

**Avantiico**

# Dynamics 365

10.0.36 Update Notes



Wave 1 Release 2023

# What's Inside

This deck contains product release updates for the Dynamics 365 Finance & Operations 10.0.36 Services Update.

10.0.36 includes updates to:

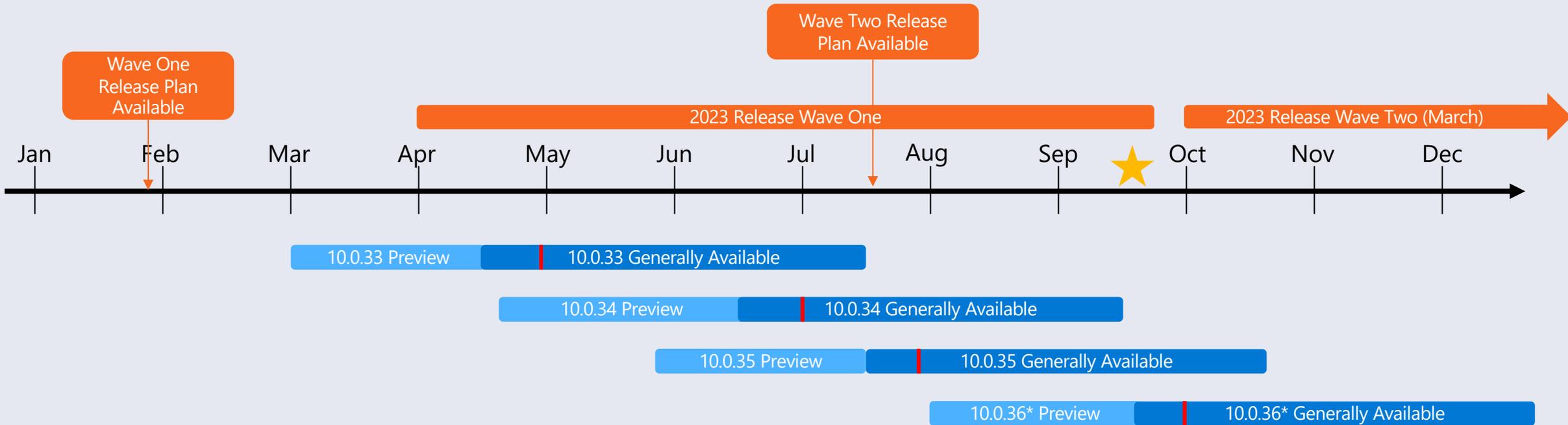
- ➔ Finance
  - ➔ New Features
- ➔ SCM
  - ➔ New Features
  - ➔ Feature Enhancements
- ➔ Platform Updates

# 2023 Wave One Timeline

Preview

Generally Available

= Auto Update Start\*\*



\* = Major Release

\*\* = Up to 3 service updates can be paused before auto-update is enforced



# 10.0.36 Finance

## *New Features*



# Credit and collections: Collections coordinator summary

What is it: This feature displays an AI-generated summary and an option to create an AI-generated draft email on the collections coordinator workspace.

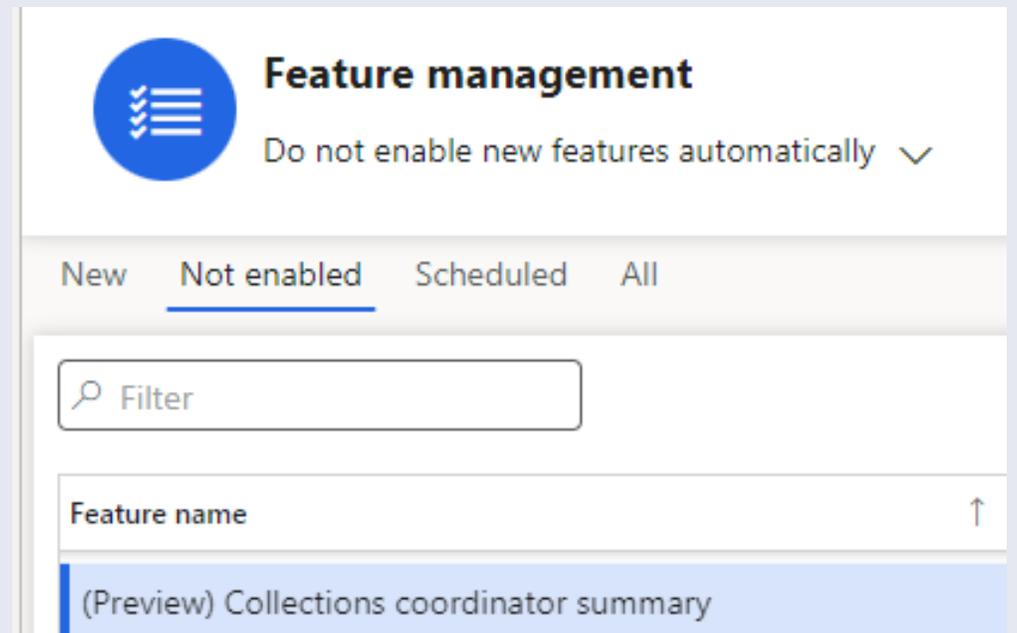
- The AI-generated summary includes information about a customer's payment history, outstanding debt amount and sales.
- An AI-generated draft email, formatted like a reminder letter, allows the collections coordinator to quickly view and edit an email before sending to customers.

## How will this help:

- This is another of the many AI-powered features Microsoft is rolling out to help increase employee efficiency by automating repeatable tasks.

**Mandatory** = Feature will be enabled when the service update is installed

**Enabled by Default** = Feature will be enabled when the service update is installed, but can be disabled through Feature Management



Mandatory?

Enabled by Default?

# 10.0.36 SCM

## *New Features*



# Warehouse management: Dynamic printer selection

What is it: A new feature that allows for dynamic printer assignment based on certain criteria:

- When dynamic printer selection is used, and a worker requests printing, the system selects a printer based on the current work user, warehouse, location, and/or zone.
- The warehouse manager can set up default printers for each work user, warehouse, location, and/or zone.

How will this help:

- Automating this process will allow greater flexibility in the configuration of your warehouse and help reduce task processing time.
- In short, this feature can help increase the efficiency of your warehouse operations.

Standard view ▾

### Default label printers

Users

+ New Delete

Filter

	Printer stock type	Warehouse	User ID	Printer name
			*	*

Mandatory?

Enabled by Default?

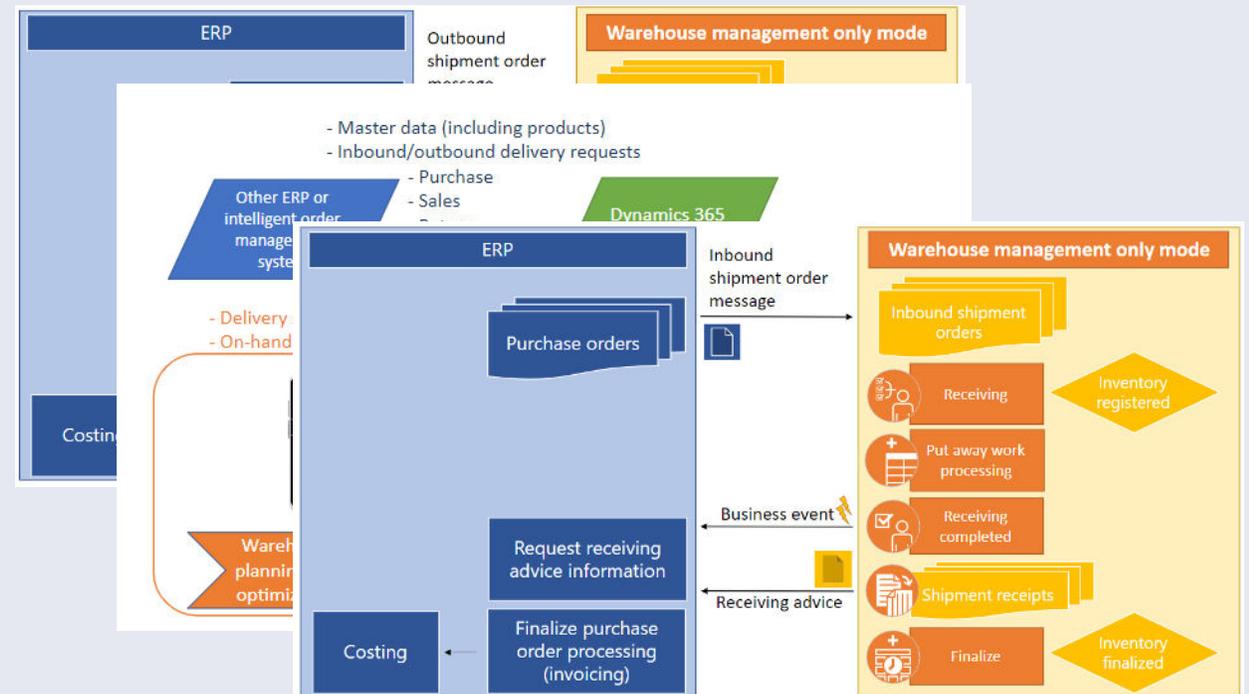
# Warehouse management: WMS only mode

What is it: This is a new feature that will allow you to use the core WMS functionality with other third-party ERP Systems.

- Regardless of the ERP or ordering systems that you have in place, you can now quickly deploy our advanced WMS functionality without having to set up or maintain areas of Supply Chain Management that you don't need.

How will this help:

- This will allow you to still benefit from advanced WMS features such as automation integration, carrier integration, and the Warehouse Management mobile app while leveraging your existing ERP.



Mandatory?

Enabled by Default?



# 10.0.36 SCM

## *Feature Enhancements*



# Master planning: Allows to create Planned order setting Purchase quantity instead of Requirement quantity

What is it: A new enhancement that allows you to create Planned order setting Purchase quantity instead of Requirement quantity

How will this help:

- Lets you create a planned order by setting the purchase quantity instead of the requirement quantity.

Standard view ∨

### New planned order

<b>PLANNED ORDERS</b>	<b>PLANNED ORDERS</b>
Planned order type	Requirement quantity
<input type="text" value="Production"/>	<input type="text"/>
Plan	Delivery date
<input type="text" value="DynPlan"/>	<input type="text" value="9/15/2023"/>
<b>IDENTIFICATION</b>	Order date
Item number	<input type="text"/>
<input type="text" value="*"/>	Planning priority
Product name	<input type="text" value="0.00"/>
<input type="text"/>	<b>BOM LEVEL RECALCULATION</b>
	Recalculate BOM levels
	<input type="checkbox"/> No

Mandatory?

Enabled by Default?

# Master planning: Average daily usage for distribution scenarios

What is it: This is a feature enhancement that will ensure that average daily usage (ADU) is based on actual sales order dates and quantities

## How will this help:

- This can be especially useful in distribution scenarios or when transitioning from material requirements planning (MRP) to Demand Driven Material Requirements Planning (DDMRP).
- It calculates the ADU based on sales order dates and quantities and manufacturing consumption across the distribution network, disregarding transfer orders.

**Feature management**  
Do not enable new features automatically

New Not enabled Scheduled All

Filter

Feature name	Status
Average daily usage for distribution scenarios	

Mandatory?

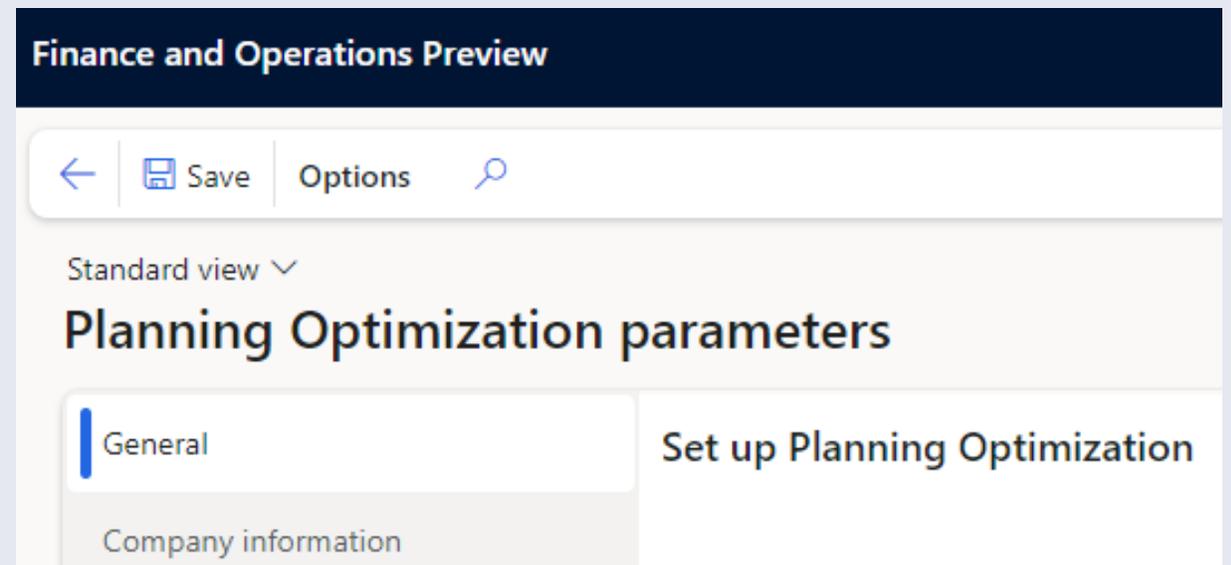
Enabled by Default?

# Master planning: (Preview) Exclude specific sales orders or sales order lines in Planning Optimization

What is it: A feature enhancement for Planning Optimization that will add a parameter that lets you choose not to create supply for a sales order or a specific line when using Planning Optimization.

How will this help:

- This lets you keep an order unplanned, which can be useful for orders that require a review or approval process.



Mandatory?

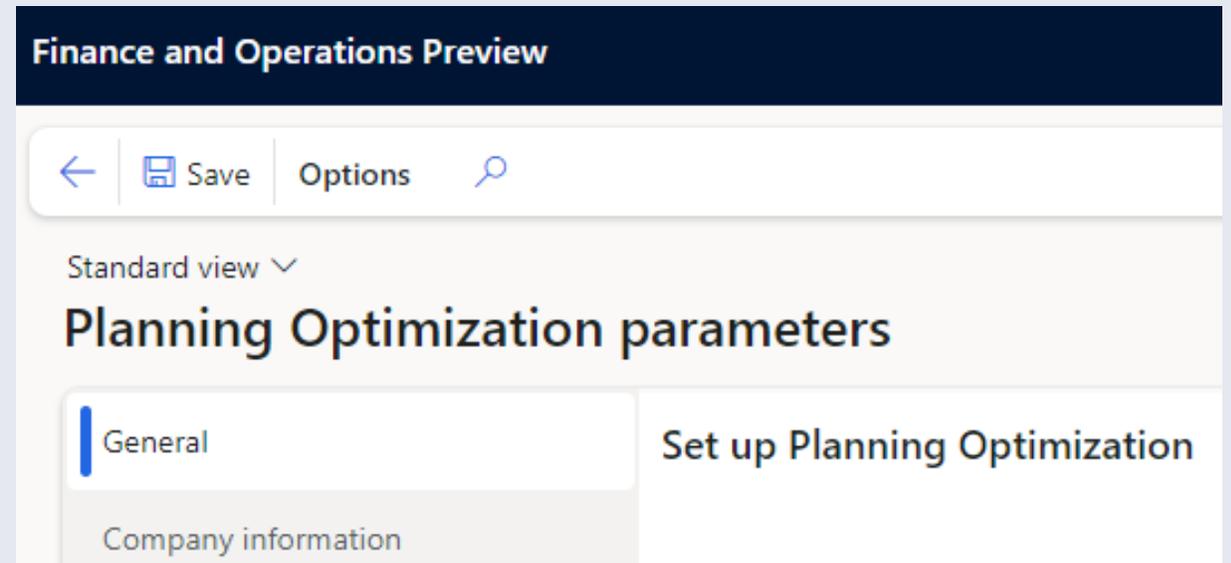
Enabled by Default?

# Master planning: (Preview) Ignore specific transaction types using Planning Optimization

What is it: A feature enhancement in Planning Optimization. This will let you select which transaction types should be considered on the master plan when running Planning Optimization.

How will this help:

- Useful in scenarios in which certain transaction types need to be excluded when running your planning optimization.



Mandatory?

Enabled by Default?

# Master planning: (Preview) Strict safety stock pegging for Planning Optimization

What is it: Gives you the option of directly pegging safety stock as demand against the planned order created for it. On the Coverage groups page, this feature adds a new parameter called Strict safety stock pegging, which lets you choose one of the following options for each coverage group: ->

- No: Safety stock is considered the least important of type of demand, so whenever a planned order is created for safety stock, all other demand will be prioritized, which lets you provide a higher service level for your customers. **This is how the system always behaved in previous versions.**
- Yes: The system will apply strict safety stock pegging. When a planned order is created for fulfilling safety stock, it will always be pegged against safety stock, without allowing any other demand to be pegged against it (except when using a Coverage code of Period).

How will this help:

- If enabled, this can provide better visibility in some scenarios, such as when you're using a high number of negative days.

Mandatory?

Enabled by Default?



# Transportation management: (Preview) Match vendor invoice journal with voyage cost in different currency.

What is it: This feature enhancement will allow you to specify any currency code on a vendor invoice journal and match it with the voyage cost in another currency.

## How will this help:

- If using multiple currencies, this can make operations much simpler, removing the need for handling currencies outside the tool.

Records to include

[Filter](#)

**VENDOR INVOICE JOURNAL**

Number sequence group

Invoice

Invoice account

Currency

Date

Mandatory?

Enabled by Default?

# Sales and marketing: Review changes to confirmed purchase orders

What is it: This feature will allow you to use artificial intelligence to summarize the downstream effects of changes to confirmed purchase orders.

- This feature adds a new workspace called "Confirmed purchase orders with changes".
- The workspace summarizes changes made to previously confirmed purchase orders, prioritized by risk to downstream processes such as production, service, or sales.

How will this help:

- Purchasers can quickly review and confirm low-risk changes, leaving more time to focus on high-risk changes, communicate with vendors using email or Microsoft Teams chat, and follow up with downstream stakeholders.

**Confirmed purchase orders with changes**

^ Summary

**Low impact changes: 0**

Number of low impact orders: 0

[Show](#)

**High impact changes: 1**

Number of high impact orders: 1

[Show](#)

All purchase orders with changes

Confirm purchase orders Send email Send Teams message

Purchase order	Vendor account	Vendor name	Req
000016	US-101	Fabrikam Electronics	11/
000030	1001	Acme Office Supplies	12/

Item number	Product name
M0004	Crossover

Mandatory?

Enabled by Default?

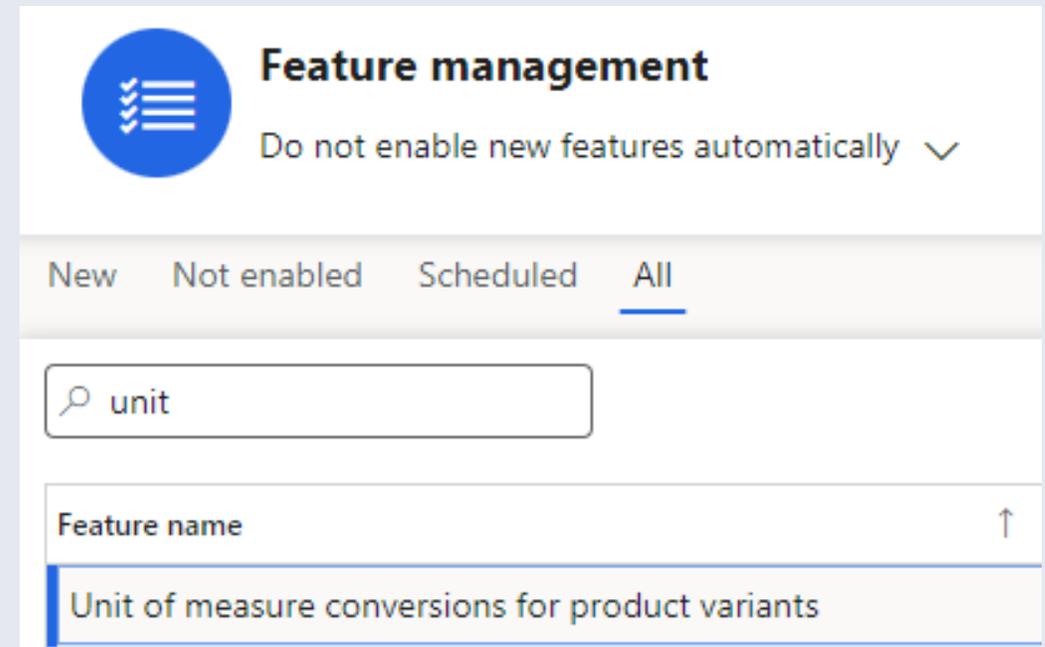


# Sales and marketing: Unit of measure for line level charges

What is it: This feature gives you the option of specifying a unit of measure (UoM) for which a line-level auto charge applies. You can set up an auto charge for customer and vendor so that it only applies to lines that use the exact UoM configured for the charge, or you could choose to allow the charge to apply proportionally based on an applicable UoM conversion factor (if one exists).

## How will this help:

- This feature supports customer and vendor line-level charges and applies for sales quotation and sales order lines, request for quotation, purchase requisition, and purchase order lines.



Mandatory?

Enabled by Default?

# Business performance analytics shortcut

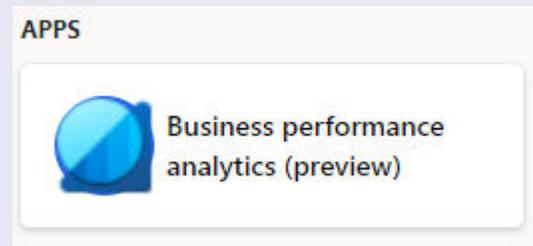
What is it: Business performance analytics is a new capability in Dynamics 365 Finance that streamlines financial reporting by centralizing data from multiple business processes, including record to report, order to cash, acquire to retire, and procure to pay, presenting it in an easy-to-use interface.

Powered by Dataverse, Business performance analytics includes a web-based hub that enables end users to create and share reports through familiar tools like Excel and Power BI.

With Business performance analytics, users get secure and near real-time access to critical financial information, empowering non-technical users to access and analyze data easily. With improved visibility into valuable financial data, finance teams can make informed decisions and streamline financial reporting to free time to focus on high-value initiatives.

How will this help: With Business performance analytics, customers can:

- Gain a complete view across multiple business processes.
- Enable non-technical users to access and analyze data easily.
- Reduce cycle times with streamlined financial reporting.
- Seamlessly integrate with familiar apps like Excel and Power BI.



Mandatory?

Enabled by Default?



# 10.0.36 Update

## *Platform Updates*



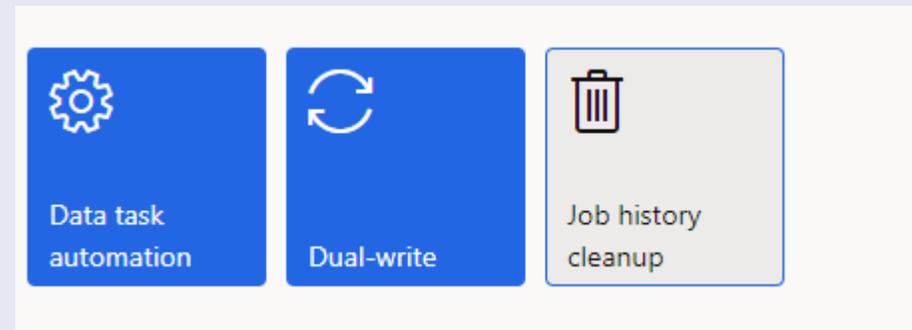
# Data Management: Job history cleanup

What is it: A feature enhancement for the existing job history cleanup feature.

- By default, job history entries and related staging table data that are older than 90 days will be automatically deleted.
- The Job history cleanup feature in Data management can be used to create a Job history cleanup batch job with a lower value configured for job history retention.

How will this help:

- This can be leveraged to further refine job cleanup activities.



Thank You



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