

The background features a stylized city skyline with various skyscrapers in shades of blue, purple, and pink. A superhero figure is flying in the upper left sky. In the lower right, a fountain with two superheroes sitting on its tiers is visible. The text '2025 DYNAMICS CON' is rendered in a bold, yellow, comic-style font with black outlines, slanted upwards from left to right. A large, stylized white and grey graphic element, resembling a wave or a ribbon, is positioned below the 'DYNAMICS' part of the text.

2025 DYNAMICS CON

**Dynamics 365
Treasures Explore
Overlooked D365 CE
Features!!**

**2025
DYNAMICS
CON**





Dian Taylor

Director



LinkedIn Learning
Instructor



 <https://D365Goddess.com>

 @D365Goddess

 <https://www.youtube.com/d365goddess>

 <https://www.linkedin.com/in/diantaylor/>



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Director



LinkedIn Learning
Instructor



 <https://D365Goddess.com>

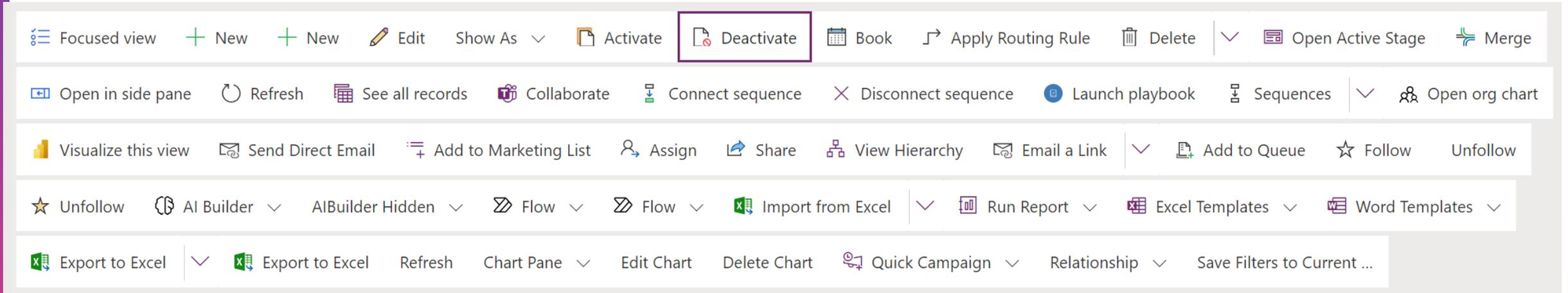
 @D365Goddess

 <https://www.youtube.com/d365goddess>

 <https://www.linkedin.com/in/diantaylor/>

Configure legacy buttons on a view

- Ribbon Editor
- Hide Legacy Buttons
- Change actions
 - Run Jscript or PowerFX Formula



Notes Configurations

- Note Roll-up types
 - Related
 - Extended
 - Works for related contact/case/opportunity/quote
- Remove Title while authoring
- Allows to create note before parent record is created



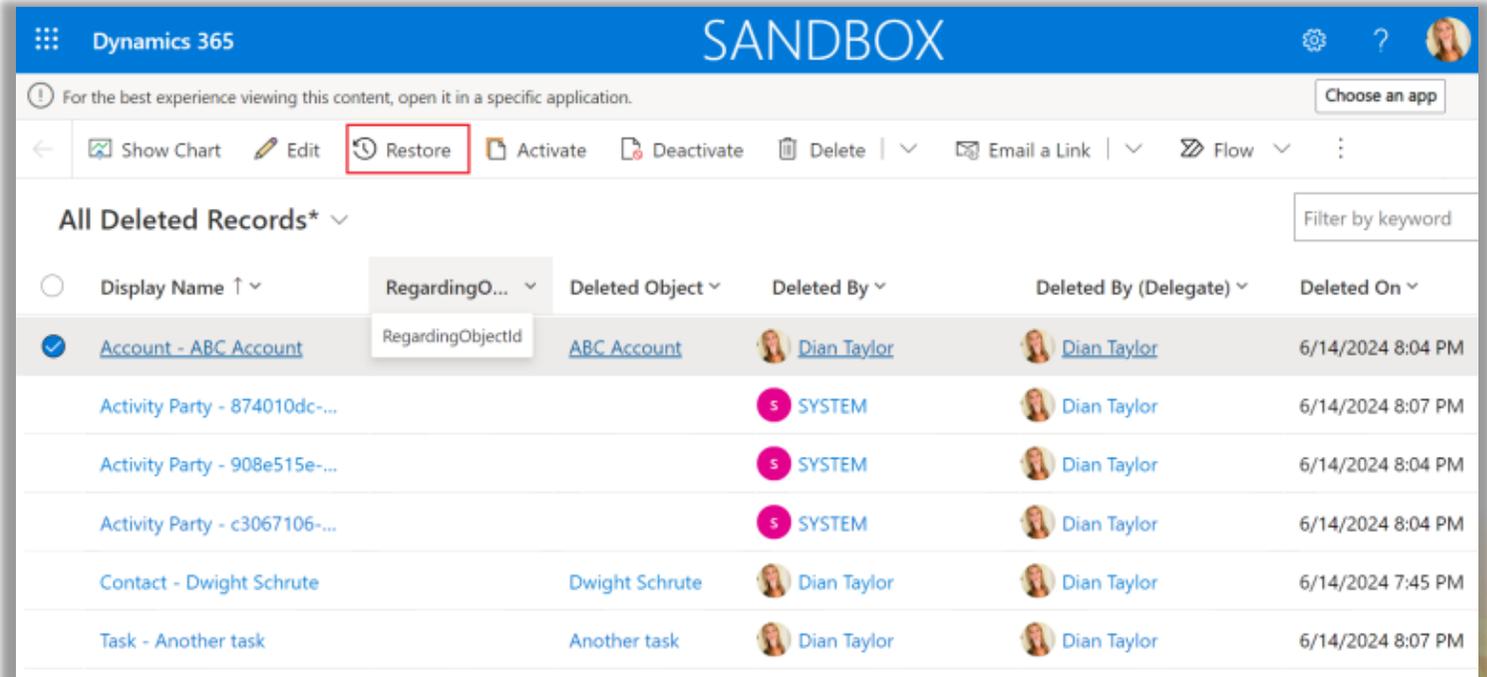
Additional Timeline Config

- 'What you've missed' summary
- File Preview
- Timeline Highlights
 - Three most recent events from timeline
 - Can be enabled/disabled
 - Available in:
 - US
 - Europe
 - UK
 - Australia
 - India



Recycle Bin

- Ability to restore deleted rows
- Up to 30 days
- Enables for ALL TABLES
- View/Restore Deleted Rows
 - Administrator Roles only
 - No deleted related rows in view(cascading rules)



The screenshot shows the Dynamics 365 interface for a 'SANDBOX' environment. The top navigation bar includes the Dynamics 365 logo, the word 'SANDBOX', and user profile icons. Below the navigation bar, there is a message: 'For the best experience viewing this content, open it in a specific application.' and a 'Choose an app' button. The main content area displays a list of 'All Deleted Records*'. The list has columns for 'Display Name', 'Regarding Object', 'Deleted Object', 'Deleted By', 'Deleted By (Delegate)', and 'Deleted On'. The 'Restore' button in the top action bar is highlighted with a red box. The first record in the list is 'Account - ABC Account', which is selected. Other records include 'Activity Party' entries and 'Contact - Dwight Schrute'.

Display Name	Regarding Object	Deleted Object	Deleted By	Deleted By (Delegate)	Deleted On
<input checked="" type="checkbox"/> Account - ABC Account	RegardingObjectID	ABC Account	Dian Taylor	Dian Taylor	6/14/2024 8:04 PM
<input type="checkbox"/> Activity Party - 874010dc-...			SYSTEM	Dian Taylor	6/14/2024 8:07 PM
<input type="checkbox"/> Activity Party - 908e515e-...			SYSTEM	Dian Taylor	6/14/2024 8:04 PM
<input type="checkbox"/> Activity Party - c3067106-...			SYSTEM	Dian Taylor	6/14/2024 8:04 PM
<input type="checkbox"/> Contact - Dwight Schrute		Dwight Schrute	Dian Taylor	Dian Taylor	6/14/2024 7:45 PM
<input type="checkbox"/> Task - Another task		Another task	Dian Taylor	Dian Taylor	6/14/2024 8:07 PM



Power Platform Settings App

The screenshot displays the Dynamics 365 Power Platform Settings App interface. At the top, the header includes 'Dynamics 365', 'Power Platform Environment Settings', and 'SANDBOX'. A 'New look' toggle is visible, along with search, help, and user profile icons. A notification states 'You are now using the new settings experience' with a 'Learn more' link.

The left sidebar contains a navigation menu with the following categories and items:

- Business**
 - Business Manage...
 - Templates
 - Service Managem...
 - Mobile Offline
 - Sync Error
 - Product Catalog
- Customization**
 - Customizations
 - Solutions
 - Microsoft AppSou...
 - Plug-In Trace Log
 - Solutions History
- System**
 - Administration
 - Security
 - Data Management
 - System Jobs

The main content area is titled 'Business Management' and 'Business settings'. It features a table with the following data:

Name	Description
Fiscal year settings	Select fiscal year settings for Microsoft Dynamics 365.
Goal metrics	Define and manage the kinds of goals that your organization tracks.
Business closures 🔗	Create a list of holidays and other times when the business is closed.
Facilities and equipment	Add facilities and equipment for service scheduling. Change information about resources or delete existing resources.
Queues	Create and manage service queues, and manage the membership of private queues. Establish criteria for automatic record creation and updates.
Resource groups	Add new groups and new members to existing groups for service scheduling. Update group information and delete groups or group members.
Sales territories	Create new sales territories and assign territory managers. Add and remove members, modify territory information, and delete territories.
Services	Add new services for service scheduling. Change service information and deactivate existing services.
Sites	Create new sites or office locations where service operations take place. Add and remove resources, change site information, or delete sites.
Subjects 🔗	Manage the subject hierarchy for your organization's products, literature, and articles.
Currencies	Currency in which a financial transaction is carried out.



Demo 1



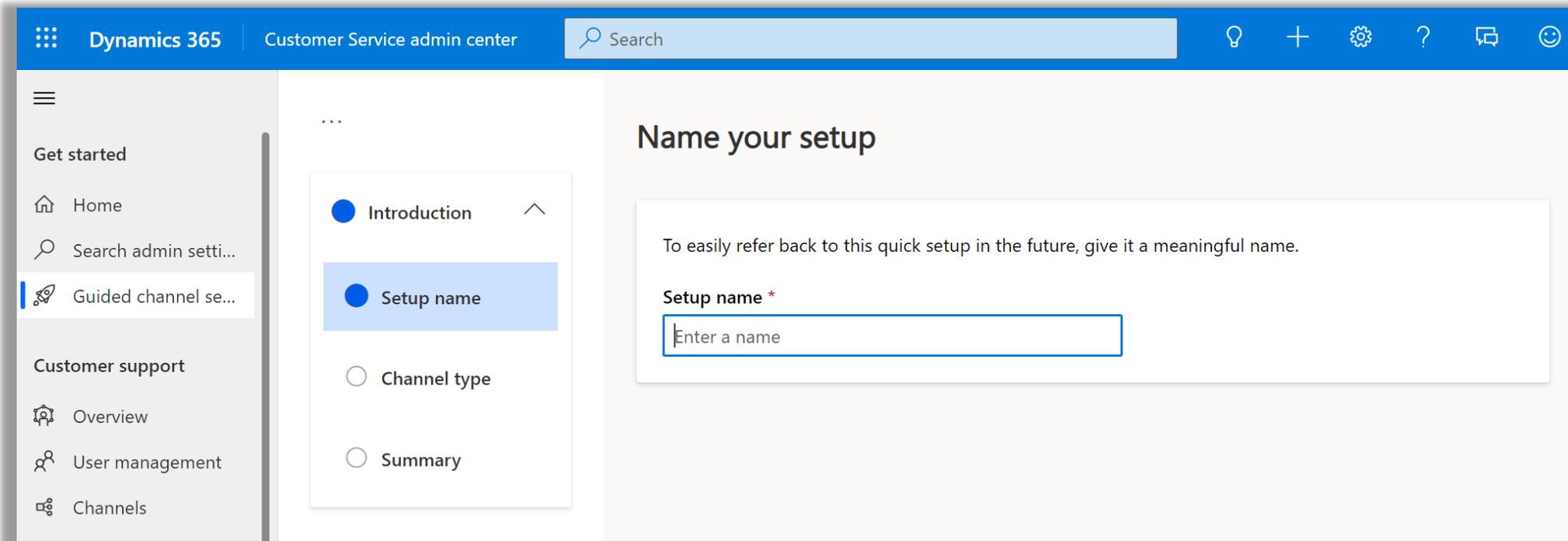
Customer Service: Search Admin settings



- Ability to use **search** to find tasks and settings

Guided Channel Setups

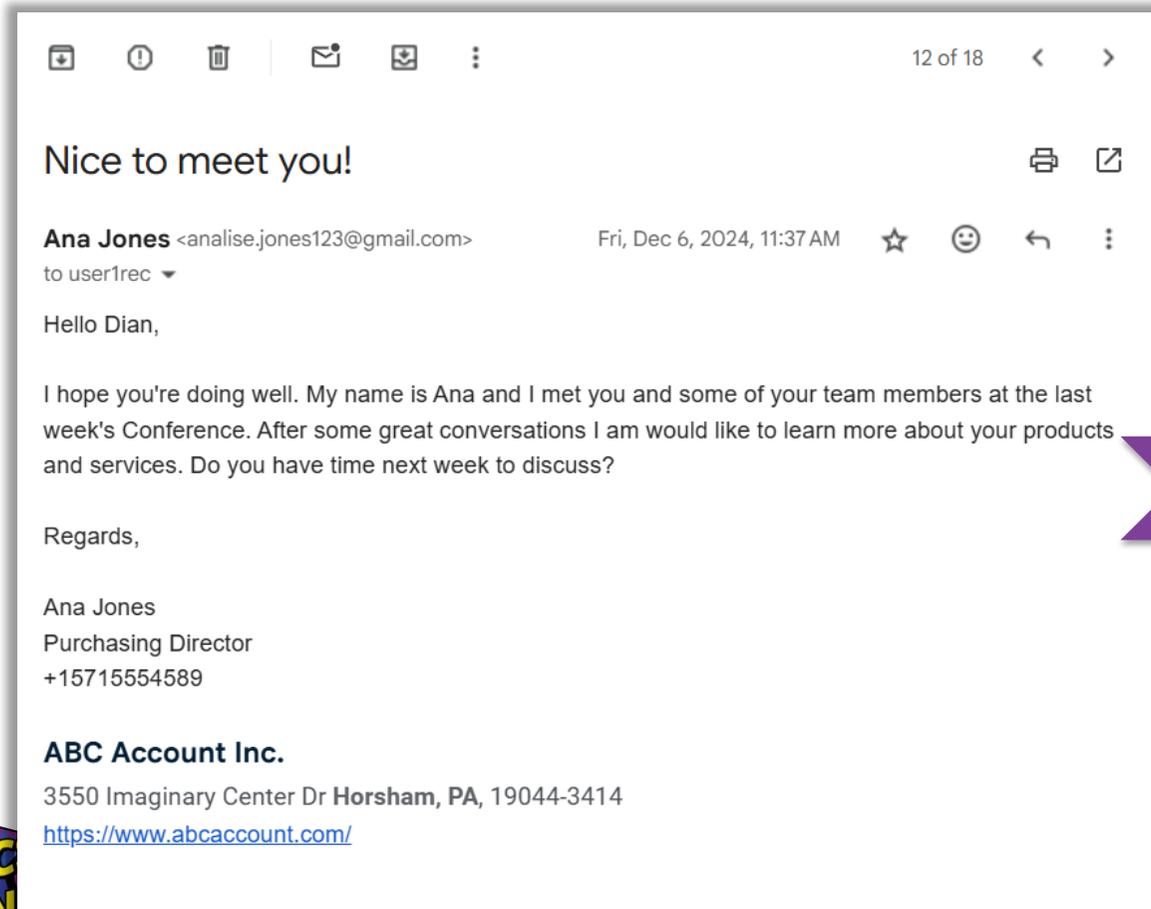
- Track channels setup
- All the needed steps to configure a channel
- Admins can see what has been completed



The screenshot displays the Dynamics 365 Customer Service admin center interface. The top navigation bar includes the Dynamics 365 logo, the text 'Customer Service admin center', a search bar, and several utility icons (lightbulb, plus, gear, question mark, speech bubble, smiley face). The left sidebar contains a menu with the following items: 'Get started', 'Home', 'Search admin setti...', 'Guided channel se...' (highlighted), 'Customer support', 'Overview', 'User management', and 'Channels'. The main content area is titled 'Name your setup' and features a progress indicator with four steps: 'Introduction', 'Setup name' (selected), 'Channel type', and 'Summary'. Below the progress indicator, a text box prompts the user: 'To easily refer back to this quick setup in the future, give it a meaningful name.' The 'Setup name *' field is currently empty, with a placeholder text 'Enter a name'.

Smart Paste

- Copy items to clipboard
- Paste into Dynamics 365 form (CTRL+V)



Quick Create: Lead

Try form fill assistance Suggestions will not be saved until you accept them. Review AI-generated entries for accuracy. [See terms](#) | 🗑️ 🔍

Details

Topic * Inquiry about products and services

Budget Amount ---

Purchase Timeframe Unknown ▾

Lead Source --- 🔍

Preferred Language English ▾

Personal Information

First Name * Ana

Last Name * Jones

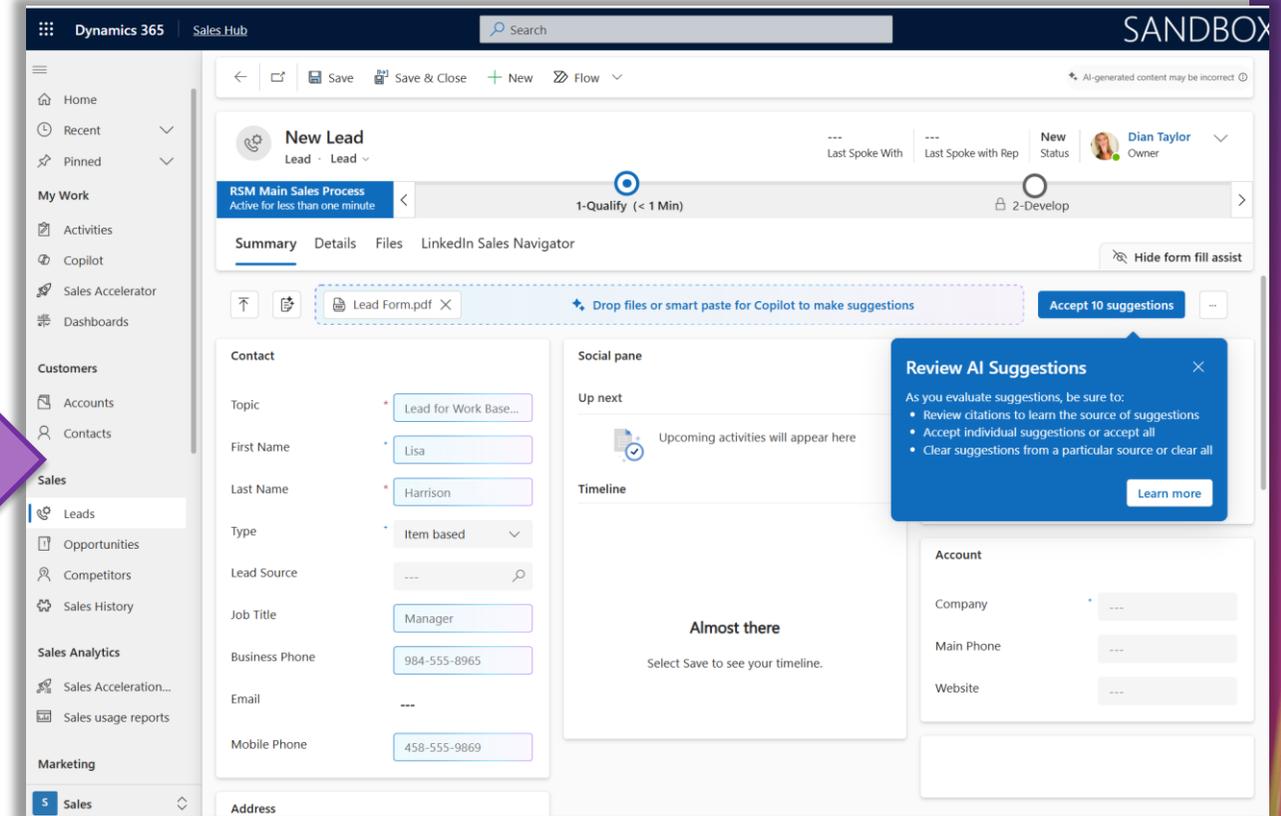
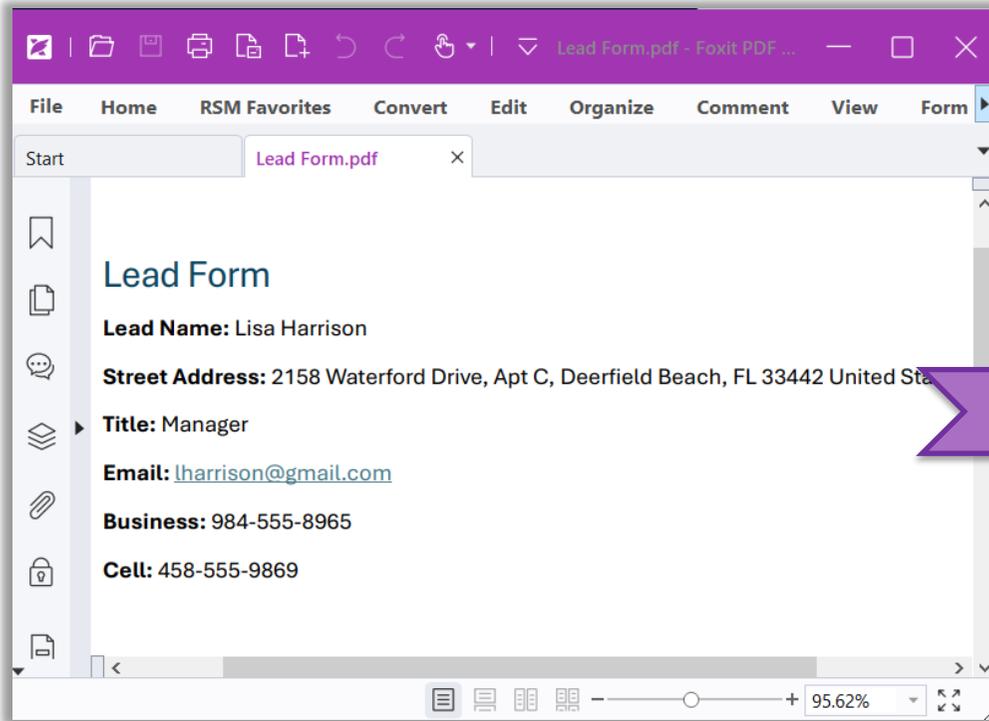
Job Title Purchasing Director

Company Name * ABC Account Inc.



Form Fill Assist Toolbar

- Upload Document
- Fills out form with data from document



Add Copilot Summary to Oppty form

- Provides summary on opportunity form
- 'Record Summary' Control
- Can be added to custom opportunity forms!

The screenshot shows a Microsoft Dynamics 365 Opportunity form for '5 Deathstars'. The form is in the '1-Qualify (4 Yrs)' sales stage. A Copilot Summary card is highlighted with a red border. The summary card contains the following key information:

- Key info**
- The Empire** has been a customer that has spent over \$175,000.00 with us since 7/21/2020. **The Empire** operates in the Agriculture industry sector and provides a wide selection of products in its stores and online.
- Our last successful opportunity with **The Empire** for **5 Deathstars** was worth \$125,000.00. We have successfully closed 2 opportunities with them so far from a total of 3.
- Anakin Skywalker** is a common stakeholder for 3 other opportunities associated with the account.
- The Opportunity has an estimated revenue of \$35,548.00 and an estimated close date of 4/24/2020.
- It belongs to the Forecast category "Won" and is in the Sales Stage (Custom) of "1-Qualify."

The form also displays the following information:

- Opportunity information:** Opportunity ID: OPT000000029, Name: 5 Deathstars, Account: The Empire, Contact: Anakin Skywalker, Lead Source: Existing Customer, Source Campaign: , Order Type: Item based.
- Summary:** Won Status Reason, 4/24/2020 Est. Close Date, \$35,548.00 Est. Revenue, \$3,554.80 Weighted Revenue.
- Opportunity score:** Prioritize smarter with opportunity scores. Get insights into which opportunities are most likely to be won. Ask your admin to set up predictive opportunity scoring for your org. [Learn more](#)
- COMPETITORS:** (Empty section)
- Up next:** Manage your activities. See upcoming activities by connecting the opportunity to a sequence or by creating an activity. [Learn more](#)



Embedded Row Summaries (preview)

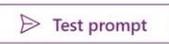
- Create for any table
- Configure using natural language prompts
- Choose which source fields to use (Including related tables)

Class row summary

Prompt

Describe the rows and columns you want summarized and the key information you want displayed. Specify the output (for example, in paragraph form, or bullet points). AI-generated content may have mistakes, so test and review your prompt before using it.

Summarize Class with    /



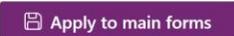
Prompt response

Waiting for response generation.

AI-generated content may be incorrect. Make sure it's accurate and appropriate before using it. [Read terms](#)  

Inputs

- Text
- Image or document (preview)
- RecordId
- Data used (preview)
- Class

Power Apps | Contoso Learning

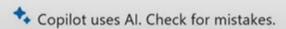
← Save Save & Close + New Share

Copilot summary

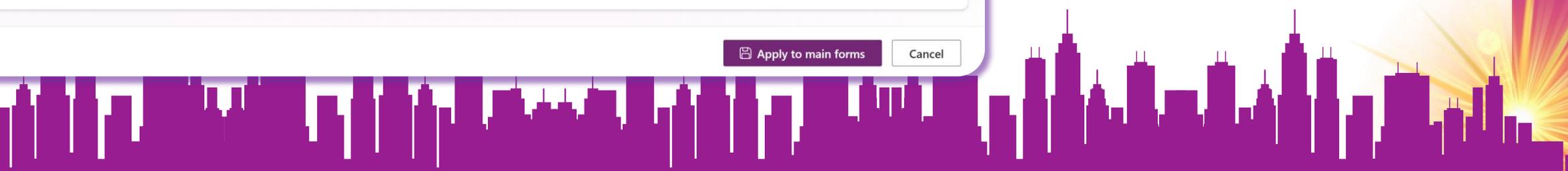
Here's a summary of the class information based on the provided data:

Class Name: History 101
Schedule: Monday and Wednesday
Teacher: Jim Glynn (sample)

For more details, you can view the class record [here](#) and the teacher's record [here](#).

Copy   

History 101 - Saved

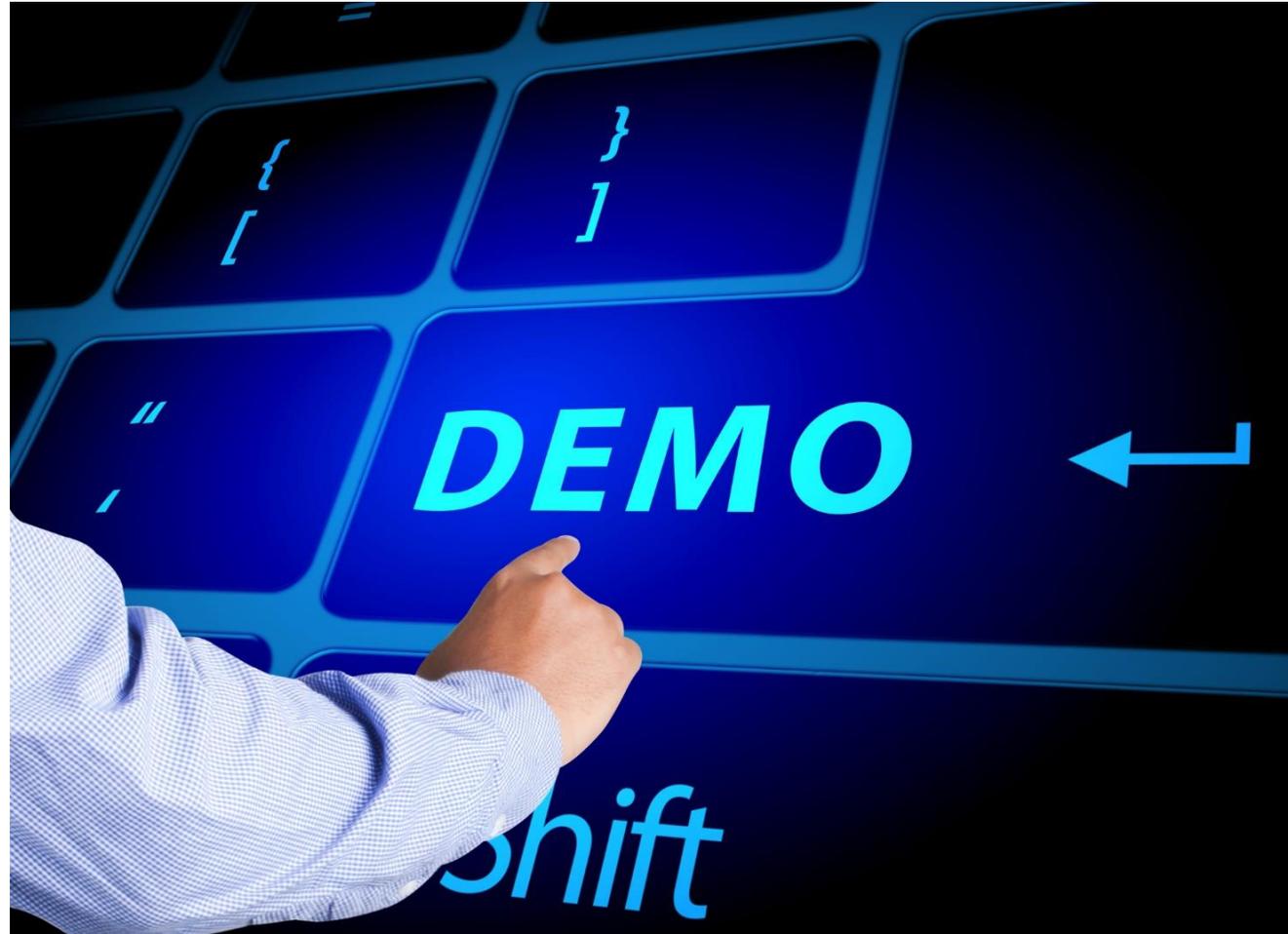


How to get your org details quick?

- Tenant ID
- Organization ID
- Environment ID



Demo 2



Additional Properties for Choice Fields values

- Add descriptions to Choice Field values
- Mark a Choice Field value as hidden

The screenshot shows the Power Apps interface with the 'Account Rating' column selected in the 'Columns' list. The configuration pane on the right is open, showing the following settings:

- Required: Optional
- Searchable:
- Allow form fill assistance (preview):
- Selecting multiple choices is allowed:
- Sync with global choice?: No (selected)
- Choices:
 - Green
 - Yellow
 - Red
 - Purple (with external value 4)
- Default choice: Green
- Advanced options: (collapsed)

An 'Additional properties' dialog is open for the 'Purple' choice, showing:

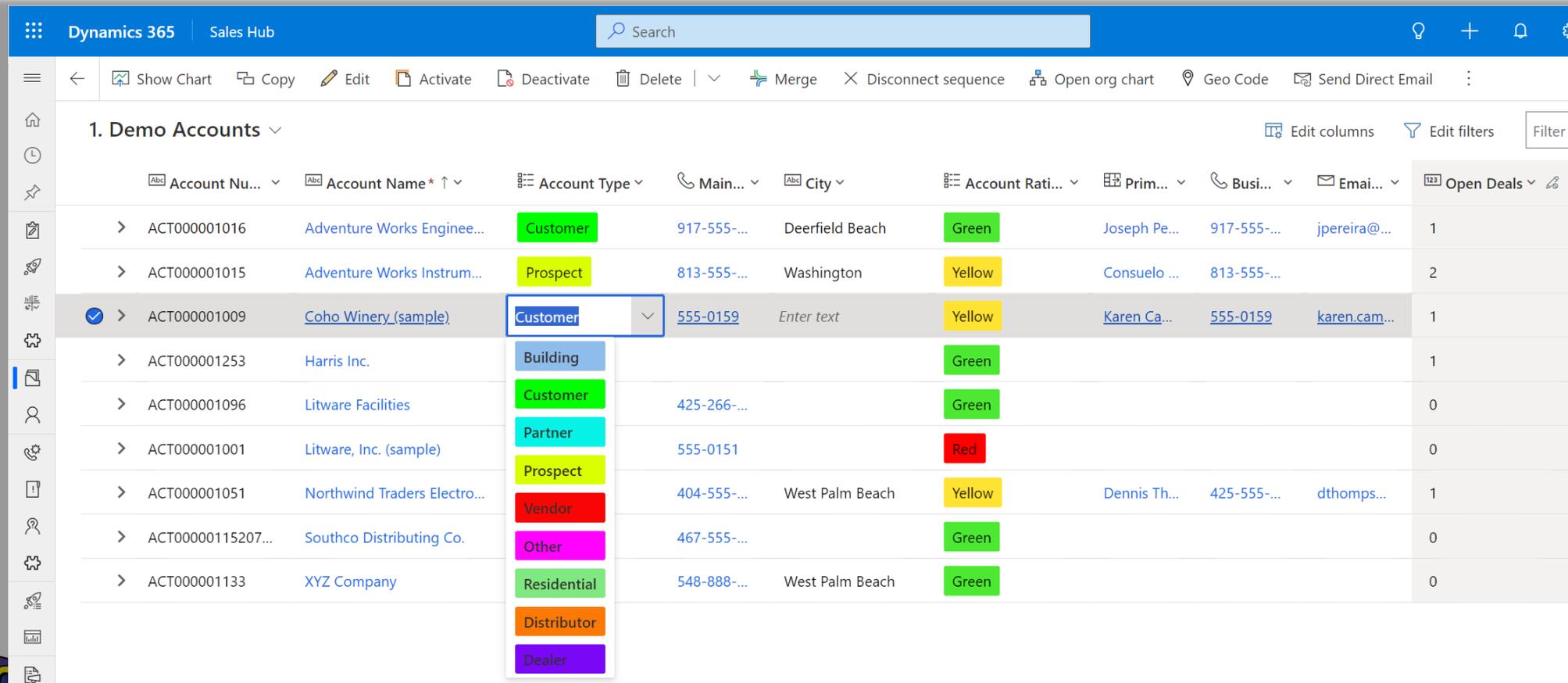
- Description: Purple means the rating is horrendous, worse it can be
- External value: (empty)
- Hidden:

Buttons for 'Save' and 'Cancel' are visible at the bottom of the dialog.



Choice field color configuration in views

- Configure colors in choice columns
- Set colors per choice



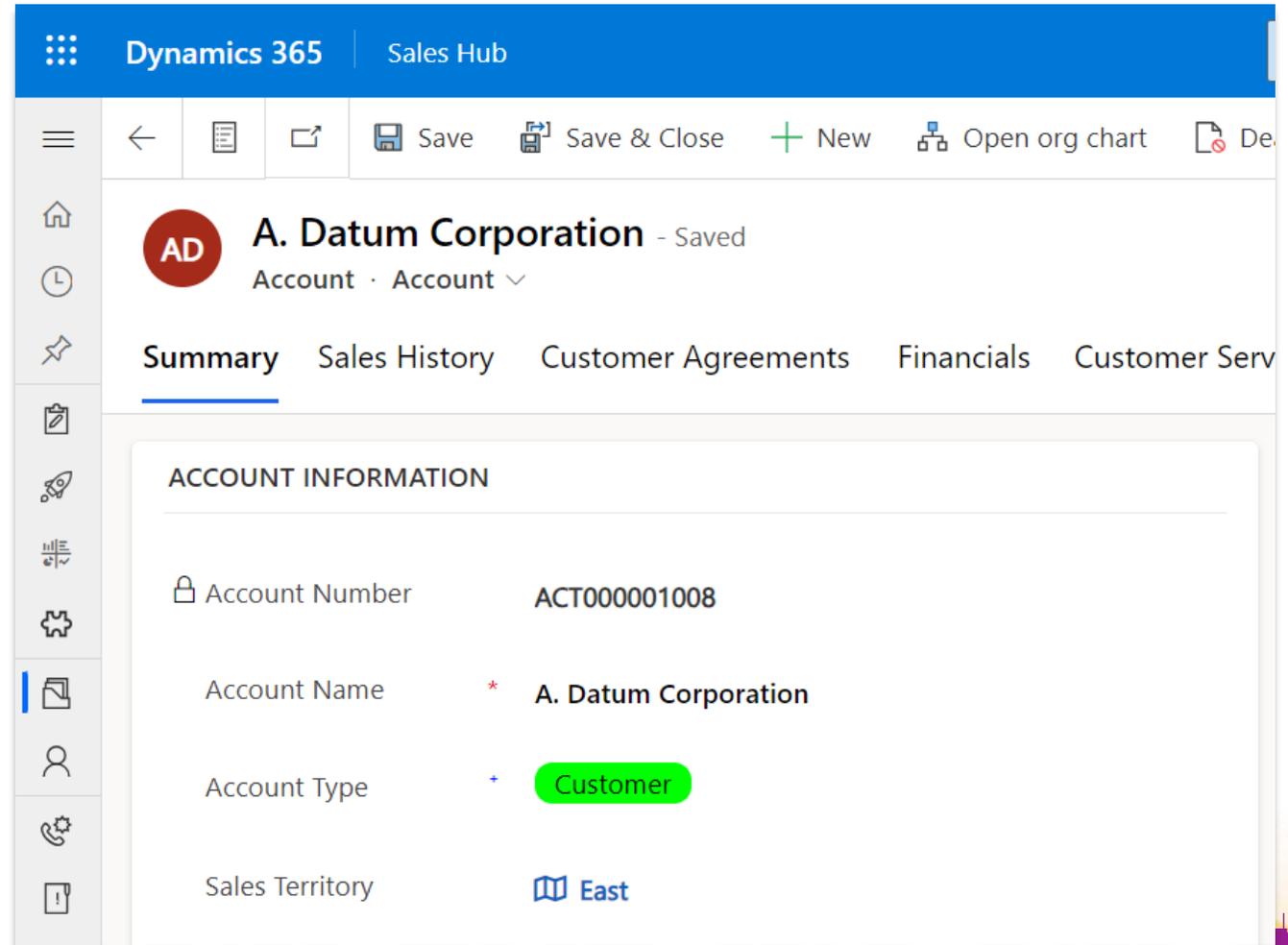
The screenshot displays the Dynamics 365 Sales Hub interface. The main view is titled "1. Demo Accounts" and shows a table of accounts. The columns include Account Number, Account Name, Account Type, Main Phone, City, Account Rating, Primary Contact, Business Phone, Email, and Open Deals. The "Account Type" column is highlighted, and a dropdown menu is open, showing a list of choice options with corresponding colors. The table data is as follows:

Account Number	Account Name	Account Type	Main Phone	City	Account Rating	Primary Contact	Business Phone	Email	Open Deals
ACT000001016	Adventure Works Enginee...	Customer	917-555-...	Deerfield Beach	Green	Joseph Pe...	917-555-...	jpereira@...	1
ACT000001015	Adventure Works Instrum...	Prospect	813-555-...	Washington	Yellow	Consuelo ...	813-555-...		2
ACT000001009	Coho Winery_(sample)	Customer	555-0159	Enter text	Yellow	Karen Ca...	555-0159	karen.cam...	1
ACT000001253	Harris Inc.	Building			Green				1
ACT000001096	Litware Facilities	Customer	425-266-...		Green				0
ACT000001001	Litware, Inc. (sample)	Partner	555-0151		Red				0
ACT000001051	Northwind Traders Electro...	Prospect	404-555-...	West Palm Beach	Yellow	Dennis Th...	425-555-...	dthomps...	1
ACT00000115207...	Southco Distributing Co.	Vendor	467-555-...		Green				0
ACT000001133	XYZ Company	Other	548-888-...	West Palm Beach	Green				0



Choice field color configuration in forms

- Show colors in option set field on form
- Set colors per choice



The screenshot displays the Dynamics 365 Sales Hub interface for an account named "A. Datum Corporation". The account type is set to "Customer", which is highlighted in a green pill. The account number is ACT000001008, and the sales territory is East.

ACCOUNT INFORMATION	
Account Number	ACT000001008
Account Name	A. Datum Corporation
Account Type	Customer
Sales Territory	East



Configuration

Field Configuration

- Configure colors in choice columns
- Set colors per choice

View configuration

- Power Apps Grid Control in view
 - “Enable OptionSet Colors”

Form Configuration

- ‘OptionSet Wrapper’ control on column in fo



Nested Grids

- Show list of related records in view
- Child records

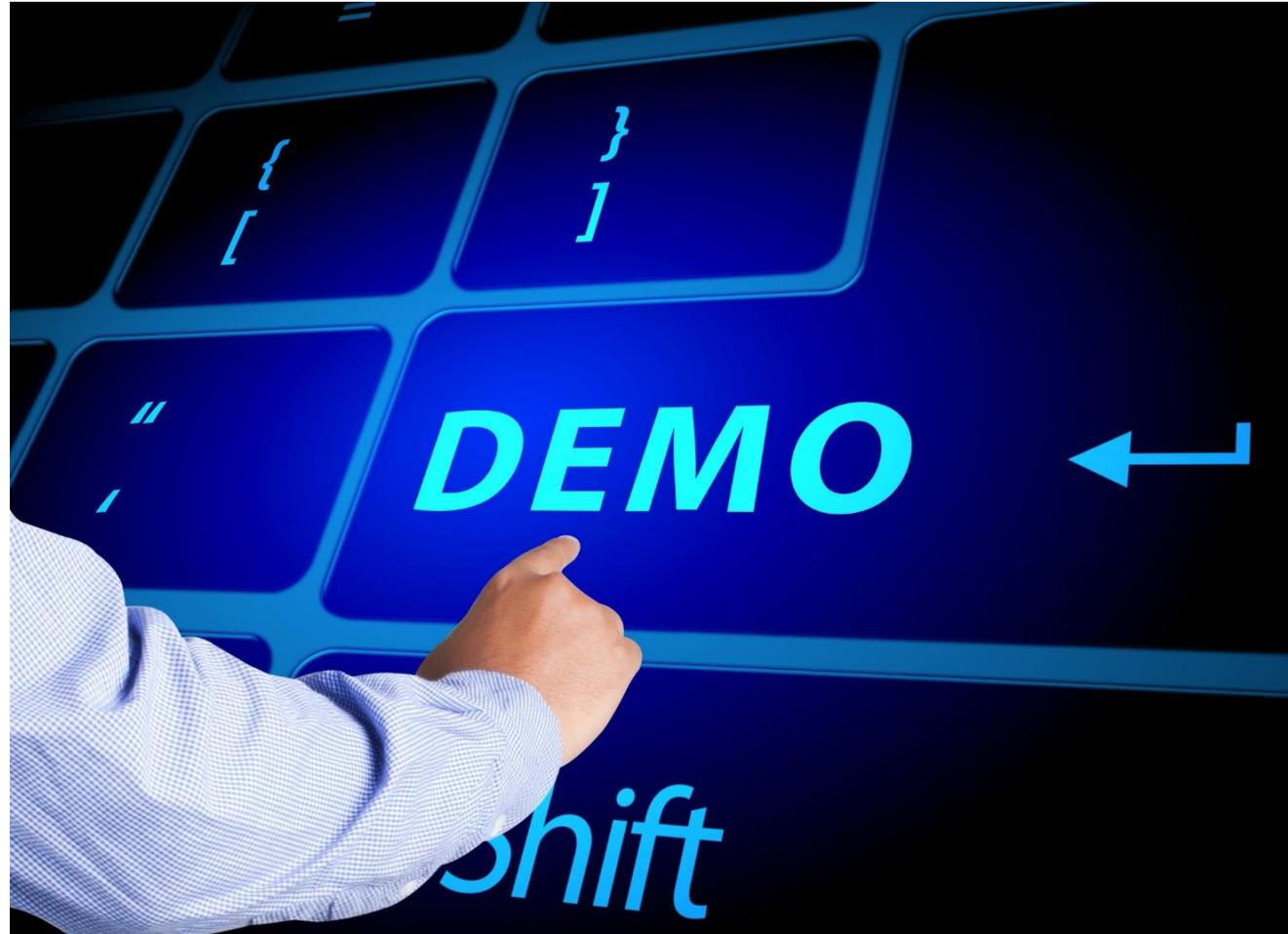
The screenshot displays the Dynamics 365 Sales Hub interface. At the top, there is a navigation bar with 'Dynamics 365 | Sales Hub' and a search bar. Below this is a toolbar with various actions like 'Show Chart', 'Focused view', 'New', 'Delete', 'Refresh', 'Collaborate', 'Visualize this view', 'Email a Link', 'Flow', 'Run Report', and 'Share'. The main content area is titled '1. Demo Accounts' and features a table with columns for Account Number, Account Name, Account Type, Main..., City, Account Ratio, Prim..., Busi..., Emai..., Open Deals, and Open Revenue. Two accounts are listed: 'Adventure Works Engine...' (Customer, Green) and 'Adventure Works Instrum...' (Prospect, Yellow). The 'Adventure Works Instrum...' account is expanded to show a nested grid of related records. This nested grid has columns for Topic, Cont..., Est. revenue, Est. close date, Forecast ca..., Status, Actual Revenue, and Actual Close Date. Two records are shown: 'Advanced Edge S...' (Committed, Open) and 'Audio Conferenci...' (Pipeline, Open).

Account Nu...	Account Name* ↑	Account Type	Main...	City	Account Rati...	Prim...	Busi...	Emai...	Open Deals	Open Reve...
ACT000001016	Adventure Works Engine...	Customer	917-555-...	Deerfield Beach	Green	Joseph Pe...	917-555-...	jpereira@...	1	\$7,000.00
ACT000001015	Adventure Works Instrum...	Prospect	813-555-...	Washington	Yellow	Consuelo ...	813-555-...		2	\$140,000.00

Topic*	Cont...	Est. revenue	Est. close date	Forecast ca...	Status*	Actual Revenue ↓	Actual Close Date
Advanced Edge S...	Consuelo ...	\$85,000.00	9/28/2023	Committed	Open		
Audio Conferenci...	Consuelo ...	\$55,000.00	8/10/2023	Pipeline	Open		



Demo 3



Custom help panes

- Help Panes in Dynamics 365
- Custom Content
 - Text
 - Images
 - Links
 - Videos
 - Visual pointers and coach marks



Custom help panes

- Enable ability to create help panes
- Administration > System Settings > Enable Custom Help Panes and Guided Tasks

System Settings ? x
Set system-level settings for Microsoft Dynamics 365.

General | Formats | Auditing | Email | Marketing | Customization | Reporting | Calendar | Goals | Sales | Service | Synchronization | Mobile Client | Previews

Users see app download message Yes No

Set custom Help URL

Use custom Help for customizable entities Yes No

Global custom Help URL

Append parameters to URL Yes No

Enable Learning Path Yes No

Enable Learning Path Authoring Yes No

Enable Custom Help Panes and Guided Tasks Yes No

Set whether users see welcome screen

Display welcome screen to users when they sign in Yes No

Show legacy Dynamics 365 – custom app

Show this app to all users, not just administrators Yes No

Recommended only for backwards compatibility. Opens in Unified Interface if **Use Unified Interface only** is enabled. [Learn more](#)

Select a custom name for the legacy app

OK Cancel



Show quick view form as card

- Add quick view form
- Select 'Show as Card' option

The screenshot displays the Dynamics 365 Sales Hub interface for the account 'A. Datum Corporation'. The top navigation bar includes 'Dynamics 365', 'Sales Hub', a search bar, and a 'Try the new look' toggle. Below the navigation bar is a ribbon with options like 'Save', 'New', 'Open org chart', 'Deactivate', 'Connect', 'Add to Marketing List', and 'Share'. The main content area shows account information, a 'Summary' tab, and a 'Primary Contact Details' card for Angel Castellar, which is highlighted with a red box. The card displays the contact's name, title 'Senior Director', and phone number '485-555-8859'. Other visible elements include 'Up next' activities and a 'Timeline' section.

Field	Value
Account Number	ACT000001008
Account Name	A. Datum Corporation
Account Type	Customer
Sales Territory	East

Primary Contact Details
Angel Castellar
Senior Director
Phone: 485-555-8859



Associated Grid Control

- Refreshed Subgrid Control
- Add up to 4 tables
- Not just for cases!

The screenshot displays the Microsoft Dynamics 365 Customer Service workspace. The main case is titled "Invoice amount on bill was wrong" and is in a "Saved" state. The case is assigned to Sandra Hill, who is the owner. The case is currently in the "Identify" stage of a process, which has been active for 8 months. The process flow includes stages: Identify (8 Mo), Research, and Resolve. Below the process flow, there are tabs for "Summary", "Attempted Resolutions", "Orders", "Case Relationships", "Enhanced SLA Details", and "Related". The "Case Relationships" tab is selected, showing a subgrid of "Similar cases". The subgrid has columns for "Knowledge Articles", "Similar cases", "Merged Cases", and "Child Cases". The "Similar cases" column is active, showing a list of cases connected to the current case. The list includes:

- A Amount on invoice is wrong
- B Bill amount on invoice incorrect
- I Invoice amount on bill is incorrect

In-App Notifications

- Different from Push notifications
- Created by Power Automate Flows
- Use XRM Toolbox to create them easily

The screenshot displays the Dynamics 365 Sales Hub interface. The main area is titled "SALES REP DASHBOARD" and contains several widgets:

- Sales Pipeline:** A funnel chart showing revenue distribution across stages: 1-Qualify (\$179,028.26), 2-Develop (\$191,951.28), and 3-Propose (\$179,152.50). The total revenue is \$15,000.00.
- My Forecast:** A bar chart comparing "Committed" (purple), "Best case" (orange), and "Pipeline" (blue) revenue for January and February 2022. The Y-axis is "Sum (Est. Revenue) (\$)" ranging from 0.00 to 200,000.00.
- My Goals:** A progress bar for "Goal Progress (Money)" comparing "In-progress (Money)" (orange) and "Actual (Money)" (blue). The target is 1,750,000.00.
- Sold CS Products:** A section for "Top 5 Products (Dollars)" with a total of \$185,266.26.

On the right side, there is a "Notifications" panel with a "Dismiss all" button. It lists several notifications:

- SLA missed:** Case record Average order shipment time (sample) assigned to you just went out of SLA.
- Upcoming Service Reminder:** Coho Winery has a service appointment coming up on 4/1/2021. Call Jim Glynn to confirm appointment.
- SLA critical:** Case record Complete overhaul required (sample) assigned to you is critically past SLA and has been escalated to your manager.
- Complete overhaul required (sample):** Maria Campbell mentioned you in a post: "@Paul we need to prioritize this overdue case. @Robert will work with you to engage engineering team ASAP."
- Welcome:** Welcome to the world of app notifications!

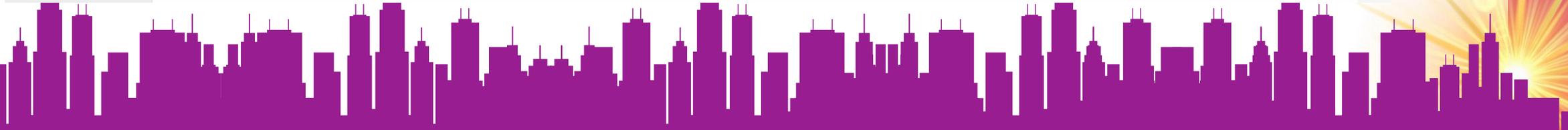
The interface also includes a left-hand navigation menu with options like Home, Recent, Pinned, My Work, Sales accelerator, Dashboards, Activities, Deal manager, Auto capture, Activity suggestions, Contact suggestions, Customers, Accounts, Contacts, Sales, Leads, Opportunities, Competitors, and Sales History.



In-App Notifications

The screenshot displays the Dynamics 365 Sales Hub interface. The left sidebar contains navigation options: Home, Recent, Pinned, My Work (Activities, Sales Accelerator, Dashboards), Customers (Accounts, Contacts), Sales (Leads, Opportunities, Competitors, Sales History), Sales Analytics (Sales Acceleration..., Sales usage reports), and Marketing (Marketing Lists, Campaigns, Quick Campaigns). The main area shows a table titled 'My Open Opportunities - Health' with columns for Opportunity ID, Topic, Account, Contact, Score, Grade, Score trend, Estimated revenue, Estimated close date, Relationship Health State (KPI), and Relationship Health trend. The table lists 10 opportunities with varying health states and trends.

Opportun...	Topic	Account	Contact	Score (Pr...	Grade (Pr...	Score tre...	Est. reven...	Est. clo...	Relationship Health State (KPI)	Relationship Health ...
OPT0000...	New Deal	Adventure Works ...	Consuelo Moses	59	Orange	→ Stea...	\$55,000.00	3/24/2023	Good	→ Steady
OPT0000...	Calibration Services	Bellows College	Jenna Smith	52	Red	→ Stea...	\$2,562.00	3/30/2023	Not enough info	→ Steady
OPT0000...	Monitors	Dewey Square To...	Maria Smith				\$4,483.60	3/31/2023	Not enough info	→ Steady
LD00000...	Website Lead	Harris Inc.	Jim Henry	51	Red	→ Stea...	\$65,000.00	4/4/2023	Good	→ Steady
OPT0000...	Tradeshow Lead	Northwind Trader...	Margarita Russo	65	Purple	→ Stea...	\$10,310.50	4/5/2023	Poor	→ Steady
OPT0000...	Additional Order	Adventure Works ...	Eva Colon	59	Orange	→ Stea...	\$7,000.00	4/13/2023	Not enough info	Not enough i...
OPT0000...	Coffee Machines	Coho Winery (sa...	Sarah Jackson	68	Green	→ Stea...	\$41,951.28	4/21/2023	Poor	→ Steady
OPT0000...	Web Lead	Contoso Transpor...	Ricardo Martinez				\$15,000.00	4/11/2024	Not enough info	→ Steady
OPT0000...	Demo Deal	A. Datum Corpor...	Angel Castellar	69	Green	→ Stea...	\$150,000.00	8/21/2024	Good	→ Steady



Demo 3



Bookmark Timeline View

- Filter underlying activities
- Create multiple bookmarks
- Personal view only

The screenshot displays the Microsoft Dynamics 365 Field Service interface for account 'A. Datum Corp'. The interface includes a top navigation bar with 'Dynamics 365', 'Field Service', and a search bar. Below the navigation bar, there are tabs for 'Summary', 'Sales', 'Financials', 'Customer Service', 'Assets and Locations', 'Servicing', 'Projects', 'Details', 'Files', and 'Related'. The 'Summary' tab is active, showing account details such as 'Account Name', 'Account Type', 'Parent Account', 'Sales Territory', 'Account Rating', and 'Billing Account'. A 'Timeline' section is visible, showing a list of activities. A red box highlights the 'Bookmarks' menu, which includes options for 'Emails', 'Overdue', 'Add bookmark', and 'Reset to default'. The 'Assistant' section on the right shows 'Notifications' with '4 reminders' and 'Primary Contact' as 'Angel Ca...'. The 'Contacts' section at the bottom right shows 'Group By: (no grouping)'.



Pin Timeline Rows

The screenshot displays the Dynamics 365 Sales Hub interface for the account "A. Datum Corporation". The top navigation bar includes the Dynamics 365 logo, "Sales Hub", a search bar, and various utility icons. Below the navigation bar, the account name "A. Datum Corporation" is shown with a "Saved" status, along with the date and time of the last spoke (9/21/2023 1:25 PM) and the sales representative (Dian Taylor). The "Summary" tab is active, showing account details such as Account Type (Customer), Sales Territory (East), and Phone (548-555-8598). The "Timeline" section on the right lists recent interactions, with a red box highlighting a pinned email from Dian Taylor dated 10/9/2023. The email content includes "Re: Quote CRM:0001108" and "Hi Angel".

Account Details:

- Account Type: Customer
- Sales Territory: East
- Parent Account: ---
- Billing Account: ---
- Phone: 548-555-8598

Business Hours:

- Weekdays: 9 AM - 5 PM
- Weekends: Closed

Timeline:

- Pinned (1)**
 - Modified on: 10/9/2023 11:03 AM
 - Email from: Dian Taylor (Closed)
 - Re: Quote CRM:0001108
 - Hi Angel
 - Sent 1/7/2022 . Last opened October 09 11:02 AM
 - View more
- Recent**
 - Modified on: 10/17/2023 5:35 PM
 - Live chat from: Angel Castellar (Closed)
 - Angel Castellar
 - View more



Pin Timeline Rows

- Configure on timeline – Customer service feature
- Security Role: Timeline Pin

The image displays two overlapping screenshots from the Power Apps interface. The background screenshot shows the 'Security Role: Account Manager' configuration page. It features a table with columns for 'Details', 'Core Records', 'Marketing', 'Sales', 'Service', 'Business Management', 'Service Management', and 'Customization'. The 'Timeline Pin' row is highlighted with a red border and has green dots in the 'Service Management' and 'Customization' columns. Other rows include 'Timesheet', 'Timesheet Entry', 'Tour', 'TrackingContext', and 'Trade', each with red circles in the 'Service Management' and 'Customization' columns.

The foreground screenshot shows the 'Configure form' panel for a 'New Account' form. The panel lists various commands that can be configured for the form. The 'Pin / Unpin' command is checked, indicating it is enabled. Other checked commands include 'Reply', 'Reply all', 'Forward', 'Open record', 'Assign', 'Delete', and 'Delete draft email'. Unchecked commands include 'Add to queue', 'Close activity', and 'Delete'. The panel also shows a list of activity types on the right side, including 'Appointment', 'Campaign Activity', 'Campaign Response', 'Email', 'Fax', 'Case Resolution', 'Letter', 'Opportunity Close', 'Order Close', 'Phone Call', and 'Quote Close'.

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization
Timeline Pin				●		●	●
Timesheet				○		○	○
Timesheet Entry				○		○	○
Tour				○		○	○
TrackingContext				○		○	○
Trade				○		○	○

Command	Checked
Reply	<input checked="" type="checkbox"/>
Reply all	<input checked="" type="checkbox"/>
Forward	<input checked="" type="checkbox"/>
Open record	<input checked="" type="checkbox"/>
Assign	<input checked="" type="checkbox"/>
Pin / Unpin	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
Delete draft email	<input type="checkbox"/>
Add to queue	<input type="checkbox"/>
Close activity	<input type="checkbox"/>

Activity type	Checked
Appointment	<input checked="" type="checkbox"/>
Campaign Activity	<input type="checkbox"/>
Campaign Response	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>
Fax	<input type="checkbox"/>
Case Resolution	<input checked="" type="checkbox"/>
Letter	<input type="checkbox"/>
Opportunity Close	<input checked="" type="checkbox"/>
Order Close	<input type="checkbox"/>
Phone Call	<input checked="" type="checkbox"/>
Quote Close	<input type="checkbox"/>



Extend Copilot in D365 Sales

- Copilot Studio
- Sales Copilot Power Virtual Agents Bot

The screenshot displays the Copilot Studio interface for a bot named "Sales Copilot Power Virtual Agents Bot". The interface includes a sidebar with navigation options: Home, Create, Copilots, Library, and a menu icon. The main content area shows a "Your copilot is ready!" notification with three next steps: "Add actions", "Build topics", and "Publish your copilot". Below this is a "Details" section with fields for Name (Sales Copilot Power Virtual Agents Bot), Description (None provided), and Instructions (None provided). There is also a "Knowledge" section with an "Add knowledge" button. On the right, a "Test your copilot" panel shows a chat window with a greeting "Hi Dian, Welcome to Copilot..." and three suggested prompts: "Get info", "Ask questions", and "Stay ahead". The chat input field contains the text "Ask a question or describe what you need" and a character count of "0/2000".



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