

Business Performance Planning

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Agenda

- Overview
- Capabilities
- New Features
- More Capabilities
- Coming Soon
- Guidance and Resources
- Q&A

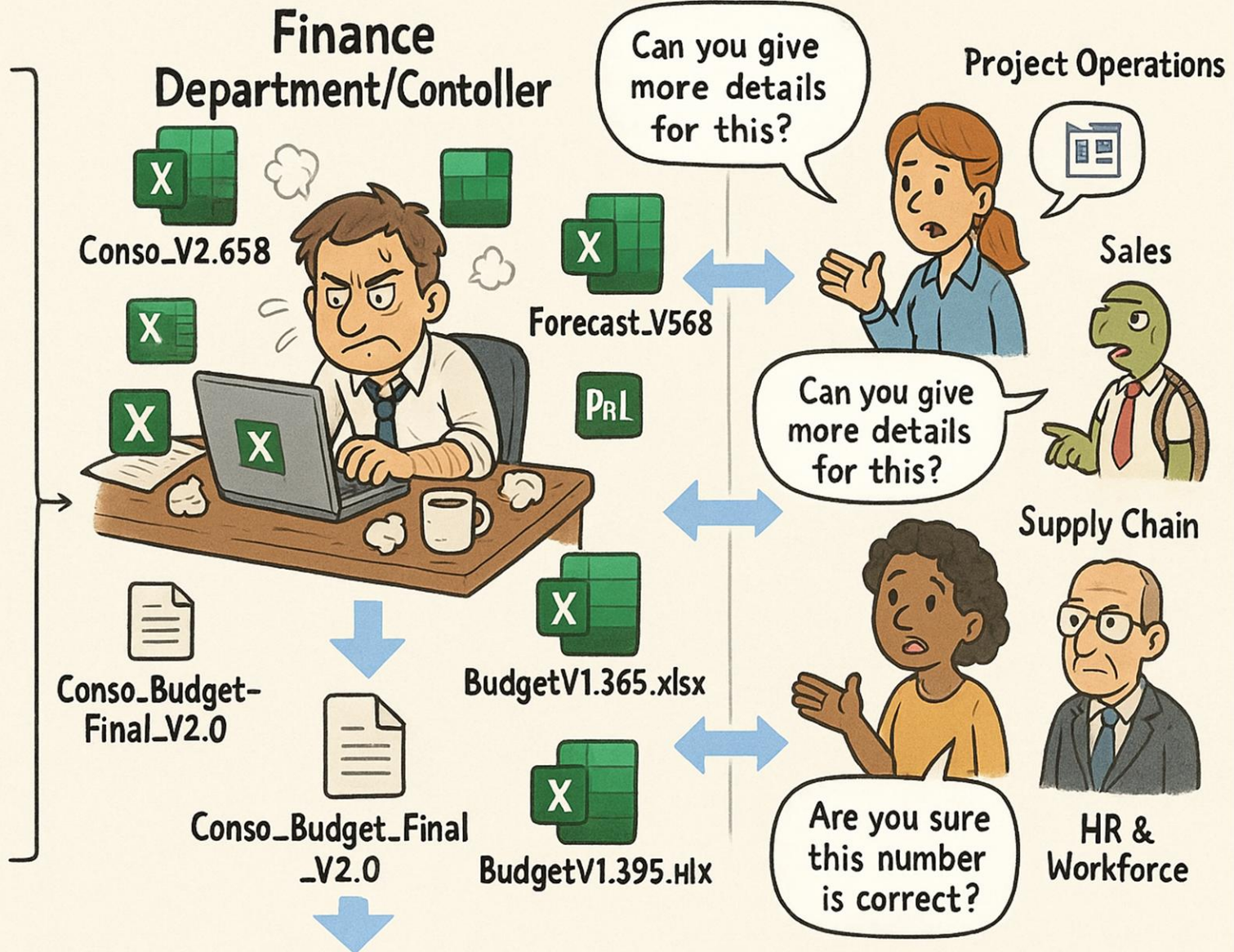


Overview

The Reality of Today's Planning Process

Systems of Record

- oracle **SAP**
- ariba
- ariba
- ariba
- Contracts
- Flat file Extract



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

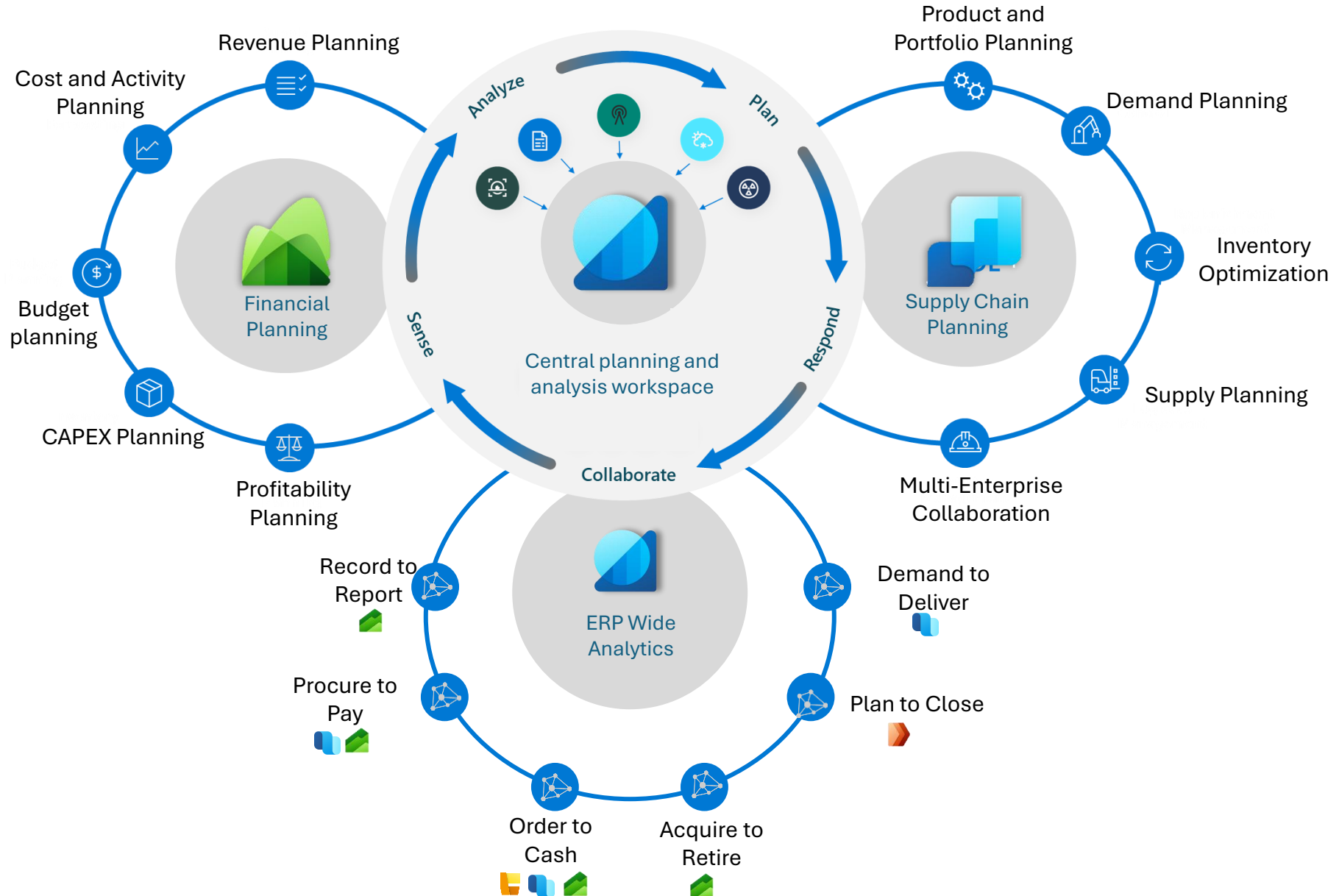
See insights and seamlessly drive these insights back into daily operations

Planning better with Copilot & Agent

Accurately capture nuances, underlying trends, complex patterns to inform forecasting and create what-if scenarios



Future of integrated planning and analysis



Overview





Business Performance Planning

Dynamics 365

Feature overview



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

Demo

OPEX Planning



- Model
- Home
- Dimensions
- Cubes
- Administration
- Dimension groups
- Users

Business performance planning

Perform financial analysis, forecasting, budgeting, and driver-based planning in extended planning and analysis for Dynamics 365.



Get started

Create dimension

Dimensions define how you want to filter and group your data. Common examples are time, rates, customers, 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](#)


Plan in Excel

The Excel Add-In enables you to create, edit and save your financial plans in a familiar Excel experience.

[↓ Install add-in](#) [Learn more](#)

Resources

Learn the basics



Business Performance Planning

Get started by learning more about Business Performance Planning.

[Learn about the product](#)



Power BI visuals

Planning leverages the familiar user experience of Power BI. Learn more about how to use Power BI in your planning process.

[Learn about Power BI visuals](#)



Install Power BI visuals

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

[Learn about installing Power BI visuals](#)

Try out visuals

[Matrix](#)

[Reporting](#)

[Comment](#)

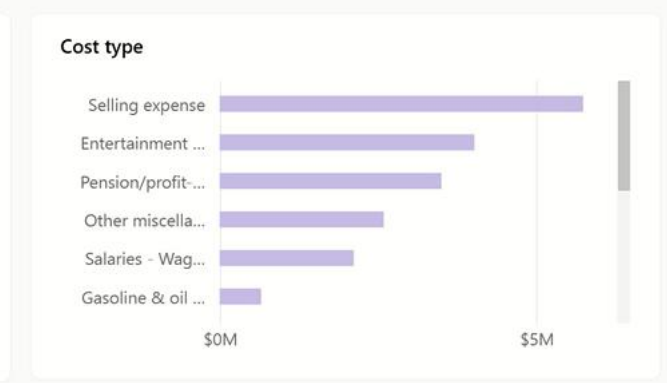
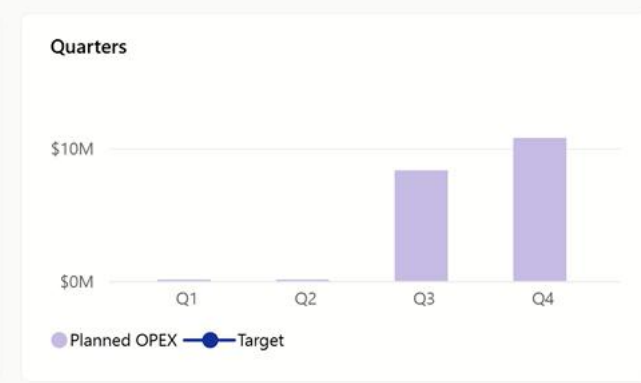
[Planning](#)

[Copy](#)

OPEX planning

Category: All Currency: All Scenario: Budget Account: All Date: 2025

Target (Blank) Currently planned \$19.23M Variance (\$19.23M) Actuals PY (Blank)

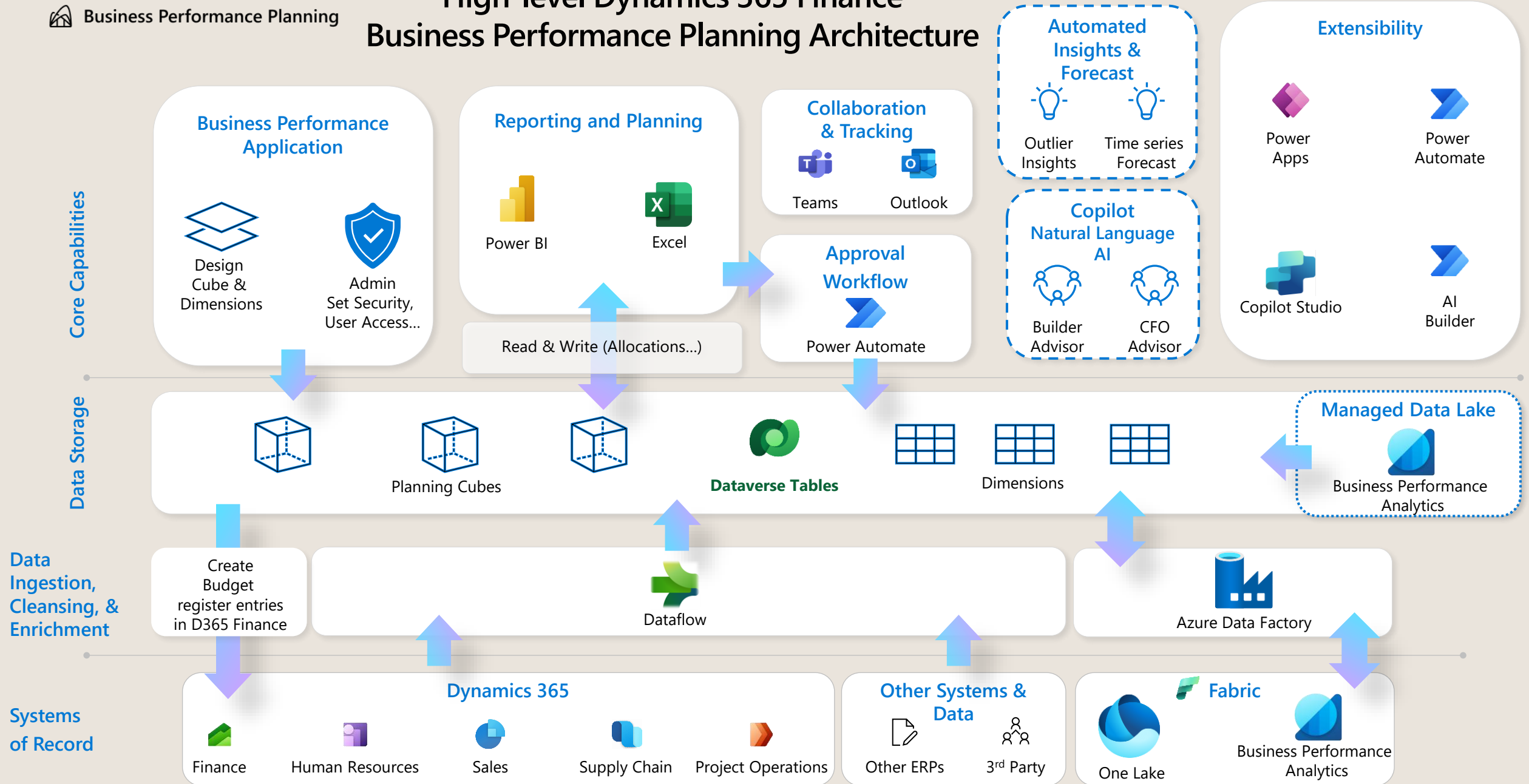


OPEX

Refresh Edit Multiselect Value Save

	2025_01	2025_02	2025_03	2025_04	2025_05	2025_06	2025_07	2025_08	2025_09	2025_10	2025_11	2025_12
Selling Expense	\$0	\$0	\$0	\$0	\$0	\$0	\$57,683	\$246,103	\$838,649	\$181,819	\$126,213	\$4,349,179
Travel and Entertainment Expenses	\$13,337	\$35,692	\$8,102	\$7,043	\$16,388	\$21,256	\$2,614,310	\$223,190	\$828,015	\$397,176	\$19,475	\$60,000
Other Employee Expenses	\$0	\$0	\$0	\$0	\$0	\$0	\$247,012	\$257,750	\$1,006,861	\$345,727	\$715,849	\$928,999
Manufacturing Expense	\$0	\$0	\$0	\$0	\$0	\$0	\$190,327	\$308,977	\$642,800	\$193,167	\$4,668	\$1,252,427
Salaries Expense	\$0	\$0	\$0	\$0	\$0	\$0	\$176,563	\$0	\$90,968	\$166,088	\$209,181	\$1,495,974
Administrative Expense	\$0	\$0	\$0	\$0	\$0	\$0	\$489,789	\$119,318	\$2,775	\$208,075	\$124,596	\$9,395

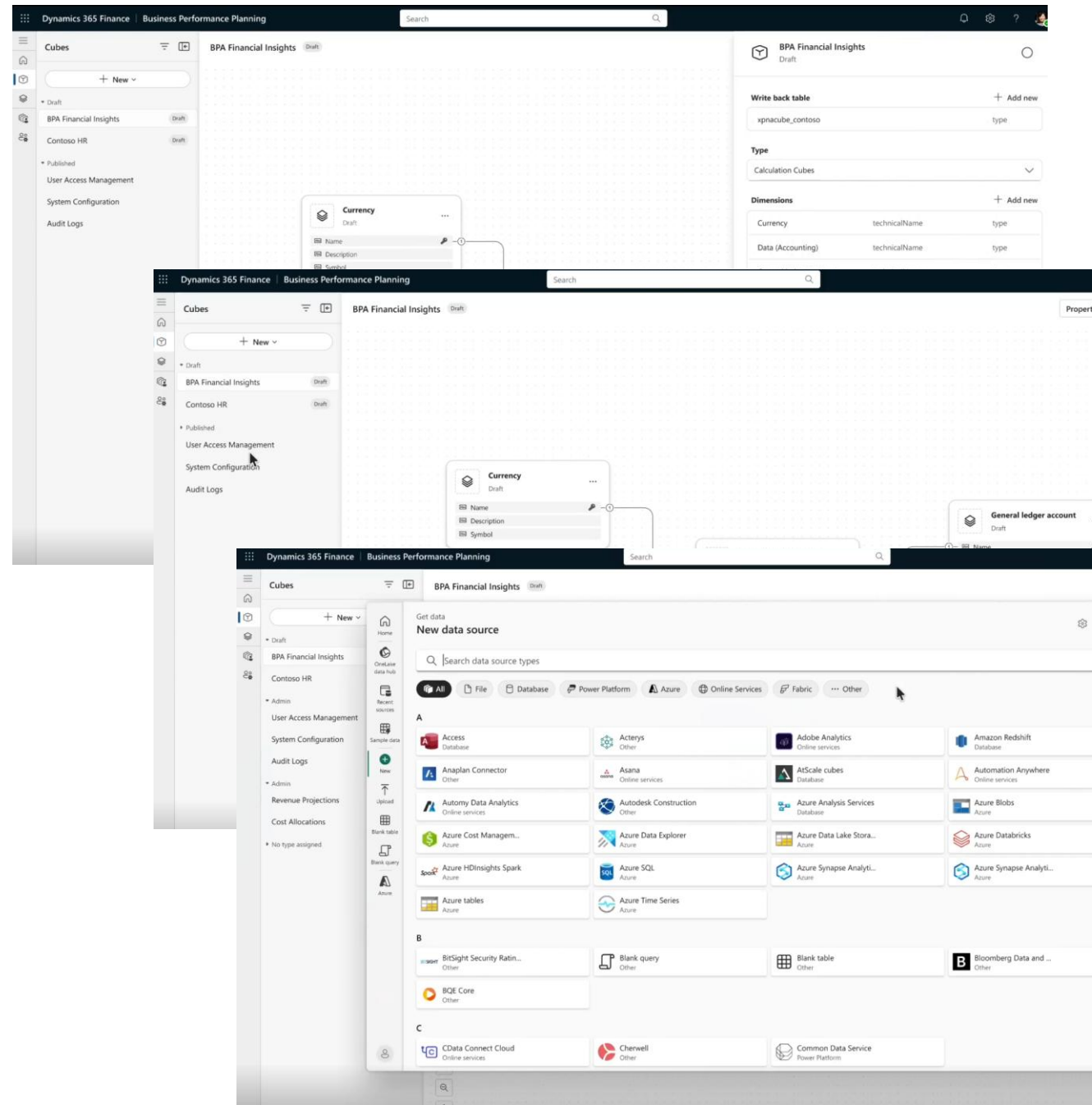
High-level Dynamics 365 Finance Business Performance Planning Architecture



Version 1.14

Next-Gen Data Model Builder

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



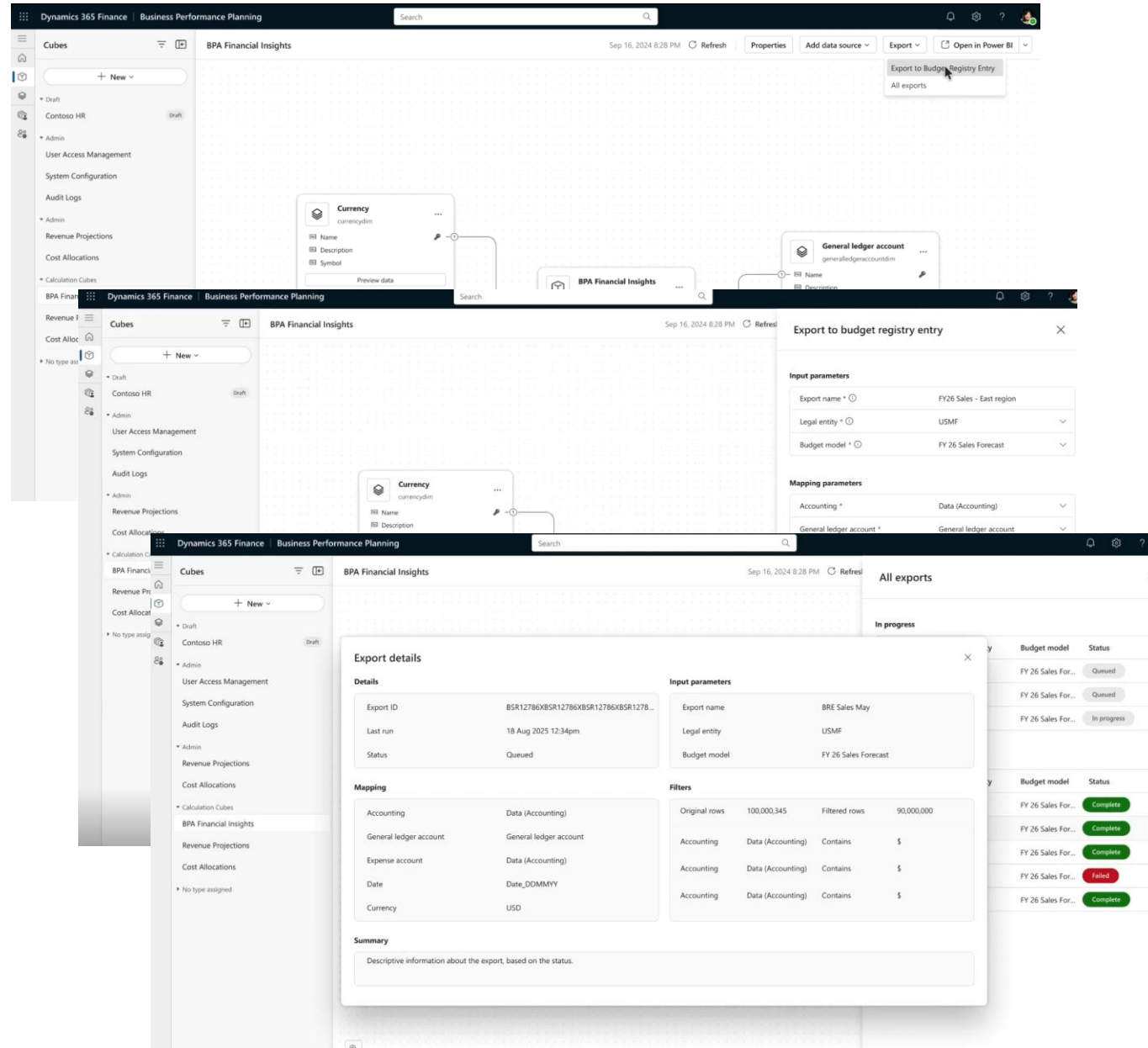


Model builder

feature overview

Version 1.14

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





Budget Write-back

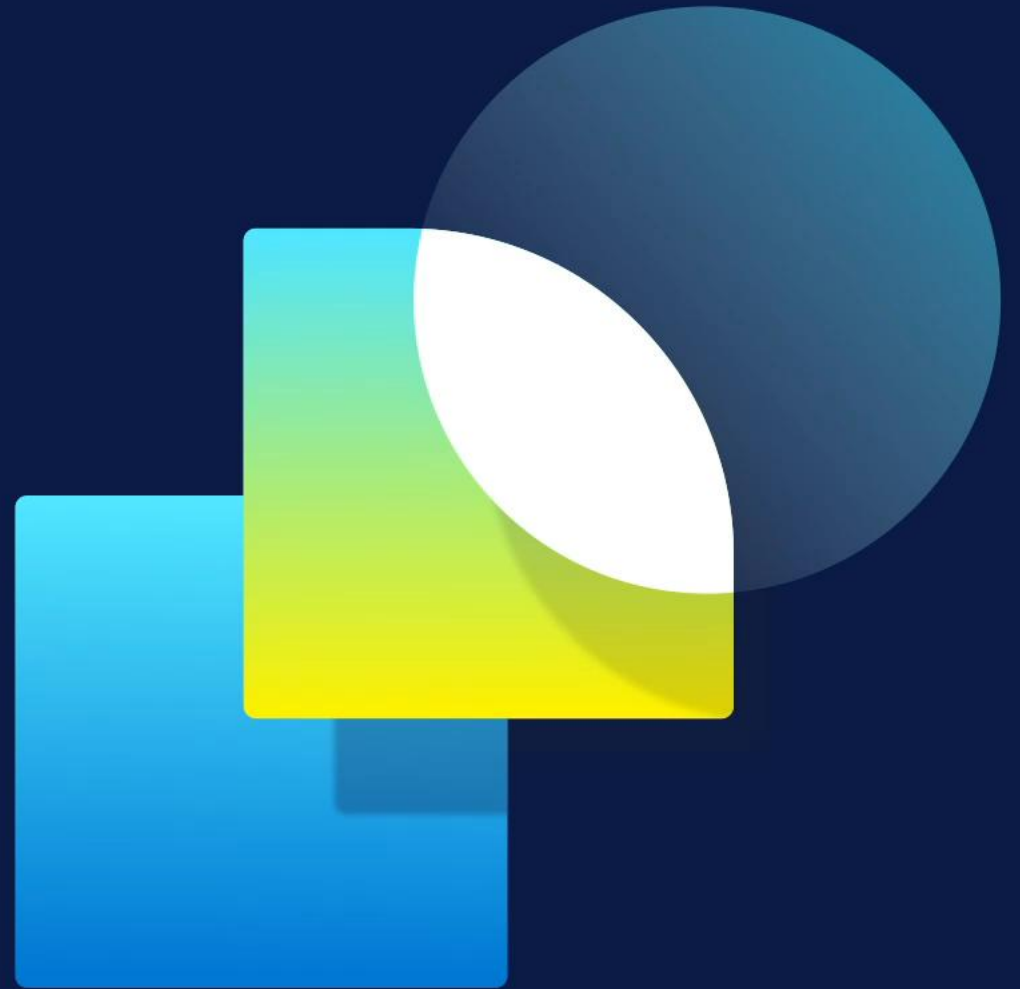
feature overview

Demo

OPEX and CAPEX Planning

Revenue and Income Planning

Reporting Statements



MS_Demo_v6 - RB31 Finance

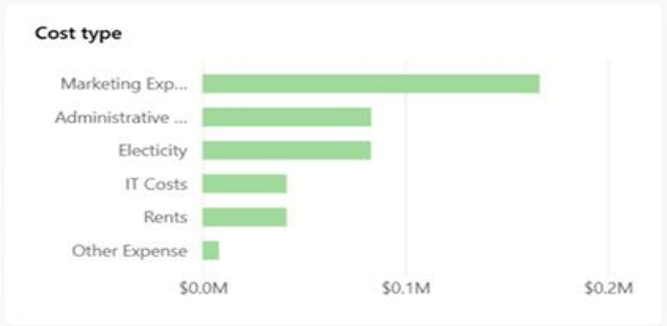
Pages

- Home
- Copilot
- Start
- Initiative Planning
- Strategic Planning
- Revenue Planning
- Price and COGS Scenarios
- Investment Planning
- Workforce Planning
- HR Assumptions
- OPEX Planning**
- New Scenario
- Reporting Statement
- FX-Rate
- Page 1
- Workloads
- Workspaces
- Finance
- MS_Demo_v6 - RB31...
- MS_Demo_v6 - RB28

OPEX planning

Cost type: All | Legal entity: All | Strategic initiative: All | Scenario: FC 3+9 (2025) | Date: 2025

Budget \$474.73K | **Currently planned \$425K** | **Variance \$50K** | **Personnel cost % 71.23 %**



OPEX

Refresh Edit Multiselect Value Save

	2025_05	2025_06	2025_07	2025_08	2025_09	2025_10	2025_11	2025_12
Legal	\$3,087	\$3,087	\$3,087	\$3,087	\$3,087	\$3,087	\$3,087	\$3,087
Investments	\$2,468	\$2,484	\$2,484	\$2,484	\$2,484	\$2,484	\$2,484	\$2,484
East	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468
Exec Mgmt	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468
IT Projects	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468
North	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468	\$2,468

Demo

Collaboration, Copilot, and
Administration



MS_Demo_v6 - RB31 Finance

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- MS_Demo_v6 - RB31 ...

Search

Power BI trial: 2 days left

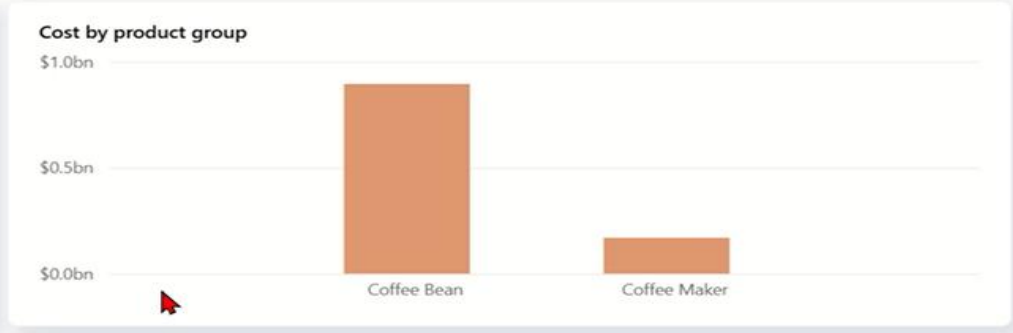
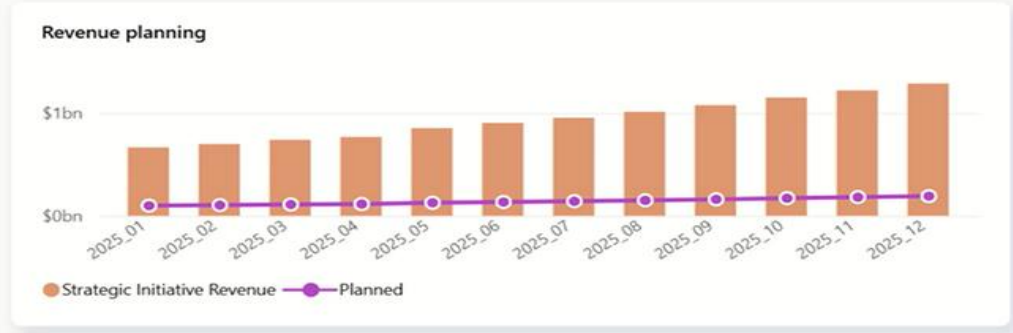
Copilot

File Export Share Explore Subscribe Set alert Monitor Edit

Revenue planning

Legal entity: All Product: All Scenario: FC 3+9 (2025) Date: 2025

Budget \$11.33bn **Currently planned \$1.69bn** **Variance \$9.64bn** **Discount amount 0.05** **Average discount 0.05**



Revenue planning

Refresh Edit Multiselect Value Save

	2025_01	2025_02	2025_03	2025_04	2025_05	2025_06	2025_07	2025_08	2025_09	2025_10	2025_11	2025_12	
US	\$17,672	\$18,552	\$19,606	\$19,918	\$23,026	\$24,126	\$25,440	\$27,074	\$28,854	\$30,754	\$32,886	\$34,918	\$302,826
Europe	\$13,388	\$14,050	\$14,898	\$15,884	\$16,882	\$18,028	\$19,044	\$20,088	\$21,342	\$22,918	\$24,066	\$24,970	\$225,558
	\$31,060	\$32,602	\$34,504	\$35,802	\$39,908	\$42,154	\$44,484	\$47,162	\$50,196	\$53,672	\$56,952	\$59,888	\$528,384

Demo

Under the hood



MS_Demo_v6 - RB31 Finance

Pages

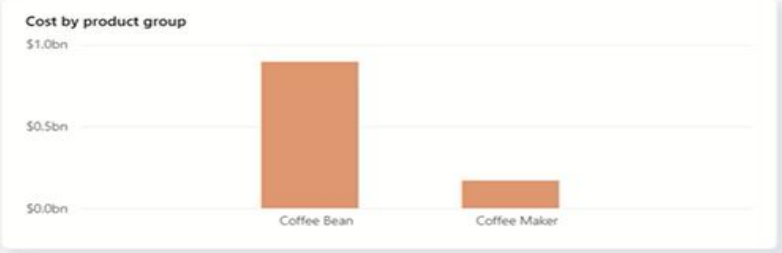
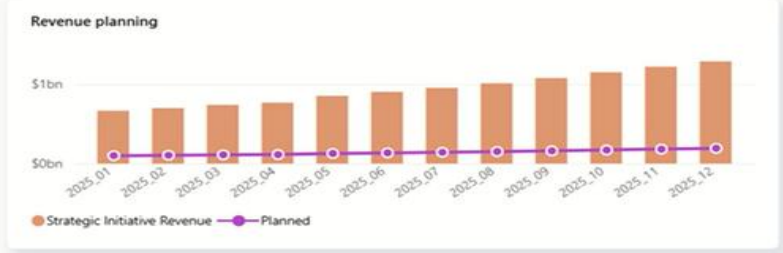
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- MS_Demo_v6 - RB31...

File Export Share Explore Subscribe Set alert Monitor Edit

Legal entity: All Product: All Scenario: FC 3+9 (2025) Date: 2025

Revenue planning

Budget **\$11.33bn** | Currently planned **\$1.69bn** | Variance **\$9.64bn** | Discount amount **0.05** | Average discount **0.05**



Revenue planning

	2025_01	2025_02	2025_03	2025_04	2025_05	2025_06	2025_07	2025_08	2025_09	2025_10	2025_11	2025_12	
US	\$17.672	\$18.552	\$19.606	\$19.918	\$23.026	\$24.126	\$25.440	\$27.074	\$28.854	\$30.754	\$32.886	\$34.918	\$302.826
Europe	\$13.388	\$14.050	\$14.898	\$15.884	\$16.882	\$18.028	\$19.044	\$20.088	\$21.342	\$22.918	\$24.066	\$24.970	\$225.558
	\$31.060	\$32.602	\$34.504	\$35.802	\$39.908	\$42.154	\$44.484	\$47.162	\$50.196	\$53.672	\$56.952	\$59.888	\$528.384

Copilot

Dig deeper

Write a summary

What is this report page about? Give me a concise summary of content.

The "Revenue Planning" report page focuses on financial planning and performance for the year 2025 under the scenario "FC 3+9 (2025)." It provides detailed data on planned and actual revenues, cost of goods sold (COGS), budget, and variance, segmented by product groups such as Coffee Bean and Coffee Maker 1 | 2 | 3 | 4 | 5.

Key metrics include:

- Budgeted strategic base revenue:** \$11,329,666,766.44
- Currently planned revenue:** \$1,687,339,341.48
- Variance between budget and planned revenue:** \$9,642,327,424.96
- Average discount applied:** 5% 3 | 4 | 5 | 6 | 7.

The report breaks down COGS by product group, with Coffee Bean at \$894,660,951.46 and Coffee Maker at \$169,863,159.62. Monthly revenue planning figures are provided, showing both strategic initiative revenue and planned revenue for each month of 2025 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12.

Additionally, the report includes granular revenue data by geography, segment, product group, and product name, supporting detailed analysis of revenue streams across different markets and products 8 | 9 | 10 | 11 | 12.

Is this response helpful?

Ask a question about this report

Copilot uses AI. Always review content for mistakes. [Learn more](#)

Microsoft Dynamics 365

OPEX Reporting

Review the operating budget

Select account

All

Select business unit

All

Select company

All

Select department

All

Budget FY24
2024

	2024_01	2024_02	2024_03	2024_04	2024_05	2024_06	2024_07	2024_08	2024_09	2024_10	2024_11	2024_12
	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount
- SELLEXP	\$308,518	\$304,282	\$299,698	\$301,031	\$294,886	\$302,079	\$307,736	\$320,438	\$340,681	\$367,019	\$403,017	\$116,392,848
Advertising Expense	\$191,465	\$188,150	\$185,560	\$186,165	\$182,545	\$186,901	\$190,385	\$197,716	\$209,748	\$225,250	\$246,076	\$116,212,644
Selling Expense	\$110,553	\$109,798	\$107,805	\$108,533	\$106,007	\$108,845	\$111,796	\$117,167	\$125,377	\$136,214	\$151,385	\$174,649
Promotional Expense	\$6,500	\$6,333	\$6,333	\$6,333	\$6,333	\$6,333	\$5,556	\$5,556	\$5,556	\$5,556	\$5,556	\$5,556
- SALARYEXP	\$779,816	\$779,570	\$857,518	\$766,956	\$751,871	\$705,444	\$685,839	\$749,096	\$678,104	\$689,726	\$733,429	\$708,103
Salaries - Wages Expense	\$642,041	\$646,855	\$724,021	\$643,128	\$632,283	\$585,616	\$563,269	\$617,922	\$544,675	\$544,675	\$569,919	\$520,437
Payroll Tax Expense	\$122,991	\$118,081	\$119,261	\$109,448	\$105,713	\$105,398	\$107,563	\$115,107	\$115,734	\$125,204	\$140,644	\$160,162
Salaries - Other Expense	\$15,097	\$14,946	\$14,547	\$14,693	\$14,188	\$14,755	\$15,345	\$16,420	\$18,062	\$20,229	\$23,263	\$27,916
Payroll Allocation	(\$312)	(\$312)	(\$312)	(\$312)	(\$313)	(\$326)	(\$339)	(\$352)	(\$366)	(\$381)	(\$397)	(\$413)
- OTHEREMEXP	\$180,516	\$192,184	\$213,583	\$189,140	\$184,880	\$184,361	\$172,190	\$212,839	\$198,901	\$189,664	\$243,412	\$243,994
Pension/Profit-Sharing Pla...	\$109,925	\$109,075	\$107,695	\$106,031	\$101,881	\$103,587	\$104,567	\$111,545	\$120,385	\$133,389	\$151,948	\$178,954
Group Health/Life Insuranc...	\$62,358	\$74,769	\$97,010	\$74,769	\$74,121	\$73,473	\$60,323	\$94,236	\$71,996	\$49,755	\$84,407	\$59,057
Training and Personal Dev...	\$4,370	\$4,370	\$4,370	\$4,370	\$4,370	\$4,370	\$4,370	\$4,370	\$4,370	\$4,370	\$4,370	\$4,370
Workers Compensation Ex...	\$2,042	\$2,150	\$2,687	\$2,150	\$2,687	\$2,150	\$2,150	\$2,687	\$2,150	\$2,150	\$2,687	\$1,612
Employee Benefit Program...	\$1,820	\$1,820	\$1,820	\$1,820	\$1,820	\$780	\$780					
- OTHEREXP	\$150,275	\$176,357	\$161,776	\$149,513	\$163,998	\$164,374	\$148,548	\$192,903	\$169,421	\$148,274	\$196,765	\$366,841
Miscellaneous Expense	\$79,576	\$94,864	\$90,941	\$78,950	\$94,678	\$93,241	\$77,020	\$119,279	\$91,375	\$64,096	\$107,288	\$271,120
Interest on Bank Loans	\$70,698	\$71,433	\$70,835	\$70,563	\$69,320	\$71,132	\$71,528	\$73,624	\$78,047	\$83,336	\$89,477	\$95,721
Currency Adjustment Loss ...		\$10,060										
Other Miscellaneous Expen...	\$1									\$842		
Intercompany Purchases - ...											(\$0)	(\$0)
Rounding Difference	(\$0)			(\$0)	(\$0)		(\$0)	(\$0)	(\$0)	\$0	(\$0)	(\$0)
- ADMINEXP	\$155,034	\$140,746	\$142,274	\$141,461	\$142,242	\$141,180	\$142,179	\$142,171	\$141,528	\$142,387	\$141,616	\$142,559
Rent Expense	\$51,764	\$47,368	\$47,368	\$47,368	\$47,368	\$47,368	\$47,368	\$47,368	\$47,368	\$47,368	\$47,368	\$47,368
Lease Expense	\$40,664	\$35,590	\$37,163	\$36,377	\$37,163	\$36,377	\$37,163	\$37,163	\$36,377	\$37,163	\$36,377	\$37,163

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

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

2026 Wave 2 In planning*
(Oct-26 to Mar-26)



General Availability

- [Next-Gen Data Model Builder](#)
- Seamless [Budget Write Back into D365 F&O](#) Budget Registry Entry Module
- New Matrix & Table Visual Updates

March '26

- Revamp of Linked Table experience
- Budget Write-Back with Smart Account structure Validation (*Private Preview*)
- Jump-Start Planning with OOB Demo Dataset
- Dynamic Environment Binding for BPP Visuals

April '26

- Streamline Finance Integration with BPA Connector
- Dimension Security Group experience update

May '26

- Quick-Start OPEX Planning
- Calculated Column on Dimensions

June '26

- Cube Audit trail in BPP App
- Add driver on published cube

July '26

- Excel Add-ins improvement

September '26

- Automated What-If Scenario Planning with Copilot

October '26

- Simplify Approvals with Workflow Automation

Vision Video





Guidance

Join the Viva Engage group

Start with existing data and leverage the Data Model Builder to get started quickly

Build your dashboards in Power BI and combine BPP dashboards with other reports

Don't create a new Data Warehouse in BPP; refine your data model first and just work with your planning data

Contributors need Ops activity licenses; Power Users and Admins require Finance Premium

For complex scenarios, refine your data model first

Work with aggregated data where possible

...



Documentation:

Questions ?

