

Dynamics 365 Finance business performance planning overview

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Agenda

-
- Dynamics 365 Finance business performance planning explained
 - Demo
 - Licensing
 - Installation guide
 - Roadmap
 - Resources
 - Q&A

Meet our new Analytics, Insights & Planning capabilities

Legacy systems

Systems are disconnected, minimal automation, highly manual, no AI

Old data and disparate systems



Requires data scientists to create reports



Overwhelmed by data, time to insight is slow



Siloed planning, lacks advanced capabilities



Turn data into action to improve business performance

Dynamics 365 Finance

One Extensible Solution for Planning, Analytics, Insights, and Reporting



Transformed and unified data with near-real time access



Self-serve, easy, and collaborative reporting



Timely insights delivered to the point of decision



Company-wide and intelligent planning

One Extensible Finance Hub Solution for Planning, Analytics, & Insights

Core Capabilities

Planning



Financial



HR & Workforce



Cross Domain Planning



Project Operations



Supply Chain

Extensibility



Power Apps



Power Automate



Power BI



AI Builder

Purpose-Built Analytics



Power BI



Excel

Automated Insights



Data Insights



Process Insights

Copilot Natural Language AI



CFO Advisor



Spend Advisor

Regulatory Reporting



Word



Electronic Submission

Collaboration & Tracking



Teams



Outlook

Global Scale (localized, regulatory support, multi-region)

Analytical Models



Record to Report



Procure to Pay



Order to Cash



Acquire to Retire



Plan to Close



Hire to Retire



Dataverse

Data Ingestion, Cleansing, & Enrichment

Systems of Record

Dynamics 365



Finance



Human Resources



Sales



Supply Chain



Project Operations

Other Systems & Data



P2P



Contracts



Other ERPs



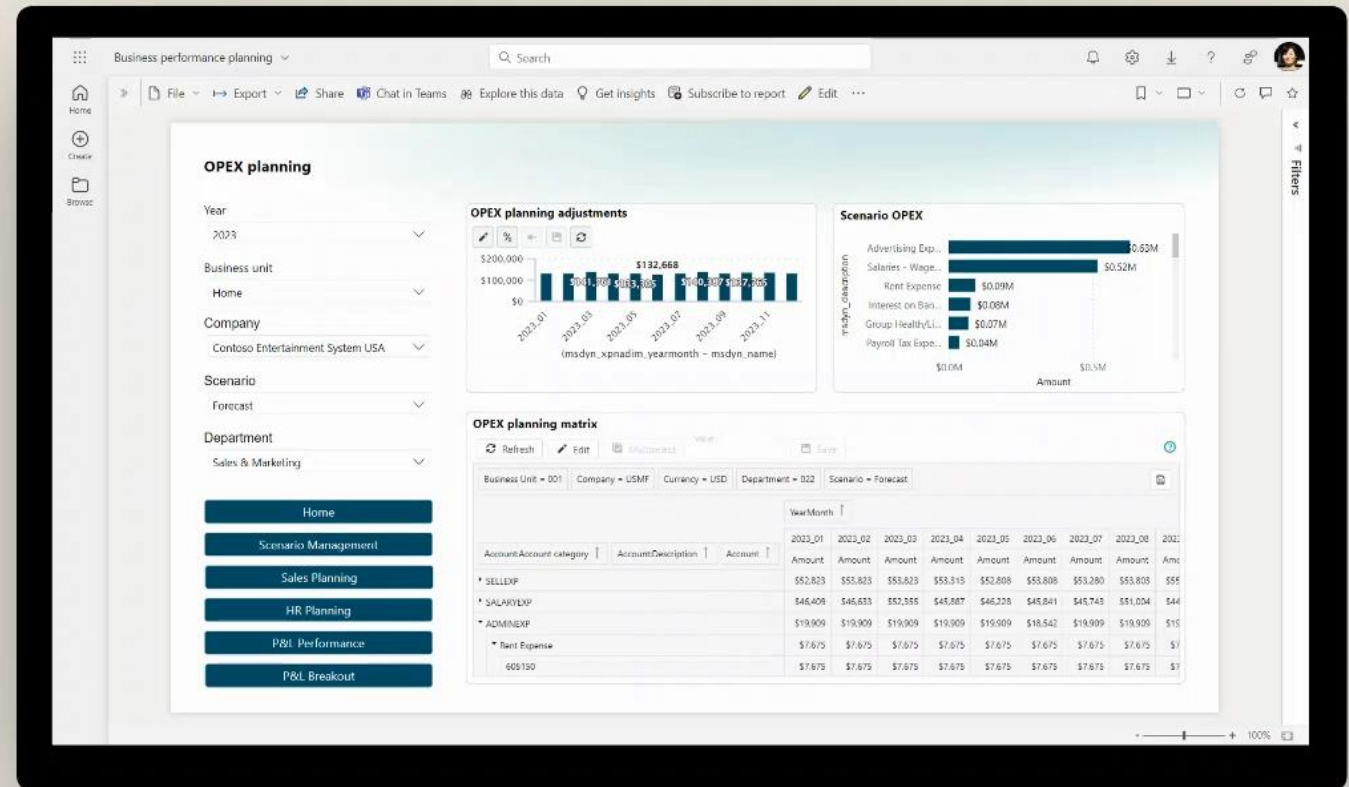
3rd Party

Transform planning with the power of Microsoft

Make planning easy with familiar tools finance teams use daily

Seamlessly integrate planning with collaboration & productivity tools

Enhance planning with automated insights & generative AI



Reports & Analytics



Power Platform



Collaboration



AI & Insights



Licensing

Optimize your licensing mix to empower people with the right capabilities		Dynamics 365 Team Member	Dynamics 365 Operations-Activity	Dynamics 365 Finance	Dynamics 365 Finance Premium
Overview		Ensure people have access to data, reports, and simple tasks such as timesheet or expense entry.	Equip operational workers with access to designated warehousing, receiving, shipping, orders, vendor, budgets, and device activities.	Enable finance with intelligent, automated, and trusted core financial management capabilities.	Empower people with advanced business performance management capabilities.
Core Financials	Read Only	✓	✓	✓	✓
	Restricted Access		✓	✓	✓
	Full Access			✓	✓
Business Performance Planning (FP&A / XP&A functionality)	Read Only		✓	✓	✓
	Restricted Access/Inputs			✓	✓
	Admin/Creator Access				✓
Business Performance Analytics	Read Only	✓	✓	✓	✓
	Core Reporting & Insights			✓	✓
AI/ML	AI capabilities within Dynamics 365 Finance			✓	✓
Capacity & Storage	Higher entitlements				✓

[Microsoft Dynamics 365 Finance Premium Announcement - Microsoft Community Hub](#)

[Enhance business performance with Microsoft Dynamics 365 Finance Premium - Microsoft Dynamics 365 Blog](#)

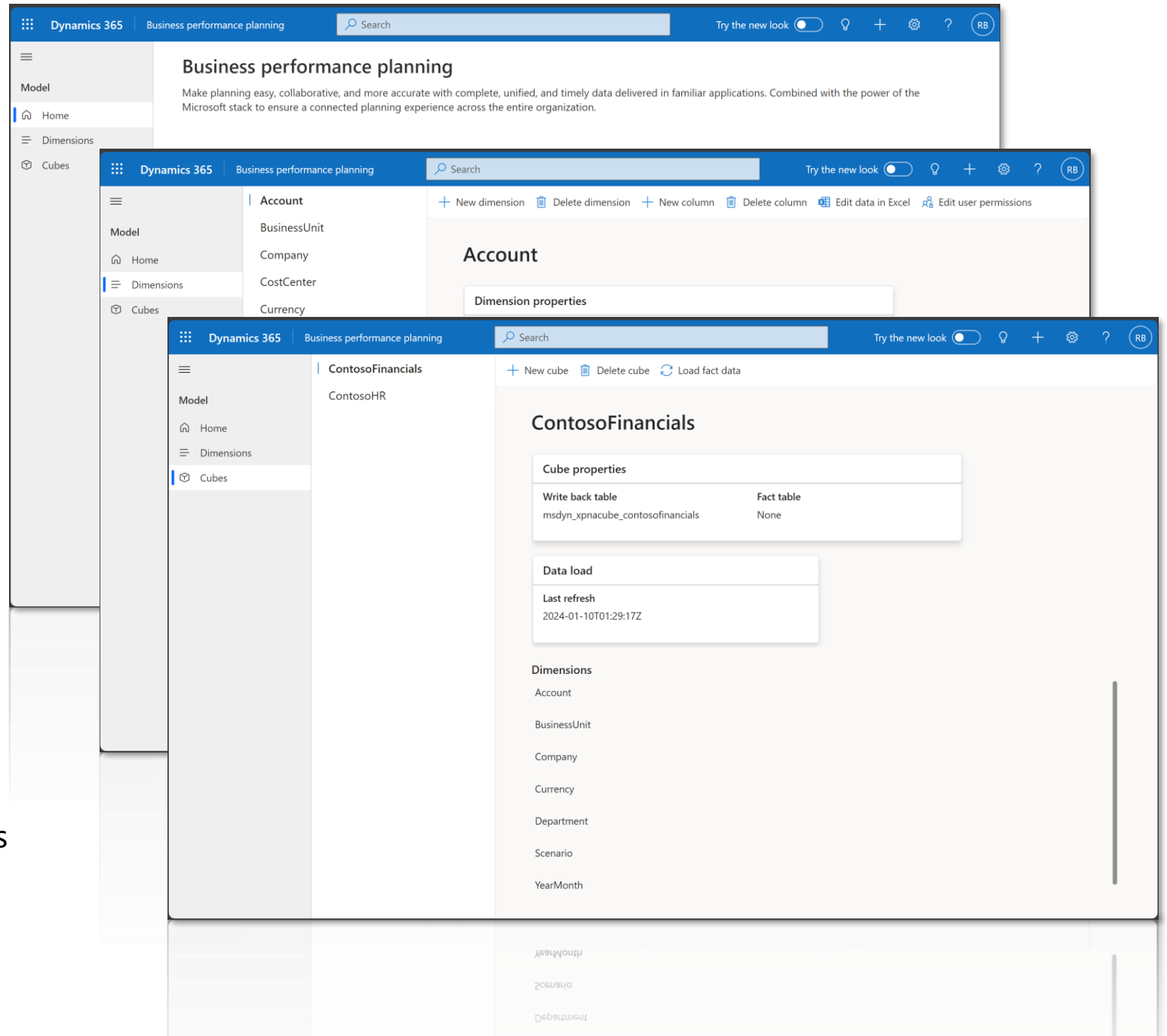


Installation Guide

Business Performance Planning – Model

Model in canvas app

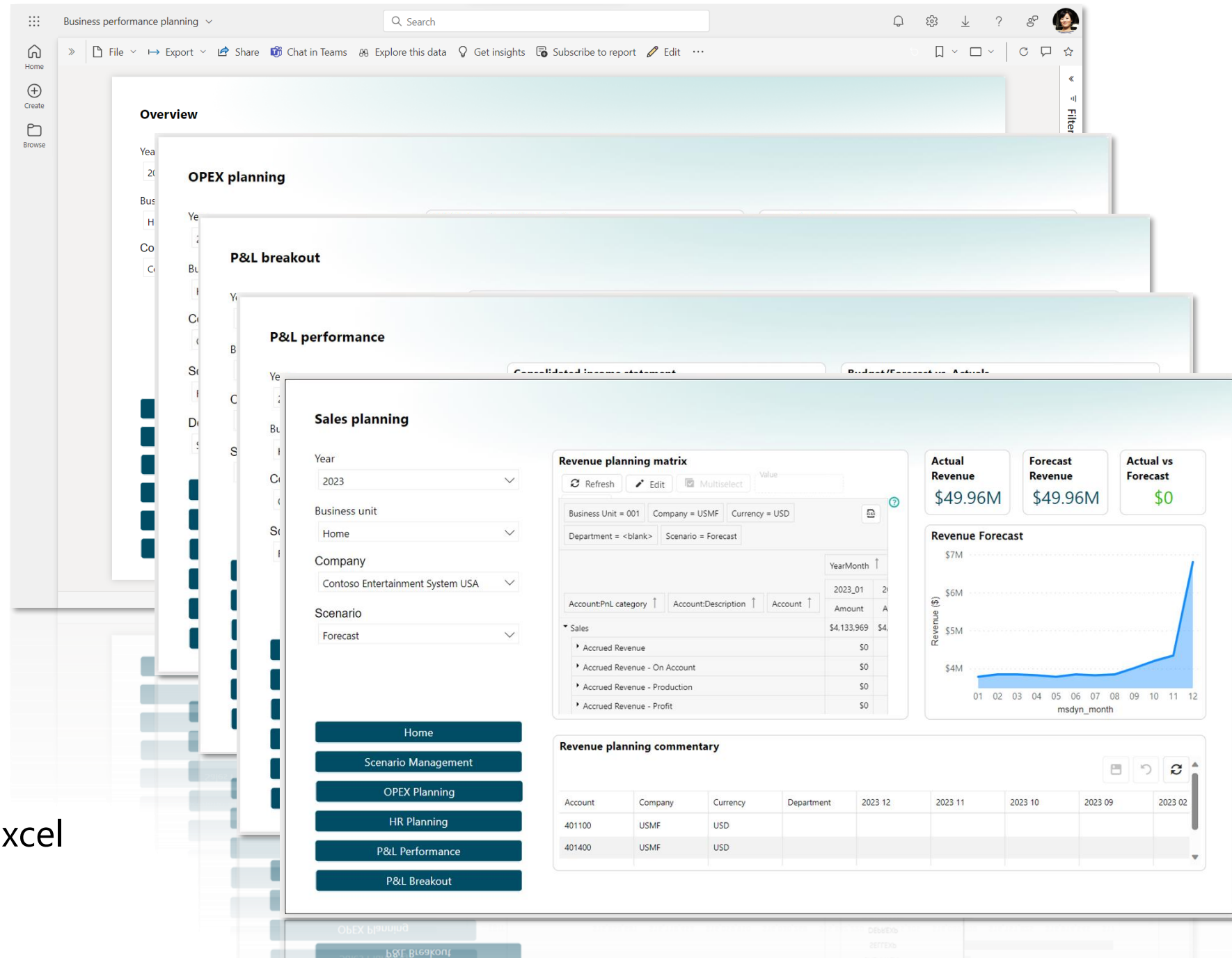
- Create dimensions
 - Via Dataverse
 - Excel
 - Ad hoc
- Create Cubes
 - Via Dataverse
 - Excel
- Define security
 - Query builder for cubes and dimensions



Business Performance Planning – Act

Act in Power BI and Excel

- 7 pre-defined visuals
 - Matrix
 - Table edit
 - Planning
 - Variance
 - Reporting
 - Copy
 - Comment
- Leverage PowerBI and Excel Co-pilot scenarios



Installation Guide



Install canvas application



Configure dimensions and cubes, and load data



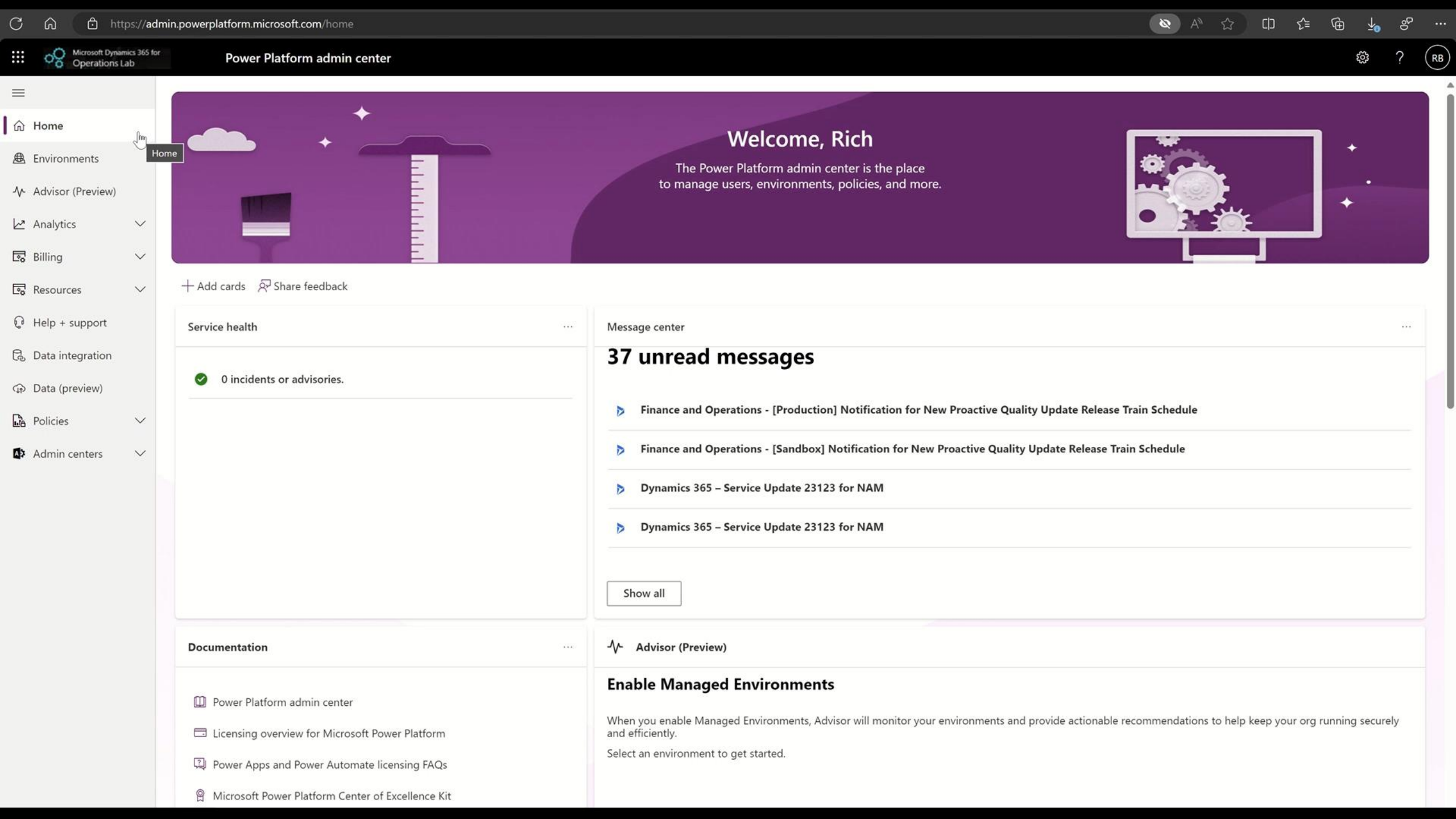
Connect PBI to Dataverse & install visuals



Configure visuals




1. Install canvas application








2. Configure dimensions and cubes, and load data



Model

Home

Dimensions


Cubes

Business performance planning



Make planning easy, collaborative, and more accurate with complete, unified, and timely data delivered in familiar applications. Combined with the power of the Microsoft stack to ensure a connected planning experience across the entire organization.

Start here


Create dimension





Dimensions define how you want to filter and group your data. Common examples are time, exchange rates, customers, products, departments, and locations.

 New dimension  Learn more

Create cube




A cube contains information for modeling and analytical purposes and consists of dimensions and fact data.

 New cube  Learn more

Learn more


Business performance planning

Get started by learning more about Business performance planning capabilities.

 Learn more


Power BI visuals overview

Planning leverages the familiar user experience of Power BI. Learn more about how Power BI is used as part of the planning process.

 Learn more

Installing Power BI visuals

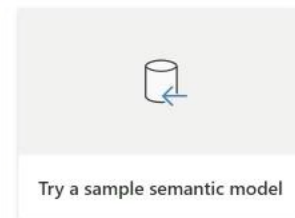
Install the Power BI visuals that will be used as part of your planning process.

 Learn more

3. Connect PBI to Dataverse & install visuals



Once loaded, your data will appear in the **Data** pane.



Get data from another source →

- + 116%

4. Configure visuals

FileHomeInsertModelingViewOptimizeHelpFormatData / DrillTable toolsColumn tools

Namemsdyn_amount

FormatGeneral

SummarizationSum

Data categoryUncategorized

Data typeDecimal number

\$ %

Auto

Structure

Formatting

Properties

Sort by column

Data groups

Manage relationships

New column

Sort

Groups

Relationships

Calculations

Business performance planning

Dynamics 365 Finance licenses are required. Learn more

FiltersVisualizationsData

Quick start

1 Review setup guidance found here.

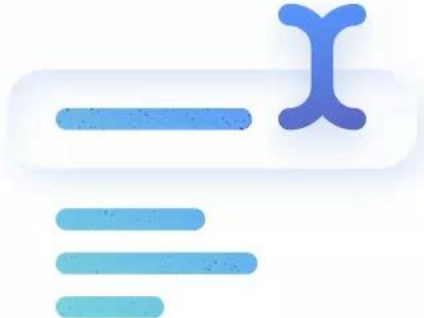
2 Connect to your data and select the tables to work with.

3 Populate the visual with data by selecting columns from your datasets.

Setup guide

Microsoft Learn

Matrix planning visual



The Matrix Planning visual is used for comprehensive planning and forecasting scenarios.

• Enter data for planning or forecasting scenarios in tabular format.

• Drill down into rows and columns.

• Changes in Power BI will automatically update tables in business performance planning.

Learn more

Filters

Visualizations

Data

Page 1

Storage Mode: DirectQuery (click to change)

90%

Roadmap - Dynamics 365 2024 Release Wave 1

Capability	Create a restricted list of values for a dimension in business performance planning	Prevent users from entering ad-hoc or incorrect dimension values when entering budgets, by creating a list of values with linked columns in business performance planning.
	Dimension and cube creation copilot in planning	Using dimension and cube creation copilot for planning, this process is simplified and streamlined by pointing to the Excel spreadsheets and having the system recommend dimensions, values, cubes and formulas.
	Automating approved recommended actions from Planning to Dynamics 365 Finance	Automating the plan to act to analyze process is possible with the Business performance capabilities, Power Automate and Dynamics 365 Finance, increasing business agility and reducing time to take action.
	Create drivers and formulas in planning app	Provide an additional capability to add calculation logic and methods for driver-based planning
	Edit dimensions and dimension values in grid for business performance planning	To model different scenarios, (e.g., a new division, product, or service) an editable grid will be added so the user can edit or add dimension values directly within the planning app, without having to launch Excel.
	Set up data flows in the business application planning app	Embedding data flows into the business application planning app unifies the setup and data integration experience in a single place, resulting in less steps and higher usability.
	Setup security for multiple users in business performance planning	Mass assign dimension and cube access for a user or group of users.
	Quick start templates in planning for Dynamics 365 Finance	Use out of the box templates provide a view of the organizations profit and loss. With editing capabilities, users can try out the entry experience immediately.

Resources

- [Business performance planning overview - Finance | Dynamics 365 | Microsoft Learn](#)
- [Business performance planning requirements - Finance | Dynamics 365 | Microsoft Learn](#)
- [Install business performance planning visuals - Finance | Dynamics 365 | Microsoft Learn](#)
- [Business Apps – Microsoft AppSource](#)
- [Yammer : Dynamics 365 and Power Platform Preview Programs : Private: xP&A](#)
- [Microsoft Dynamics 365 - Release Plans](#)
- [Microsoft Dynamics 365 Finance Premium Announcement](#)
- [Pricing | Microsoft Dynamics 365](#)
- Installation feedback form - <https://forms.microsoft.com/r/AzkYp6r5B2>

Q&A

Thank you

