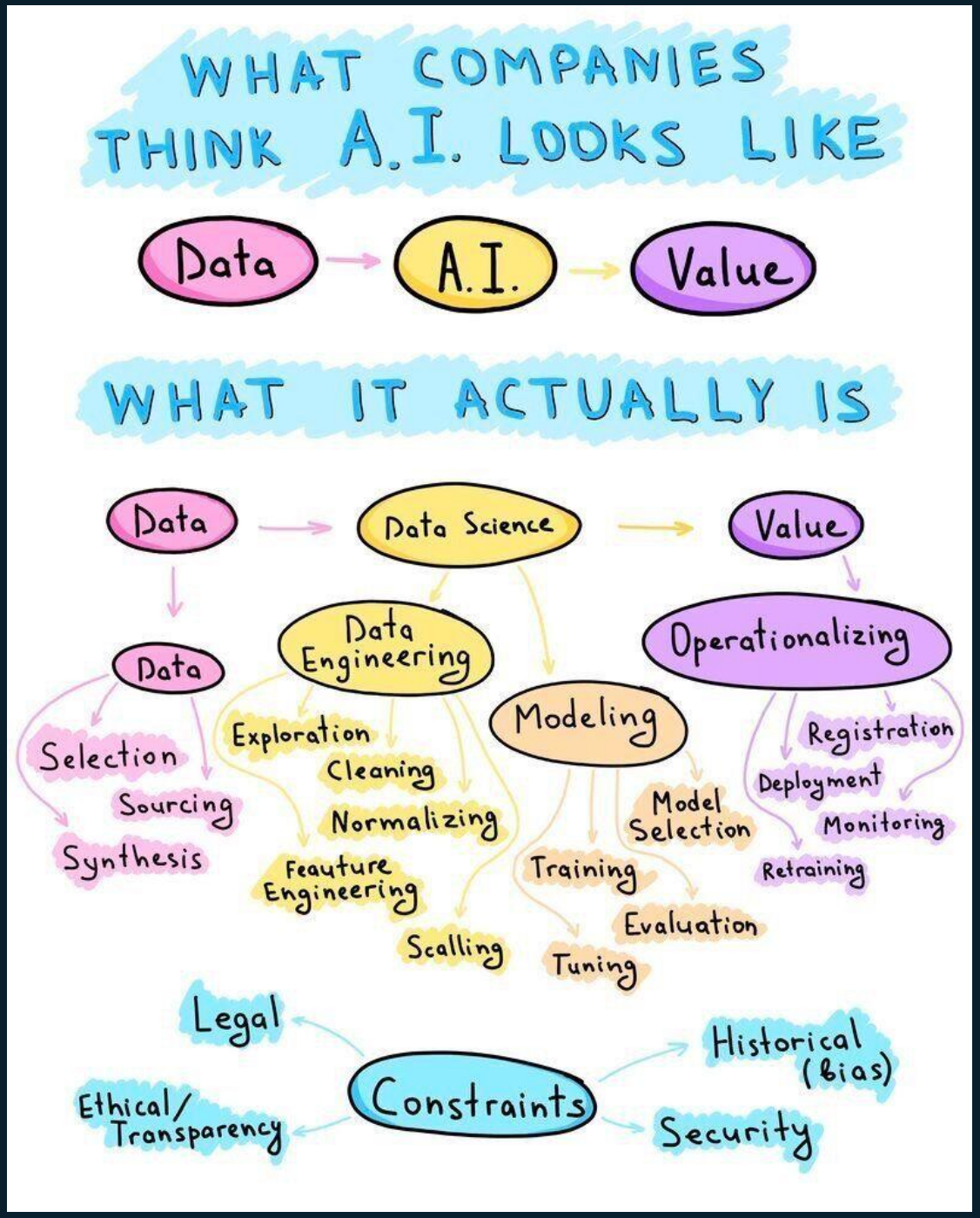
Getting AI Ready with D365 F&O

Experience the new era
of AI-powered business

Espen Stensaas & Henrik Jacobs

CEO Generative AI
Process Mapping
Data Quality
Governance
Siloed Systems


WHAT COMPANIES THINK A.I. LOOKS LIKE
Data
A.I.
Value
WHAT IT ACTUALLY IS
Data
Data Science
Value
Data
Data Engineering
Operationalizing
Selection
Sourcing
Synthesis
Exploration
Cleaning
Normalizing
Feauture Engineering
Scalling
Modeling
Training
Evaluation
Tuning
Model Selection
Registration
Deployment
Monitoring
Retraining
Legal
Constraints
Historical (Bias)
Ethical/ Transparency
Security

Business applications are being
reimagined at their core

CHAT

What are the characteristics of a successful finance and operations leader?

Searching for: **what are the characteristics of a successful finance and operations leader**

Generating answers for you...

- Agility
- General management understanding
- Intensely entrepreneurial
- Thriving in ambiguity and chaos
- Risk takers as well as risk managers
- Highly collaborative

Other qualities: excellent financial acumen, honesty/integrity, balance, people skills and adaptability/flexibility

Stop Responding

New topic

What are the characteristics of a successful finance and operations leader?

Agility is critical

85%

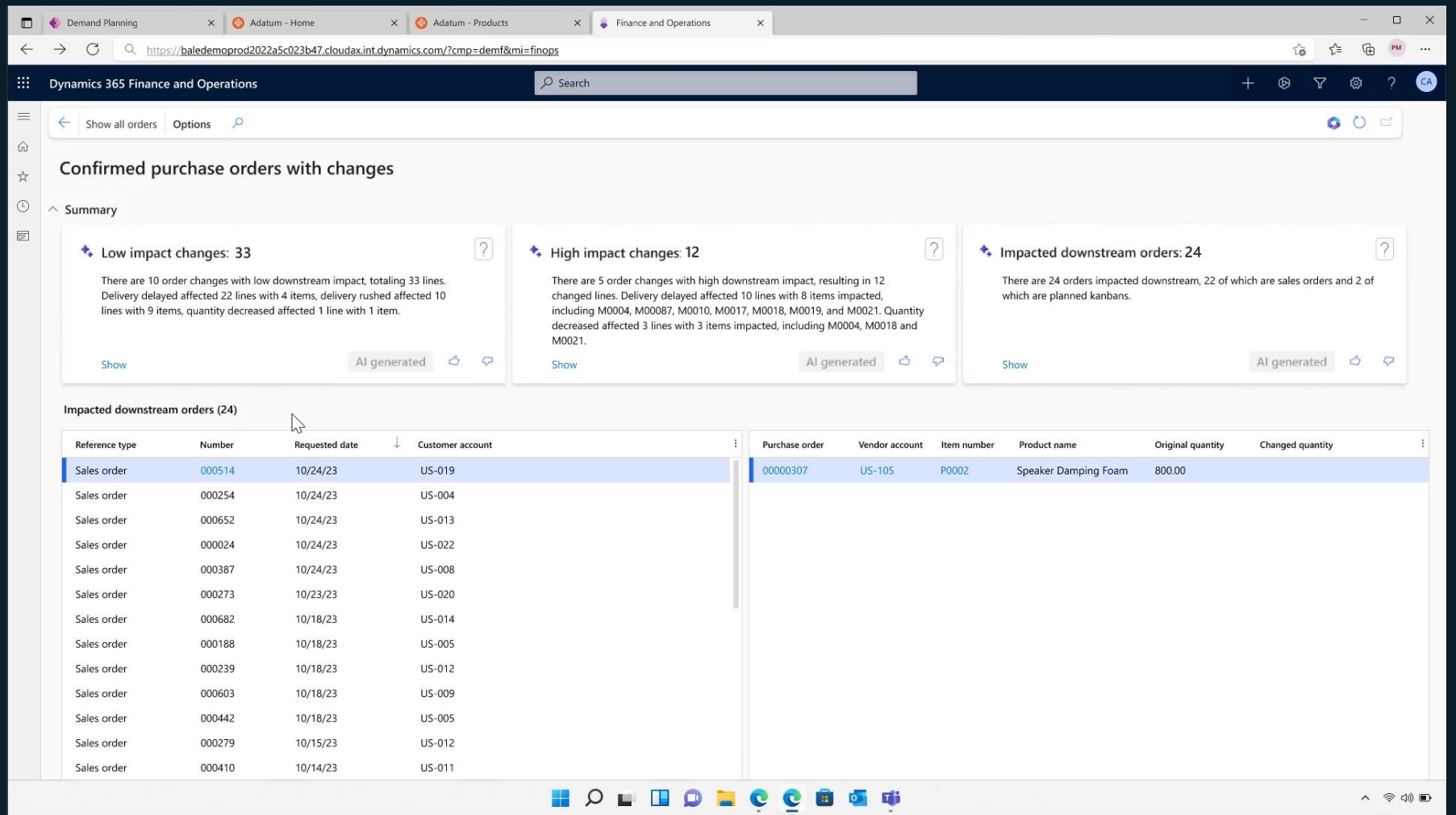
agree that increasing **agility** to respond quickly to changing market conditions as a competitive differentiator.

90%

see **automating** routine business processes to drive up productivity gains as a key to achieving **agility**.

Source: Future of ERP

A new era of AI-led ERP



A Microsoft Copilot for everyone

Dynamics 365 Copilots in procurement

Microsoft

Dynamics 365 Copilots in procurement

Microsoft

Search people ...

September 2023

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Work items assigned to me

- Cash advance request : Record ret...
- Expense reports : Record returned
- Catalog : catalog approval
- Expense reports : Expense report a...
- Cash advance request : Cash advan...
- Approve travel requisition
- Catalog : catalog approval

APPS

- Business performance analytics (preview)

WORKSPACES

- Bank management
- Benefits
- Budget planning
- Business document management
- Business processes for human resources
- Business processes for payroll
- Cash overview - all companies
- Cash overview - current company
- Catalog management
- Channel merchandising configuration validator
- Collections coordinator (preview)
- Commerce pricing and discount management
- Compensation management
- Confirmed purchase orders with changes
- Cost accounting ledger administration
- Cost administration
- Cost analysis
- Cost control
- Customer payments
- Data management
- Data validation checklist
- Distributed order management
- Electronic reporting
- Employee development
- Employee self service
- Engineering change management
- Expense management
- Financial analysis - current company
- Financial period close
- Fixed asset management
- General journal processing
- Invoicing
- Learning
- Leave and absence
- Ledger budgets and forecasts
- Maintenance request management
- Optimization advisor
- Outbound work monitoring
- Outbound work planning
- Payment workspace
- Payroll management
- People
- Personnel management
- Product readiness for discrete manufacturing
- Product readiness for process manufacturing
- Project management
- Purchase order confirmation
- Purchase order preparation
- Purchase order receipt and follow-up
- Recruitment management
- Released product maintenance
- Resource lifecycle management
- Retail and Commerce IT
- Sales order processing and inquiry
- Store management
- Supply risk assessment
- System administration
- Task management
- Vendor bidding
- Vendor information
- Vendor invoice automation
- Vendor invoice entry
- Vendor payments

Demo Financial Performance | Share | Edit | Duplicate | Details | Rename | Data refreshed on: 9/13/2023, 8:50:07 AM

Financial performance

Revenue

0.07M✓

Expense

288.73K✓

Budget vs Expenses

(37.55K)

Currency parameter

Accounting currency

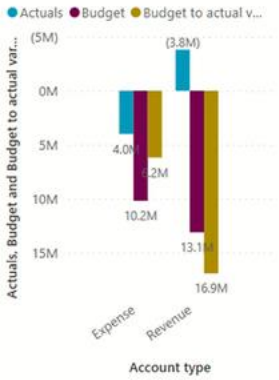
Legal entity

All

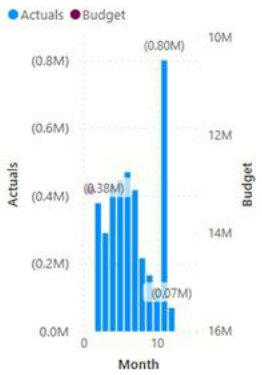
Fiscal period

All

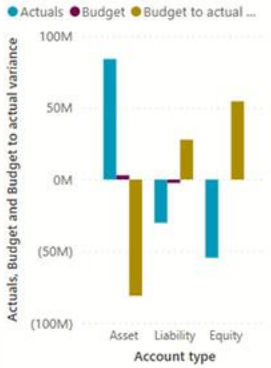
Budget to actual profit & loss



Budget to actual revenue



Budget to actual balance sheet



Filters

Financial Performance

Copilot PREVIEW

Have a question about this app? Ask Copilot.

Copilot can answer questions about the data in this app, and help you navigate. It's always learning from your feedback.

Show expense details

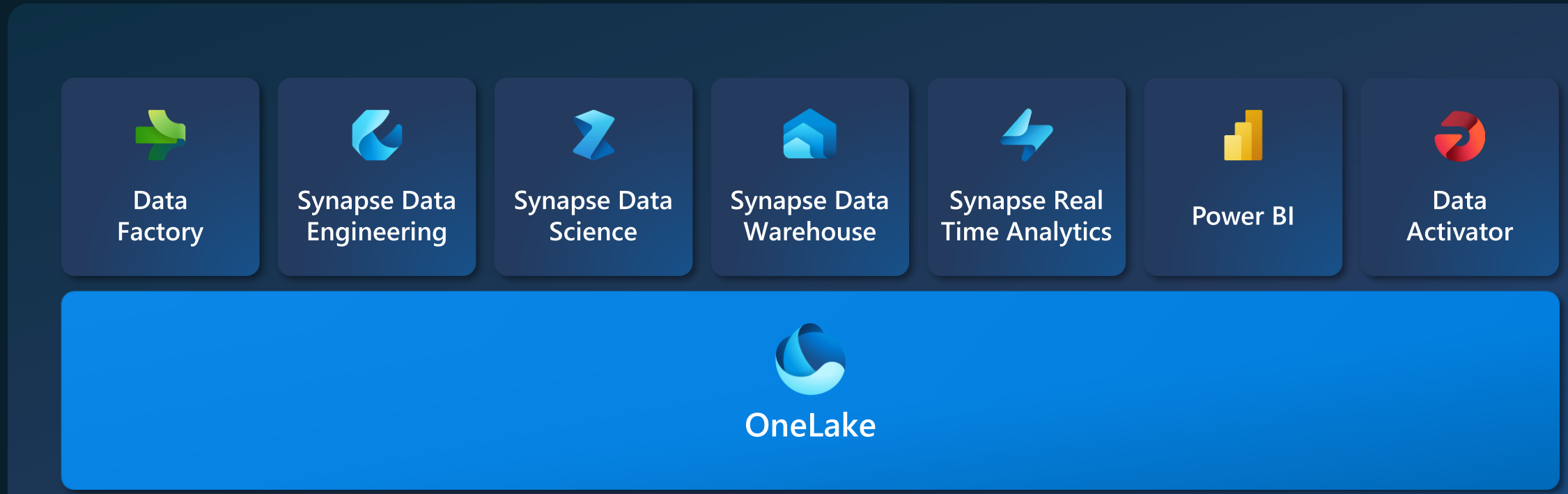
Ask a question about the data in this app, or tell me what you're looking for

0/500

Make sure AI-generated content is accurate and appropriate before using. See terms

Microsoft Fabric

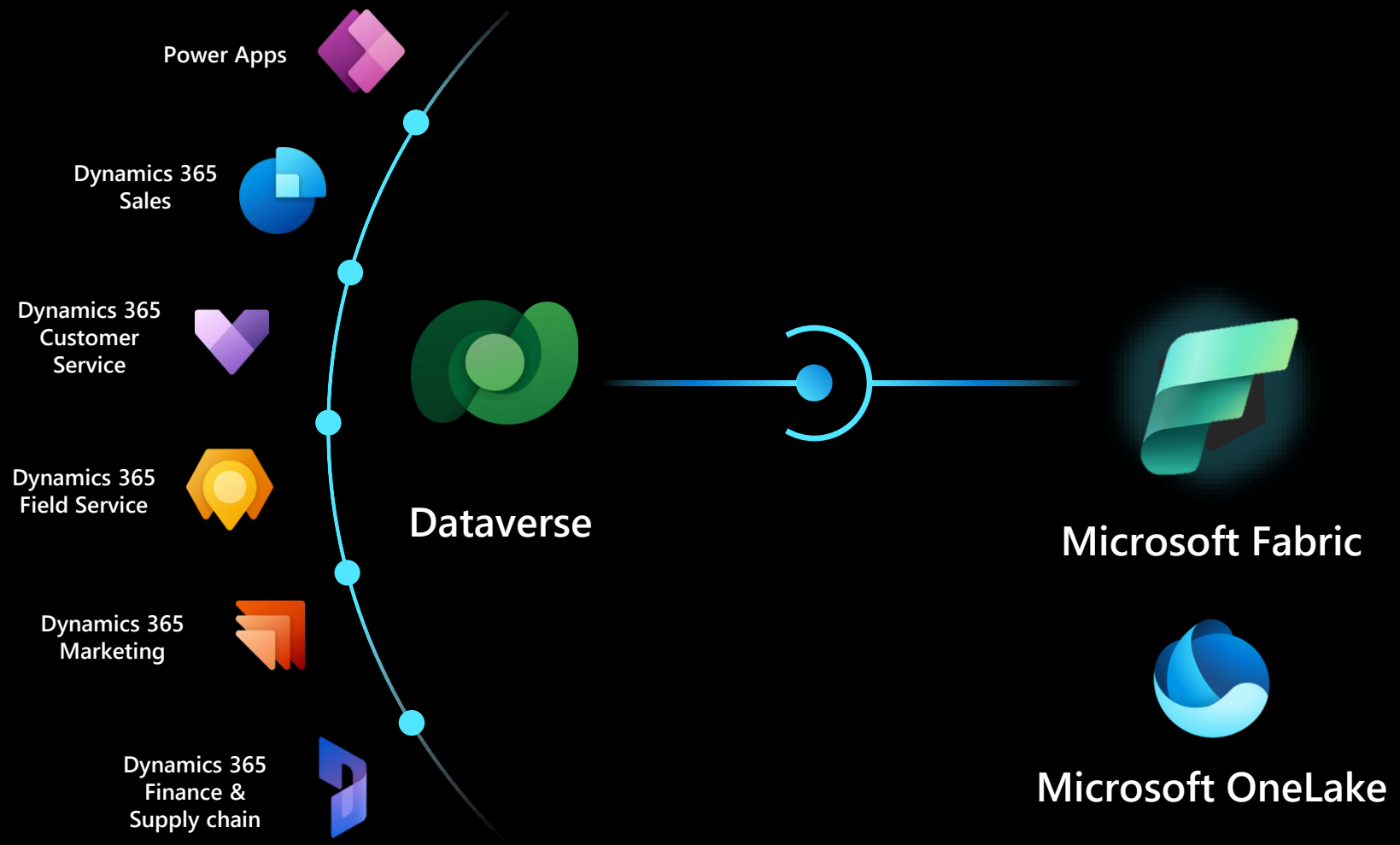
Data analytics for the era of AI



In Public preview

Power platform & Microsoft Fabric

Dynamics & Dataverse data available in Microsoft Fabric immediately, no ETL, no data copy



Microsoft Power Platform

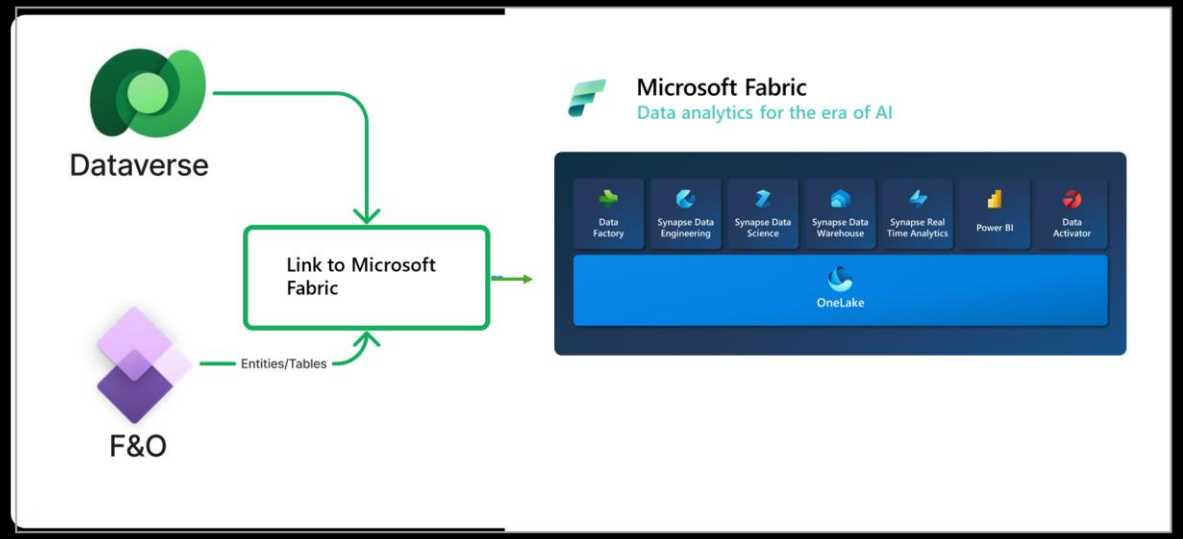
Power Platform and Microsoft Fabric

Mudit Mittal

Principal Group Engineering Manager
Microsoft

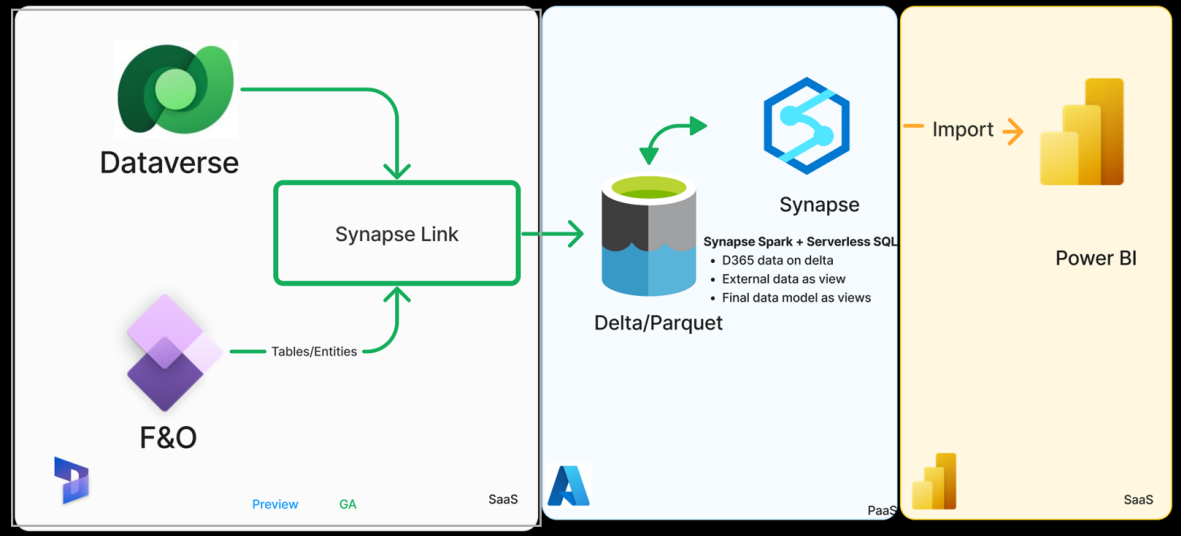
Link to Fabric further simplifies data integration

Link to Fabric



- No ETL, No data copy, no third-party tools
- No need to bring storage - uses DV storage
- Data stays in Dataverse – secure access in Fabric
- All tables activated
- F&O table support coming soon

Synapse Link



- Bring your own storage and Synapse
- Export data to your own lake and integrate yourself
- Choose tables to be activated
- Includes F&O data (GA)

Microsoft Dynamics 365

Dynamics data in Synapse Link for Dataverse

- Transitioning from Export to Data Lake to Synapse Link

Milinda Vitharana, Principal Product Manager, Microsoft Dataverse
in/milindav

Jila Yadav, Principal Solution Architect, Microsoft Dynamics
in/JJYadav

Classified as Microsoft Confidential

The three A's of Operational Innovation

Artificial intelligence

Automation

Analytics

5 ways of getting ready for AI

1) Create a **AI Center of Excellence**
2) **Prepare your data** and ensure compliance with just enough access
3) **Develop your AI plan** for the organization – Technical & Organizational
4) **Skill your people**
5) Stay up to date – **leverage standard & extend where needed**

Business Applications Copilots

Customer Experience	Service	ERP	Power Platform
Sales	Customer Service	Business Central	Power Apps
Customer Insights	Field Service	Finance	Power Automate
Field Service	Power Virtual Agents	Project Operations	Power Virtual Agents
		Supply Chain Management	Power Pages
			Power BI

Common questions on moving to the Cloud

Will it be Secure?

Will it protect our Privacy?

Is the Performance good enough?

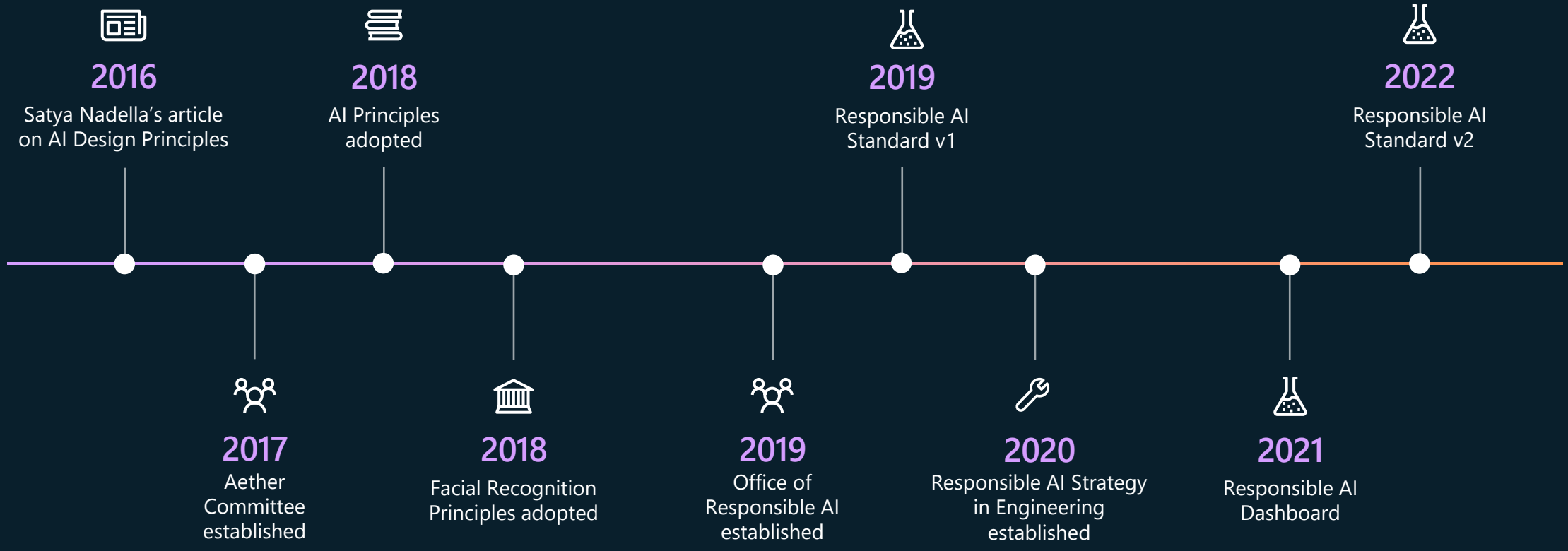
Will I have enough insight to what is going on?

Will I have enough control over the solution?

130,000 organizations

have experienced Copilot in
Dynamics 365 & Power Platform

Our responsible AI journey



Responsible AI empowers
the world to achieve more

Microsoft Tech Briefs

With Georg Glantschnig, VP Dynamics 365 F&O

Reg. now Open

Dec 06 — Redefine ERP in the Era of AI

Henrik will be joined by Georg Glantschnig to show the transformative power of AI-infused ERP systems.

- **AI-Driven Efficiency:** Learn how AI revolutionizes finance and supply chain operations, boosting efficiency and agility.
- **Seamless Cloud Transition:** Gain insights into the smooth journey toward cloud-based ERP solutions, equipped with essential tools for your success.
- **Empower Your Team:** Experience how AI-powered ERP systems empower individuals across your organization to excel and drive innovation.

Registration: Microsoft Events - Microsoft Tech Brief: Redefine ERP in the Era of AI

Scan QR-code for agenda & registration