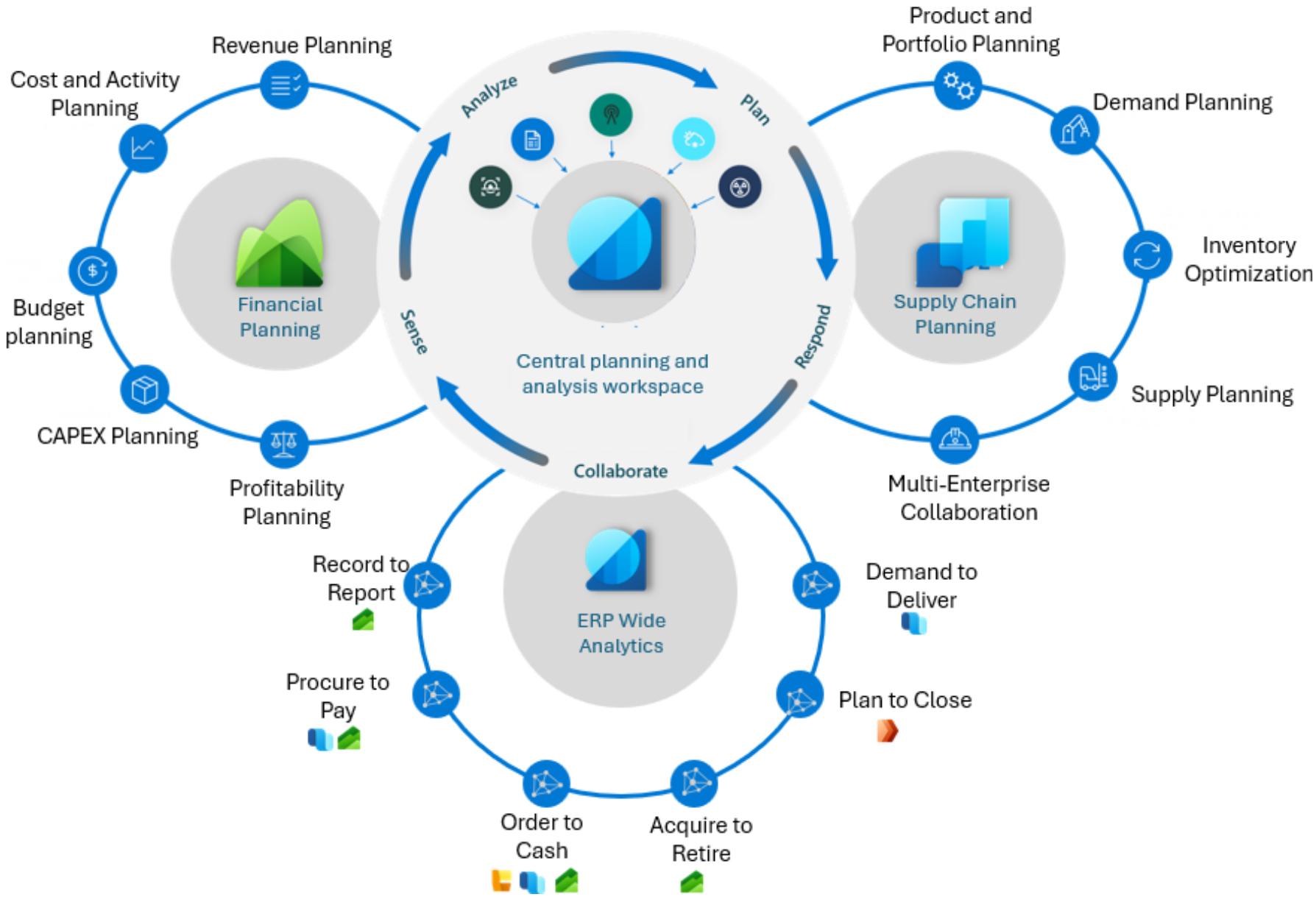
Microsoft

Classified as Microsoft Confidential

Agentic Planning

Turn what-if into what's next: intelligent agents driving faster, smarter planning.

Future of integrated planning and analysis

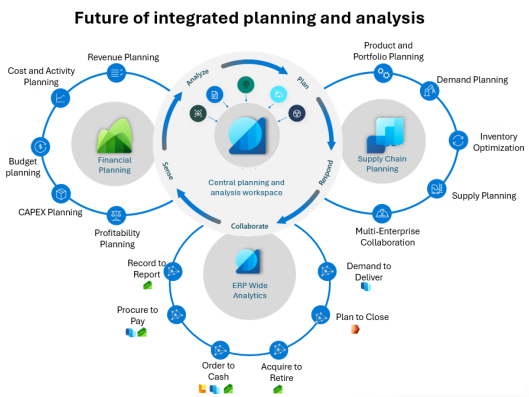


Classified as Microsoft Confidential

Microsoft

with Unlimited Extensibility

Dataverse



Microsoft Fabric

The one-stop-shop for data integration, data engineering, real-time analytics, data science, and business intelligence across all your organizational data.

Native Integration

Classified as Microsoft Confidential

Business Performance Planning

Dynamics 365

Feature overview

Microsoft

Business Performance Planning

High Level D365 Finance Business Performance Planning Architecture

Core Capabilities

Business Performance Application
- Design Cube & Dimensions
- Admin Set Security, User Access…

Reporting and Planning
- Power BI
- Excel

Collaboration & Tracking
- Teams
- Outlook

Automated Insights & Forecast
- Outlier Insights
- Time series Forecast

Extensibility
- Power Apps
- Power Automate
- Copilot Studio
- AI Builder

Copilot Natural Language AI
- Builder Advisor
- CFO Advisor

Read & Write (Allocations…)

Approval Workflow
- Power Automate

Data Storage
- Planning Cubes
- Dataverse Tables
- Dimensions

Managed Data Lake
- Business Performance Analytics

Data Ingestion, Cleansing, & Enrichment
- Create Budget register entries in D365 Finance
- Dataflow
- Azure Data Factory

Systems of Record

Dynamics 365
- Finance
- Human Resources
- Sales
- Supply Chain
- Project Operations

Other Systems & Data
- Other ERPs
- 3rd Party

Fabric
- One Lake
- Business Performance Analytics

October/ November 2025

2026

Classified as Microsoft Confidential

Microsoft

Current

Out-of-the-box features

Embedded Dataflow within BPP

Seven Power BI visuals

Unlimited What if Analysis Scenario Creation

Edit Dimension directly from PBI and Excel

Comments in Power BI & Excel

Dimension Security group & RLS

Driver Based Planning

Audit Trail for Dimensions & Cubes

Classified as Microsoft Confidential

CONVERGENCE
AI + ERP
MIAMI | 2025
Demo
Sponsored By Microsoft
Hosted By DYNAMICS USER GROUP

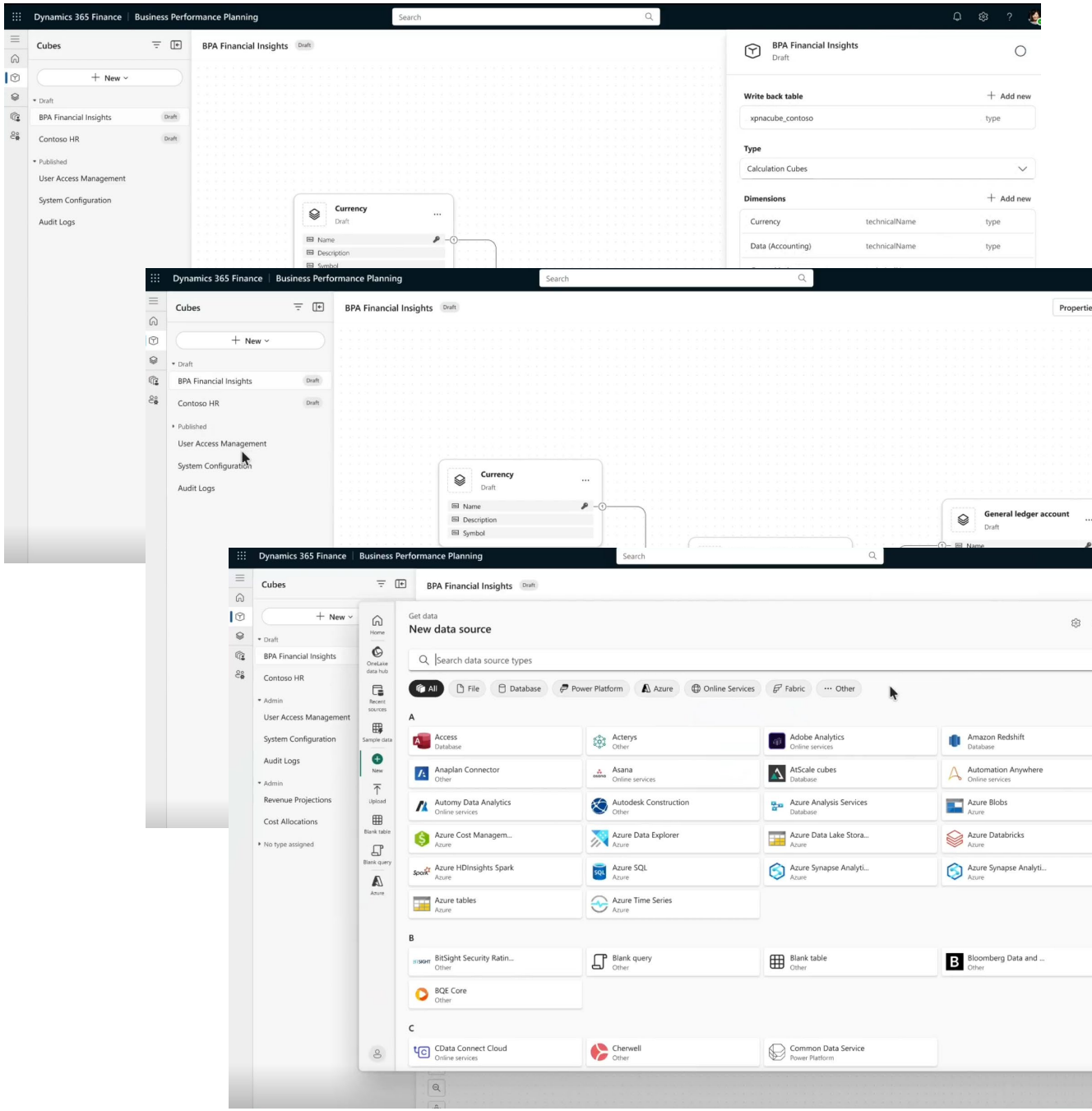
Business Performance Planning

New

Version 1.14

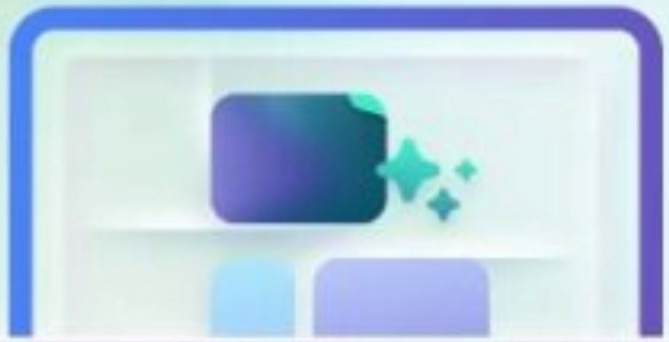
Next-Gen Data Model Builder

Seamless Budget Write Back into D365 F&O Budget Registry Entry Module



Microsoft

Classified as Microsoft Confidential



Model builder

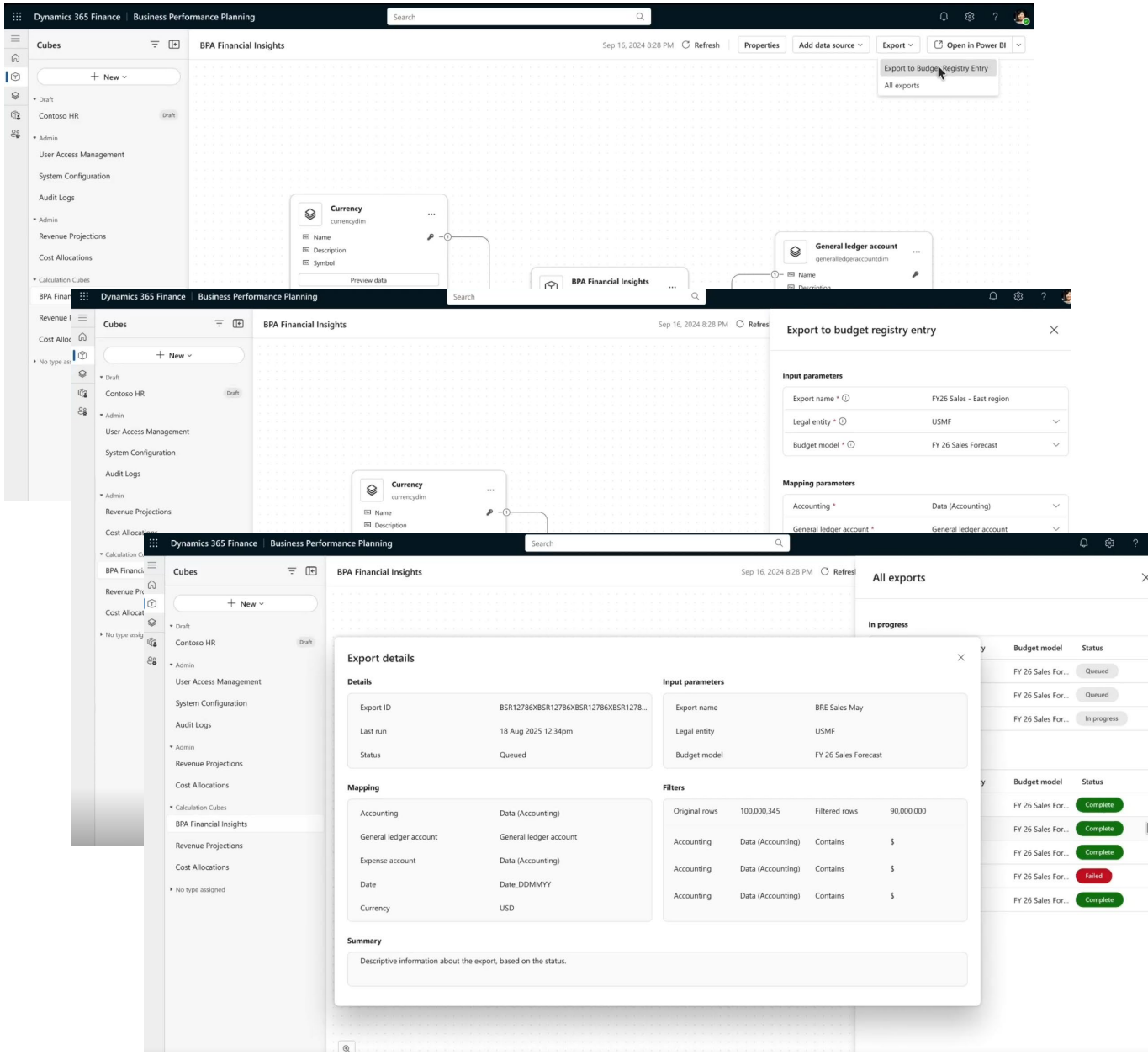
feature overview

New

Version 1.14

Next-Gen Data Model Builder

Seamless Budget Write Back into D365 F&O Budget Registry Entry Module



Microsoft

Classified as Microsoft Confidential

Budget Write-back

feature overview

2025 Wave 2 In Progress (Nov-25 to Mar-26)

2026 Wave 1 In planning* (Apr-26 to Oct-26)

General Availability
- Next-Gen Data Model Builder
- Seamless Budget Write Back into D365 F&O Budget Registry Entry Module

December '25
- Streamline Finance Integration with BPA Connector
- Jump-Start Planning with OOB Demo Dataset
- New Matrix Visual Updates
- Enable automatic refresh of Virtual Entity Linked Dimensions
- Budget Write-Back with Smart Account structure Validation

January '26
- Visual Updates
- Accelerate Insights with Incremental BPA Refresh
- Quick-Start OPEX Planning

February '26
- Automated What-If Scenario Planning with Copilot

March '26
- AI-Driven Forecast Projections

April '26
- Simplify Approvals with Workflow Automation

** This is a planned list of features item subject to change*

How to connect with Microsoft on BPP

Monthly Office Hours:

These monthly sessions are designed to provide support for all your BPP-related needs, from creating a data model to ingesting data, designing dashboards, addressing security, and soliciting feedback and input

Open to all members of our [Business Performance Planning Yammer Group]

Monthly Customer Advisory Board

The Finance CAB is our inner circle for FastTrack customers established to solicit input and feedback in direct discussions with our product team

Monthly Focus Group

Invitation only, for customers implementing BPP with FastTrack and partner support

Weekly/Bi-Weekly implementation Follow-up

Dedicated meeting with FastTrack & Product Group to follow-up on implementation

Classified as Microsoft Confidential

Additional resources

Documentation:

Business performance planning overview - Finance | Dynamics 365 | Microsoft Learn

Get started with Dynamics 365 Finance Business performance planning - Training | Microsoft Learn

Business performance planning – Public SharePoint

Yammer:

Viva Engage : Dynamics 365 and Power Platform Preview Programs : Business Performance Planning Focus Group

TechTalk:

Training Content: Please review the newly published training content at Enhance business performance planning in Dynamics 365 Finance

TechTalk published in March

- YouTube: Dynamics 365 Finance Business performance planning | Dynamics 365 FastTrack TechTalk
- Community: Dynamics 365 Finance Business performance planning | Dynamics 365 FastTrack TechTalk

MS Ideas Portal for Dynamic 365

The Microsoft Ideas Portal for Dynamics 365 Business Performance Planning is an interactive platform where users can submit, discuss, and vote on feature ideas to enhance Dynamics 365 and related Microsoft business applications, directly influencing future updates and innovations!

Classified as Microsoft Confidential

Microsoft

Questions ?