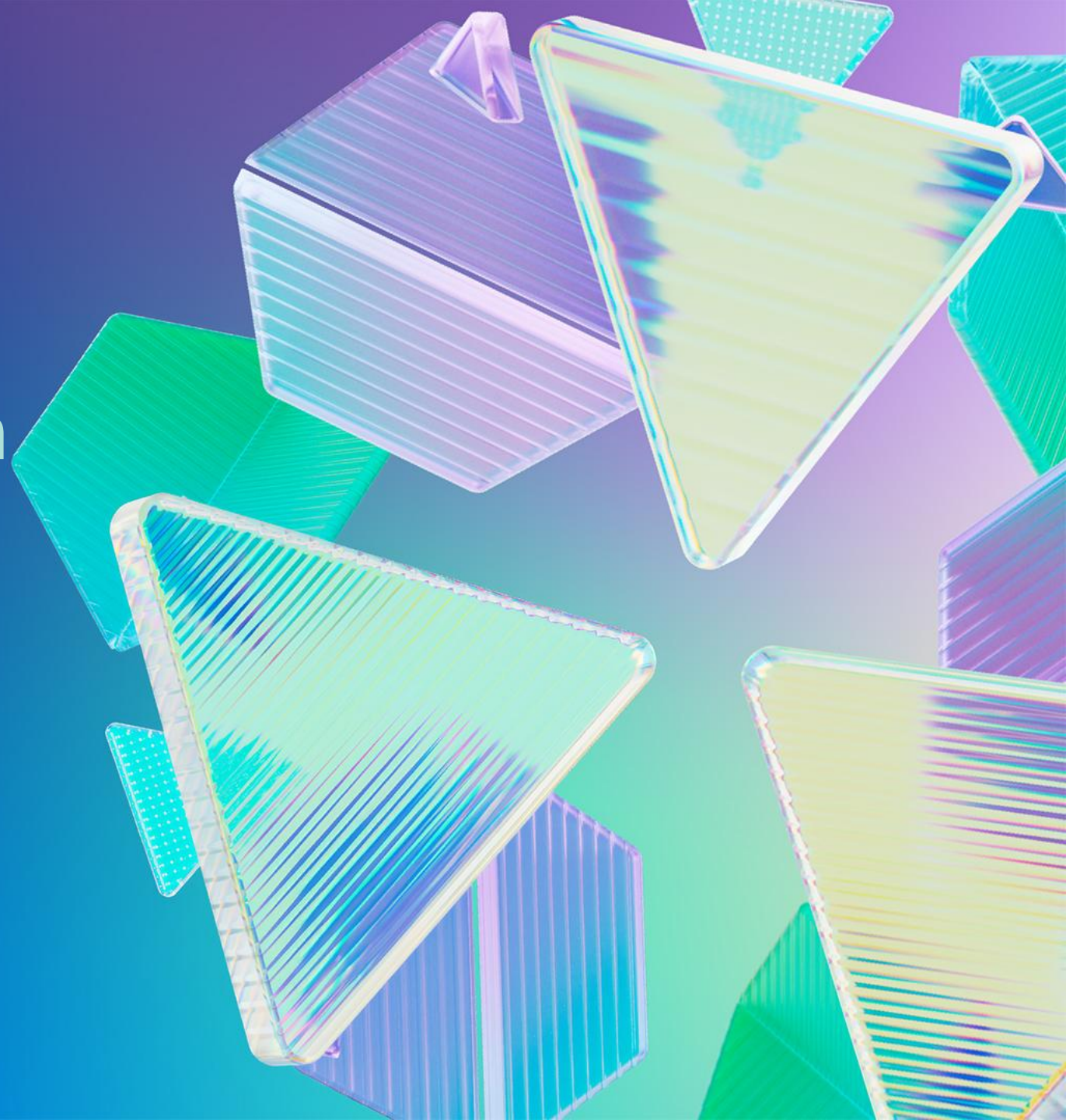




# Dynamics 365 : Our path to autonomous ERP

Espen Stensaas  
Technical Specialist  
Dynamics 365 AI-ERP



# Autonomous ERP

Meeting customer today's need and ensuring future success



AI driven solution with  
Copilot and agents



Extensive and scalable  
Portfolio for service and  
product centric industries



Robust, extensible and  
secure Platform



# 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)



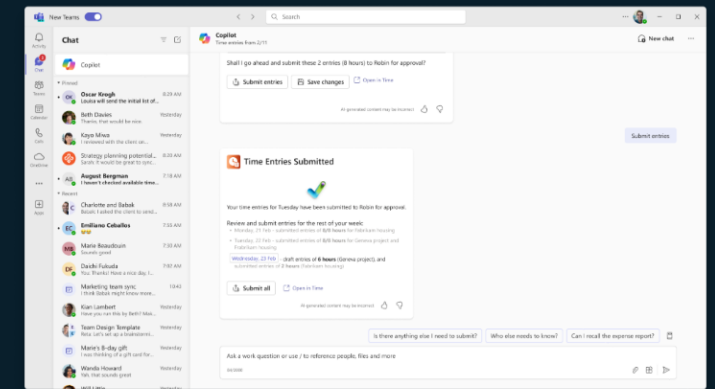
Industries

Microsoft  
365

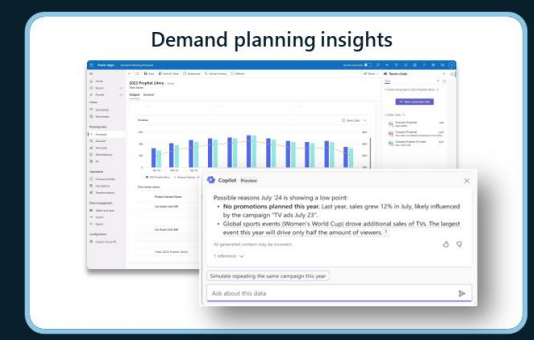
Dynamics 365  
Sales & Service

3P apps

Extensibility / Industry Verticals



## Time and Expense Agent



# Our Process Portfolio

## Common industry processes across the ERP suite

### Dynamics 365 AI-ERP

Integrated Business Planning - Business Performance Planning, Business Performance Analytics



Design to retire	Forecast to plan	Source to pay	Plan to produce	Order to cash	Inventory to deliver	Project to profit	Hire to retire	Acquire to dispose	Record to report
Engineering change management	Enterprise performance management	Sourcing	Production scheduling	Sales order management	Warehouse management	Project management	Time, attendance, leave,	Fixed assets	Cash and bank management
Product lifecycle management	Workforce planning	Procurement (direct and Indirect)	Manufacturing execution	Accounts receivable	Transportation management	Project accounting	Human resources	Asset management	Budgeting and control
Pricing management	Financial planning and analysis	Supplier Information Management	Quality management	Customer management	Quality management	Time tracking	Benefits management	Asset leasing	General ledger
Product Compliance Management	Supply Planning	Accounts payable	Manufacturing operations management	Credit and collections	Inventory management	Expense management	Employee and manager self-service	Maintenance, Predictive, Preventative	Cost accounting
Assortments & Catalogs	Demand Planning	Supplier Collaboration	Production costing	Retail and commerce	Reverse Logistics	Resource Scheduling	Workforce planning	Circularity and Sustainability	Subscription billing revenue recognition

Core Financials, and Globalization Studio (Tax, localization, Regulatory Reporting and Compliance, Regulatory Discovery & Alerting Service)

Finance



Supply Chain



Sustainability



Commerce



Field Service



Human Resources



Project Operations



E2E Business Processes

Common Data and Analytics Foundation

Modular and Extensible



# Finance Portfolio – Investments

Leading the way to autonomous ERP

## Business performance

- Streamline Dynamics 365 finance and operations integration, via Business performance analytics. *Public Preview May 2025*
- Put planning into action using outlier detection. *Public Preview Jun 2025*
- Start planning quickly with templates solutions. *GA Jun 2025*
- Use managed extensibility of data models. *Public Preview Feb 2025*
- Create dimensions and cubes using Copilot in BPP. *Public Preview Apr 2025*

## Core financials

- Further bank reconciliation report enhancements. *Public Preview May 2025*
- Cancel customer payment journals from bank reconciliation worksheet. *Public Preview May 2025*
- Optimize user security configurations and licensing costs. *Public Preview May 2025*
- Reconciliation matching rules data entity improvements. *Public Preview May 2025*
- Introduce financial tags into Business performance analytics and Accounting source explorer. *Public Preview May 2025*
- Generate a single journal for multiple vendor payment lines during bank reconciliation process. *Public Preview May 2025*
- New Ledger account only journal using new journal framework. *Public Preview May 2025*
- Preview automatic bank reconciliation matching results
- Split fixed assets. *Public Preview May 2025*
- Transfer fixed assets between legal entities. *Public Preview May 2025*
- Get greater budget control for multiple account structures. *Public Preview May 2025*
- View cross company transactional data using accounting source explorer. *Public Preview May 2025*



## Copilot

- Account reconciliation agent workspaces *Public Preview Apr 2025*
- Experience the immersive homepage and Copilot for accounts payable clerk. *Public Preview Jun 2025*
- Search documents using natural language using document explorer. *Public Preview Jun 2025*
- Summarize fixed asset book with Copilot. *Public Preview Jun 2025*

## Globalization

- Expand country coverage to Türkiye. *Public Preview Apr 2025*
- Extend support for multiple tax registration numbers in tax reporting. *GA Apr 2025*
- Use the security enhancements in UK MTD VAT integration. *Public Preview Apr 2025*
- Use electronic invoicing in Bolivia. *GA Sept 2025*
- Access electronic invoicing phased rollout in Belgium. *GA Sept 2025*
- Update to OIOUBL format 3.0 for Electronic invoicing in Denmark. *GA Sept 2025*
- Use electronic invoicing in Poland. *Public Preview Apr 2025*
- Convert Excel business documents to PDF locally. *Public Preview Apr 2025*
- Automate tax feature creation based on tax master data. *Public Preview Jul 2025*

# Multi-entity investment



## **New Journal Framework**

Introduction of a new journal framework featuring multi-entity support, hyper scale and enhanced import experience, and accounting rules engine



## **Enhanced user experience**

Improved user experience and processing for multi-entity operations



## **Consolidation Framework**

Consolidation across multiple ERP systems



## **Automation of standards**

Automation of multiple accounting standards

# Immersive workspaces

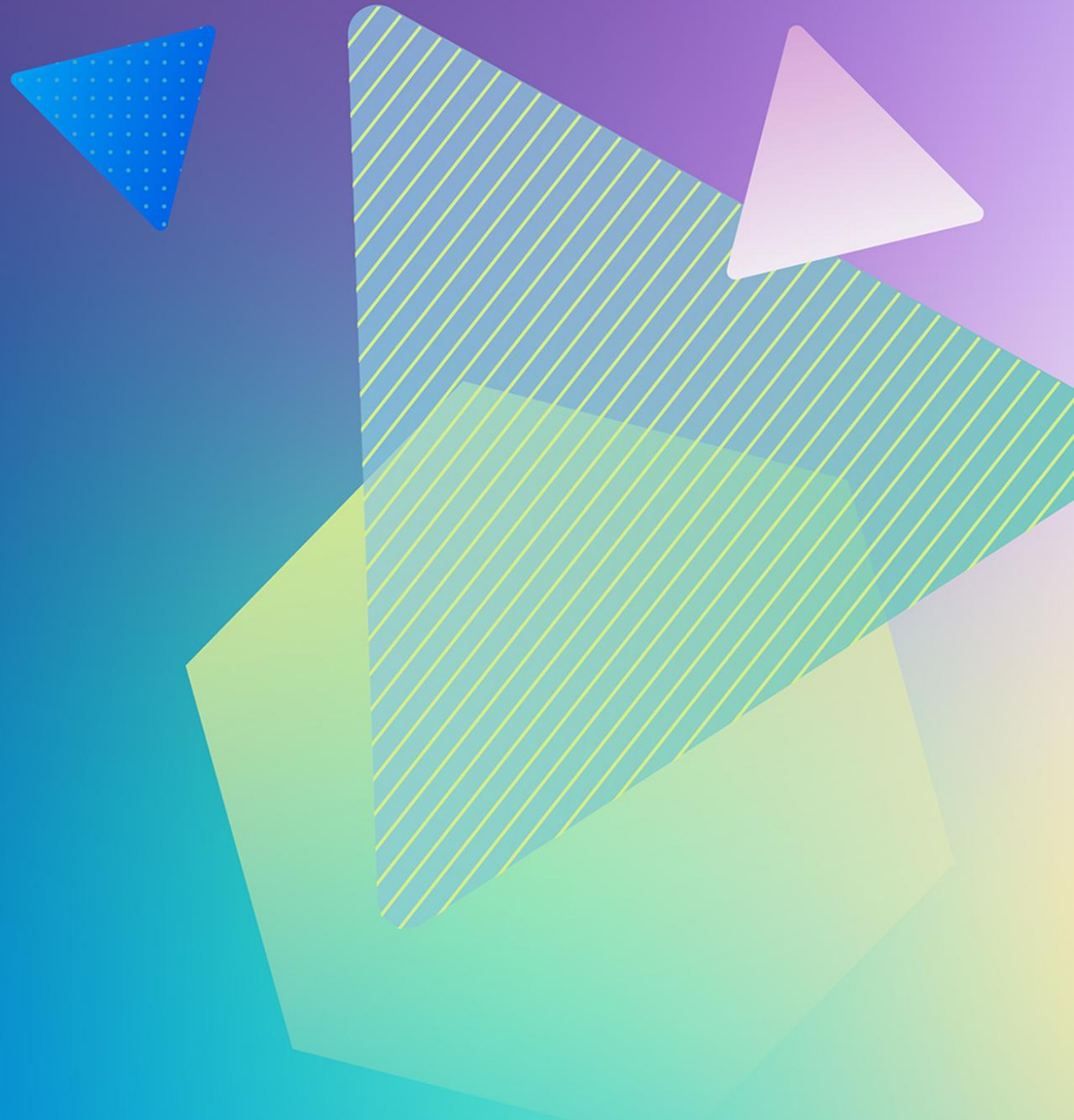




# New financial framework



# Documents & security



# Demo: Security governance

The background features a vertical gradient from dark blue at the top to light yellow at the bottom. On the right side, there are several overlapping geometric shapes: a small blue triangle with white dots at the top, a larger light blue triangle with yellow diagonal stripes below it, and a white triangle with a light blue gradient to its right. At the bottom right, there is a large, complex shape composed of several overlapping polygons in shades of green and yellow.



Finance and Operations Preview										
Search for a page										
USMF   Contoso Entertainment System USA										
← + New Delete Delete user Disable user Enable user Options										
User activity aging (preview)										
Standard view										
Filter										
Operator name	User ID	Enabled	Basic user license	Manually assigned license	Last logon date	Last 7 days c...	Last 30 days c...	Last 60 days c...	Last 90 days c...	Last 180 days c...
TestUser5	test.user5	✓	Team Members	Team Members		0	0	0	0	0
TestUser6	test.user6	✓	Team Members	Team Members		0	0	0	0	0
TestUser7	test.user7	✓	Team Members	Team Members		0	0	0	0	0
TestUser8	test.user8	✓	Team Members	Team Members		0	0	0	0	0
TestUser9	test.user9	✓	Team Members	Team Members		0	0	0	0	0
TIM	TIM	✓	Unknown	Unknown		0	0	0	0	0
TIML	TIML	✓	Unknown	Unknown		0	0	0	0	0
Tom Perham	TomP	✓				0	0	0	0	0
TONY	TONY	✓	Basic Supply Chain Management	Basic Supply Chain Management		0	0	0	0	0
TRICIA	TRICIA	✓	Basic Project	Basic Project		0	0	0	0	0
VINCE	VINCE	✓	Basic Supply Chain Management	Basic Supply Chain Management		0	0	0	0	0
Wayne	Wayne	✓				0	0	0	0	0
Paul Cannon	pcannon	✓				0	0	0	0	0
PHYLLIS	PHYLLIS	✓	Basic Finance	Basic Finance		0	0	0	0	0
portalanony...	portalanonymous	✓				0	0	0	0	0
PRAKASH	PRAKASH	✓	Basic Project	Basic Project		0	0	0	0	0
Paweł Woźni...	pwozniak	✓	Team Members	Team Members		0	0	0	0	0
\$C0BA	\$C0BA	✓				0	0	0	0	0
YOICHIROO	yoichiroo	✓	Basic Project	Basic Project		0	0	0	0	0
	Guest		Team Members	Team Members		0	0	0	0	0
Admin	Admin	✓			10/28/2024	0	0	2	2	2
Radek Sulej	x_radsul	✓	Team Members	Team Members	10/28/2024	0	0	2	2	2
AWX Test 2	awx.test2	✓	Team Members	Team Members	12/5/2024	0	898	1641	1641	1641
Radosław Su...	radoslaw.sulej	✓	Team Members	Team Members	12/5/2024	0	1	1	1	1
AWX SSW1	awx.ssw1	✓	Activity	Activity	12/5/2024	0	1	1	1	1
Paweł Woźni...	pawel.wozniak	✓	Team Members	Team Members	12/5/2024	0	3	3	3	3
AWX Test 1	awx.test1	✓	Team Members	Team Members	12/12/2024	3453	7608	7791	7791	7791
AWX Test 4	awx.test4	✓	Team Members	Team Members	12/12/2024	1	2391	2391	2391	2391
AWX Test 5	awx.test5	✓	Team Members	Team Members	12/12/2024	2	2	2	2	2
AWX Test 6	awx.test6	✓	Team Members	Team Members	12/12/2024	85	142	144	144	144



Finance and Operations Preview

Search for a page

USMF | Contoso Entertainment System USA

Report data may be out of date or not yet generated. Use Rebuild to refresh the data.

EditRebuildRecalculate pricesRebuild licensesOptions

Standard view

Licenses usage summary (preview)

User licenseRole licensesDuty licensesPrivilege licensesUser licenses summarySecurity summary

DETAILS

User ID	Operator name	Title	Activity	Team Members	None	Finance	SCM	Commerce	Project	HR	Basic user license	Price	Manually assigned license
BROOKE	BROOKE	HR Assistant				✓				✓	Basic Human resources	159.00	Basic Hun
BrunoD	BrunoD	Category Manager										0.00	
bszpiech	Bartosz Szpi...			✓							Team Members	8.00	Team Mer
CASSIE	CASSIE					✓	✓		✓		Basic Finance	189.00	Basic Fina
cdsaurouser	Aurorouser0...											0.00	
cdscapuser	Testuser@ca...											0.00	
cdscapuser2	Testuser2@c...											0.00	
cdsdevuser1	User1@devt...											0.00	
cdsdevuser2	User2@devt...											0.00	
CHARLIE	CHARLIE	President	✓								Activity	39.00	Activity
CHRIS	CHRIS										Unknown	0.00	Unknown
CHRISTIP	CHRISTINA	Machine Operator										0.00	
CLAIRE	CLAIRE	Director of Human Resources								✓	Basic Human resources	159.00	Basic Hun

SUMMARY

User licenseManually assigned licenseUser entry points

Basic user license	Price	Quantity	Amount
Basic Finance	189.00	10	1,890.00
Basic Supply Chain Management	189.00	20	3,780.00
Basic Commerce	189.00	2	378.00
Basic Project	189.00	5	945.00
Team Members	8.00	57	456.00
Activity	39.00	12	468.00
Finance	0.00	1	0.00
SCM	0.00	4	0.00
Commerce	0.00	4	0.00
Project	0.00	1	0.00
Unknown	0.00	3	0.00

User licenseManually assigned license

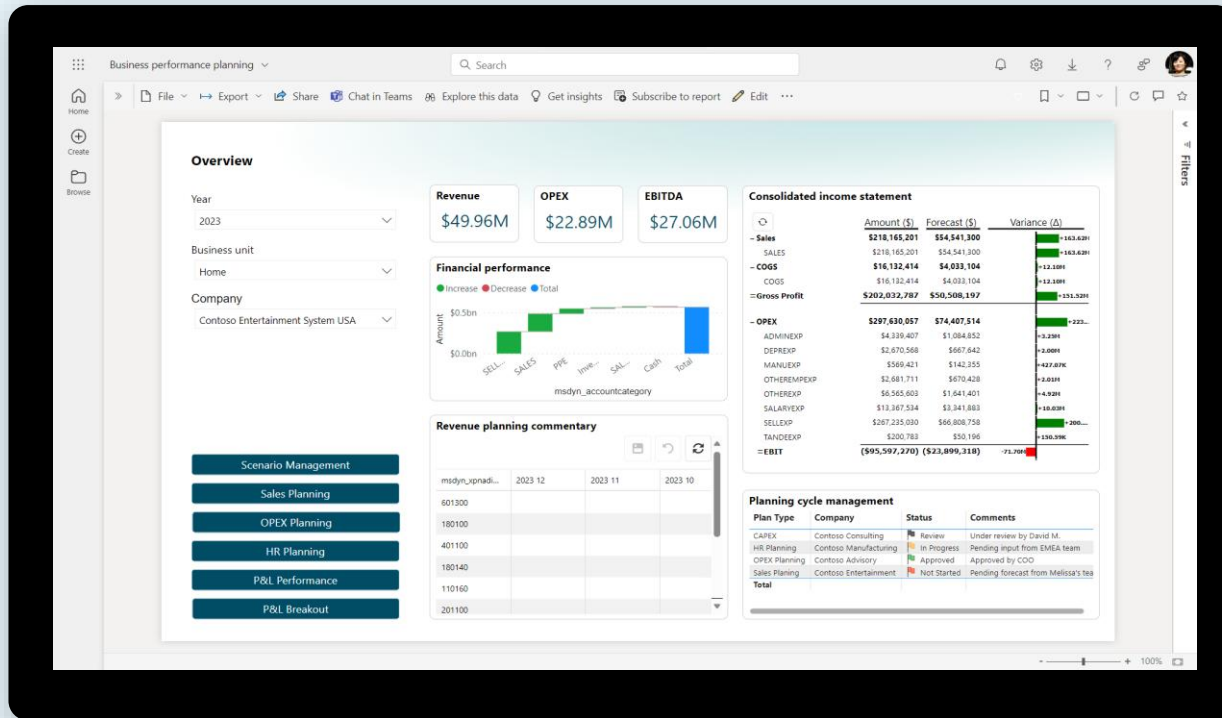
Basic user license

Basic Finance189.00

SCM0.00

Project0.00

# Business Performance Planning



Connect: Data Integration and Modeling Flexibility using Microsoft Fabric and Dataverse

Create: Planning, Budgeting and Forecasting

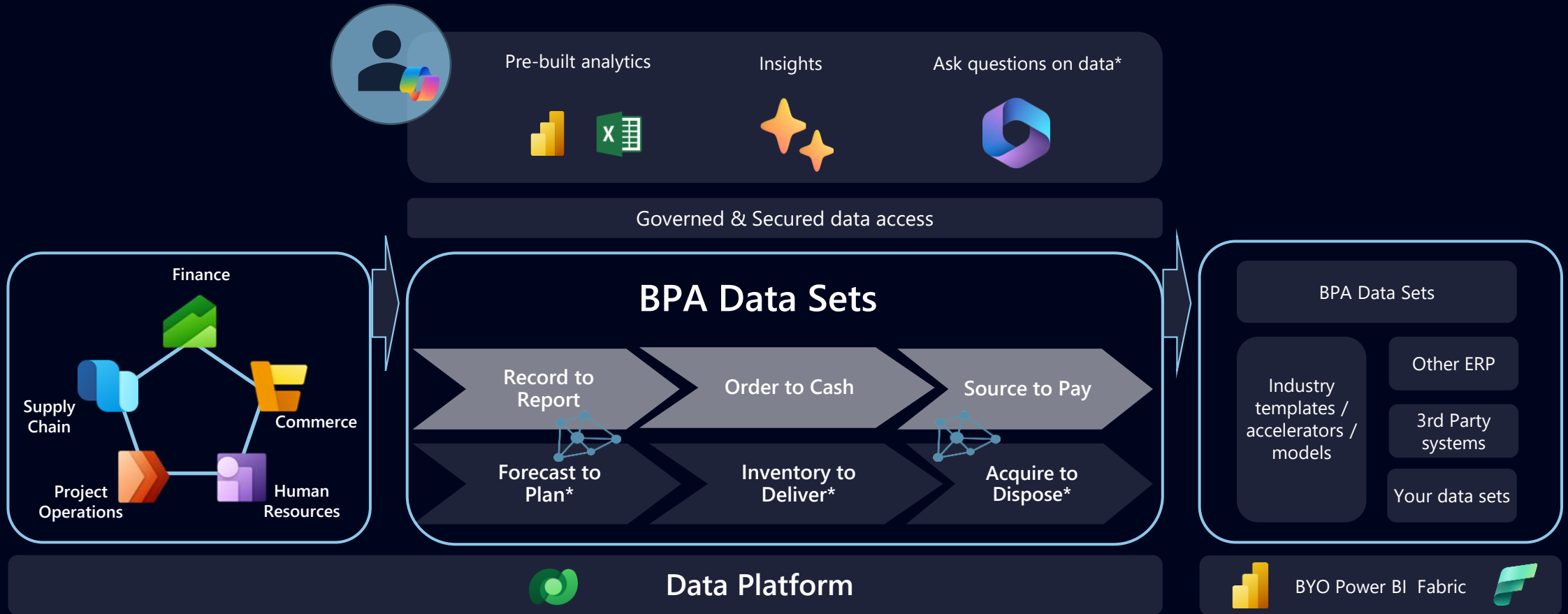
Collaborate: Using Microsoft Excel and Power BI

AI-assisted Workflow and Processes

Trusted security and compliance



# Business Performance Analytics



\*Planning capabilities in future roadmap

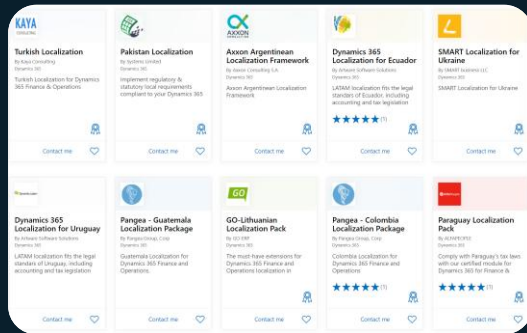


# Global platform

## Globalization studio

Simplified extensibility. Configurable globalization tools and services for key globalization areas of tax, e-invoicing, regulatory reporting, banking, and business documents.

Customers and partners extended and created over 13,000 features for 120+ countries. 50+ ISV solutions on Microsoft AppSource



## Maintaining regulator compliance

Monitoring legislation changes and shipping regulatory updates. Alerting service in the platform administration tools enables customer to discover and implement updates.

[Globalization resources - Finance & Operations | Dynamics 365 | Microsoft Docs](#)  
[General Data Protection Regulation overview - Finance & Operations | Dynamics 365 | Microsoft Docs](#)



## Wide out-of-the-box country/region coverage

### 58 countries/regions

Australia, Austria, Arg (PP), Bahrain, Belgium, Bolivia, Brazil, Canada, Chile, China, Colombia, Costa Rica, Dom. Rep., Czech Republic, Denmark, Ecuador, Estonia, Finland, France, Germany, Hong Kong SAR, Hungary, Iceland, India, Indonesia, Ireland, Italy, Japan, Kuwait, Latvia, Lithuania, Malaysia, Mexico, New Zealand, Nicaragua, Norway, Oman, Panama, Paraguay, Peru, Poland, Qatar, Russia, Saudi Arabia, Singapore, South Africa, Spain, Sweden, Switzerland, Thailand, The Netherlands, United Arab Emirates, United Kingdom, United States, Uruguay, Venezuela

### 74 languages

Arabic (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE), Chinese Simplified (China), Czech (Czech Republic), Danish (Denmark), Dutch (Belgium, Netherlands), English (Australia, Canada, Hong Kong SAR, India, Ireland, Malaysia, New Zealand, Singapore, South Africa, UK, US), Estonian (Estonia), Finnish (Finland), French (Belgium, Canada, France, Switzerland), German (Austria, Germany, Switzerland), Hungarian (Hungary), Icelandic (Iceland), Italian (Italy, Switzerland), Japanese (Japan), Latvian (Latvia), Lithuanian (Lithuania), Norwegian Bokmål (Norway), Polish (Poland), Portuguese (Brazil), Russian (Russia), Spanish (Mexico, Spain), Swedish (Sweden), Thai (Thailand), Turkey (Turkish), Ukrainian, Vietnamese...

# Supply Chain Portfolio – Investments

Leading the way to autonomous ERP

## Copilot and AI Innovation

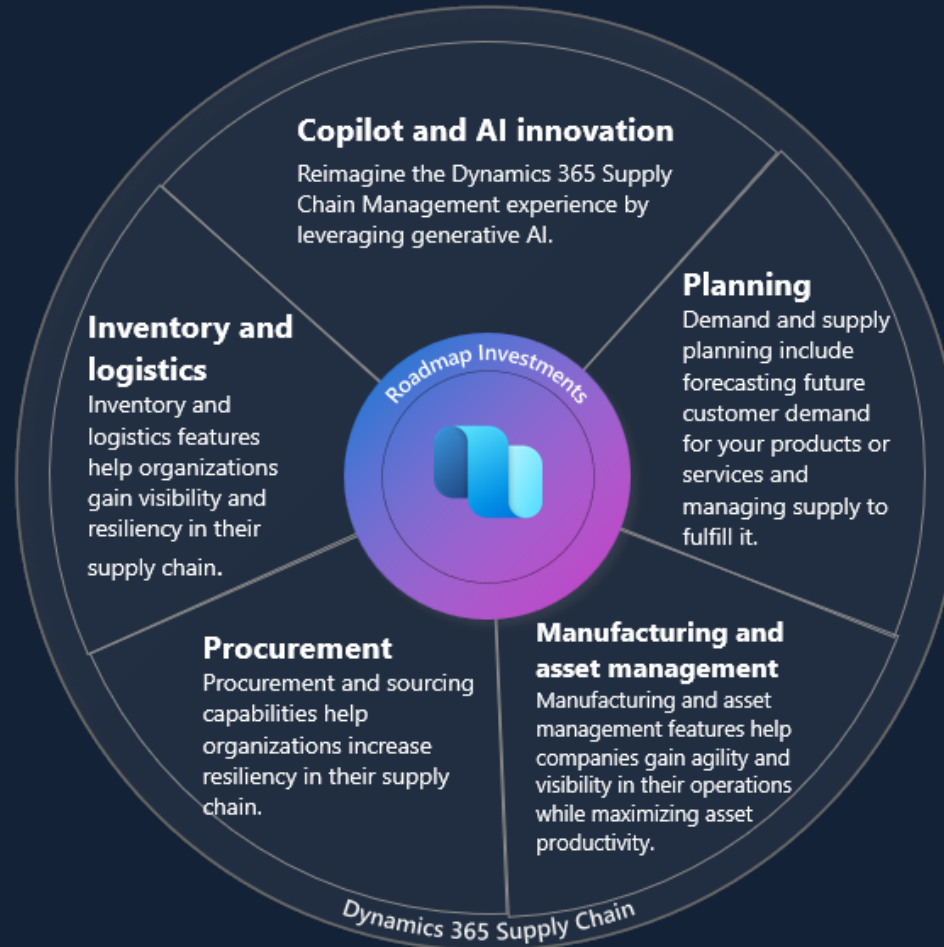
- Keep conversations going with AI-generated follow-ups. *GA April 2025*
- Automate procure-to-pay tasks with supplier communications agent. *Public Preview April 2025*

## Inventory and logistics

- Trace and solve quality issues with Copilot. *Public Preview May 2025*
- Add transactions when recalculating weighted average. *GA April 2025*
- Track with tracking attributes and data collection in Supply Chain Traceability. *Public Preview May 2025*
- Enhance vendor rebate management. *GA April 2025*

## Procurement

- Manage supplier relationships and improve collaboration. *Public Preview Jul 2025*
- Support contract lifecycle management in source to pay by flexible integration. *GA April 2025*



## Planning

- Enhance your demand forecasting and planning. *GA April 2025*
- Implement lean manufacturing, catch weight, and step consumption with Planning Optimization. *Public Preview Jul 2025*

## Manufacturing and asset management

- Achieve regulatory compliance and quality excellence. *Public Preview April 2025*

# Modernize Manufacturing processes



## Resource Allocation and Scheduling

Increase efficiency and optimize throughput through Intelligent resource allocation and *what-if-analysis*\*.



## Advanced Quality Management

Include quality management tasks in all aspects of shop floor operations.



## Production process execution & control

Gain insights and predictions with real-time IoT data.



## Traceability

Gain transparency and compliance from tracking history and use of materials in the production process.



## Copilot and Agents

Optimize master data; improve production quality and utilization



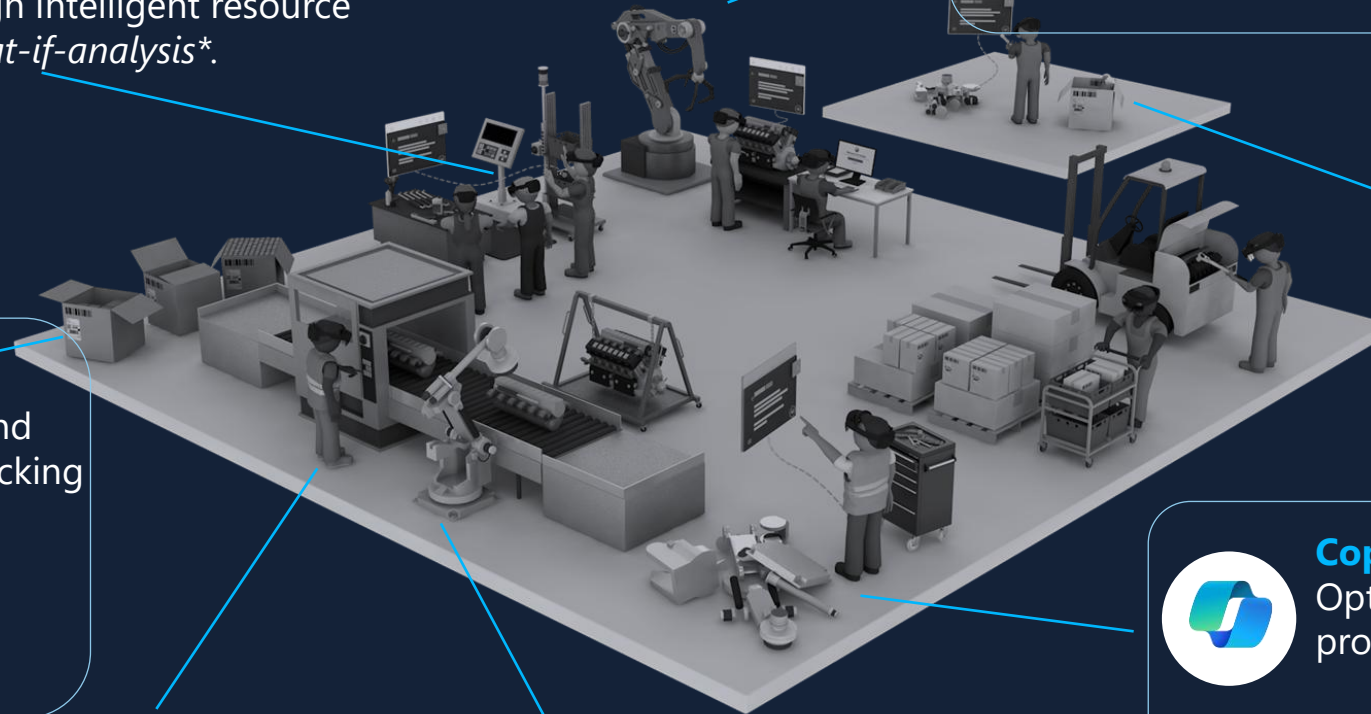
## Inventory & warehouse management

Seamless physical flows between shop floor and warehouse.



## Subcontracting

Continuous collaboration with through integrated visibility across supply chains.



# Advanced Quality Management



# Traceability

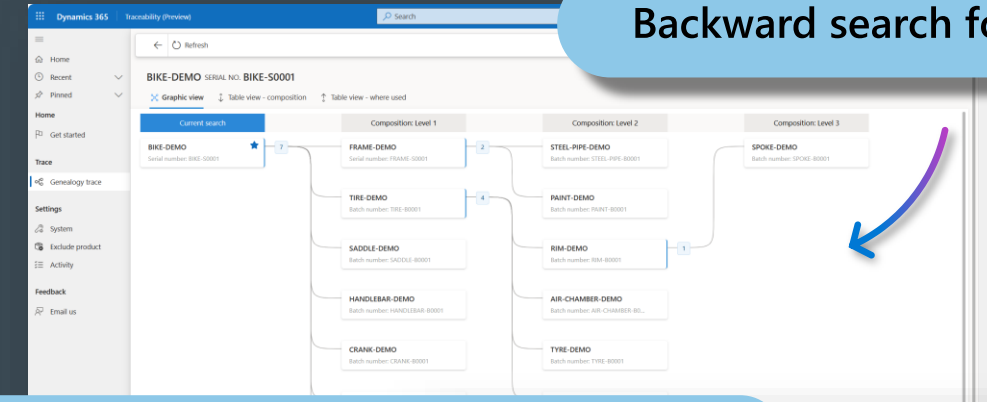


With **strict regulations, high consumer expectations, and complex global supply chains**, traceability helps businesses manage risks, ensure compliance, and boost efficiency

## Capabilities

- **Full Supply Chain Visibility:** Traceability provides insights into the flow and status of goods from sourcing to delivery.
- **Risk Management & Recalls:** It allows for accurate tracking of affected products during recalls, minimizing impact and safeguarding the brand.
- **Sustainability:** Traceability ensures ethical sourcing and sustainability by tracking material origins and labor practices.
- **Data-Driven Insights:** The collected data supports advanced analytics, enabling better decision-making and process optimization.
- **Copilot Summary:** Copilot uses large language models (LLM) to summarize activities and where-used data, delivering fast insights from large datasets.

Backward search for finished goods



Activity detail with Copilot summary

Copilot summarizes the where-used list to final finished goods

Item name	Batch number	Serial number	Asset number	Lot number	Production
BIKE-DEMO		BIKE-S0002			11/08/202
BIKE-DEMO		BIKE-S0001			11/06/202
TIRE-DEMO	TIRE-S0001				11/05/202
RIM-DEMO	RIM-S0001				11/05/202

Forward search for component

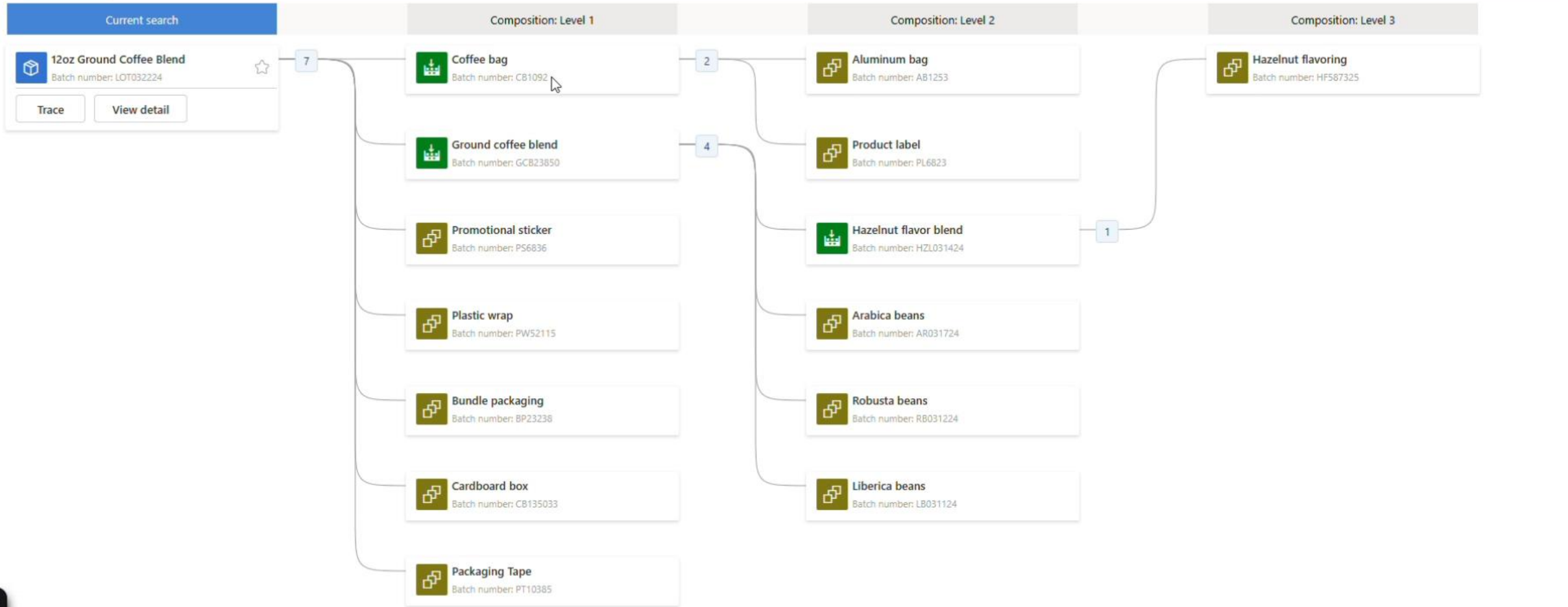


←

Refresh

12oz Ground Coffee Blend BATCH NO. LOT032234

[Graphic view](#) | [Table view - composition](#) | [Table view - where used](#)



Power Apps

Finance and Operations

Supply Chain Management

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🔍 https://dynamics365/scm

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Dynamics 365

Traceability (preview)

🔍 Search

🔗

+

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Home

Recent

Pinned

Home

Get started

Workspace

Trace

Genealogy trace

Find items

Settings

System

Exclude product

Activity

Data collection

+

Add

💾

Save

Data collection configuration

All status

🔍 Search

Name ↑	Description	Data collection ID	Data type ▾	Applicable activity	Company ▾	Status ⋮
▼ Pump assembly						
Date	Date of assembly	LOC002	Date	All activities	USMF	🔵 On
Time	Time of assembly start	LOC002	Time	All activities	USMF	🔵 On
Location	Manufacturing site of this assembly	LOC002	Text	All activities	USMF	🔵 On
Worker	Person who performed the assembly	LOC002	Text	All activities	USMF	🔵 On
Intake diameter (micron)	Pre-assembly, inside measurement	QA0021	Integer	All activities	USMF	🔵 On
Output diameter (micron)	Pre-assembly, inside measurement	QA0021	Integer	All activities	USMF	🔵 On
Pump membrane travel (mm)	Post assembly measurement	QA0021	Real	All activities	USMF	🔵 On
Test workbench	ID of location test tool	QA0021	Text	All activities	USMF	🔵 On
Test water pressure (psi)	Measurement of water pressure test	QA0021	Real	All activities	USMF	🔵 On
Test duration (minutes)	Duration where pressure was maintained	QA0021	Integer	All activities	USMF	🔵 On
Pressure test ID	Reference to test report	QA0021	Text	All activities	USMF	🔵 On
Show All						
▼ Pump painting						
Date	Date when painting was performed	LOC002	Date	Power coating	All	⚫ Off
Time	Time of day that painting started	LOC002	Time	Powser coating	All	⚫ Off

SC

Supply Chain Trac...

⌵

# Sourcing and procurement



## Supplier Relationship Management

Improve supplier lifecycle management from onboarding to offboarding.

*Preview Q1 2025*



## Copilot and Agents

Source to Pay Copilot Agents drive efficiencies in supplier collaboration and order management processes.

*Preview at Ignite, November 2024*



## Supplier Portal

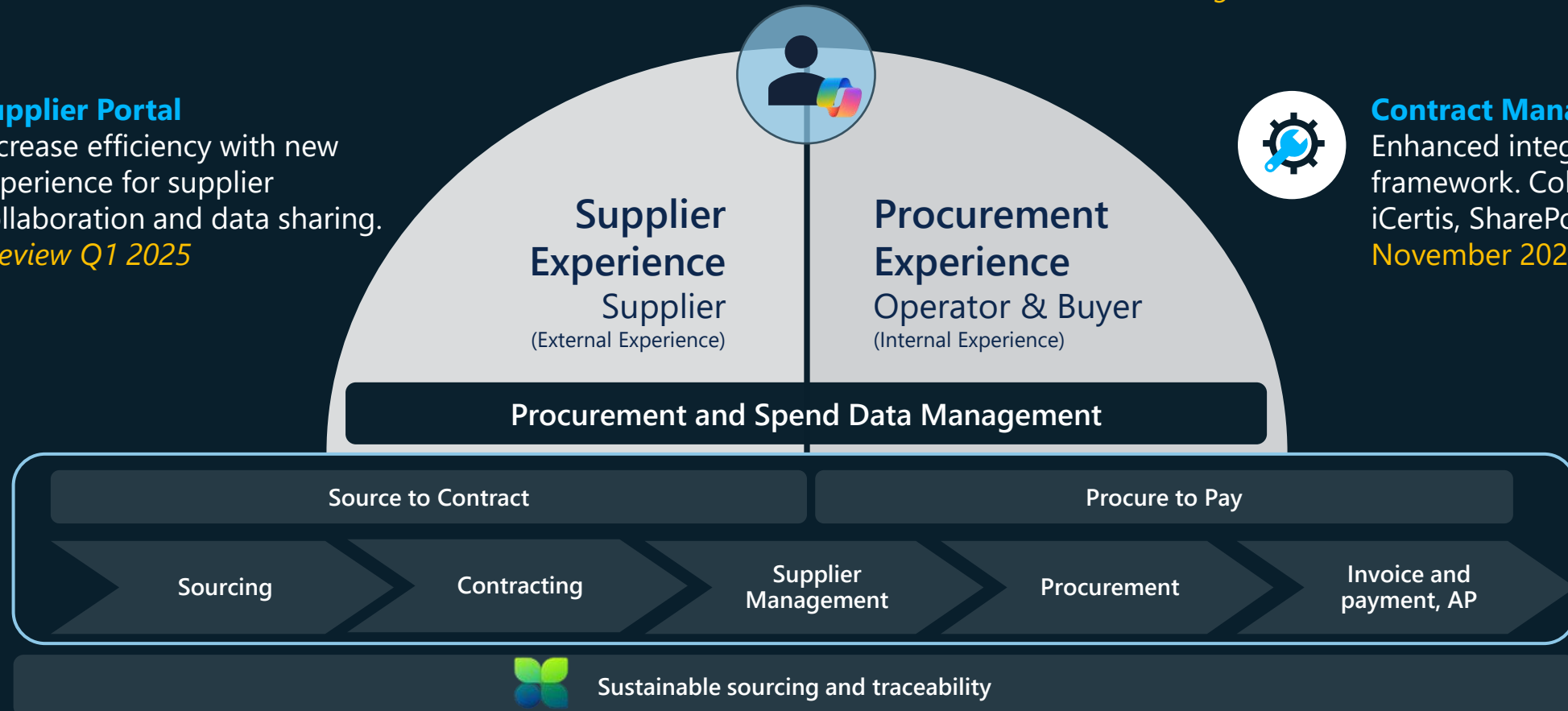
Increase efficiency with new experience for supplier collaboration and data sharing.

*Preview Q1 2025*



## Contract Management

Enhanced integration framework. Collaboration with iCertis, SharePoint *preview in November 2024*





Power Apps

Finance and Operations

Supply Chain Management

← → ↺ 🔍 https://dynamics365/financeandoperations

⌵

USMF

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⚙️

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Good morning, Daisy. You have 2 work items.

🔗 Work items

🔗 Update 15 purchase order details  
Supplier communications agent

Based on emails from vendors, 15 purchase orders have change requests. Review and update purchase order details accordingly.

Review ...

👍 👎

🔗 Review 7 draft emails  
Supplier communications agent

Review 7 emails drafted by Copilot to follow up with suppliers who have not confirmed purchase orders or have delayed deliveries

Review ...

👍 👎

🔗 Agent activity

Email follow-up

Followed-up purchase orders  
24

Estimated time saved ⓘ  
3 hours

Purchase order updates

Emails received  
10

Emails processed  
9

Estimated time saved ⓘ  
2 hours

View activity

View tasks

🔗 Workspaces

📄 Confirmed purchase orders with changes  
Visited today at 10:15

📄 Purchase order confirmation  
Visited today at 7:01

📄 Purchase order preparation  
Visited yesterday at 21:10

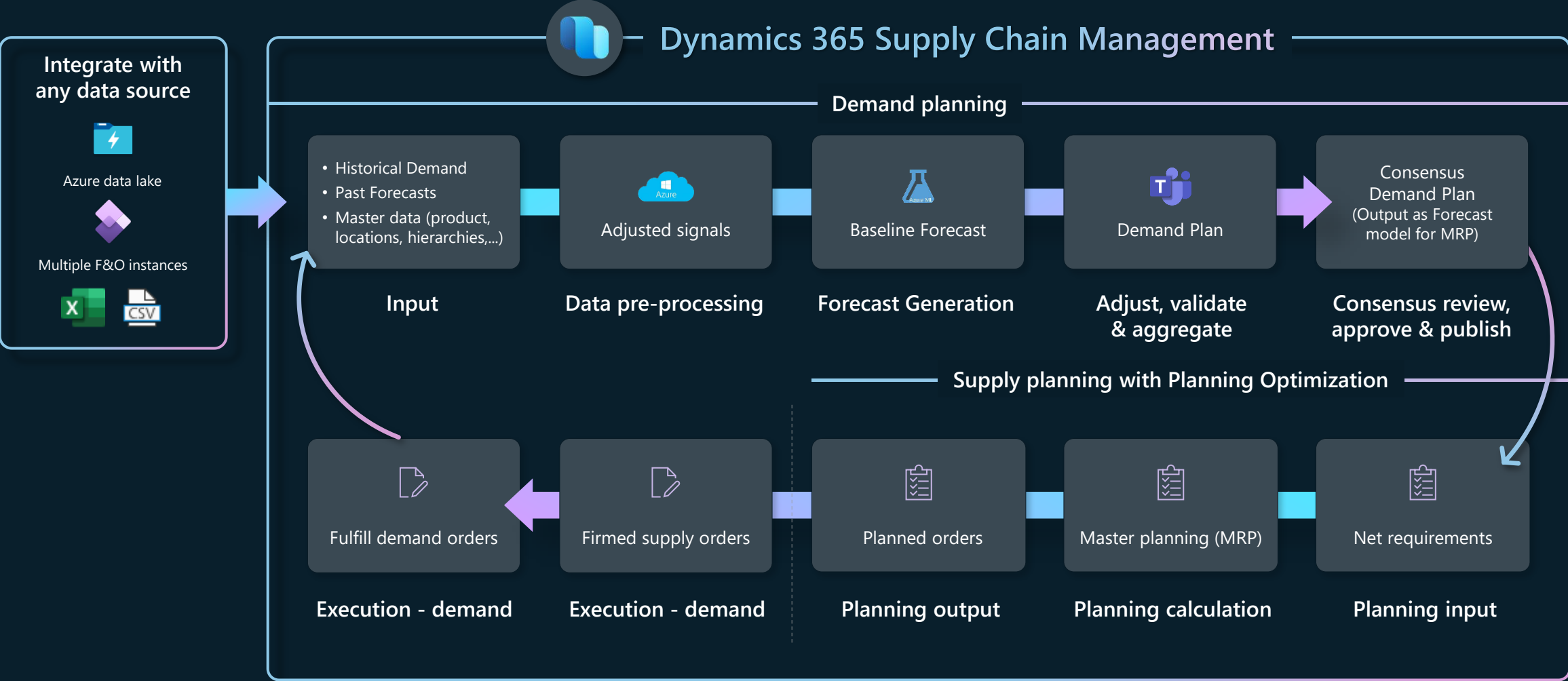
📄 Purchase order receipt and follow-up  
Visited yesterday at 17:15

See all

Supplier Communications Agent

🔗 AI generated content may be incorrect. [See terms](#)

# Full Planning cycle with demand planning



Output  Generative insights (15) ...

Generative insights Production ready preview

Regenerate ^

[View insights](#)

Category	Count
Seasonality	8
Trend	4
Signal correlation	3

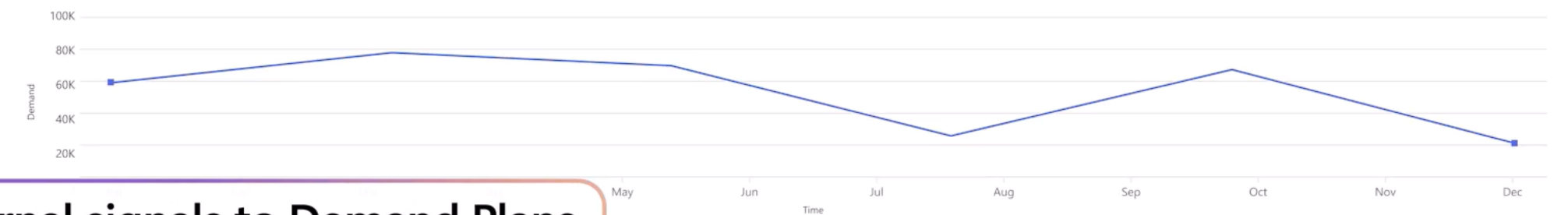
15 insights have been detected for this forecast under default worksheet

- At least 1 pattern has been detected for 73% of planning objects
- 27% of planning objects has no clear pattern
- Largest cluster is a seasonality – Spring & summer peak includes 45,063 (80% planning objects) and represents 465K (85% of total units)

- EVA sandals are trending in Southern Italy, based on current trend, sales projections are 8% higher than forecasted.
- Down sleeping bags have been trending down for the last six months, it is likely the forecasted demand will be over by at least 7%.

17 Sep 2024 11:31 PM AI-generated content may be incorrect. Supplemental terms and conditions.

Select data Label Label ⋮ ^ ^



## Time series values

Group by  Filter totals  Select data  Edit  Discard changes  Save 

Product ▾	Location ▾	Brands ▾	🏠	Total ▾	January	Febuary	March	April	May	June
Sandals	Berlin	Contoso	🏠	789,820	1,123,377.50	649,980	502,118.75	789,820	307,107.50	722,890

Power Apps

Finance and Operations

Supply Chain Management

https://make.powerapps.com/

Power Apps

Demand Planning (preview)

Search

+

🔔

👤

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Home

Get started

Worksheets

Planning data

Forecasts

Demand

Financials

Miscellaneous

All

Operations

Forecast profiles

Calculations

Transformations

Data management

Tables and data

Configuration

Custom Azure ML

Row level security

Phase in/out rules

Time fences

AN Area name

2025 Arima 12m - Saved

Time series

Output

Generative insights

Default worksheet

Timeline

100K

80K

60K

40K

20K

0

Jan

Feb

Mar

Apr

May

Jun

Jul

Aug

Sep

Oct

Nov

Dec

Amount

Month

■ Forecast 2024

● Actual sales - '22

▼ Actual sales '23

◆ Actual sales '24

Time series values

Group by

Filter totals

Select data

Edit

Discard changes

Save

Brands		Total	January	February	March	April	May	June
Contoso	Adatum	662	76	123	143	213	84	23
	Adatum	1418	200	432	234	235	64	253
Munich	Contoso	1676	163	561	342	253	234	123
	Adatum	1023	386	321	65	87	214	53
Boots	Contoso	1324	153	456	234	264	315	76
	Adatum	1234	368	123	321	236	125	98
Munich	Contoso	1365	178	432	368	125	163	36

Generative Copilot insights

# Commerce Portfolio – Investments

Leading the way to autonomous ERP

## Store Commerce

- Simplify Store Commerce offline database size management. *Public Preview May 2025*
- Monitor and manage Store Commerce offline readiness. *Public Preview May 2025*
- Customize payments, peripherals on Store Commerce app for iOS. *Public Preview May 2025*
- Improve Store Commerce health check. *Public Preview May 2025*
- Notify associates on network and offline data issues using Store Commerce notification framework. *Public Preview May 2025*



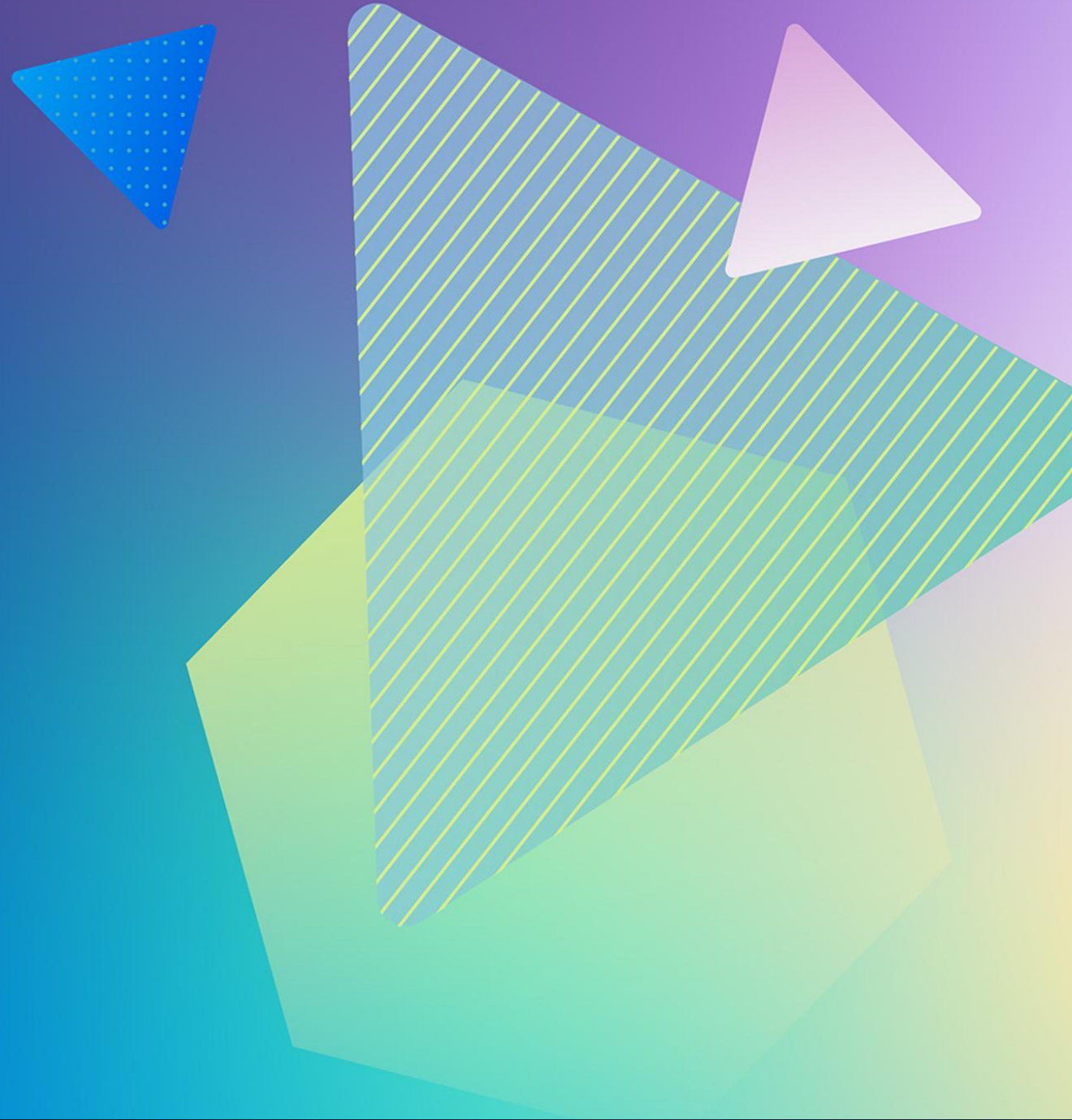
## Omnichannel Commerce

- Roll out multifaceted pricing strategies. *Public Preview April 2025*
- Enable use of sales order attributes to define pricing rules. *GA April 2025*
- Modernize Commerce payments to process asynchronous payment notifications and enable new payment methods. *Public Preview April 2025*



Activate Windows  
Go to Settings to activate Windows.

# Commerce updates



# AI-powered Hire to Retire processes

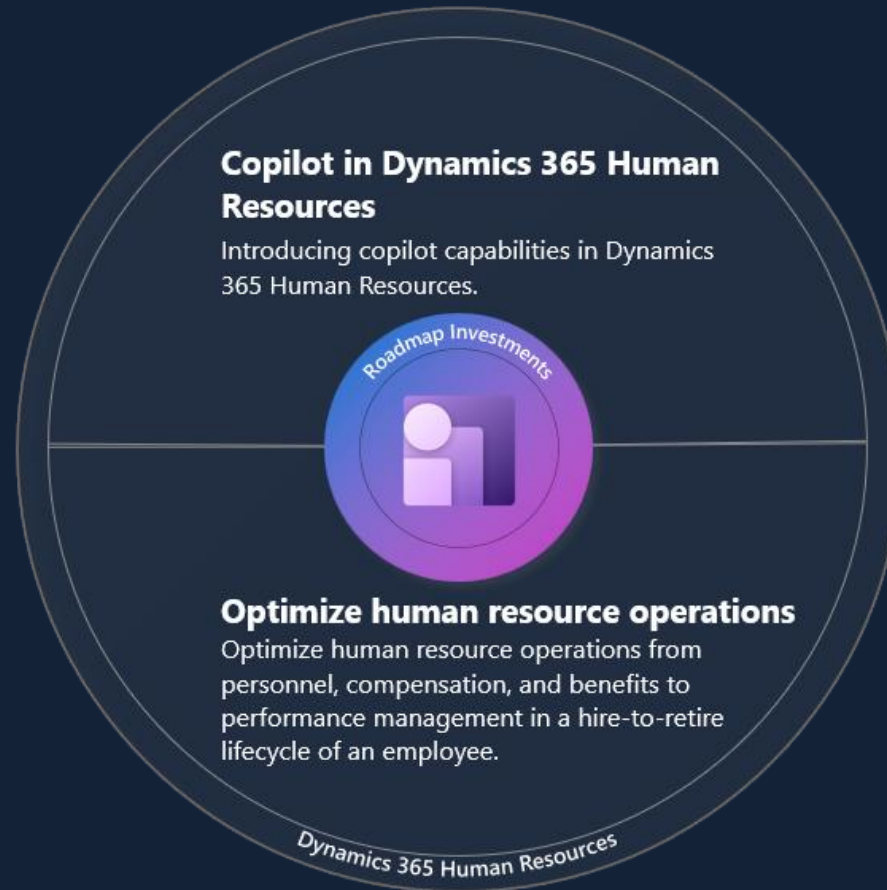


# Human Resource Portfolio – Investments

Leading the way to autonomous ERP

## Copilot

- Simplify the onboarding process for new hires with copilot *Public Preview June 2025*
- Streamline the onboarding process for hiring managers with Copilot. *Public Preview June 2025*
- Boost candidate screen efficiency with automated assessments. *Public Preview August 2025*



## Optimize human resource operations

- Expand recruiting capabilities for service-centric organizations. *GA June 2025*
- Integrate Human Resources with Viva Connections. *Public Preview March 2025*
- Enhanced integration with Microsoft Entra ID integrations. *Public Preview July 2025*



**Boost candidate screening efficiency  
with automated assessments**

The screenshot displays the Dynamics 365 Human Resources dashboard. At the top, a browser window shows the URL <https://www.dynamics365/humanresources>. The dashboard header includes a search bar and user information (USMF). The main content area is divided into several sections:

- Welcome Message:** "Good morning, Beth. You have 3 new candidates to review for your open position."
- Upcoming tasks:**
  - Review candidates for open position:** Created by Microsoft Dynamics 365. A button labeled "Review candidates" is visible. Below the task, it states: "Copilot has identified three new candidates who meet the criteria for your vacant Account Manager positions."
  - Time off requests:** Created by Microsoft Dynamics 365. A button labeled "Approve" is visible. Below the task, it states: "April has applied for time off from February 5th, 2025 to February 7th, 2025. View details. PTO - Details. February 5th, 2025 to February 7th, 2025. 1 half day. 2 full days."
- Important documents:**
  - Security and privacy:** Includes links to "IdentifyingPhishing.docx", "Privacy101.docx", and "DataProtection.docx".
- Quick actions:**
  - Open positions:** View open positions. You have 3 open positions and 4 new candidates that fit your job requirements.
  - Performance management:** View goals. You are on track for 4/5 goals for this cycle. You are yet to begin "Complete mandatory trainings".
- My team:** View more. A grid of team members is shown:

Name	Role	Upcoming leaves
Chris Naidoo	Account Manager	12th-15th February
Miguel Silva	Account Manager	None
Issac Fielder	Account Manager	19th- 20th February
Kat Larrson	Account Manager	None
April Ahokas	Account Manager	None
Erik Nason	Account Manager	7th-15th March



A person wearing light-colored trousers and dark shoes is walking on a city sidewalk. They are pulling a black, hard-shell rolling suitcase with a distinctive wavy, ribbed pattern. The background is a blurred urban street scene with buildings, traffic lights, and a white car. The overall tone is professional and modern.

**Automate a personalized employee onboarding experience**

# Project Operations – Investments

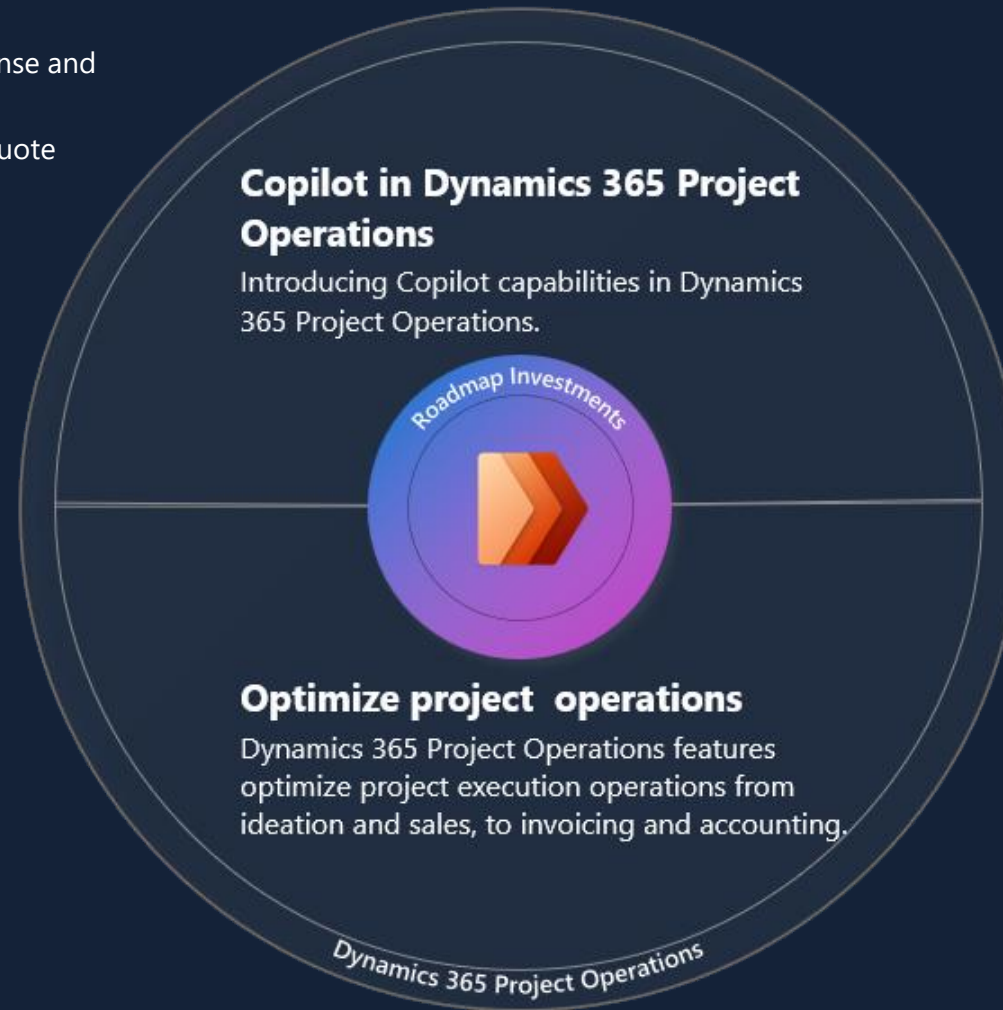
Leading the way to autonomous ERP

## Copilot in Project Operations

- Optimize processes with agent-led time, expense and approvals. *Public Preview Mar 2025*
- Use the enhanced Quote experience and AI Quote summary. *Public Preview Mar 2025*

## Optimize project operations

- Edit per diem transaction date and exchange rate in expense management. *GA June 2025*
- Enable expense delegates to create cash advance requests. *GA June 2025*
- Enable number sequences in Expense Management. *GA June 2025*
- Post expenses on the expense report posting date. *GA June 2025*
- Simplify expense management using new enhancements. *GA June 2025*
- Use financial tags for Project sales orders and journals. *GA June 2025*
- Use integration troubleshooting for modern projects. *Public Preview Mar 2025*
- Support for line discounts and fees in resource based deployments. *GA Jul 2025*



## Optimize project operations

- Use the new Time Entry mobile app. *Public Preview Mar 2025*
- Calculate revenue recognition based on contract line value. *GA Sep 2025*
- Simplify editing of project invoices to improve efficiency. *GA Sep 2025*
- Use general journals against projects for resource non-stocked scenarios. *GA Sep 2025*
- Use the simplified Approvals page. *GA Sep 2025*
- Use the enhanced quote experience. *GA Sep 2025*
- Use the new Calendar interface for time entry. *Public Preview May 2025*
- Use stocked products in resource based deployments. *Public Preview Jul 2025*
- Use what if analysis on estimates. *Public Preview Aug 2025*
- Use the Improved project contract experience. *Public Preview Aug 2025*
- Add calendar control to the work hour template entity. *Public Preview Sep 2025*
- Add support for WBS and project templates. *Public Preview Sep 2025*
- Copy externally scheduled projects. *Public Preview Sep 2025*



Dynamics 365 Project Operations

Dynamics 365 Project Operations

Dynamics 365 Project Operations

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Dynamics 365 Project Operations

🔍 Search for a page

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⚙️

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PM

🏠 Home

🕒 Recent

📌 Pinned

Customers

👤 Customers

📅 Contacts

🔗 Products

🔗 Price lists

Sales

📞 Leads

📄 Opportunities

📄 Quotes

📄 Project contracts

Transactions

📅 Approved time

📄 Approved expenses

📄 Journals

📄 Actuals

📄 Retainers and Advan...

📄 Available retainers an...

🔗 Product billing baclo...

🔗 Time and material bil...

🔗 Invoices

S Sales

←

📄

🔗

💾 Save

💾 Save & close

📄 Activate

➕ New

➕ What if analysis

📄 Update totals

🗑️ Delete

📄 Copy

🔍 Check access

📄 Export to PDF

🔄 Process

👤 Assign

⋮

🔗 Share

Adventure Works

- Saved

\$1,700,000

\$2,000,000

12

Draft

Total cost

Total revenue

Gross margin

Status

Quote

• Project quote information

Summary

Details

Projects

Products

What-if analysis

Analytics

Proposal

Name

Balanced growth plan

🔍

Goal

Increase gross margin

▼

Target %

75

Pricing controls

Transaction class

Time

▼

Pricing dimensions

Resourcing unit

▼

Resourcing unit (5)

✓ Apply

⋮

Fabrikam India

\$350,000.00

Fabrikam UK

\$600,000.00

Fabrikam US

\$450,000.00

Performance and insights

Performance indicators

Original vs target

60% of target achieved.

Original

24.68%

Target

75%

Delta

15%

Insights and alerts

Your total cost has been reduced by 23% and revenue increased by 30%

A detailed breakdown of changes, including the associated line items, pricing adjustments has been suggested...

View changes

Line details

🔗 Cost detail

↺

⋮

Task	Transaction...	Role	Resourcing unit	Work hours	Resource level	Quantity	Unit	Unit price	Amount
🔗 Build a sales order...	Time	Consultant	Fabrikam US	Regular	Associate	100	Hour	450	45,000
🔗 Data collection	Time	Consultant	Fabrikam UK	Regular	Associate	150	Hour	150	22,500
🔗 Regulatory rules maj	Time	Engineer	Fabrikam India	Regular	Associate	120	Hour	120	14,400
🔗 Data field mapping	Time	Technician	Fabrikam Neth...	Regular	Senior	230	Hour	230	52,900
🔗 Validate mapping	Time	Sr. Consultant	Fabrikam US	Regular	Senior	110	Hour	110	12,000
Design report templ	Time	Consulting Lead	Fabrikam UK	Regular	Principal	220	Hour	220	48,400
Generate draft repor	Time	Consulting Lead	Fabrikam India	Regular	Principal	300	Hour	300	90,000
Review and finalize r	Time	Consulting Lead	Fabrikam Neth...	Regular	Principal	450	Hour	450	202,500
Build a sales order...	Time	Consulting Lead	Fabrikam US	Regular	Principal	600	Hour	600	36,000

What if analysis on quote projects

# Project Operations updates

The background features a gradient from dark blue on the left to light purple on the right. Overlaid on this are several geometric shapes: a small blue triangle with white dots in the upper left; a large, semi-transparent triangle with yellow diagonal stripes in the center-right; a solid light green triangle below the striped one; and a small solid pink triangle in the upper right.

# Dynamics 365 Time and Expense Agent

The screenshot shows the Microsoft Teams interface with the Dynamics 365 Time and Expense Agent chat open. The left sidebar contains navigation icons for Activity, Chat, Teams, Calendar, Calls, OneDrive, and Apps. The main chat area is titled 'Copilot' and shows a list of messages. The right pane displays a summary of time entries for the week of February 21st to 23rd, 2020, generated by the agent. The summary includes entries for Monday, Tuesday, and Wednesday, with a total of 6 hours for the Geneva project. The agent also offers to submit the entries and provides links to show details or open in Time.

New Teams ☐

Activity Chat Teams Calendar Calls OneDrive Apps

Chat

Copilot

Pinned

- Oscar Krogh 8:29 AM  
Louisa will send the initial list of...
- Beth Davies Yesterday  
Thanks, that would be nice.
- Kayo Miwa Yesterday  
I reviewed with the client on...
- Strategy planning potential... 8:20 AM  
Sarah: It would be great to sync...
- August Bergman 7:18 AM  
I haven't checked available time...

Recent

- Charlotte and Babak 8:58 AM  
Babak: I asked the client to send...
- Emiliano Ceballos 7:55 AM  
👍👍
- Marie Beaudouin 7:30 AM  
Sounds good
- Daichi Fukuda 7:02 AM  
You: Thanks! Have a nice day, I...
- Marketing team sync 10:43  
I think Babak might know more...
- Kian Lambert Yesterday  
Have you run this by Beth? Mak...
- Team Design Template Yesterday  
Reta: Let's set up a brainstormi...
- Marie's B-day gift Yesterday  
I was thinking of a gift card for...
- Wanda Howard Yesterday  
Yah, that sounds great

Copilot  
Time entries from 2/11

Hi Babak, I've created your time entries for this week based on your...  
I've added comments to the same. Here's a summary:

Monday, 21 Feb submitted entries of 8/8 hours for Fabrikam housing ✓

Tuesday, 22 Feb Out of Facility

Wednesday, 23 Feb draft entries of 6 hours (Geneva project), and submitted (Fabrikam housing)

Shall I go ahead and submit these 2 entries (6 hours) to Robin for ap

AI-generated content may be

Is there anyt

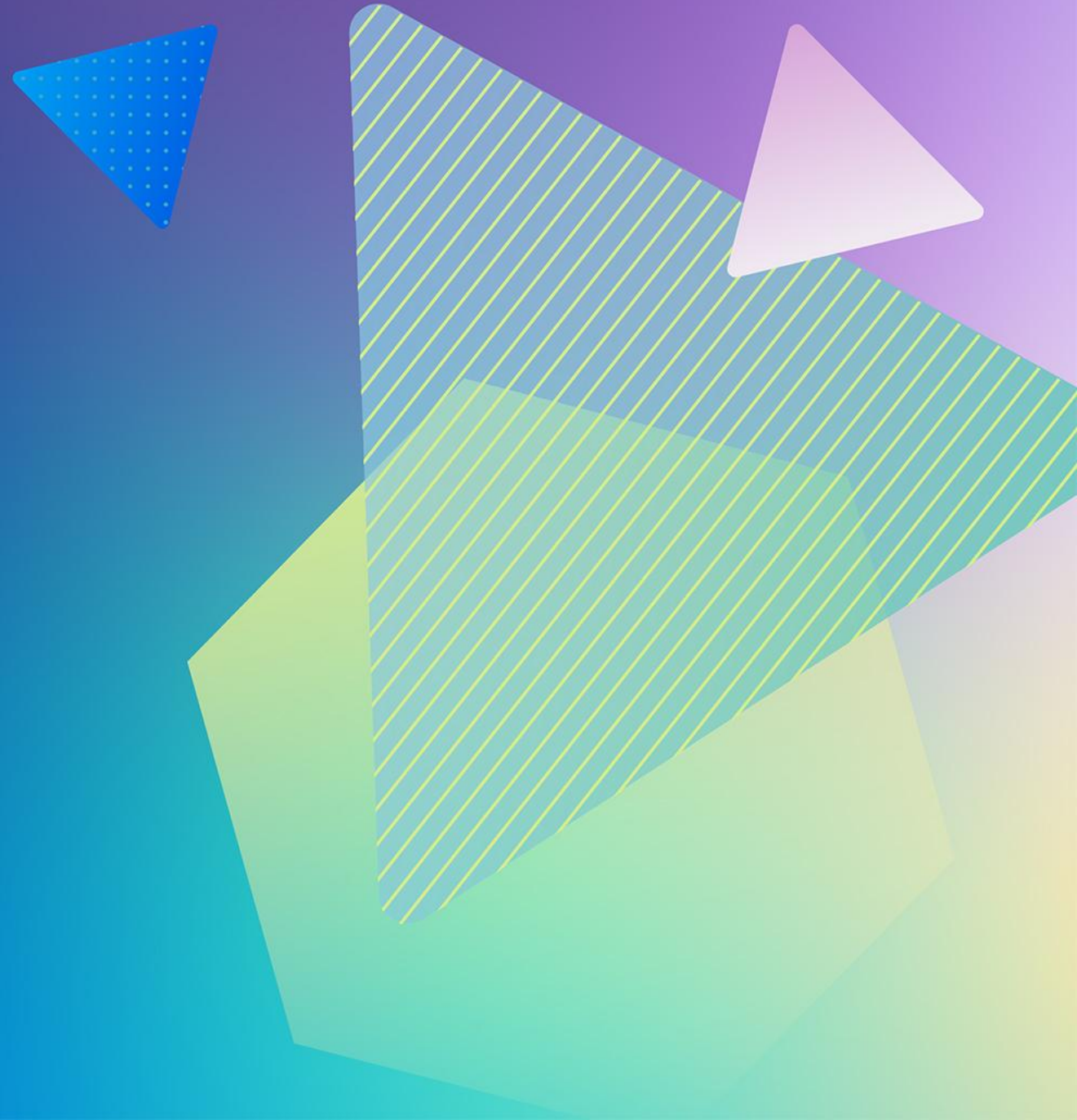
Ask a work question or use / to reference people, files and more

84/2000

is a task no one enjoys.

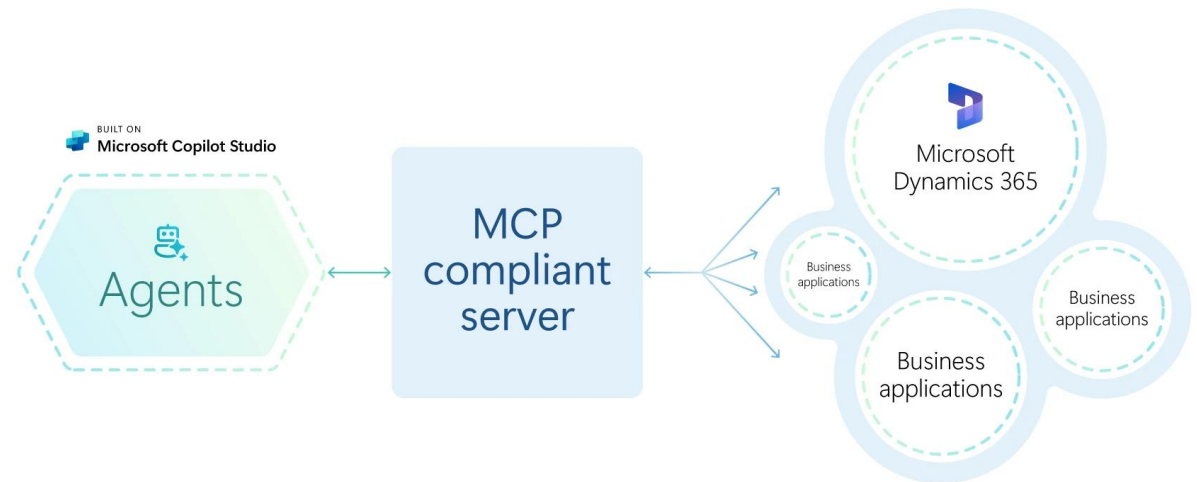


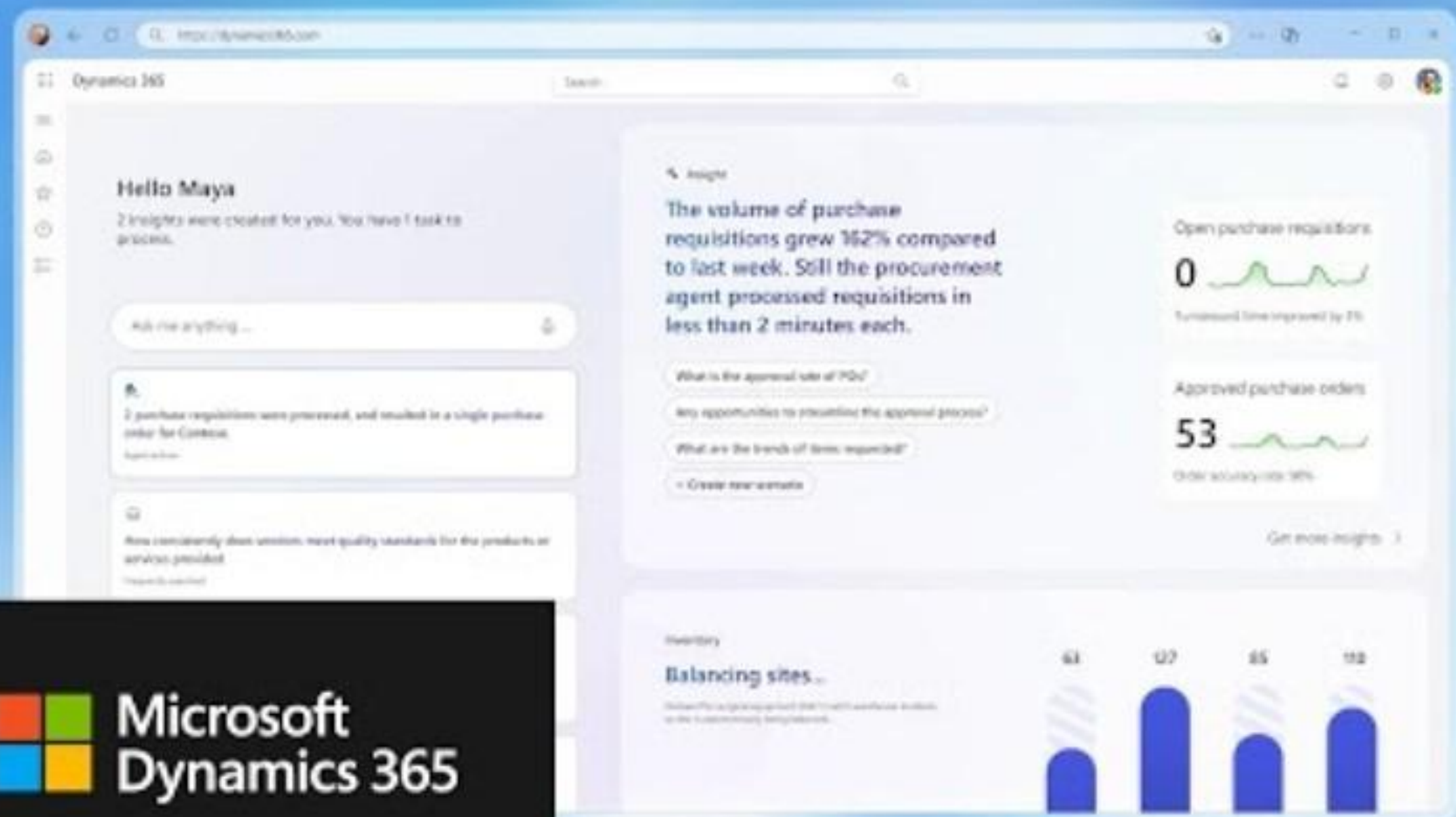
# Cross app capabilities



# Model context protocol

- **Seamless Integration:** MCP servers eliminate data and application silos, allowing AI agents to work seamlessly across various business processes and systems
- **Enhanced Productivity:** MCP enables AI agents to automate tasks, streamline workflows, and make context-aware decisions, significantly boosting efficiency and productivity
- **Security and Governance:** MCP servers prioritize security by requiring authentication and enforcing authorization, ensuring that agents perform only authorized actions
- **Accelerated Development:** MCP standardization reduces complexity, accelerates development, and increases time to value for partners and customers, enabling diverse agent scenarios across industries







Thank You