



Autonomous ERP

Dynamic, multi-layered, agentic business workflows.

Example of how you can create retrieval and autonomous task agents for Dynamics 365 SCM.

Anders Dahlin Sr Technical Specialist





THE COMING

THE AGENTS ARE COMING

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Copilot

Every employee
has a Copilot

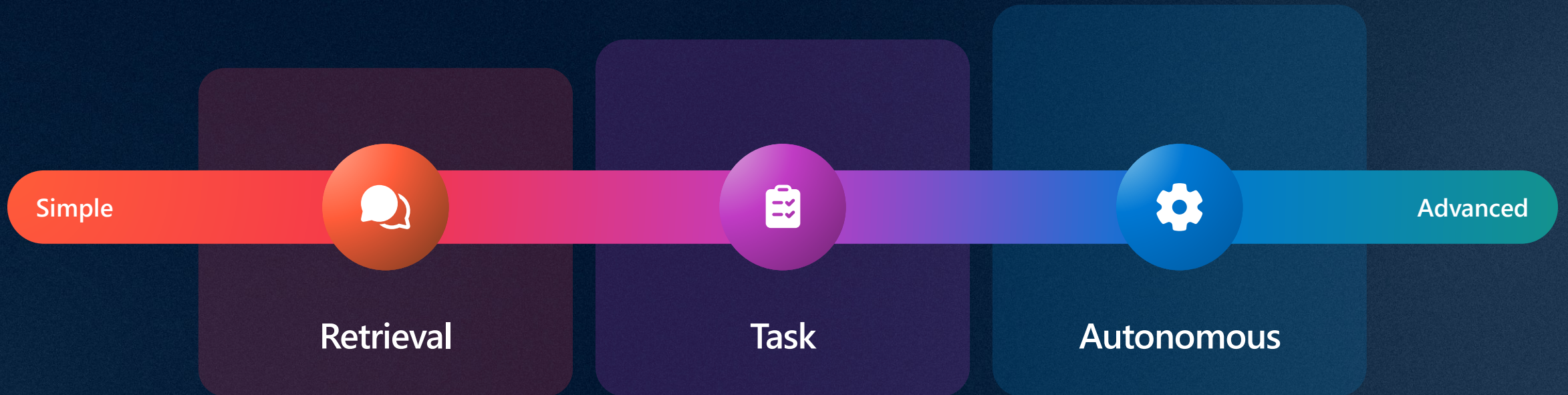


Agents

Every business process
transformed by agents

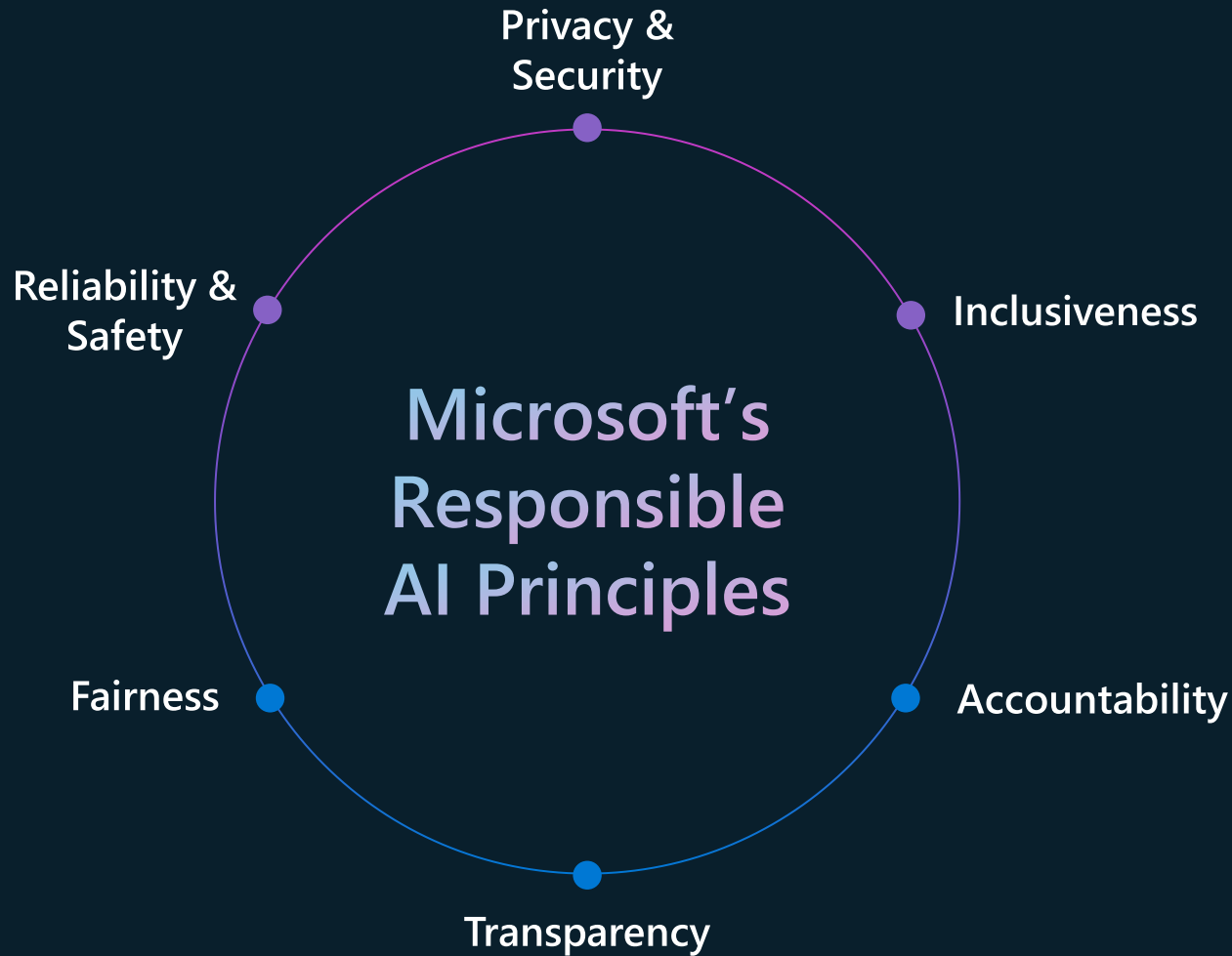
What are agents?

Agents use AI to automate and execute business processes, working alongside or on behalf of a person, team or organization



← Agents vary complexity and capabilities depending on your need →

Microsoft Azure Cloud - Runs on trust



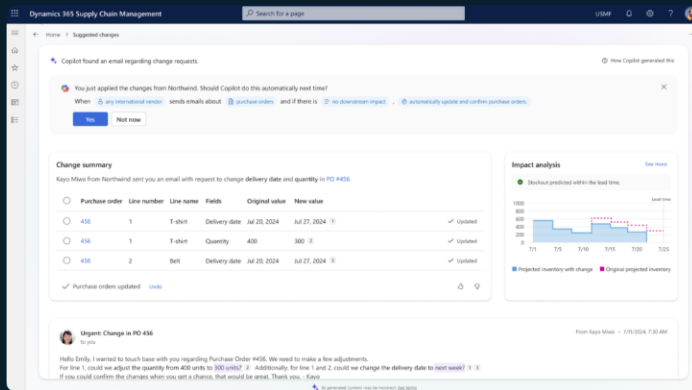
Your data is your data

Your data from any fine-tuning is not used to train the foundation AI models

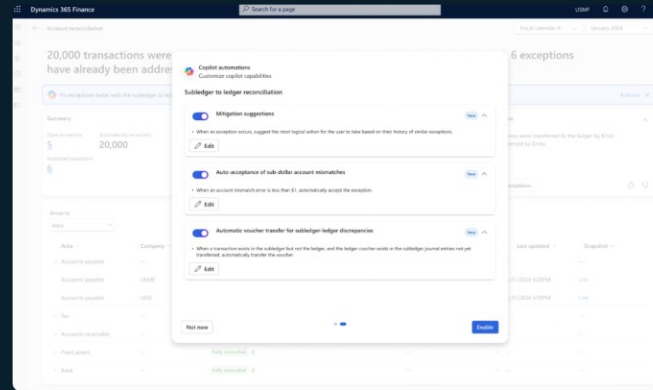
Your data is protected by the most comprehensive enterprise compliance and security controls



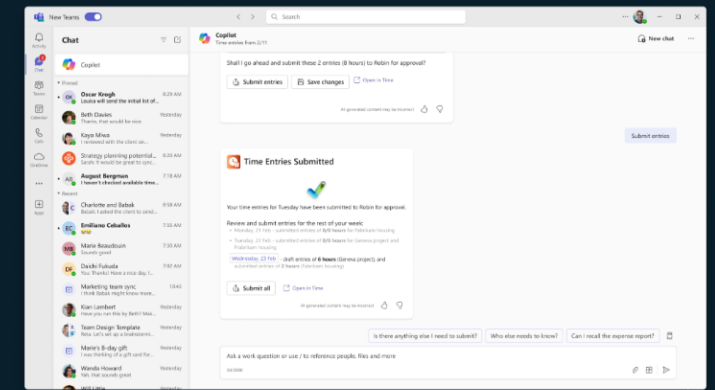
Autonomous agents in Dynamics 365 AI – powered ERP



Supplier Communications Agent



Account Reconciliation Agent

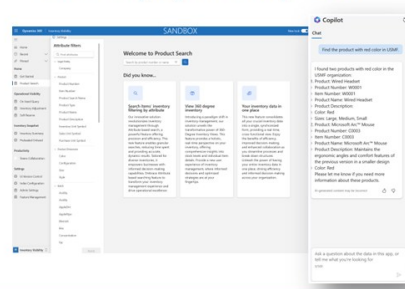


Time and Expense Agent

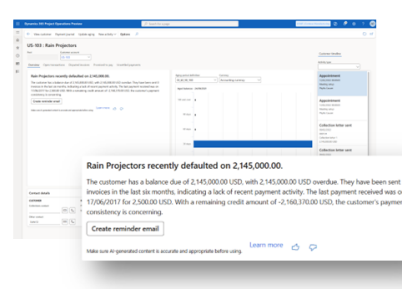
Help and guidance



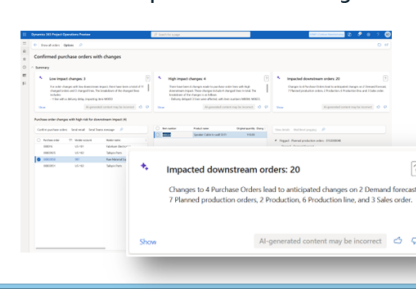
Natural language inventory search



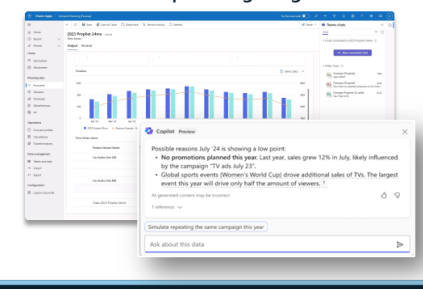
Collections coordinator



Summarize purchase order changes

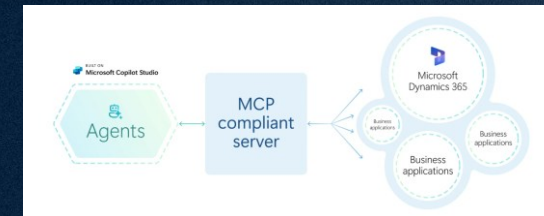
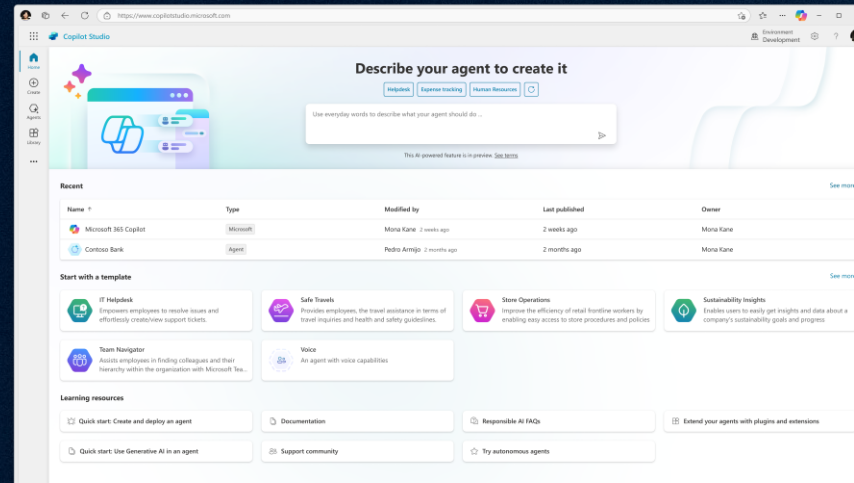


Demand planning insights



Copilot Studio

Copilot Studio is the solution to build and manage agents that supports an **autonomous ERP**.



✓ Meet your users where they already are

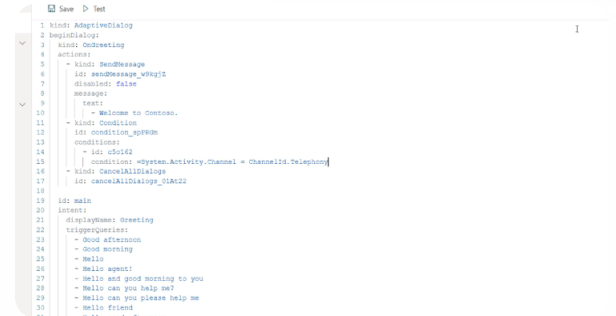
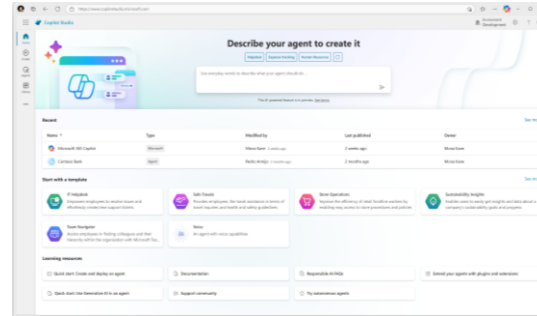
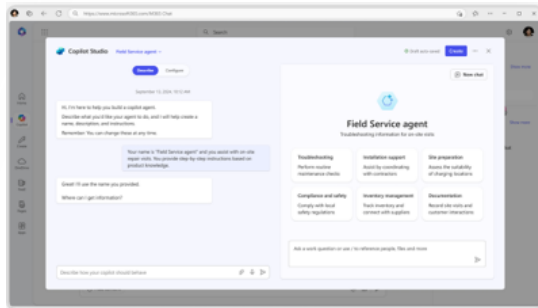
✓ Access everything in one place

✓ Automate your workflows

✓ Integrate with your external apps

✓ Connect to your Dynamics 365 and M365 data

Agent tooling for building custom agents



No
Code



Agent Builder in M365
Copilot
"Click"

Business
Users



Low
Code

Copilot Studio
"Type & Configure"

Makers



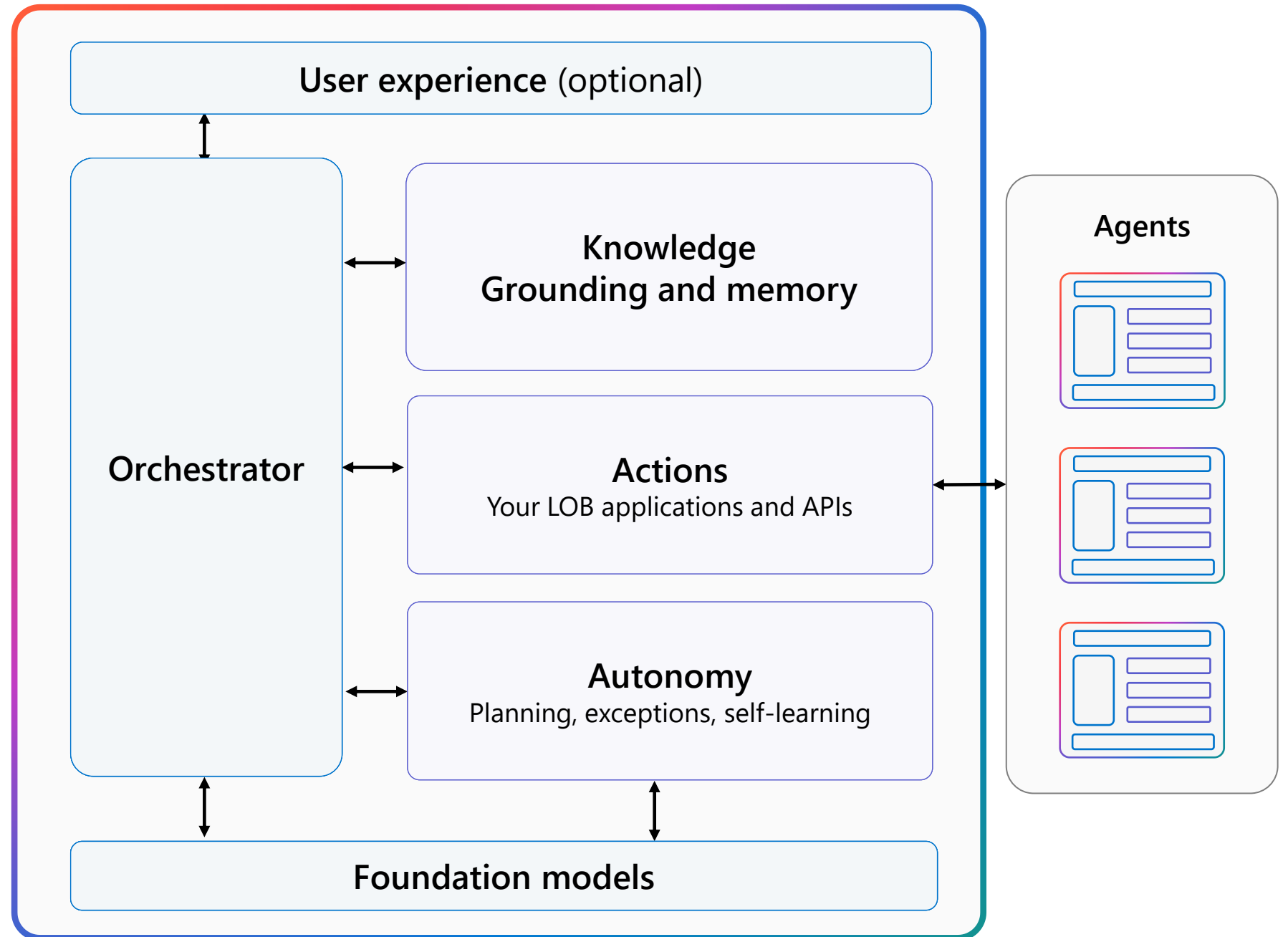
Code
First

Copilot Studio + Azure AI Foundry
"Code"

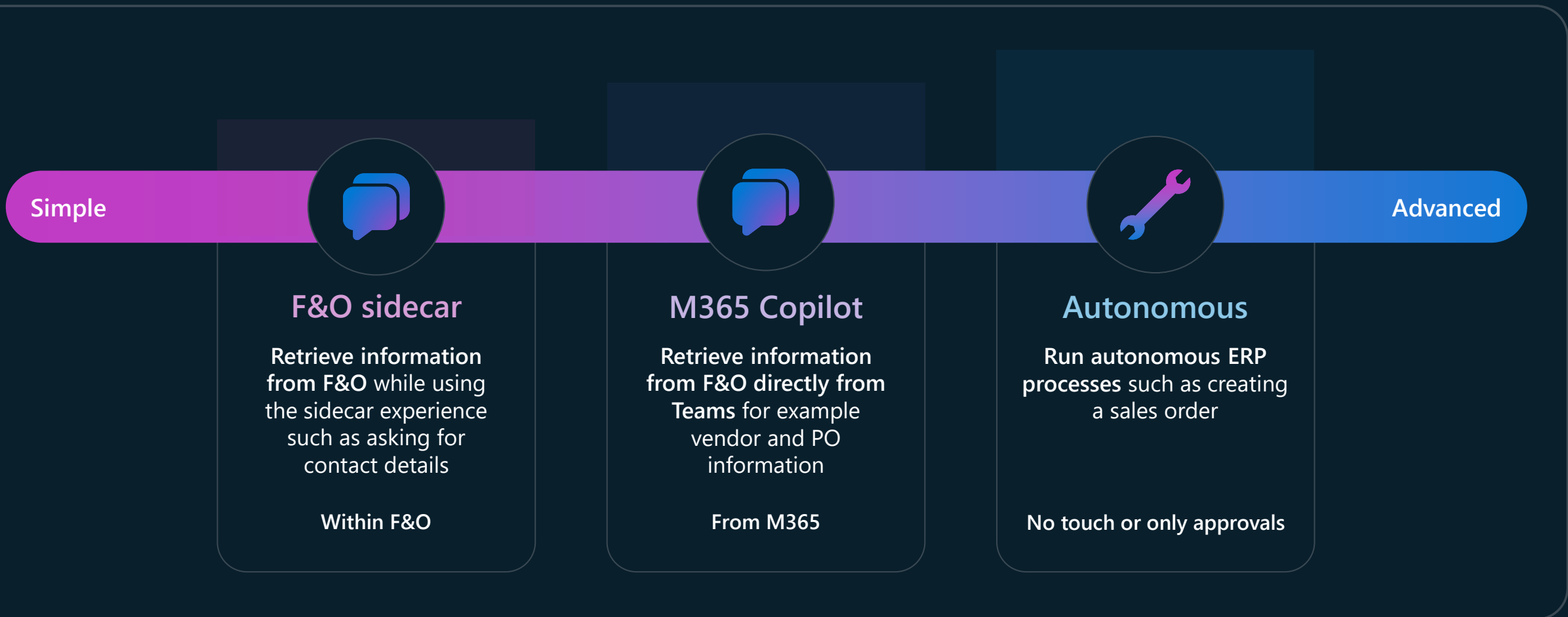
Developers

Customize your agent

Easily tailor your agent's building blocks to meet your unique business needs in a comprehensive, end-to-end studio



Build your own ERP agents (focus on the simple initial agents)

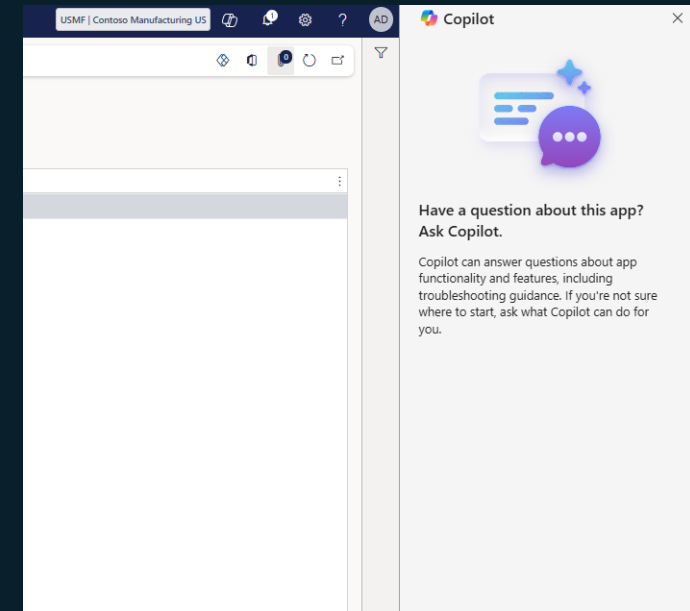


Retrieval agent use case

Ask for contact information within Dynamics 365

Ask the sidecar
regarding e-mail address

The copilot side car uses
knowledge from F&O
entities and replies



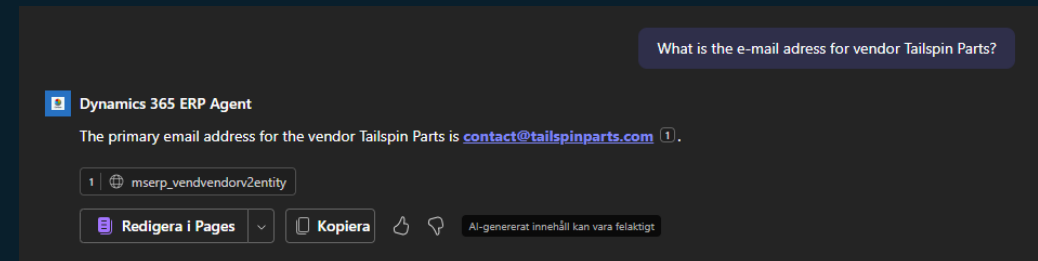
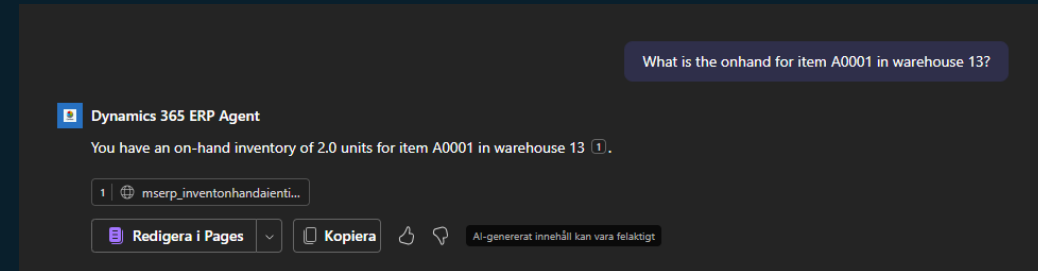
Retrieval agent use case

Ask for vendor or on-hand information from Teams

Open Teams Copilot
and ERP agent

Ask for vendor
information or on-
hand

Retrieve vendor contacts, on-
hand etc directly in Teams
from F&O data



Autonomous task agent

Receive, create and inform on sales orders

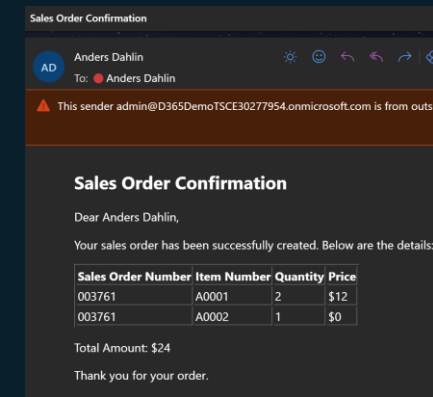
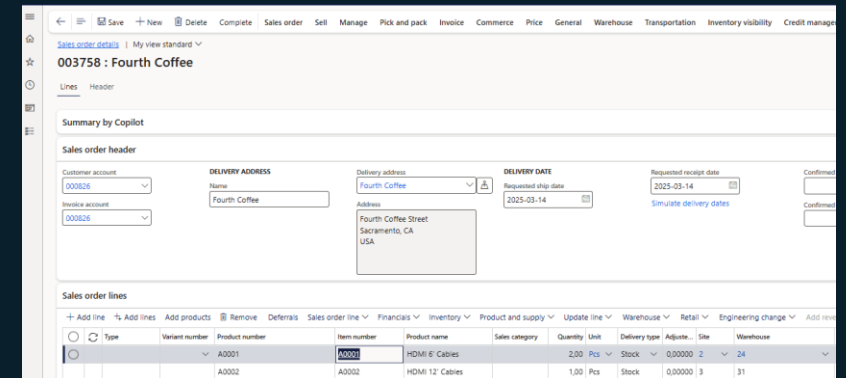
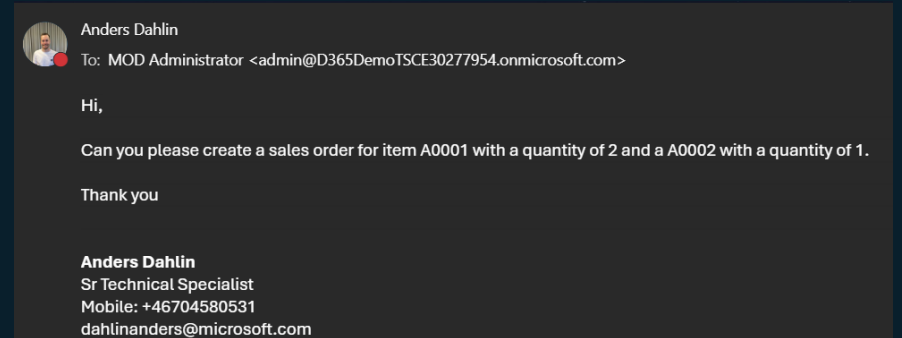
E-mail gets sent from customer on order

Agent finds customer record

Agent decides to create the order header in F&O

Agent decides to create order lines in F&O – multiple times if needed.

Agent sends an email back with order information



Autonomous task agent

Receive, create and inform on sales orders

I did NOT tell it how to create the sales order.
It reasoned by itself to first create the header and then multiple lines using different actions.

Tell the agent WHAT to do, not HOW to do it, the power of agents is to be dynamics and select the needed knowledge sources and actions.

Extend with automations where it makes sense

START TESTING TODAY

It doesn't need to be perfect

Start simple

Iterate on use case

How is a modern AI- powered ERP different?



Copilot and Agents

Always – on listening for signals across all systems to take proactive action



Dynamic workflows

Replace rigid preset workflows with dynamic ones and constantly adapt to change



Adaptive Experience

Modern UI that only shows what the user needs at that moment instead of forms over tables



Autonomous ERP



Copilot Adaptive Experience

Dynamic, contextual, decision-centric UI generation
Facilitation of users<>agents communication



Copilot
Studio



Enterprise Agent Platform

Dynamic, multi-layered, agentic business workflows
Plan, generate, orchestrate and execute workflows. Activate actions

Headless Business Services

Dynamics 365 (AI ERP)



Industries

Microsoft
365

Dynamics 365
Sales & Service

3P apps


Extensibility / Industry Verticals

Thank you



ERP SYSTEMS & THIRBIC & DYNAMICS 365 DYNAMICS 365


New pre-built Copilot Agents for Dynamics 365



Copilot

- ✓ Personal Human Augmentation
- ✓ Private, Personal Assistant
- ✓ People 1:1 Copilots (need interaction)





Agents

- ✓ Autonomous Expert Systems
- ✓ Works for a process or company
- ✓ People 1:N Agents

