

What's new?

Dynamics 365 Finance & Operations (AI ERP)
Release wave 1 - 2024

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Dynamics 365

Finance & Operations



Finance



Supply Chain
Management



Project
Operations



Commerce



Human
Resources

AI ERP





Dynamics 365

Finance & Operations

F&O – Tier 2 application development

Offline support for Dynamics 365 finance and operations virtual tables



Copilot

Enable support for asynchronous operation in dual-write functionality

One Dynamics One Platform

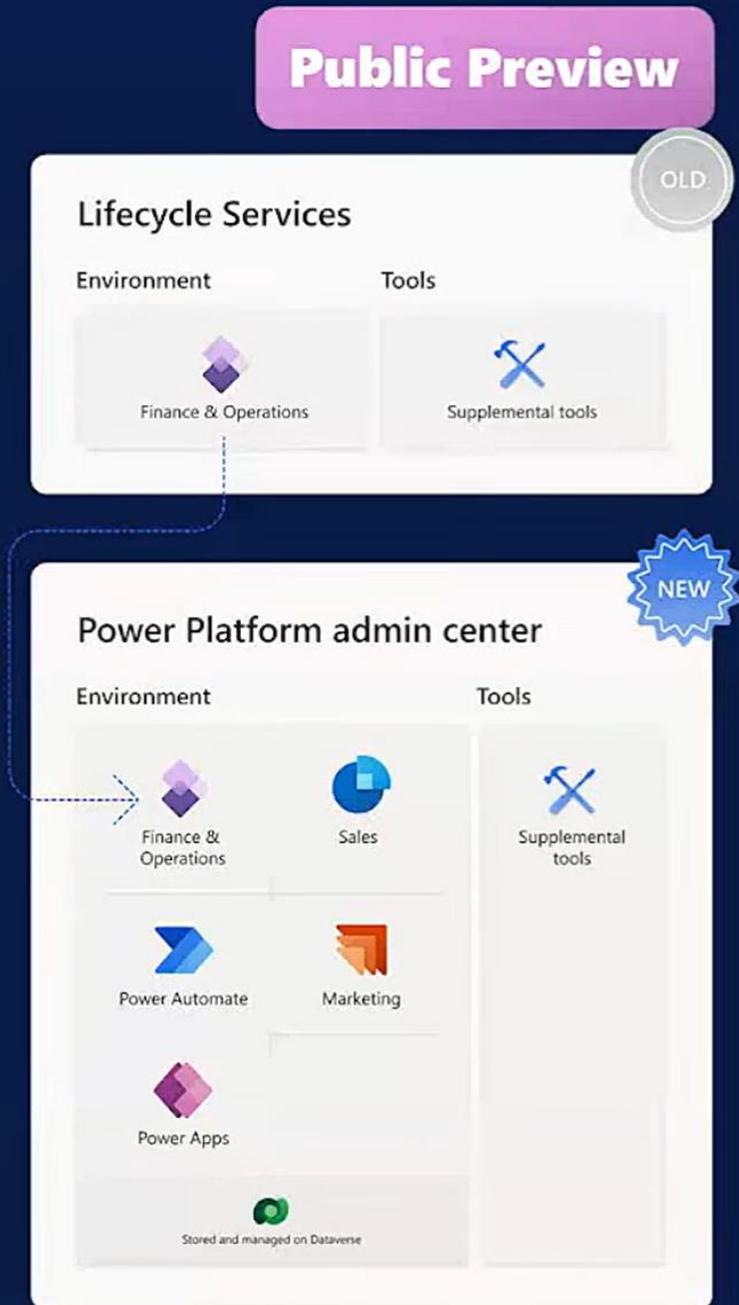


AI Actions

One Admin, One Admin Center

Finance and Operations runs on Dataverse

- Provides for a unified **environment lifecycle** as well as **application lifecycle**
- **Single admin portal** for managing low-code as well as business applications
- Robust automation support in **Connectors, CLI, PowerShell, and REST APIs**



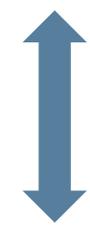
To exit full screen, swipe down from top of screen or press F11

Business performance planning	Invoice capture		
Cost accounting ledger administration	Feature management	Outbound work monitoring	Released product maintenance
Cost administration	Financial analysis - all companies	Outbound work planning	Resource lifecycle management
Cost analysis	Financial analysis - current company	Payment workspace	Retail and Commerce IT
Cost control	Financial period close	Payroll management	Sales order processing and inquiry
Customer credit and collections	Fixed asset management	People	Sales return processing
Customer invoicing	General journal processing	Personnel management	Store financials

 F&O Copilot



AI Actions & Plugins



 Dataverse

 M365

 Copilot Studio

CORRE

FINANCE

Core Finance



Dynamics 365 Finance

 **Copilot for Finance**

Customer summary

Collection coordinator

Archive data

Vendor invoice center

Business Performance



Microsoft Copilot for Finance

Your everyday AI assistant for finance professionals

Natural Language



Large Language Models (LLMs)



Web grounding



Microsoft Graph grounding



Enterprise-grade data protection



ERP and Financial Systems



Commercial data protection



The Internet



Microsoft 365 Apps



Copilot Studio

Microsoft Dynamics 365 Finance
Finance-specific actions, insight,
and recommendations

Microsoft Copilot for Finance

Accelerate business impact and reduce cost with a copilot in the flow of work.

GA Juni

Copilot for Finance is experienced in Microsoft 365 and connects to your financial systems

Accelerate impact
Deliver new insight and reduce the time it takes to compile and analyze data

Reduce cost
Drive efficiency by applying AI to optimize manual, labor-intensive processes

Row Labels	Actual	Forecast
Sum of Amount	30,940,442	28,567,057
Row Labels	Actual	Forecast
5 Inflow	30,608,026	35,214,249
6 Cash sales	1,468,420	2,300,302
7 Incoming customer payments	4,035,395	3,142,797
8 Interest, other income	8,102,267	2,287,059
9 Loan proceeds	4,742,563	7,513,302
10 Other receipts	8,137,609	5,812,170
11 Returns and allowances	4,441,188	5,046,188
12 Outflow	21,832,294	22,499,190
13 Advertising	1,571,927	729,393
14 Commissions and fees	1,616,199	1,931,286
15 Contract labor	1,234,329	274,757
16 Employee benefit programs	552,463	937,842
17 Insurance (other than health)	381,560	622,243
18 Interest expense	1,854,117	664,358
19 Materials and supplies (in COGS)	488,578	1,331,378
20 Meals and entertainment	1,390,781	1,685,580
21 Miscellaneous	1,026,940	157,262
22 Mortgage interest	194,710	1,189,551
23 Office expense	1,707,982	1,942,299

Analyze variances
Create summary report

Selected criteria and variances

Criteria

- February forecast varies from actuals more than 10%

Variances

- 2 pairs of variances have been identified that match this criteria.
- E9 | F9**: The variance of \$755,705, representing an approximately 12% decrease. 1 | 2 Washington state sales was \$505,685 resulting in the biggest impact to actuals and driving difference to forecast. The second biggest contributor was Oregon.
- E12 | F12**: In February 2024, the actual loan proceeds reached \$2,044,802, marking a variance of nearly 25% from the initially forecasted amount of \$1,635,842 for the same period. 1 | 2 The difference is due to the changes in "Lease and rent breakdown.xlsx."

AI-generated content may be incorrect

Edit summary | Regenerate | Add criteria

Outlook

Email from: Kristin Watson
2/23/2024, 9:55 AM

Save email

Finance insights

- Jane Cooper is the primary contact for the customer Fabrikam (US).
- Fabrikam specializes in crafting immersive and premium tea experiences, highlighting ethically sourced leaves and a diverse range of delicate flavors.

Copy

AI-generated content may be incorrect

Customer

- 358 overdue invoices. See details
- Fabrikam (US) Supply chain

Contact

Saved in SAP (1)

- Jane Cooper Fabrikam (US) Account manager

Note

New note

Archive data

Transaction Data Lifecycle

Live data

- Data that requires frequent access, ability to modify or remove and the needs to support a wide variety of search criteria.
- Live data will exist in SQL Azure at this stage.

History data

- Over time, data is used for reference and/or analytics only and data cannot be modified. The access frequency and the variety of search criteria are greatly reduced.
- History data will remain in the SQL Azure database but cannot be modified.

Long term data retention(LTDR)

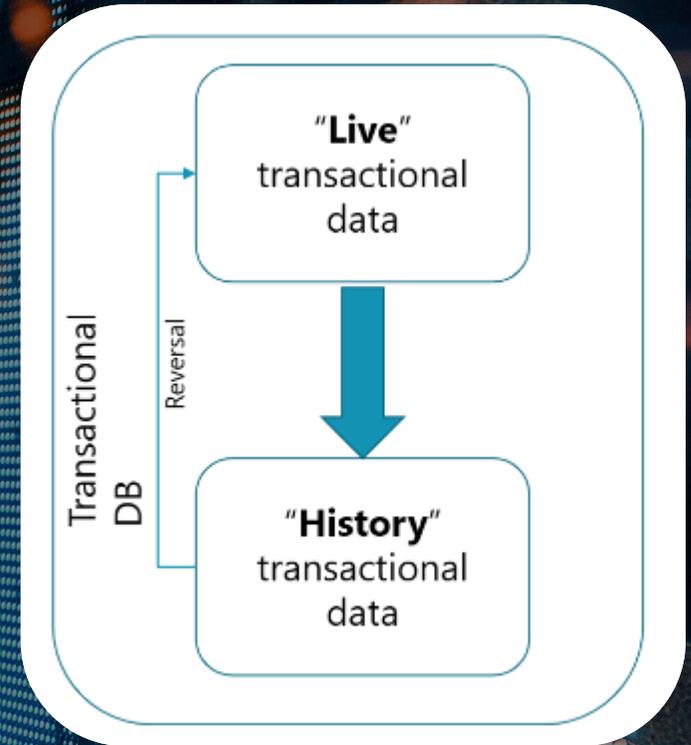
- Over more time, the need to reference this data or use it in analytics decreases. At this point, the customer decide to retain the data in LTDR
- At this stage, History data will be removed from AXDB and stored only in managed Data Lake (LTDR).

Purge

- When data is no longer needed, even for the rare audits or analysis, the data can be completely removed from the system.
- The typical data lifecycle would have data being purged from Long-Term Retention.
- An additional scenario will be supported to purge data from History when Long Term Retention is not being utilized for a table(s).

Transaction Data

Transaction data in our ERP system has different characteristics over time.



Vendor Invoice Center

Our goal is to provide customers with a comprehensive vendor invoice automation solution. While the invoice automation can handle the majority of invoices, there are still some exceptional cases that require user intervention. Our new workspace will provide an intuitive view of all the pending vendor invoices in various processing status, allowing accounts payable clerks to easily identify and correct exceptional invoices.



Copilot

Matching	Validation	Related information	History
Matching details Policy violations Match product receipts	Simulate posting Results of posting simulation Error text	Pending invoice detail	Invoice payment hold

Pending vendor invoices

Standard view ▾

Filter

Number	Comp...	Invoice account	Name	Purchase order	Invoice received date	Invoice date	Imported i...	Last match status	Product receipt
INV175	usmf	1001	Acme Office Supplies	00000175	9/1/2023		0.00	Failed	PR175_1
INV200	usmf	1001	Acme Office Supplies		9/1/2023		0.00	Passed	

Customer summary

On the customer page, this feature aggregates and analyzes data from various sources including customer invoices, payments, sales orders, sales agreements, outstanding invoices, and delayed order lines. This data can identify anomalies and potential risks.

The summarized information, which offers valuable insights into each customer's financial activities and insights, is displayed at the top of the customer page for easy access and review. This allows for proactive risk management and informed decision-making.

The screenshot shows a web interface for a customer summary page. At the top, there is a navigation bar with various menu items like 'Edit', 'New', 'Delete', 'Customer', 'Sell', 'Invoice', etc. Below the navigation bar, the page title is 'US-001 : Contoso Retail San Diego'. The main content area is divided into several sections:

- Summary:** This section contains three key insights:
 - Status:** The customer has 23 posted invoices totaling 460,090 USD, with 89,000 USD outstanding. In supply chain management, 25 delivered orders amount to 260,196 USD, with 150,000 USD not yet invoiced.
 - Outliers:** Invoice 800010 with an outstanding balance of 196 USD stands out. Delivered but not invoiced sales orders suggest potential revenue loss. Lack of data in item statistics raises inventory tracking concerns.
 - Risks:** The presence of 5 overdue invoices poses collection risks. High outstanding balances and undelivered sales orders indicate liquidity and delivery risks respectively. Inaccurate item statistics may lead to inventory management issues.
- General:** A table-like section with columns for 'CUSTOMER', 'GENERAL INFORMATION', and 'OTHER INFORMATION'. It includes fields for Name, Account, Search name, Type, Organization, Customer group, Classification group, Payment priority, Organization number, ABC code, Name, DUNS number, Address books, RetailCue, Language, and Phonetic name.
- Addresses:** A section for managing customer addresses.
- Contact information:** A section for managing customer contact details.
- Miscellaneous details:** A section for miscellaneous customer information.
- Sales demographics:** A section for sales-related demographic data.
- Credit and collections:** A section for credit and collection management.
- Sales order defaults:** A section for sales order default settings.
- Payment defaults:** A section for payment default settings.
- Financial dimensions:** A section for financial dimension management.
- Warehouse:** A section for warehouse management.
- Invoice and delivery:** A section for invoice and delivery management.

Workflow approval with copilot summarization

Workflow approvers must navigate to the workflow history and then look through multiple entries to find the status of a given workflow. By using this summarization feature, approvers don't have to search for the submitter, the most recent status, comments, and the due date. Relevant history also gives more information about specific workflow types to improve the overall process

The screenshot displays the 'Finance and Operations Preview' interface for an 'Invoice journal' workflow. The main area shows a table of workflow entries:

Journal no.	Name	Description	Posted	Posted on	Log	In use by	Modified
00460	WIFAPINV	Wif AP Invoice					SARA
00583	APInvoice	AP Invoice					askocdo
00643	WIFAPINV	Wif AP Invoice					Admin

On the right side, the 'Summary by Copilot' section provides an overview of the workflow history, including details about submission, rejection, and potential risks of failure. The interface includes navigation buttons like 'Approve' and 'Cancel' at the bottom right.

Collections coordinator

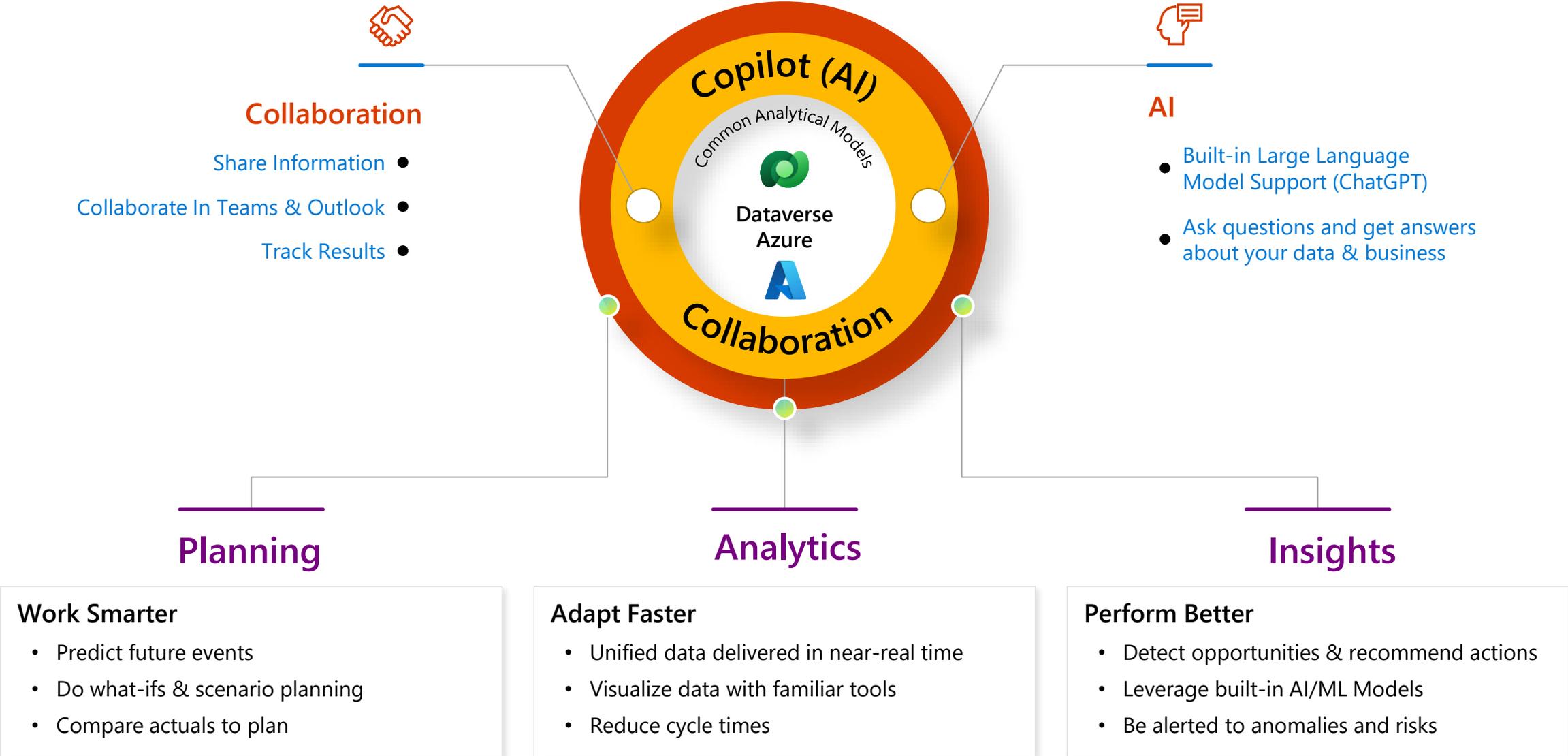
The screenshot displays the Microsoft Dynamics 365 Collections coordinator interface. At the top, the header shows "Finance and Operations Preview" on the left, a search bar "Search for a page" in the center, and user information "USMF" and a profile icon "BE" on the right. Below the header is a banner image of a large, curved metallic structure. The main content area is divided into several sections:

- Navigation:** A vertical sidebar on the left contains icons for home, favorites, calendar, and a menu.
- Calendar:** A calendar for September 2023 is shown, with the 13th highlighted. Below it, a list of "Work items assigned to me" includes tasks like "Cash advance request: Record returned" and "Expense reports: Record returned".
- APPS:** A section titled "APPS" contains one application: "Business performance analytics (preview)".
- WORKSPACES:** A large grid of workspace tiles is displayed, each with an icon and a title. The tiles include: Bank management, Channel merchandising configuration validator, Customer payments, Financial analysis - current company, Optimization advisor, Project management, Store management, Benefits, Collections coordinator (preview), Data management, Financial period close, Outbound work monitoring, Purchase order confirmation, Supply risk assessment, Budget planning, Commerce pricing and discount management, Data validation checklist, Fixed asset management, Outbound work planning, Purchase order preparation, System administration, Business document management, Compensation management, Distributed order management, General journal processing, Payment workspace, Purchase order receipt and follow-up, Task management, Business processes for human resources, Confirmed purchase orders with changes, Electronic reporting, Invoicing, Payroll management, Recruitment management, Vendor bidding, Business processes for payroll, Cost accounting ledger administration, Employee development, Learning, People, Released product maintenance, Vendor information, Cash overview - all companies, Cost administration, Employee self service, Leave and absence, Personnel management, Resource lifecycle management, Vendor invoice automation, Cash overview - current company, Cost analysis, Engineering change management, Ledger budgets and forecasts, Product readiness for discrete manufacturing, Retail and Commerce IT, Vendor invoice entry, Catalog management, Cost control, Expense management, Maintenance request management, Product readiness for process manufacturing, Sales order processing and inquiry, and Vendor payments.

The background is a complex digital visualization. It features a grid of small, glowing blue dots that form a 3D perspective. A line graph with a sharp upward peak is visible in the lower-left quadrant. The overall color palette is dominated by deep blues and teals, with scattered bokeh lights in warmer tones like orange and yellow. The text 'Business Performance Management' is centered in a clean, white, sans-serif font.

Business Performance Management

Enhance business performance management

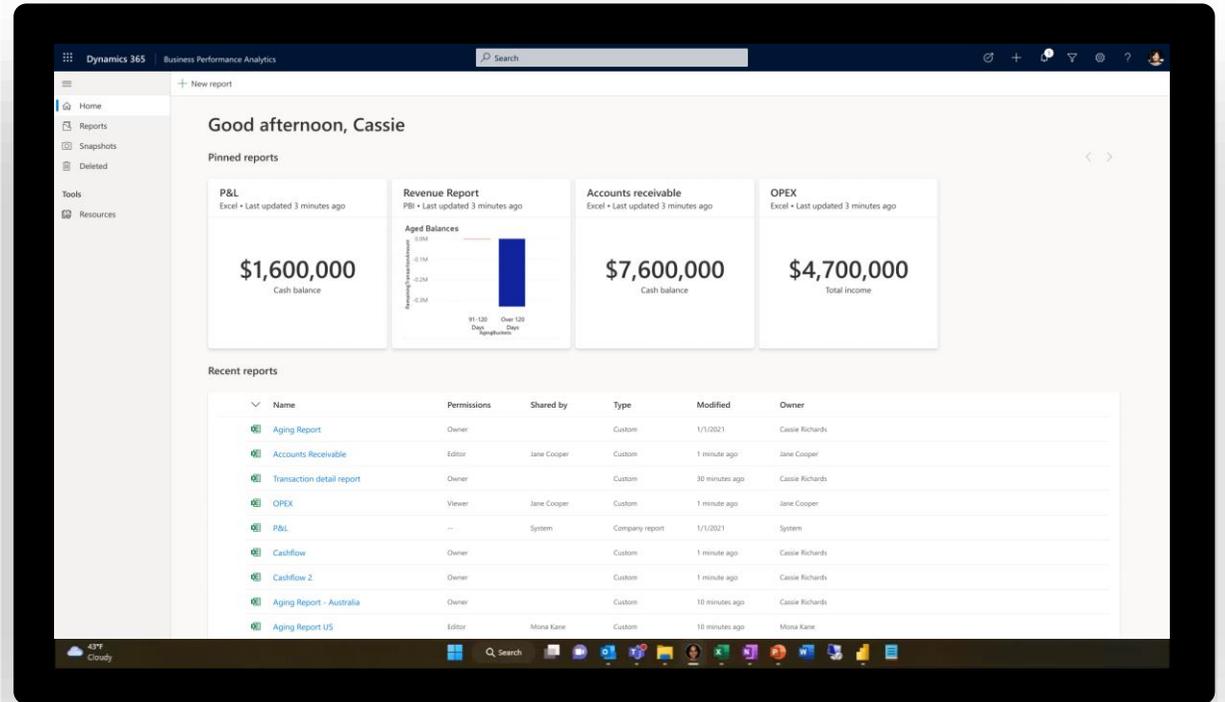


Business performance analytics

Bring data and insights closer to the point of decision. Gain near-real time access to secure cloud-based self-service reporting delivered through familiar tools like Power BI and Excel.

Learn more from the blog: [Dynamics 365 Finance business performance analytics - Microsoft Dynamics 365 Blog](#)

Announced: February 22, 2023



AI and Analytics



Power BI Excel

Power Platform



Power Apps Power Automate

Common Data Model



Dataverse



Azure

Collaboration



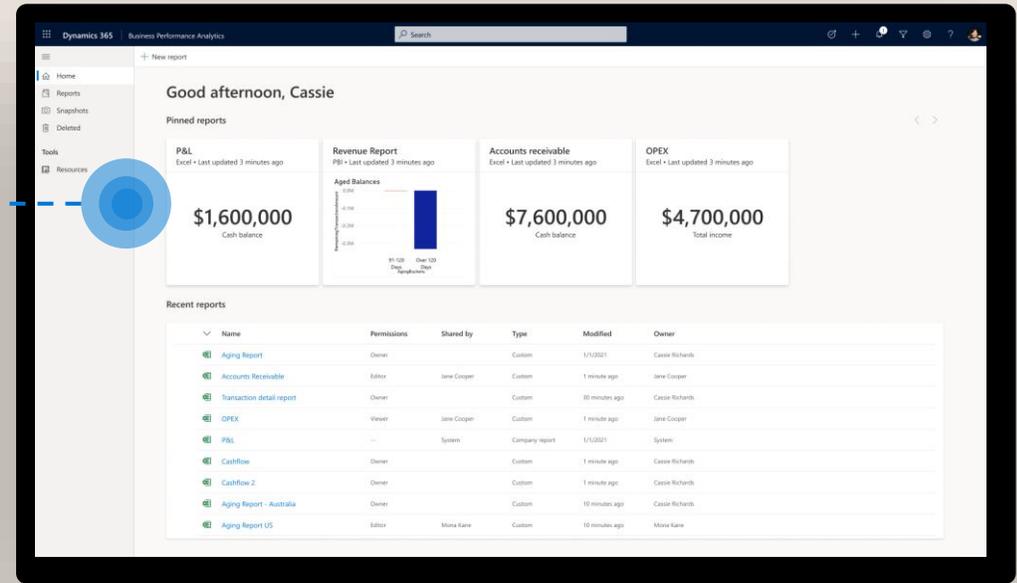
Teams

Make analysis easy and more accessible

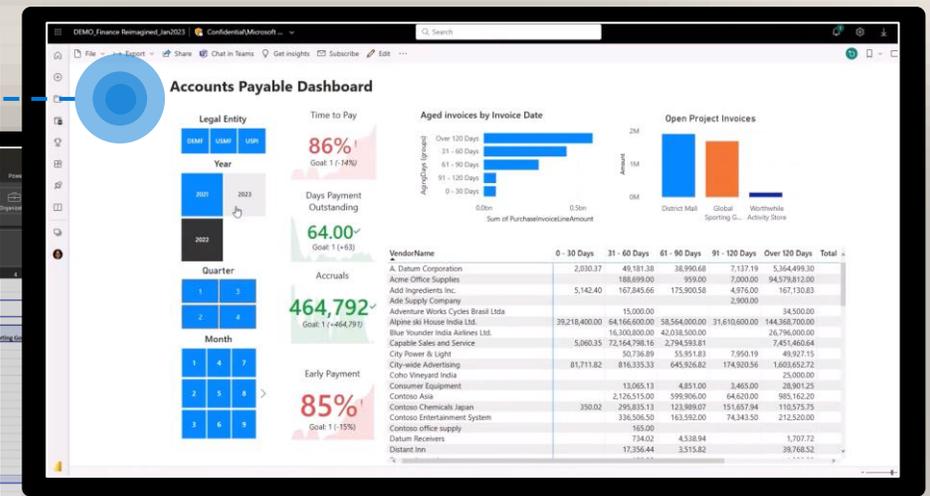
Delivered seamlessly through familiar and easy-to-use tools

Create, save, and share reports securely for easy collaboration

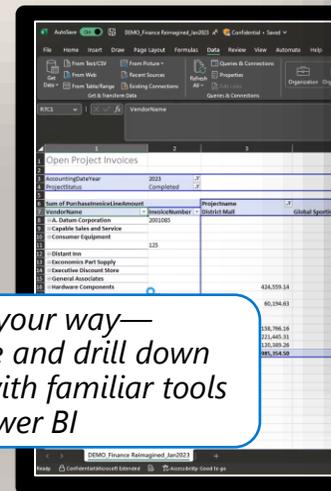
Enhance decision making with near-real time data and insights



Securely create, share, and collaborate with team members in the reporting hub



Visualize data your way—quickly analyze and drill down to the details with familiar tools like Excel & Power BI

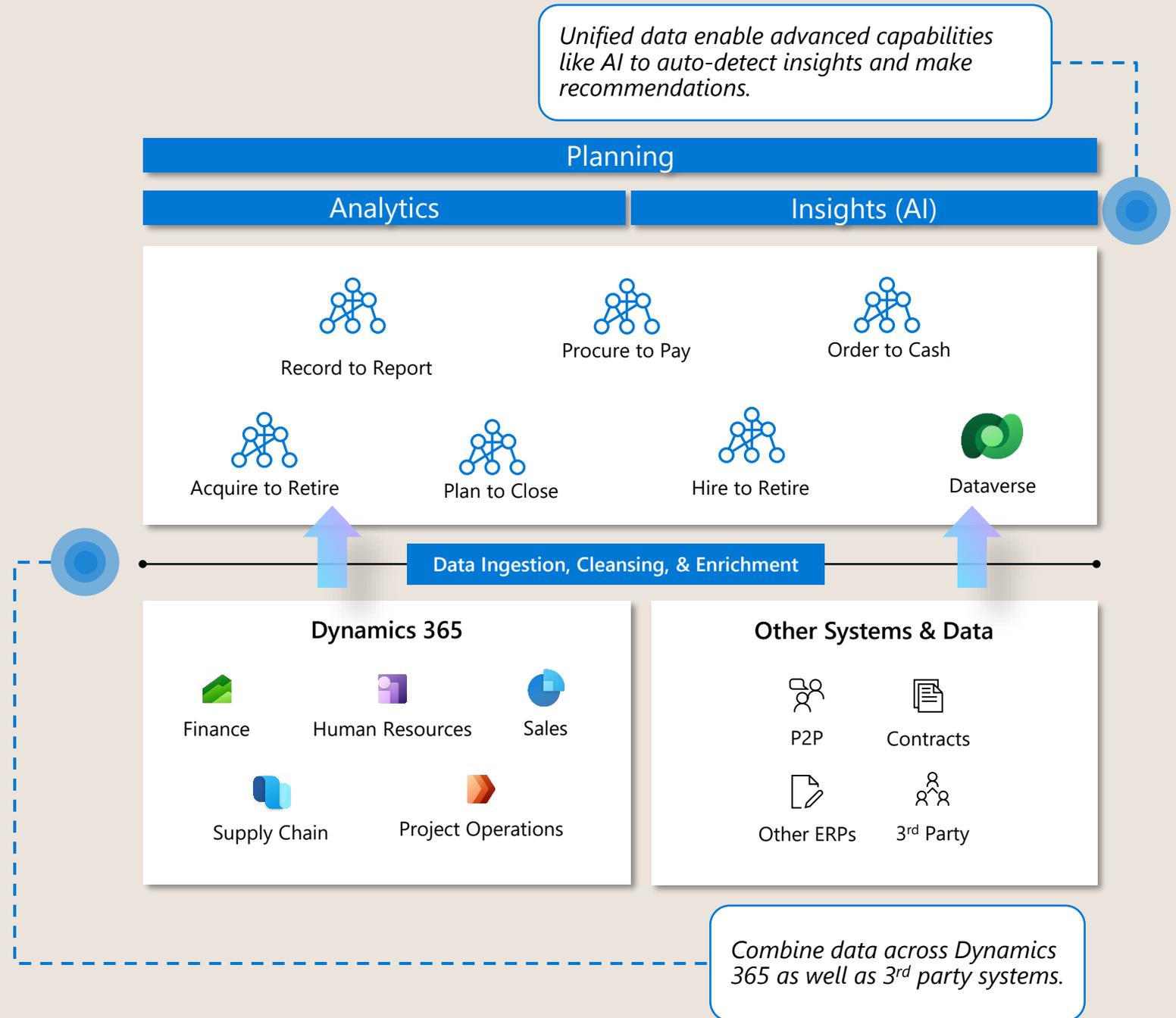


Enhance visibility with unified data

Gain a complete view across business systems and processes

Streamline data ingestion, cleansing, and enrichment for enhanced usability

Lay the foundation for advanced planning, analytics, and AI



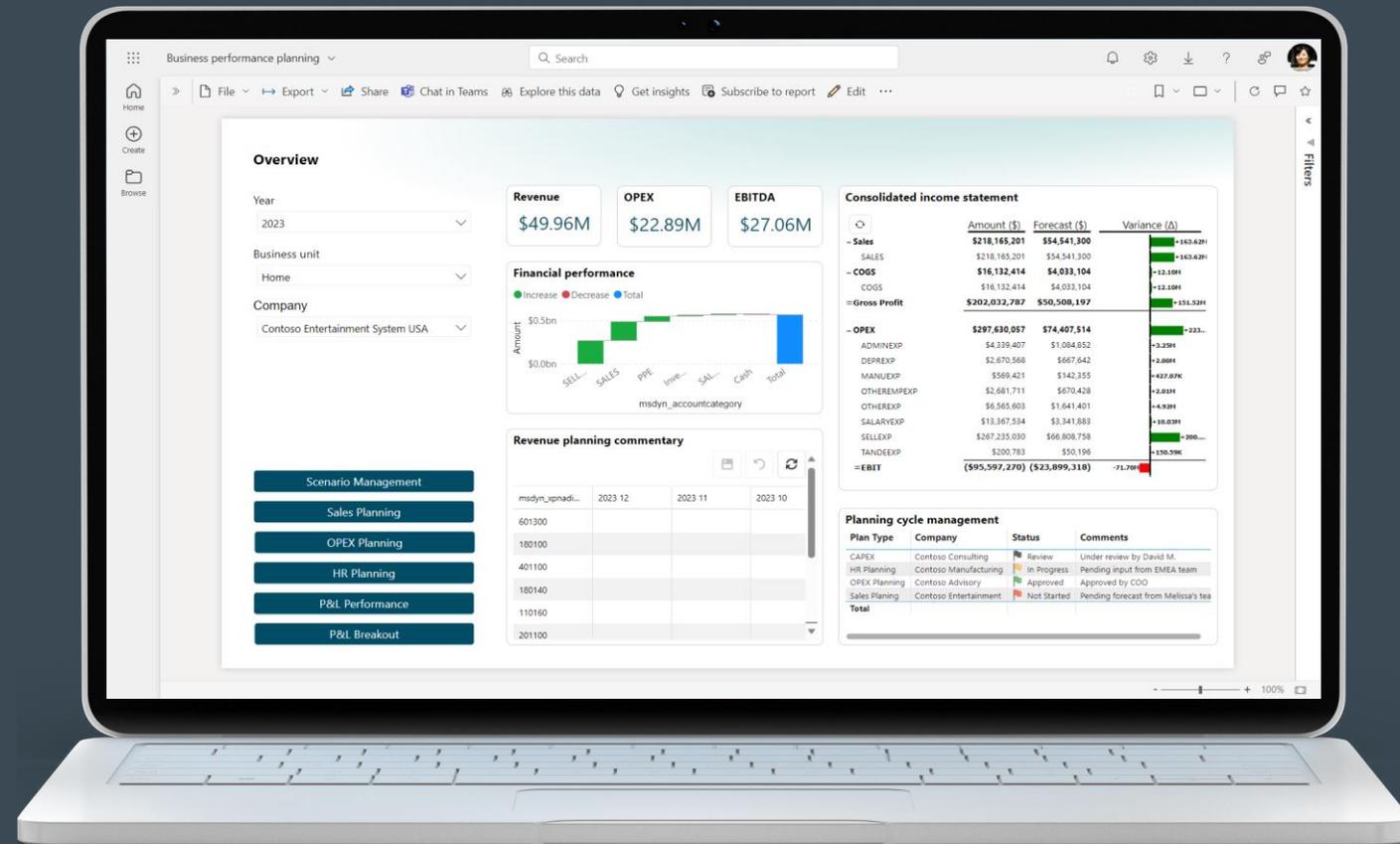
Business performance planning

Transform planning with the power of Microsoft

Encompassing crucial tasks of budgeting, forecasting, financial analysis, and corporate performance management—all from market leading business intelligence tools Microsoft Power BI and Excel.

AI guided experiences provide the ability to analyze vast amounts of data, uncover valuable insights, and enhance the accuracy of financial projections.

- Revenue planning
- Bottom-Up Planning
- Driver Based Planning
- Budgeting and Forecasting
- Long-range Planning
- M&A Valuation
- Cashflow planning
- **And many more...**



Reports & Analytics



Power BI Excel

Low-Code Agility



Power Apps Power Automate

Collaboration



Teams Outlook

AI & Insights



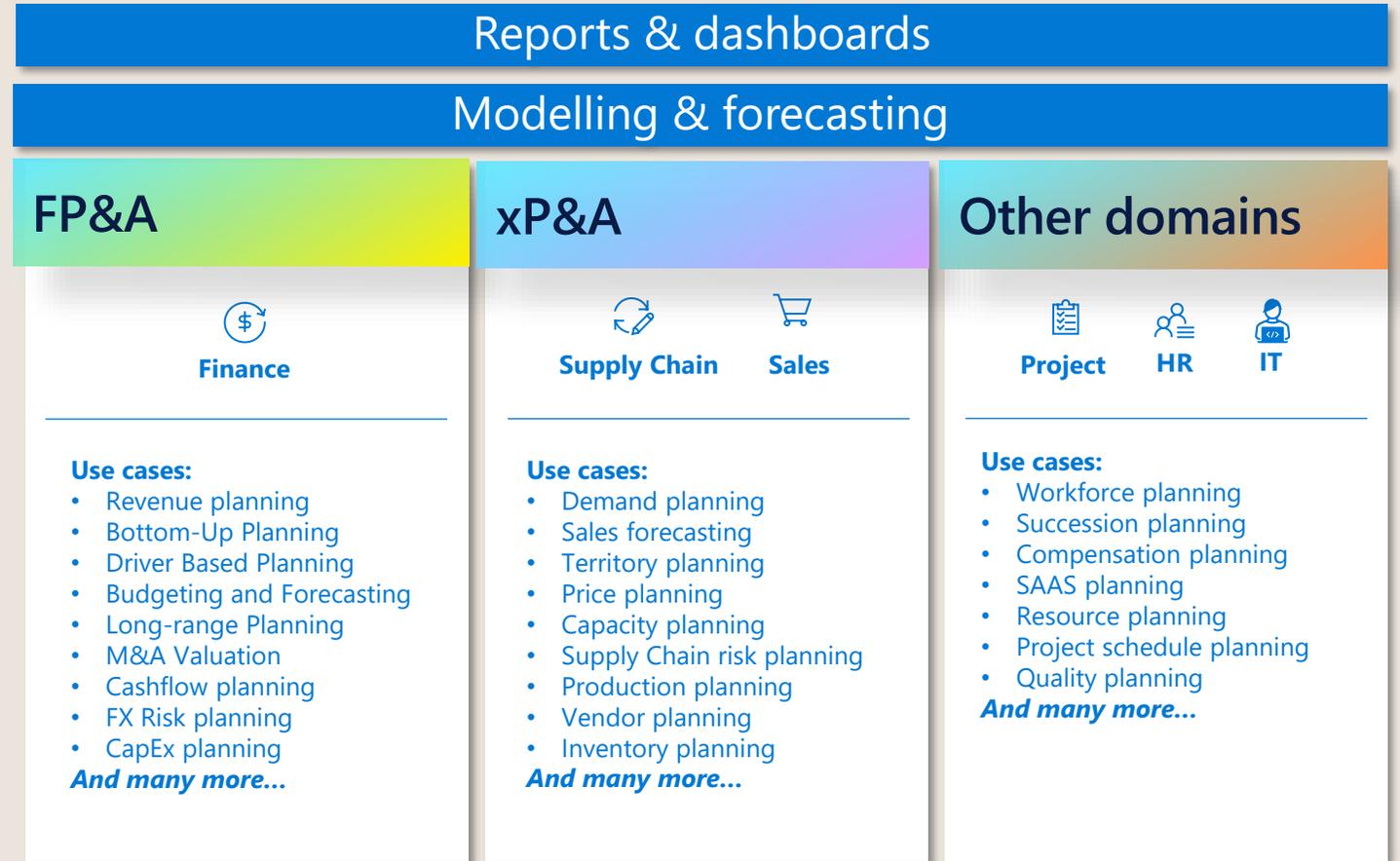
Copilot Automated Insights

Extend planning oversight and go beyond FP&A

Fulfill core FP&A requirements
finance teams rely on

Strengthen financial planning with
Sales and Operations data

Harness advanced models and
forecasting tools for key planning
use cases



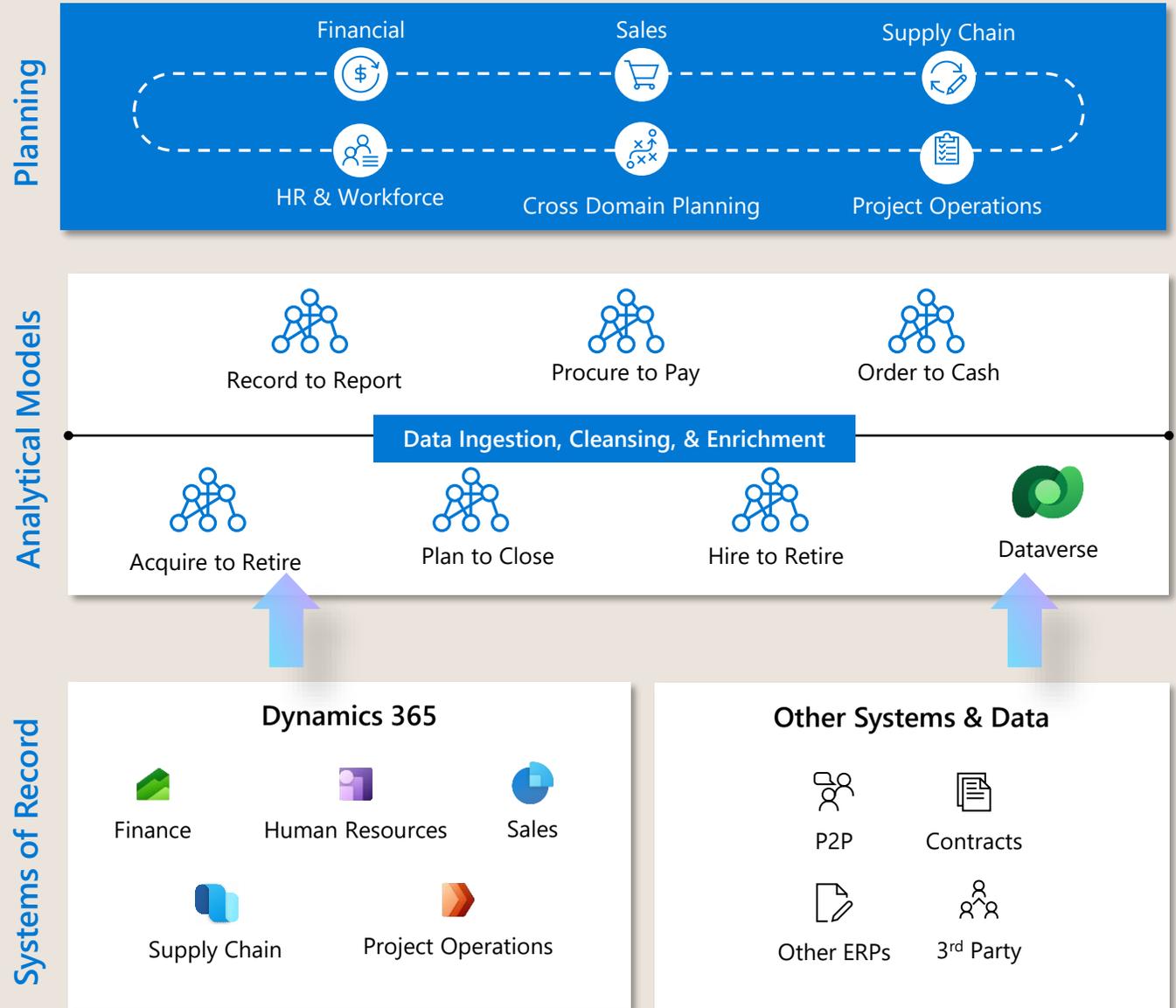
Improve planning accuracy with complete and timely data

Enable comprehensive company-wide planning

Refresh plans with near-real-time data

Accelerate decision making with greater accuracy

Complete and timely data for agile planning



The background is a complex digital visualization. It features a grid of small, glowing blue dots that form a 3D-like structure. A prominent line graph with a sharp peak is visible in the lower-left quadrant. The overall color palette is dominated by deep blues and teals, with scattered bokeh lights in shades of orange, yellow, and white, creating a sense of depth and motion.

Demo



Dynamics 365

Supply Chain Management

Track and trace for manufacturing

Approvals Management
App

Copilot for warehouse
workers

Changes to confirmed purchase orders

Product bundles

Inventory mobile app

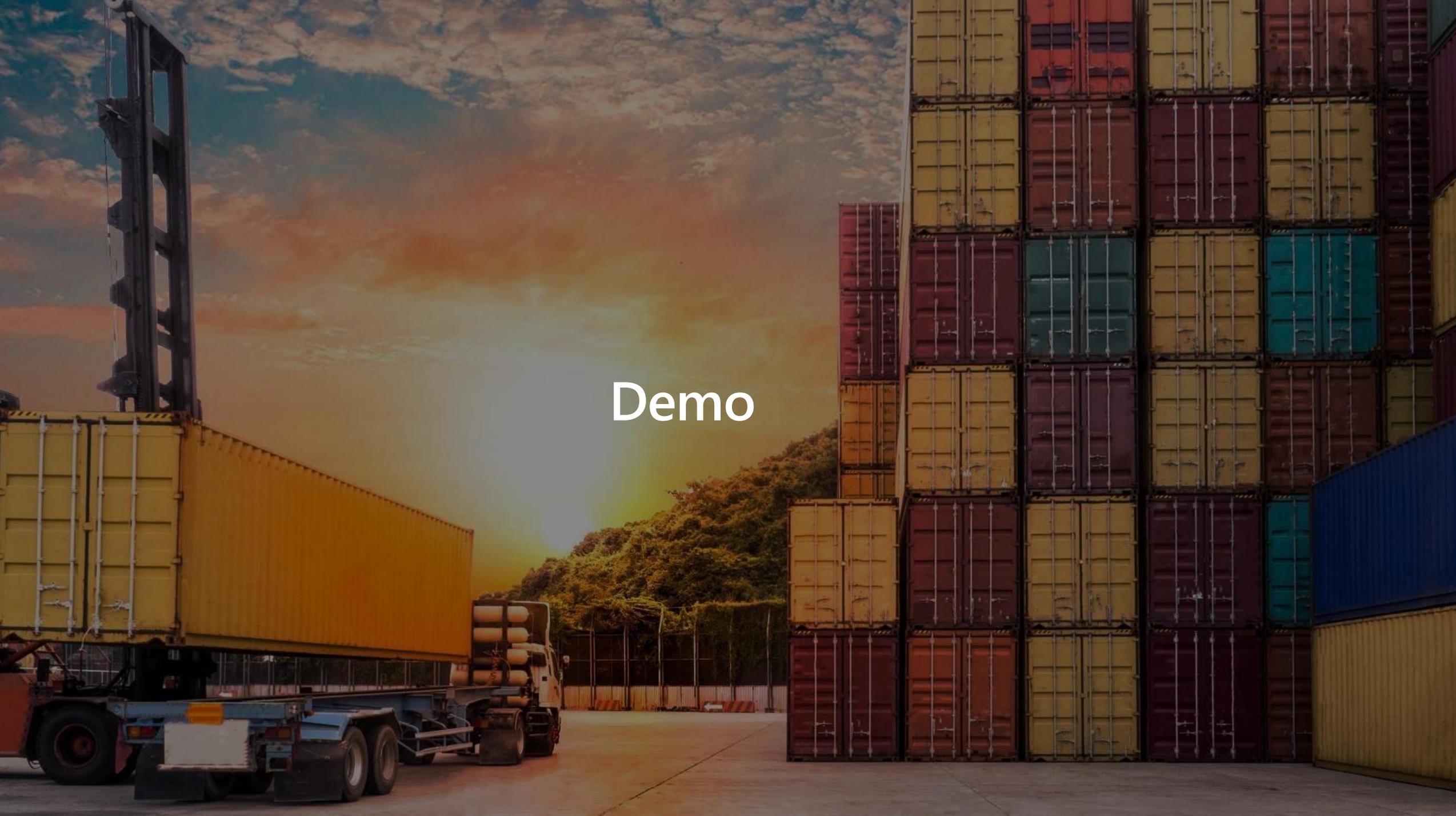
Inventory Visibility ↔ Commerce



Dynamics 365 SCM Copilot

Use artificial intelligence to summarize the downstream effects of changes to confirmed purchase orders.



A photograph of a shipping yard at dusk or dawn. In the foreground, a large stack of colorful shipping containers (yellow, red, blue, and green) is piled high. To the left, a yellow container is being lifted by a forklift. In the background, a white truck is parked on a paved area. The sky is filled with soft, colorful clouds in shades of orange, yellow, and blue. The word "Demo" is overlaid in the center of the image.

Demo

Track and trace for manufacturing

Dynamics 365 Supply Chain Management now provides an effective, accurate, and performant process for tracking serial and batch numbers of components and finished goods. It helps make sure that manufacturers can comply with industry standards and regulations and helps ensure the quality of processes such as maintenance, warranty, and recalls.

The screenshot displays the 'Track and Trace' interface for a 'D8101 Speaker' (P000123). The interface includes a search bar, a list of components, and a progress indicator showing '2 of 3' items. The components listed are:

Component ID	Component Name	Quantity	Serial Number	Actions
D8101	Speaker		7827822...2872	...
D81011	Tweeter M8101	3.32	9188871...1132	...
D81012	Bass unit M8101	3.42	4444771...4567	...
D81013	BT control M8101	3.52		

The interface also features a bottom navigation bar with the following options: Undo, Redo, Reset all, Supervisor access, Instructions, Expand BOM, Associate manually, Cancel, and OK.

Approvals Management app

Dynamics 365 Supply Chain Management now provides a mobile approval experience, which adds flexibility, efficiency, resiliency, and responsiveness to the approval process.

The screenshot displays the Dynamics 365 Approvals Management app interface. The left pane shows a list of purchase order lines with the following details:

Item number	Amount
<input checked="" type="checkbox"/> Item number: A0001	12.26 CAD
Legal entity: usmf 1 Pcs - 12.26 CAD / Pcs Purchase order: 00000127	
<input checked="" type="checkbox"/> Item number: 1000	899 USD
Legal entity: usmf 1 ea - 899 USD / ea Purchase order: 00000128	
<input checked="" type="checkbox"/> Item number: A0001	12 USD
Legal entity: usmf 1 Pcs - 12 USD / Pcs Purchase order: 00000128	

The right pane shows the detailed view for the selected line (Item number: A0001, 12 USD):

Land Packaging Supplies

[Details](#) | [Attachments](#) | [Timeline](#)

Accounting distribution details >

Overview

[View workflow instruction](#)

Vendor account	1002
Purchase order	00000126
Subtotal amount	12
End discount	0
Tax amount	0

Lines (1)

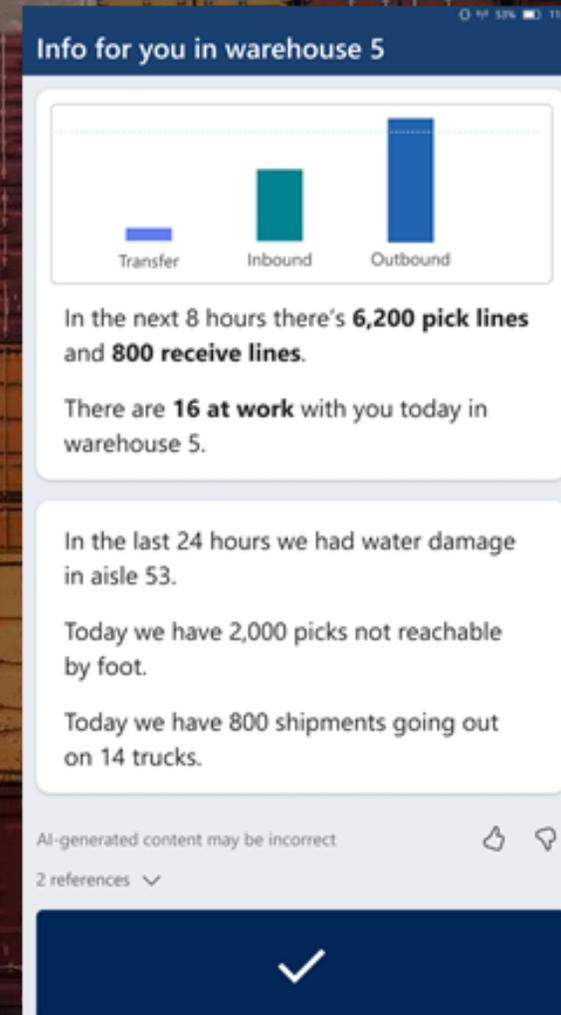
Item number: A0001	12 USD
Legal entity: usmf >	
1 Pcs - 12 USD / Pcs	

Total 12 USD

Navigation icons at the bottom: Complete (green checkmark), Return (blue X), Delegate (blue person icon), Request change (blue circular arrow).

Copilot-generated screen for warehouse workers

Revolutionize the way warehouse workers engage with their daily tasks by providing a customized, intelligent overview of their workday directly on their mobile app's home screen. Generative AI ensures that workers are immediately aware of their specific duties, workloads, and task status. This targeted information enhances operational efficiency, reduces time spent on information retrieval, and optimizes resource allocation across the warehouse floor.





Dynamics 365

Human Resources

Avoid duplication with Entra ID integration

Recruiting portal



Copilot to summarize data for employee self-service

Copilot to summarize data for employee self-service

In the employee self-service workspace, the summarization uses time-off transactions, balances, and requests to provide a summary of their time-off entitlement, what's been used, what's remaining, and if they will lose any time off. It also suggests when to take time off so they don't lose any of it to carryover rules

The screenshot displays the Dynamics 365 Finance employee self-service interface for Sara Thomas (ID: 000007), Chief Financial Officer at Contoso. The page features a navigation sidebar on the left and a main content area with the following sections:

- My view:** Sara Thomas 000007, Chief Financial Officer • Finance • Employee, Contoso • +2. Includes an "Edit personal details" button. Metrics show 17.1 Years of service, Reports to Charlie Carson, and Full-time Position type.
- My information / My team:** Navigation tabs.
- Copilot Summary:**
 - Time off:** You have 82 hours of PTO left. If you don't use it by the end of the year, you'll lose 23 hours at the beginning of 2025. You could use it in conjunction with the Memorial Day holiday coming up, extending your break through the long weekend. You've also used 5 sick days during this period and have 4 more remaining.
- Summary:** Four quick-view cards: Work items assigned to me (43), Questionnaires assigned to me (2), Company directory, and Team absence calendar.
- My career information:** A grid of summary cards:
 - Time Off Balances:** No requests made. Includes "Request time off" and "View time off" links.
 - Expenses:** 22 Unattached expenses, 28 Unattached receipts.
 - Timesheets:** No timesheets found for the current period. Includes "My timesheets" link.
 - Tasks:** 0 Overdue tasks, 0 tasks due today. Includes "View tasks" link.
 - Courses:** 0 courses overdue, 0 courses due soon, 1 course assigned. Includes "View courses" link.
 - Certificates:** Certified management account... Expired 1201 days ago.
 - Next Scheduled Review:** Review button, 1 review. Includes "View all goals" link.
 - Performance Goals:** 0 Not started, 0 On track, 0 Needs improvement. Includes "View all goals" link.
 - Compensation:** Show button.
 - Attachments:** 0 attachments. Includes "Manage attachments" link.
 - Benefits:** Benefits self-service link.





Dynamics 365

Project Operations

**Improve resource
booking performance**

Increase WBS limits to 1,500 tasks



Copilot generated project status report

**Optimize resource
requirement generation**

Progress-based billing on fixed-price projects



Dynamics 365 Commerce



Discover smart trends and patterns with Store insights

Enable self-checkout in Store Commerce app

Archive commerce transactions

Store commerce improvements