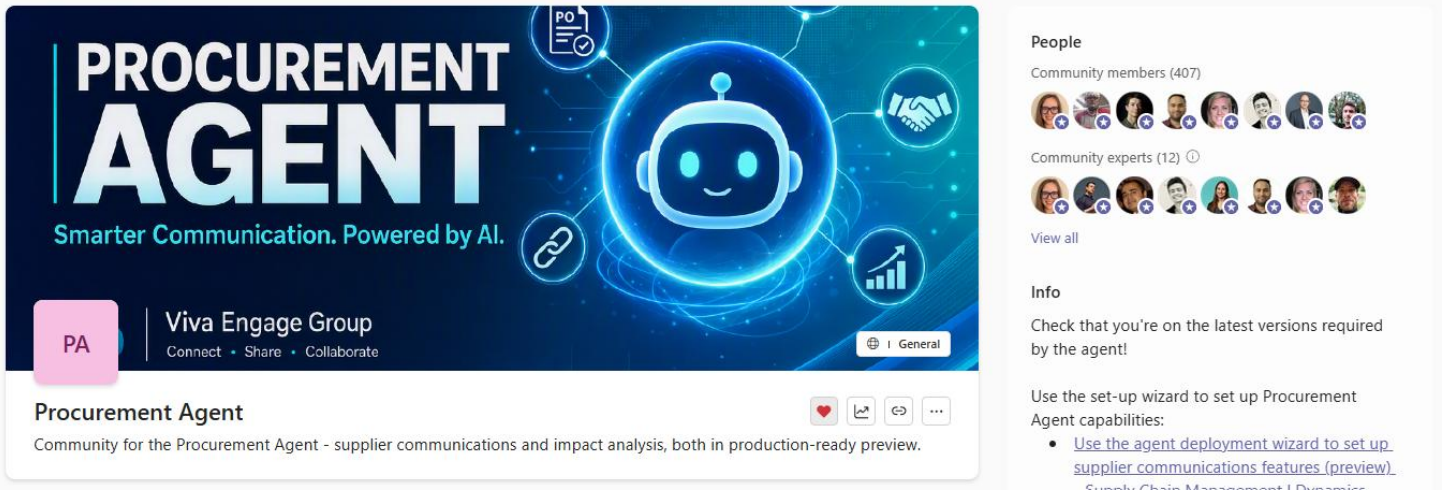
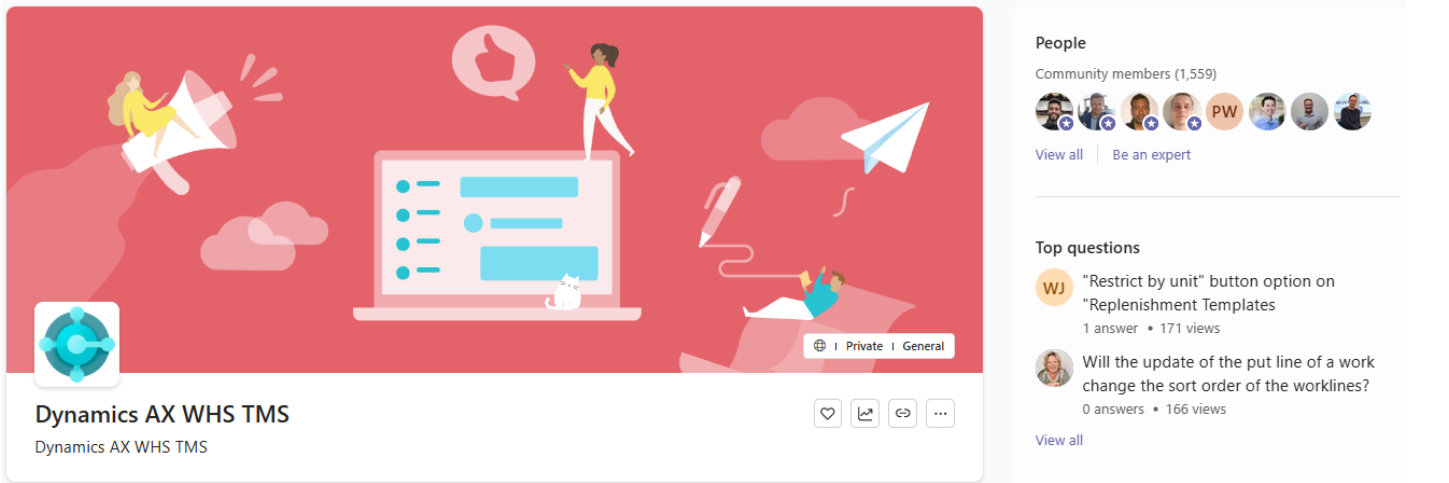
Request access to Finance and Operations Viva Engage Community

Submit your request to join one of the Finance and Operations Viva Engage Community. Make sure to use the email you are planning to use with the community. Ensure that all the information are correct and that the business justification is precise and elaborate. The justification need to be written in English. If the provided information is not sufficient or incorrect, the request will automatically be denied.





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Browse the cookbook

Pick a business process to see recipes for Microsoft Copilot Cowork.

Start your day with Cowork
Pick your role and follow a day in the life, from morning briefing to end-of-day wrap-up, with prompts you and industry plugins.

End-to-end processes (16)

Administer to operate
269 recipes

Administer to operate serves as the linchpin for the sustained success of Dynamics 365 within organizational landscapes

End-to-end process ›

Hire to retire
116 recipes

The hire to retire process, also known as the employee lifecycle, is a critical business process that involves various activities from...

End-to-end process ›

Forecast to plan
93 recipes

The term forecast to plan typically describes a collection of business processes that an organization implements to estimate demand...

End-to-end process ›

Source to pay
93 recipes

The source (previously procure to pay process, also known as purchase to pay) is a term used to describe the entire process of purchasing...

End-to-end process ›

Order to cash
91 recipes

The order to cash business process flow is a standard term used to describe the entirety of an organization's sales order process

End-to-end process ›

Acquire to dispose
90 recipes

The acquire to dispose process is a critical business process that involves managing the lifecycle of both owned and leased assets fro...

End-to-end process ›

Inventory to deliver
85 recipes

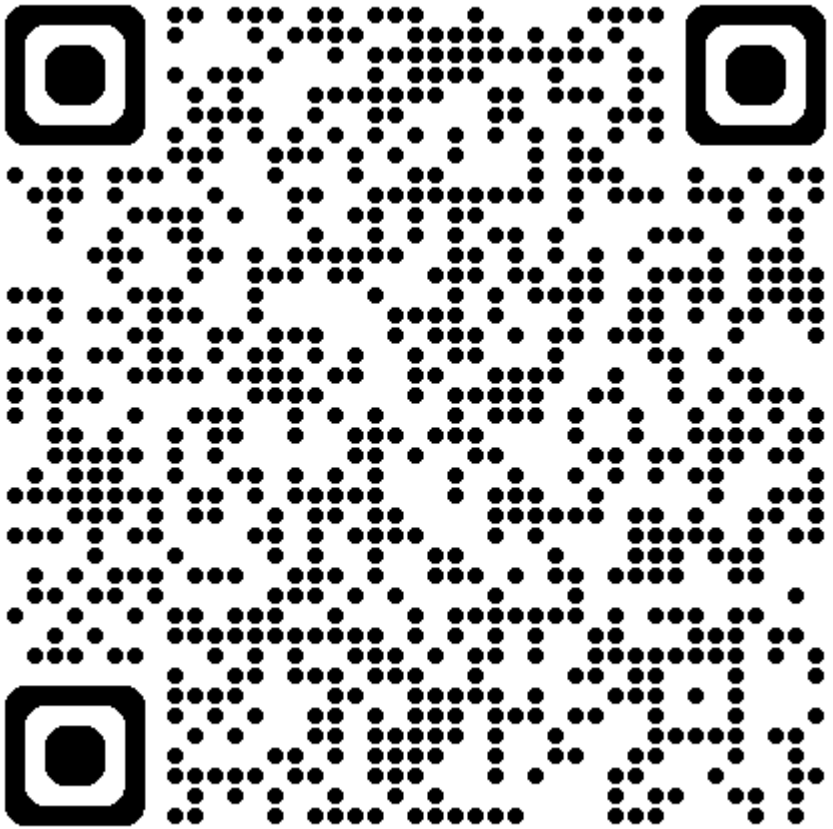
The inventory to deliver business process involves managing the flow of goods from receipt into a warehouse or distribution center...

End-to-end process ›

Concept to market
82 recipes

Concept to market is the process of managing a service offering from its inception to its eventual end of life

End-to-end process ›



http://aka.ms/**activateFOHOL**



Nytt i D365 F&O

Fredrik Sætre
Sr. Solution Sales Advisor, Microsoft
Espen Stensaas
Sr. Solution Engineer, Microsoft

Dynamics 365 ERP 2026 Investments

Investing for the future

+

Investing for core needs today





Agentic

Growth and Portfolio Maturity

Fundamentals

Dynamics 365 Over 300 Capabilities Coming up

Finance	Supply Chain	Commerce	Project Operations	Field Service	Human Resources	Sustainability	Platform	
Customer Payment remittance	Agentic Procurement	Commerce MCP	What-if analysis on Project Quotations	Agentic Scheduling operations	Onboarding agent	MCP Server and skills	ERP MCP Server	Agentic
AP Invoice Automation	Supplier Engagement	B2B Multi-outlet ordering	MCP Skills Time, Expense, Approval	Agentic optimization of resources	Recruiting efficiency	Regulatory reporting	Copilot Cowork ERP Plug-in	
Financial close	Advanced Warehousing, WOM	Cross legal entity fulfillment	Subscription billing lifecycle	Field Service + Project Operations	LinkedIn integration	Sustainability ledger	Business skills	Portfolio Maturity
New Finance Journals	Advanced Quality	Async Payments for orders	Project change orders	Field Service Agent Mobile	Project Operations + HR	Auditability and traceability	Business performance analytics	
Cost and multi-ledger	Planning	POS Modernization					Archiving Framework	
Accounting and dimension defaulting engine								Fundamental

Operational Excellence	Security	Enterprise Scale & Performance	Regulatory Requirements	Data Archival and Storage


Project Operations
Commerce
Dynamics 365
Finance & Operations
Finance
Human Resources
Supply Chain Management

Core

Dynamics 365
Finance & Operations

Copilot & agents

Role-based access controls for ERP agents

Optimal tool execution paths in Dynamics 365 ERP MCP

ERP in WorkIQ, Business skills & AI descriptions

Unified Admin Experience

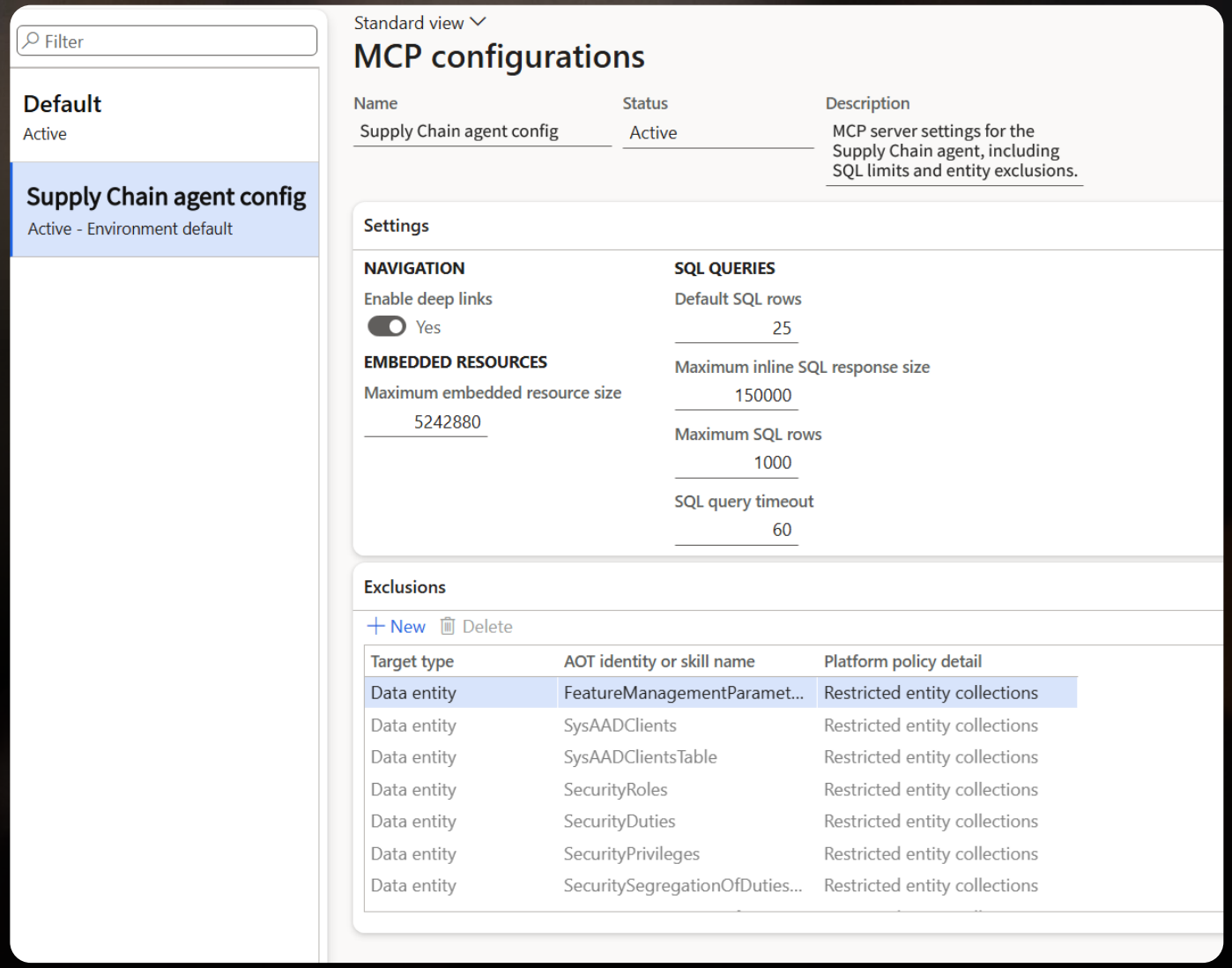
- Migrate environments from LCS to Power Platform admin center

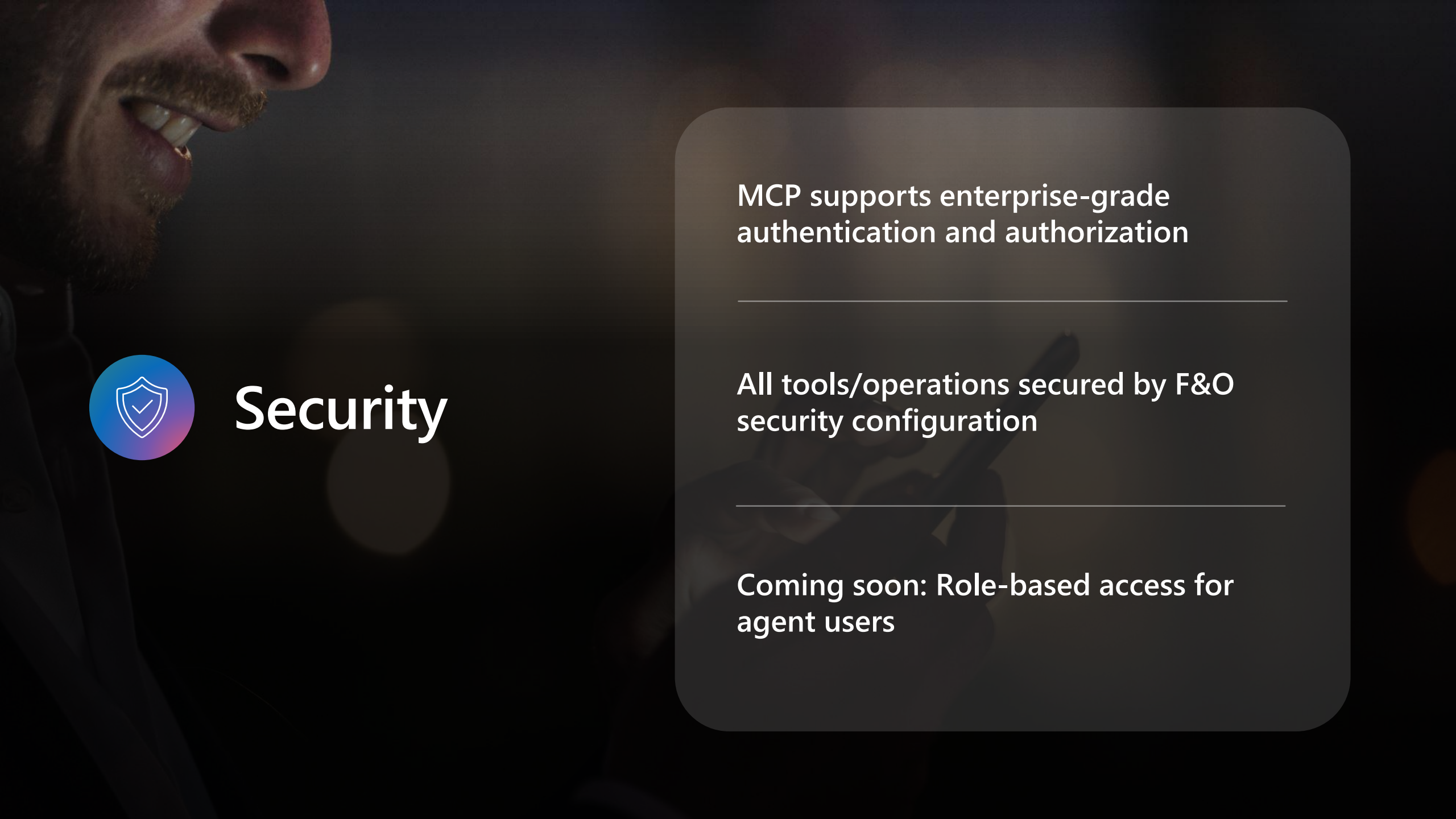
Microsoft Fabric

- Cross-region Link to Fabric

MCP Configurations

Enable configurations of the Dynamics 365 ERP MCP server for specific agentic scenarios with options





Security

MCP supports enterprise-grade authentication and authorization

All tools/operations secured by F&O security configuration

Coming soon: Role-based access for agent users

Edit | New | Delete | Run automatic role assignment | Options

Filter

- Accounts payable centralized payments cler
- Accounts payable clerk
- Accounts payable manager
- Accounts payable payments clerk
- Accounts payable positive payment clerk
- Accounts receivable centralized payments cl
- Accounts receivable clerk
- Accounts receivable clerk - Agent
- Accounts receivable manager
- Accounts receivable payments clerk
- Agent Feed Manager Role
- Agent identity administrator
- AgentFeedTesterAllowed
- AgentFeedTesterDeclined
- AgentFeedTesterEntityViewOnly
- AgentFeedViewer
- AifTestSecRole
- AppConsistencyCustomScriptApprover
- AppConsistencyCustomScriptMaintainer
- Applicant anonymous (external)
- AssetProposalMaintainerTestRole
- AssetProposalViewerTestRole
- Auditor

Standard view

Assign users to roles

Rules for dynamically assigning users to role

Add rule | Remove rule | Edit query | Assign organizations | Manage agent access

Membership rule name	Membership rule description	Query preview

We didn't find anything to show here.

Users assigned to role

Manually assign / exclude users | Manage agent access | Assign organizations | Remove

ID	User name	Alias	Assignment mode	Agent access
Jared	Jared	asUser01General@tmsfinancein...	Manual	AR Agent

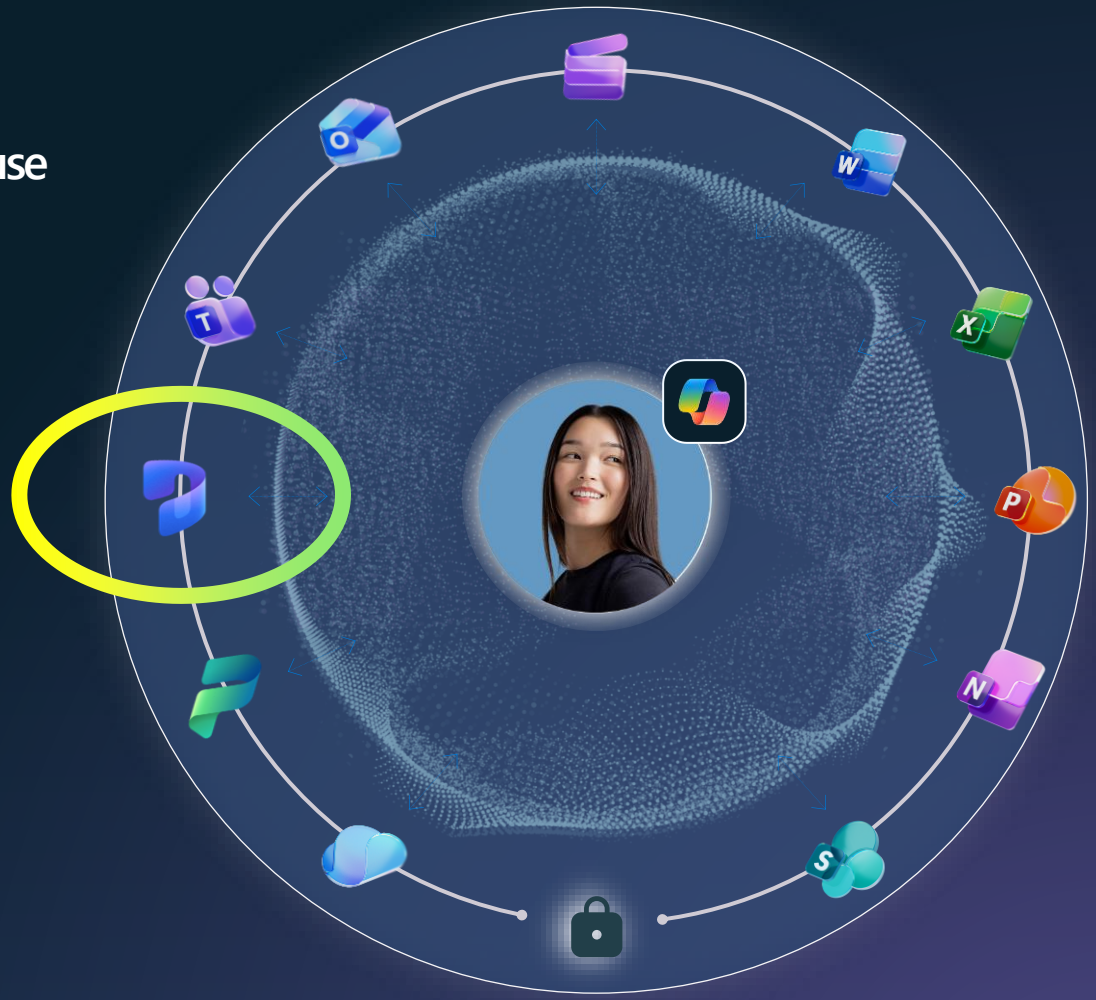
Work IQ for ERP

Making agents easy to build, accurate to run, and smarter with every use

Data (ERP Knowledge graph- business semantics)

Memory (ERP decision traces that includes real world judgment, exceptions, and precedent)

Inference (Connects people, documents, business systems with actions and events so AI understands how work gets done)



Our Approach for Agentic Business Apps

Experience

Copilot

Cowork

Autopilot

Your agents

Intelligence

Work IQ Ask

Dynamics 365 ERP MCP



Business logic & data

Business skills

Ontologies

Semantic index

Data

Business logic

Business skills

When Copilot connects to Work IQ
it has ERP context to know how to
work with the application and
how your company gets stuff done

Defines **how your organization works:** business workflows and processes

Skill = Name + Description + Business Process Instruction + Resources

Shared business context across agents and harnesses for your organization

Role based access control (RBAC) compatible

Support for both **built-in** and **custom skills**

Business skill sources

	When to use
Built-in skills are authored in the AOT and ship with the application alongside other AOT artifacts	Build skills for extensions with agent guidance specific to the application processes
Custom skills are authored through the ERP application or an agent	Customers create and customize skills to meet the needs of the organization

AI metadata descriptions

Extensible descriptions of form and entity metadata providing additional context for an AI agent

X++ Copy

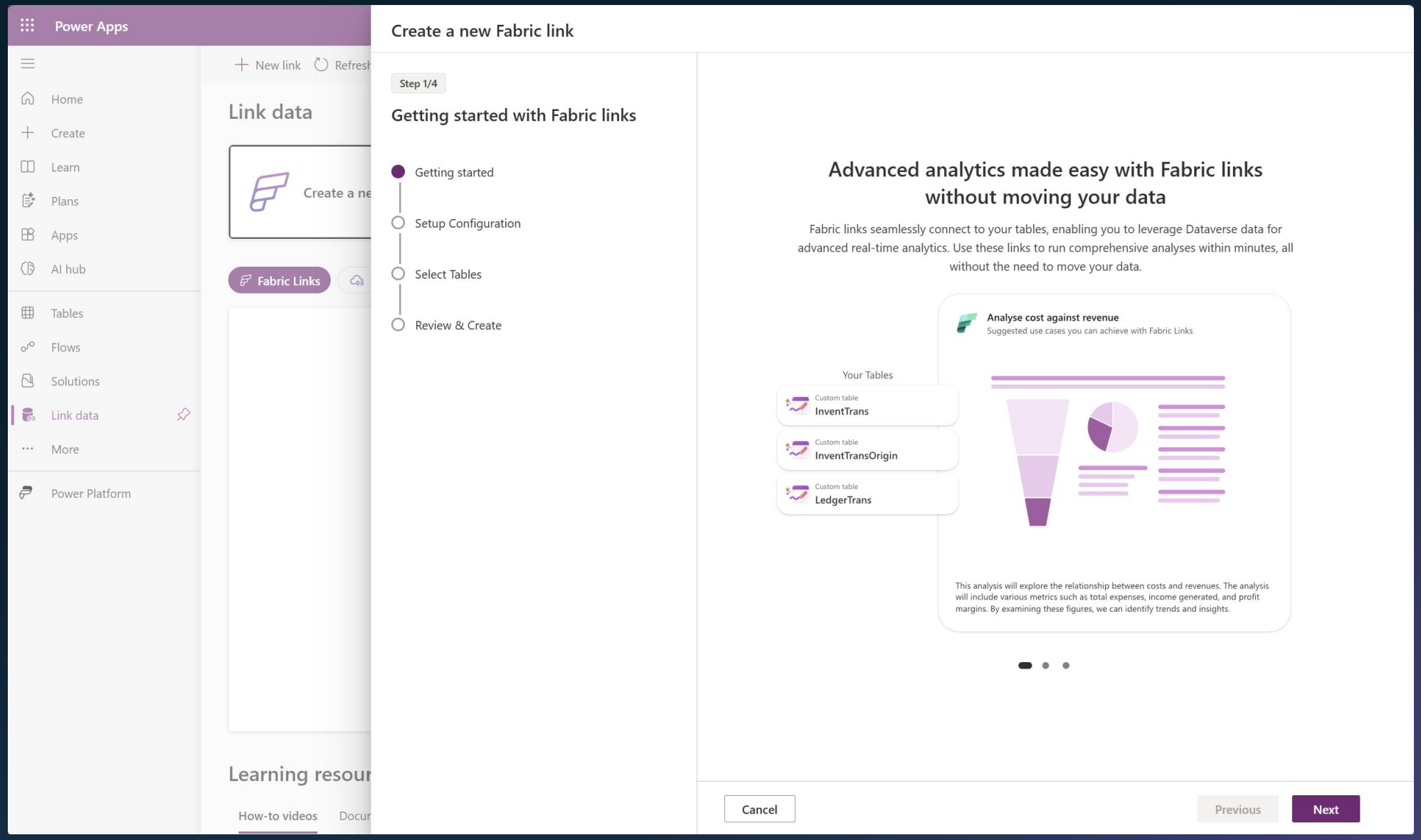
```
[McpAiDescriptionProviderAttribute]
public static void describe(McpIAiDescriptionBuilder _builder)
{
    _builder.appendDescription(
        'Equipment rental agreements with customers. One record per agreement. ' +
        'The rented items are in the ContosoRentalAgreementLines entity. ' +
        'To find the items on an agreement, filter that entity by AgreementId.');

    _builder.appendFieldDescription(fieldStr(ContosoRentalAgreementEntity, AgreementId),
        'Unique agreement number. Assigned from a number sequence when the agreement is created. ' +
        'Leave this field empty when you create a record.');

    _builder.appendFieldDescription(fieldStr(ContosoRentalAgreementEntity, Status),
        'Lifecycle stage of the agreement. Draft agreements can be edited. ' +
        'Active means that the equipment is with the customer. Returned and Closed agreements are read-only. ' +
        'The system sets this value. Do not update it directly.');

    _builder.appendFieldDescription(fieldStr(ContosoRentalAgreementEntity, PlannedReturnDate),
        'Date that the customer is expected to return the equipment. ' +
        'An Active agreement with a PlannedReturnDate in the past is overdue.');
}
```

Cross-region Link to Fabric



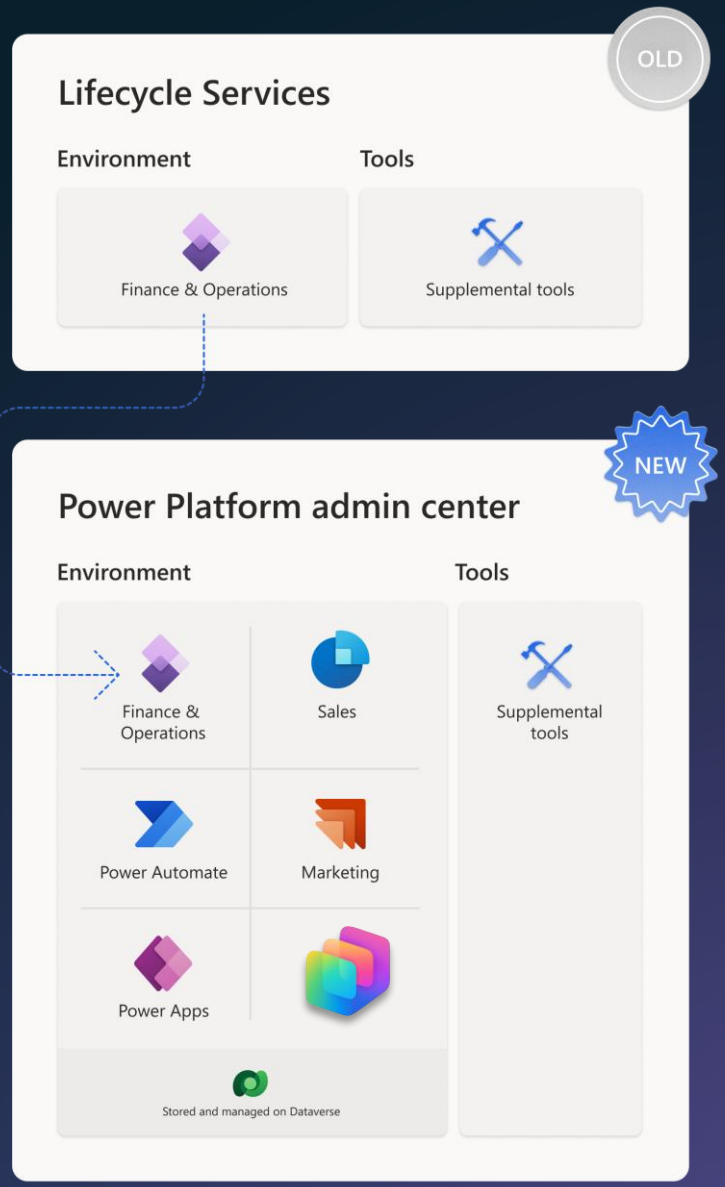
Unified Admin Experience for Finance and Operations apps

One Dynamics, One Platform #ODOP

One Admin, One Admin Center

Finance and Operations runs on Power Platform

- 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**



Find by title
Migrate environments from Lifecycle Services to Power Platform admin center (preview)
Lifecycle Services resources
Lifecycle Services for customers
Lifecycle Services for partners
Supported web brows
RESTful APIs
What's new or change Lifecycle Services
Lifecycle Services user g
Project onboarding
Project migration manag
Subscription estimator
Configure security
Issue search
Configuration manager
Download PDF

Migrate finance and operations environments from Lifecycle Services to Power Platform admin center (preview)

In this article
What happens during migration
Supported environments and limitations
Prerequisites
Recommended migration sequence
Migrate an environment
Validate the migrated environment
Resolve prerequisite check failures

Was this page helpful?

Delete Maintain History Notification list Software License Terms

Power Platform migration (Preview)

Power Platform migration is in preview. While in preview, we recommend against using it on production environments. Migration involves downtime, and afterward the environment becomes read-only in LCS.

Migrate the management of this Finance & Operations environment from Lifecycle Services to Power Platform Admin Center (PPAC). After migration, environment lifecycle operations such as deployments, updates, and monitoring will be managed through PPAC.

PREREQUISITES

- Environment is in Deployed status
- Power Platform environment is linked
- Database storage capacity is available
- You are an administrator of the linked Power Platform environment

Migration status Not started

Migrate to Power Platform Admin Center


Project Operations
Commerce
Dynamics 365
Finance & Operations
Finance
Human Resources
Supply Chain
Management


Commerce
Project Operations
Dynamics 365
Finance & Operations
Finance
Supply Chain Management

Topics for Always Ready Enterprise Finance

Intelligent transactions

- AP Automation updates – intelligent invoice capture and AI suggestions for transaction derivation
- Intelligent customer payment remittance
- Financial tags
- New financial journal and ledger posting rules
- Globalization

Continuous control

- Account reconciliation relaunch
- Finance agent connected experience

Agentic performance

- Business performance planning demo data center



Bringing AI to existing Business processes – AP Automation

Accounts payable automation capabilities overview

CORE CAPABILITIES

Capture

Invoices are captured across multiple channels and formats

- Email
- Portal
- Paper
- XML
- API
- E-Invoice
- CSV
- Other

Error checking

Cloud storage

Process

Invoices are processed via automation and workflow

- 2-way/3-way matching
- Coding
  - Header-level coding
  - Line level coding
- Approvals
- Workflow
- Error correction
- Dispute management

Pay

Multiple payment methods available, including:

- ACH
- P-Card
- Digital check
- Domestic & international

Supplier collaboration

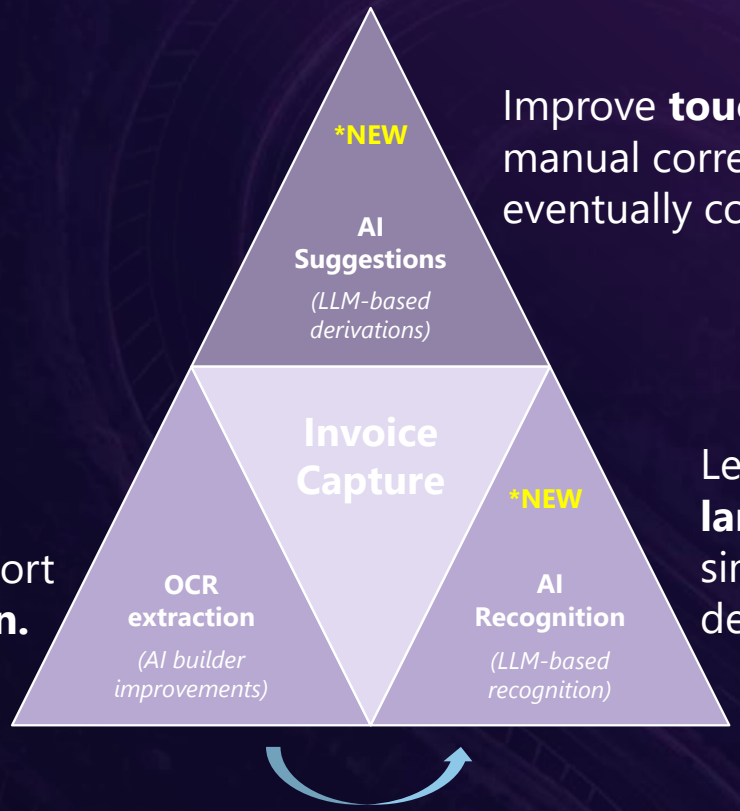
ADVANCED CAPABILITIES

- Intelligent optical character recognition (OCR)
- Machine readable invoices
- Robotic process automation

- Account coding suggestions
- Fuzzy PO matching
- Duplicate/fraudulent invoice detection

- Auto-Payment proposal
- AP analytics
  - Payment terms scenarios
  - Payment terms compliance

Invoice Capture



Improve **touchless processing rates** and decrease manual corrections. Starting with headers and eventually comprehend line entries.

Asynchronous document extraction. Continuous learning for Line level amount formatting. Improve existing offering to support **additional field** and **vendor name detection.**

Leverage LLMs handling various **formats, languages, and layouts** without custom models, simplifying deployment and speeding up value delivery.

Transition from **positional text extraction to LLM-based contextual** understanding for better invoice content comprehension.

Existing OCR Extraction

Improvements to AI Builder

Improvements completed; releasing in IC in short term

- Support to not to use logo for vendor name
- Improve document recognition for key-value pair

Enhancements aligned with LLM capability

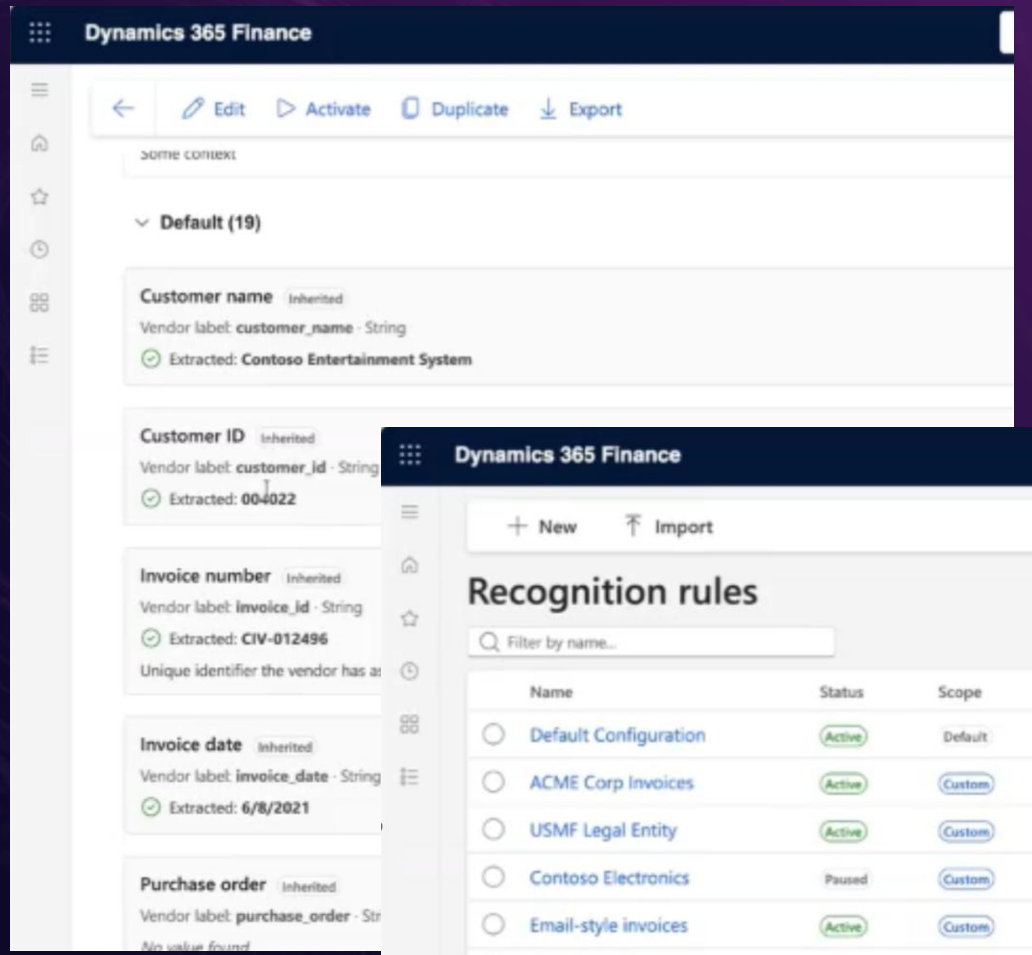
- Increase accuracy for extracted currency field
- Support for additional fields within lines
- Support credit note and other document type in a single model
- Detect/remove annexures, bill-of-lading, etc.
- Support custom fields at line level

Currently in Private Preview

AI Recognition/OCR Features

Support for header & line entries

- LLM-based invoice recognition for both header and line items
- Improved extraction accuracy across varied invoice formats and languages
- Asynchronous OCR processing for large, multi-page invoices (prevents timeouts)
- Automatic detection and reallocation of freight/tax charges from lines to charges section
- Continuous learning adapts to vendor-specific formats (dates, decimals, layouts)
- Extended field coverage for improved recognition



**Currently in Private Preview*

INVOICE CAPTURE - D365 FINANCE

AI Recognition

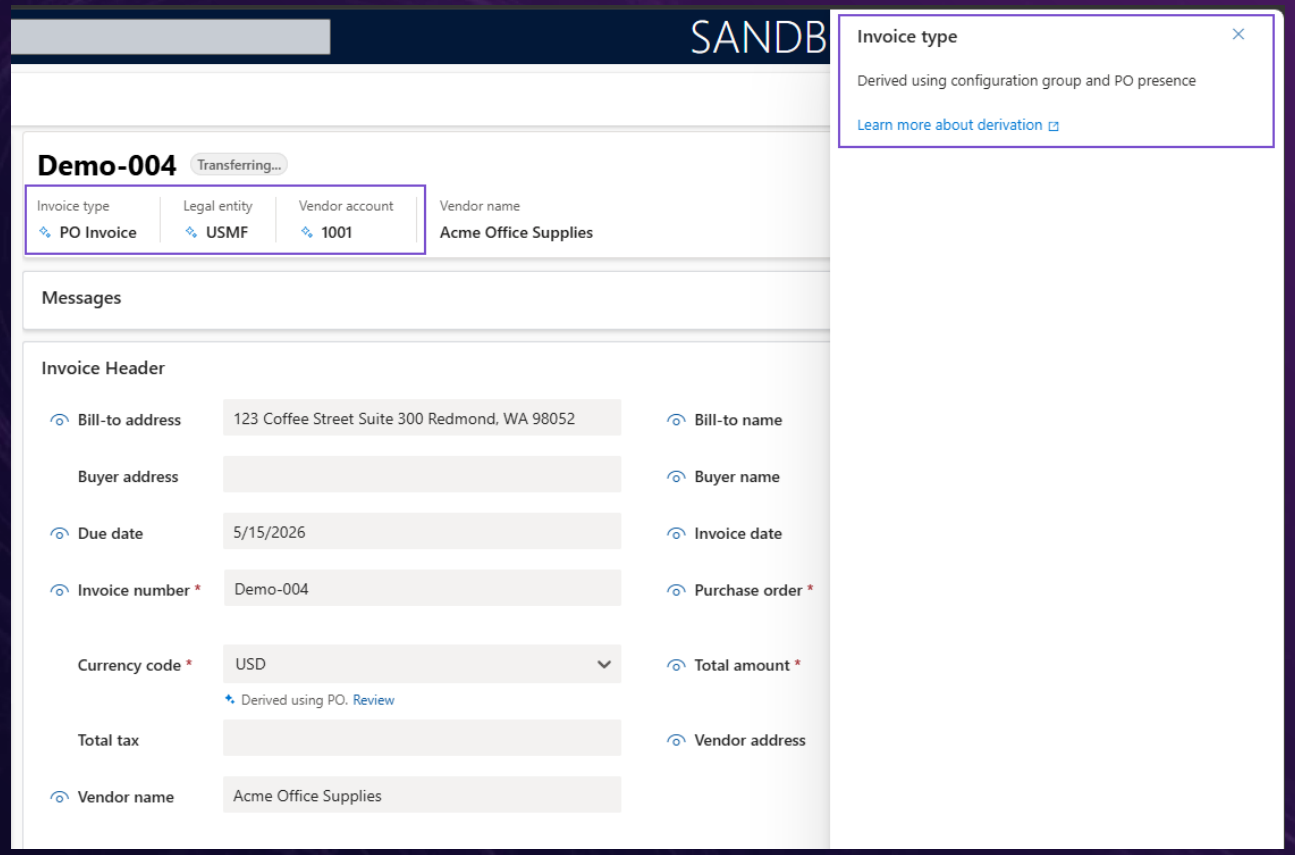
CAB - MAY 2026

Microsoft Confidential

AI Suggestions Features

Support for header (to start with)

- AI-driven header-level derivation
- Fuzzy lookup for header derivation
- Continuous learning loop
- Context-aware header field prediction
- Confidence scoring per field
- Multi-option recommendations with explainability



**Currently in Private Preview*

INVOICE CAPTURE - D365 FINANCE

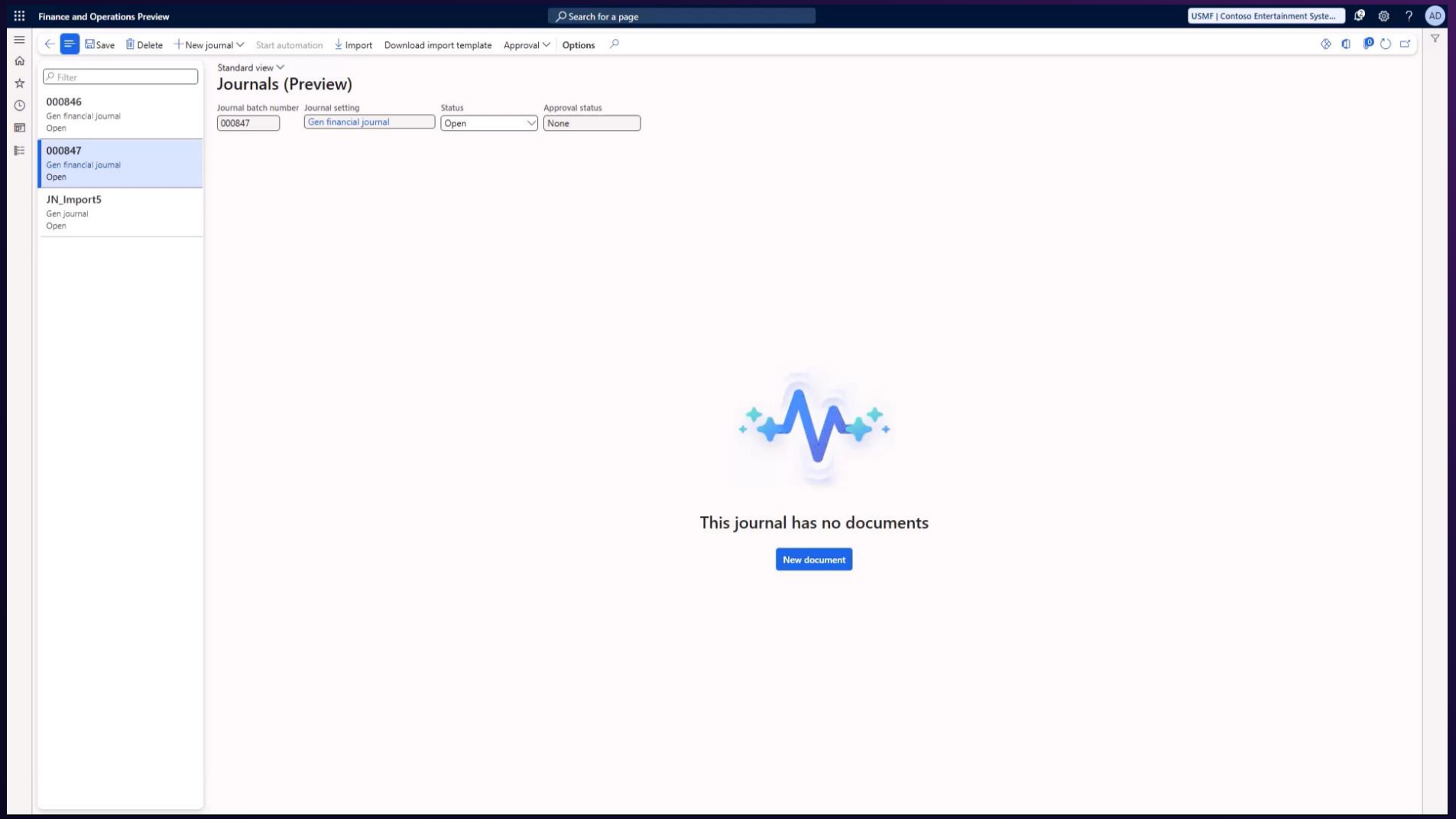
AI Suggestions

Microsoft Confidential



New financial journals

New financial journals



What's New in Dynamics 365 Finance

New financial journals

10.0.50 – Public preview

- ✓ Ledger and Customer account type
- ✓ Intercompany/intracompany
- ✓ Allocations
- ✓ Tax calculations using GTE+
- ✓ Accruals

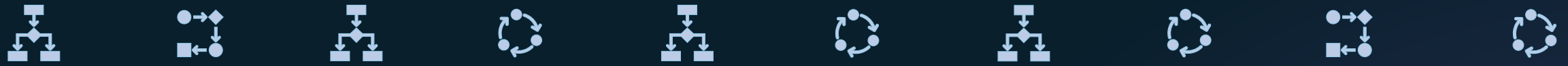
10.0.51 – Public preview

- All account types in General journal
  - Except for Project account type
- All financial journals
  - Except some vendor invoice journals



Globalization

Dynamics 365 ERP Globalization



Acquire to dispose | Source to pay | Plan to produce | Order to cash | Inventory to deliver | Project to profit | Service to deliver | Hire to retire | Record to report | Administer to operate

Globalization blueprint

Document processing | Document layouts | Indirect taxes | Payments and settlements | Corrections | ... | Regulatory reporting

Regulatory monitoring

Regulatory alerts | Regulatory updates

Globalization studio

Electronic reporting | Tax calculation | Electronic invoicing | Business documents

Supported countries or regions

Globalization Roadmap

2025 Wave 2

- Brazil Tax reform
- B2B e-invoicing updates for Belgium, Poland, Singapore , Uruguay
- Regulatory reporting updates for UK, Germany, Brazil, Italy, Sweden, Poland, EU-wide Intrastat, Multiple tax registration numbers in reports
- Electronic Reporting (ER) enhancements
- Country expansion: Türkiye

2026 Wave 1+

- Brazil Tax reform (cont.)
- Tax calculation:
  - Automate tax feature creation
  - Date effectivity, Tax rates per taxpayer
- B2B e-invoicing & e-reporting in France (Aug'26), UAE (Dec' 2026), Oman (2027), Spain ("Crea y Crece") (2027)
- Regulatory reporting updates for Netherlands, Italy, Brazil
- Country expansion: Argentina



Account reconciliation agent

Account Reconciliation Agent

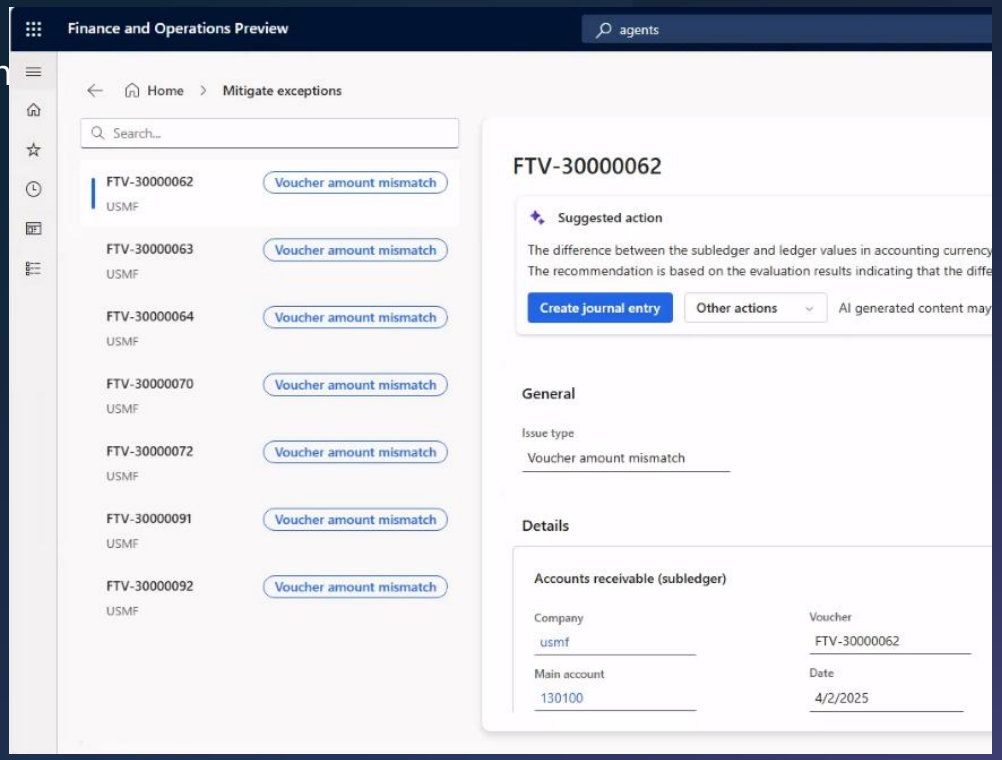
Key benefits

Enhanced Efficiency: Customers can maintain a reconciled state more consistently, reducing the time and effort required for manual reconciliation.

Proactive Management: The intelligent agent proactively identifies and suggests mitigations for exceptions, minimizing the risk of errors and ensuring financial accuracy.

Improved Transparency: Every exception is meticulously logged, capturing the history of actions taken by users, automation, or agents, thereby enhancing transparency and accountability.

Regular Reconciliation: The ability to reconcile on a more regular basis ensures that customers' financial records are always up-to-date, leading to better decision-making and financial planning.



Account Reconciliation Agent

Business outcome

What current state looks like

Time consuming to manually reconcile ledgers

Error-prone and stressful

Limited strategic focus

What future state looks like...

Continuous reconciliation

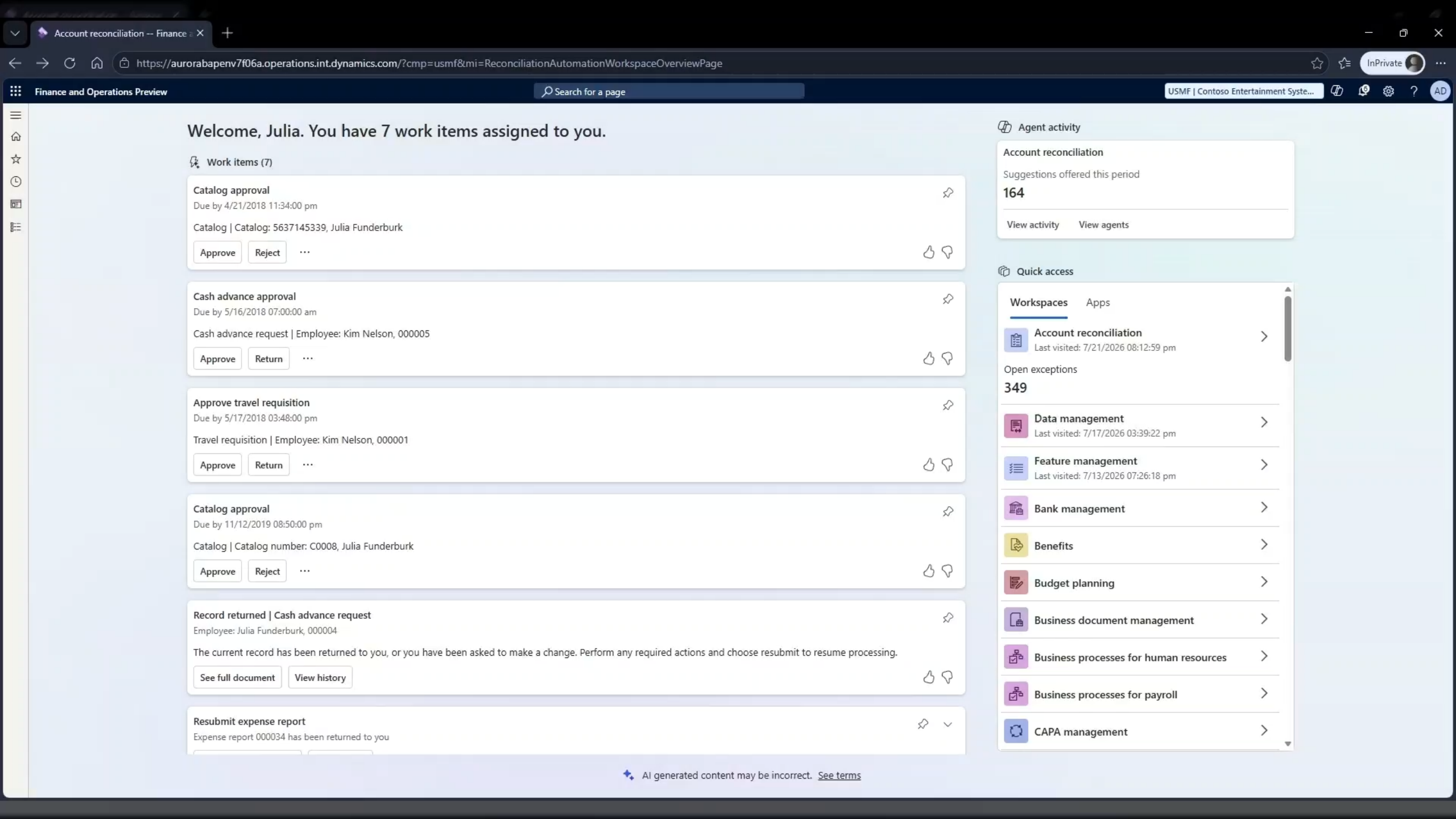
Identify issues in real time

Close books faster

Focus on planning

ARA re-launch improvements

- Agent activation
  - Added validation for permanently closed or stopped periods
  - Ability to enable agent by legal entity and area
  - Controls and notifications added for credit consumption control
- Expanded summaries
  - Analysis: Why did the exception occur?
  - Justification: Why is the suggested action the proper solution?
- Bulk exception handling
  - Manage exceptions in bulk rather on an exception by exception basis
  - Available for:
  - Accept without change
  - Create journal entrya
  - Reverse
- 1:N matching improvements


Account reconciliation -- Finance
https://aurorabapenv7f06a.operations.int.dynamics.com/?cmp=usmf&mi=ReconciliationAutomationWorkspaceOverviewPage
InPrivate
Finance and Operations Preview
Search for a page
USMF | Contoso Entertainment Syste...
AD
Welcome, Julia. You have 7 work items assigned to you.
Work items (7)
Catalog approval
Due by 4/21/2018 11:34:00 pm
Catalog | Catalog: 5637145339, Julia Funderburk
Approve
Reject
Cash advance approval
Due by 5/16/2018 07:00:00 am
Cash advance request | Employee: Kim Nelson, 000005
Approve
Return
Approve travel requisition
Due by 5/17/2018 03:48:00 pm
Travel requisition | Employee: Kim Nelson, 000001
Approve
Return
Catalog approval
Due by 11/12/2019 08:50:00 pm
Catalog | Catalog number: C0008, Julia Funderburk
Approve
Reject
Record returned | Cash advance request
Employee: Julia Funderburk, 000004
The current record has been returned to you, or you have been asked to make a change. Perform any required actions and choose resubmit to resume processing.
See full document
View history
Resubmit expense report
Expense report 000034 has been returned to you
Agent activity
Account reconciliation
Suggestions offered this period
164
View activity
View agents
Quick access
Workspaces
Apps
Account reconciliation
Last visited: 7/21/2026 08:12:59 pm
Open exceptions
349
Data management
Last visited: 7/17/2026 03:39:22 pm
Feature management
Last visited: 7/13/2026 07:26:18 pm
Bank management
Benefits
Budget planning
Business document management
Business processes for human resources
Business processes for payroll
CAPA management
AI generated content may be incorrect. See terms

Mitigate exceptions -- Finance and

https://aurorabapenv7f06a.operations.int.dynamics.com/?cmp=usmf&mi=ReconciliationAutomationWorkspaceOverviewPage

InPrivate

Finance and Operations Preview

Search for a page

USMF | Contoso Entertainment Syste...

AD

Home > Mitigate exceptions

Data last updated 4 minutes ago

Group exceptions

FTV-30000134 Voucher amount mismatch
USMF
Create journal entry

FTV-30000134 Voucher amount mismatch
USMF
Create journal entry

FTV-30000135 Voucher amount mismatch
USMF
Create journal entry

FTV-30000135 Voucher amount mismatch
USMF
Create journal entry

FTV-30000136 Voucher amount mismatch
USMF
Create journal entry

FTV-30000136 Voucher amount mismatch
USMF
Create journal entry

FTV-30000137 Voucher amount mismatch
USMF
Create journal entry

FTV-30000137 Voucher amount mismatch
USMF
Create journal entry

FTV-30000138 Voucher amount mismatch
USMF
Create journal entry

FTV-30000139 Voucher amount mismatch
USMF
Create journal entry

FTV-30000139 Voucher amount mismatch
USMF
Create journal entry

FTV-30000135 Voucher amount mismatch

Suggested action (Preview)

The recorded ledger amount assigned to tax payable in a customer document does not reconcile to the matching computed detail, and the difference is significant. This impacts financial accuracy as the discrepancy involves multiple main accounts tied to revenue and receivables.

Create journal entry | Other actions | AI generated content may be incorrect. See terms

Details

Tax (subledger)

Company: usmf	Voucher: FTV-30000135
Main account: 202100	Date: 7/8/2026
Accounting currency amount: -12.83 USD	Reporting currency amount: -12.83 USD
Account name: California State - Retail Pr...	Account: AV_CAST

Ledger

Company: usmf	Voucher: FTV-30000135
Main account: 202100	Date: 7/8/2026
Accounting currency amount: -13.33 USD	Reporting currency amount: -13.33 USD

Activity

Close

7/8/2026

Fix suggested by agent
7/8/2026 02:24:18 pm

Reconciliation failed
7/8/2026 01:08:34 pm

Transaction posted
7/8/2026

Mitigate exceptions -- Finance and

https://aurorabapenv7f06a.operations.int.dynamics.com/?cmp=usmf&mi=ReconciliationAutomationWorkspaceOverviewPage

InPrivate

Finance and Operations Preview

Search for a page

USMF | Contoso Entertainment Syste...

AD

Home > Mitigate exceptions

Data last updated 4 minutes ago

Group exceptions

6154	USMF	Voucher amount mismatch
6160	USMF	Voucher amount mismatch
6165	USMF	Voucher amount mismatch
6169	USMF	Voucher amount mismatch
6175	USMF	Voucher amount mismatch
6179	USMF	Voucher amount mismatch
6185	USMF	Voucher amount mismatch
6186	USMF	In subledger but not in ledger
6187	USMF	In subledger but not in ledger
6188	USMF	In subledger but not in ledger
6189		

6154 Voucher amount mismatch

Reverse | Create journal entry | Match exceptions | Accept without change

Details

Bank (subledger)

Company	usmf
Voucher	6154
Main account	110160
Date	7/13/2026
Accounting currency amount	1,131.00 USD
Reporting currency amount	1,131.00 USD
Account name	Payroll account - USD
Account	USMF PAYRL

Ledger

Company	usmf
Voucher	6154
Main account	110160
Date	7/13/2026
Accounting currency amount	1,130.96 USD
Reporting currency amount	1,130.96 USD

Activity

Close

7/13/2026

Reconciliation failed
7/13/2026 05:29:44 pm

Transaction posted
7/13/2026

Microsoft | Dynamics 365

DYNAMICS 365 TECHTALK

Introducing the Period Close Agent

A smarter financial close with Dynamics 365 Finance

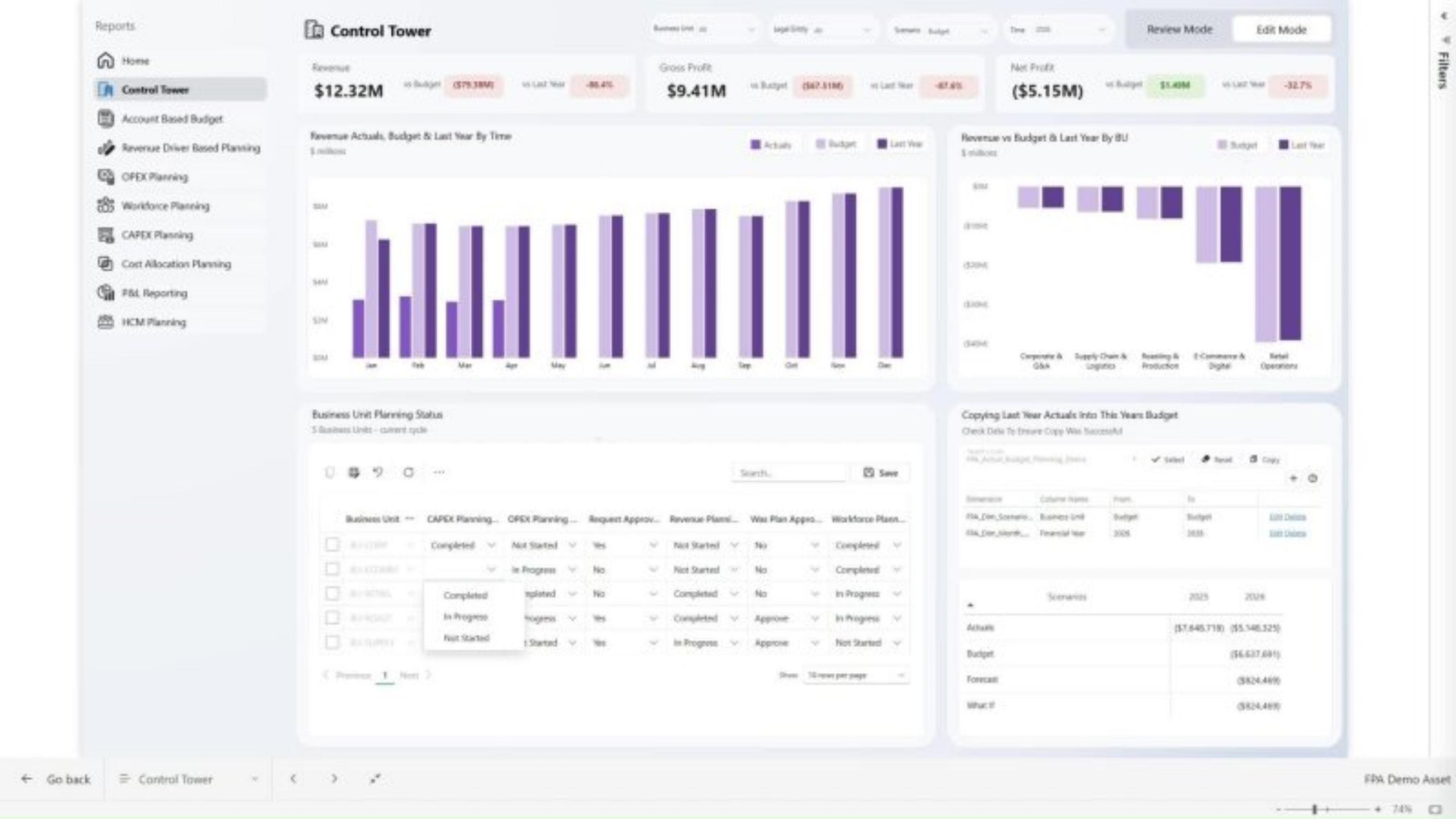



Business Performance
Planning

Planning Starter Experience — Your new Starting Point to explore and get started Business Performance Planning



BPP Demo Center


Reports
Home
Control Tower
Account Based Budget
Revenue Driver Based Planning
OPEX Planning
Workforce Planning
CAPEX Planning
Cost Allocation Planning
P&L Reporting
HCM Planning
Control Tower
Review Mode
Edit Mode
Revenue
$12.32M
Gross Profit
$9.41M
Net Profit
($5.15M)
Revenue Actuals, Budget & Last Year By Time
Revenue vs Budget & Last Year By BU
Business Unit Planning Status
Copying Last Year Actuals Into This Years Budget
Filters
Go back
Control Tower
FPA Demo Asset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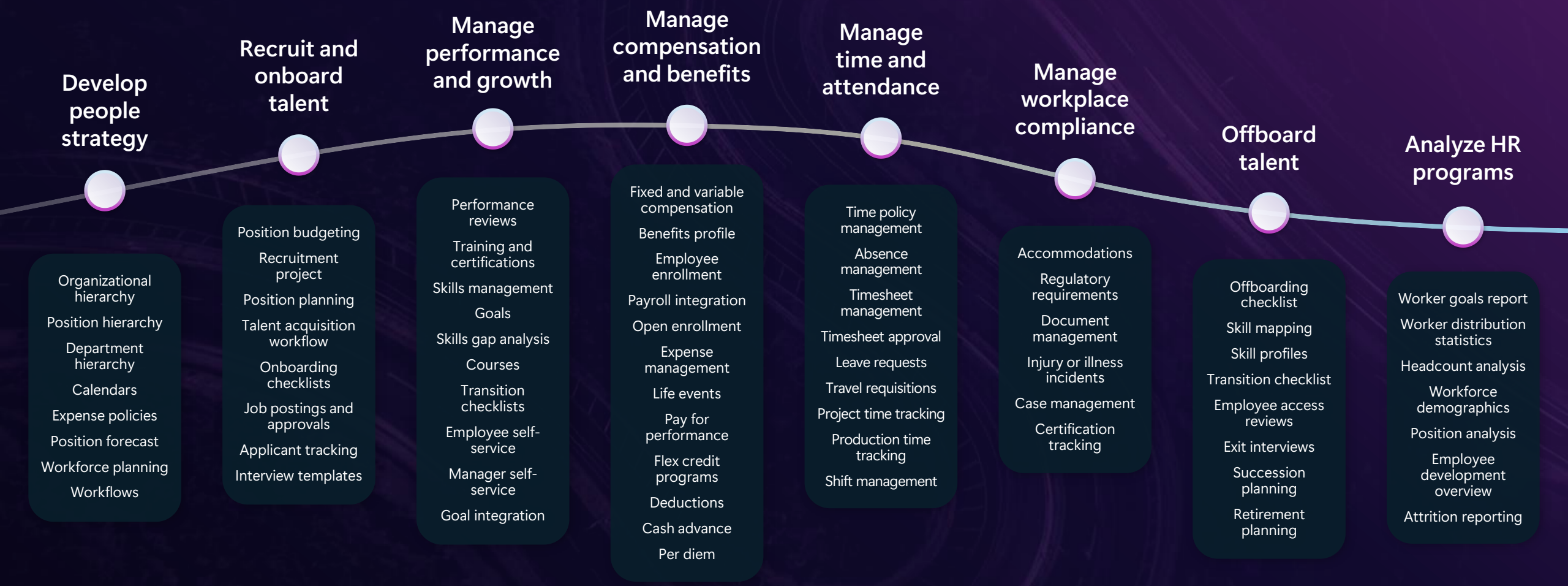
Hire to retire capabilities



Product direction

From Core HR System of Record → Intelligent Workforce Operations For Frontier Organizations

Make D365 Human Resources the trusted workforce foundation for agentic HR work—combining complete HR processes, workforce intelligence and executable business skills.

01 COMPLETE THE CORE

Keep improving the feature maturity and strengthen the system of record.

02 AGENTIZE HR

Turn HR management processes into reusable business skills, APIs, MCP, and governed actions.

03 ORCHESTRATE WORKFORCE

Combine HR data + work context to proactively coordinate workforce decisions and actions.

INTELLIGENCE HR business skills • MCP • Copilot / Cowork • Work IQ • Workforce analytics

FOUNDATION Core HR • Dataverse & APIs • Security & governance • Partner ecosystem

NORTH STAR **Increase the % of eligible HR Ops work completed intelligently—understanding → deciding → executing → verifying.**

Human Resources Releases for W1 '26

	Portfolio Maturity and Fundamentals	AI and Agentic

Talent acquisition	• Job board integration – LinkedIn (GA)
	• Offer mgmt. DocuSign & AdobeSign (GA)
	• Expand hiring via external agencies (GA)
	• Streamline interview scheduling (GA)
	• Retire outdated jobs and job titles (GA)
		• Candidate assessment agent to source and assess resumes for job fitment (PuPr.)
		  • Copilot for bulk resume upload (already in preview)
		  • Copilot to generate job descriptions (already in preview)

Talent management	• Pre-joining for BGV, tax/law compliance… (PuPr.) • Leave/absence improvements	• Onboarding agent for HR managers and New Hires (GA)
HR Operations / Administrative HR	• Project Ops time-entry integration (GA) • Benefits administration HSA/401K support (GA) • Personnel mgmt. TZ insensitive date and time support (PuPr.)	• Copilot Cowork ERP plugins

LinkedIn Integration

Easier job posting distribution: Flexibility to select and post jobs on LinkedIn.

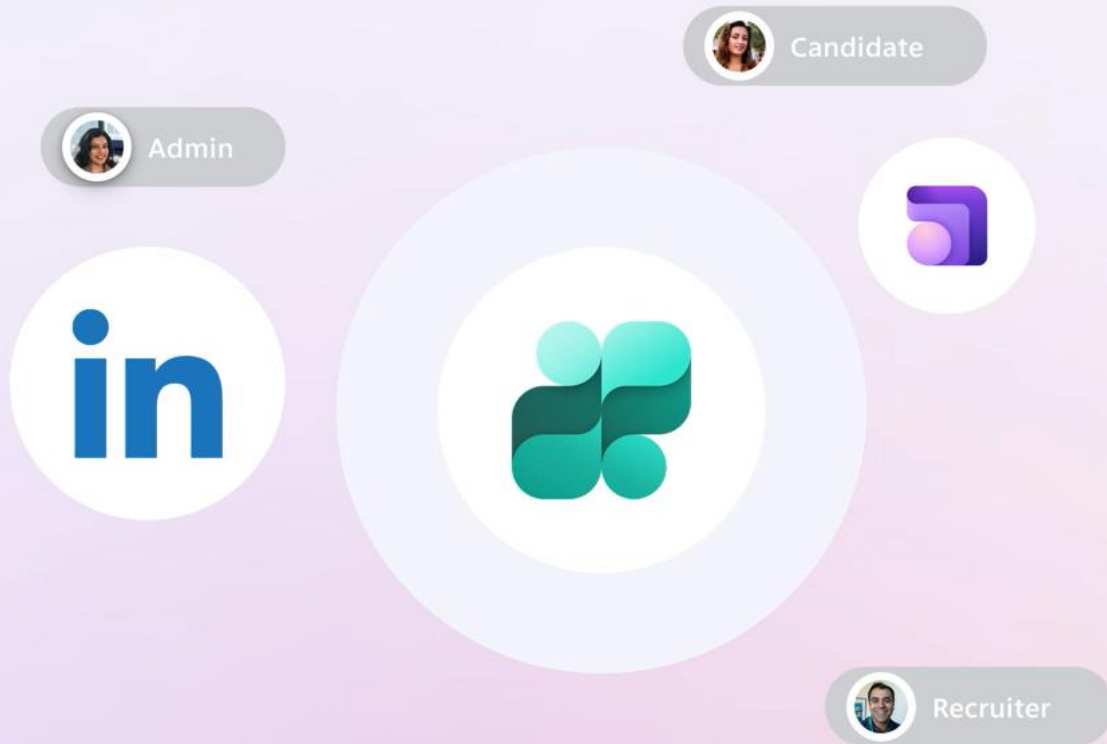
Faster candidate sourcing : Enables candidates to search and apply for jobs

Flexible contract management : Register multiple contracts to post job ad.



D365 HUMAN RESOURCES RECRUITING

Linkedin Integration



Offer Management

Streamlined Offer Operations : Import and export offer letters directly ensuring fast error-free preparation workflows.

Flexible Approval Processes : Configurable single or multi-level workflows allowing recruiters to define approvers per policy.

Enhanced Collaboration : Review letters, submit comments, and provide feedback ensuring transparency and alignment .

Digital Signature Integration : Send offers for digital signing through integrated provider ensuring secure compliant experiences.

Highlights

- Multi-level approval workflows.
- DocuSign and Adobe Sign integration
- Extensible e-signature provider architecture

Candidate Assessment – Resume Processing

AI-powered resume processing and job profile matching

Streamline candidate evaluation from application to decision.

AI based extraction of text, eliminating manual data entry.

Configure profile match settings for evaluation criteria, weightage, and scoring.

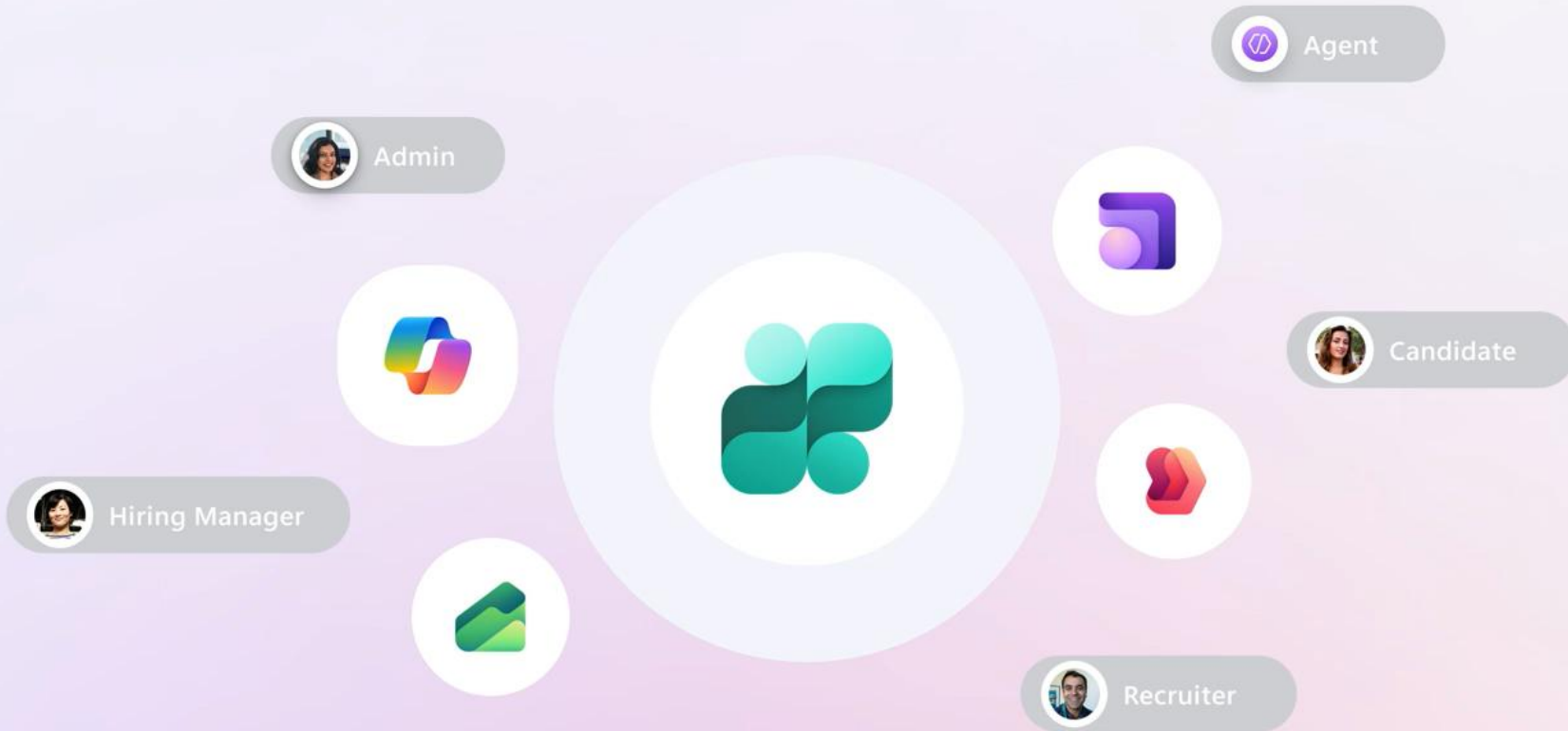
Multi-dimensional analysis of the resume and Job description for assessment score.

Workflow

- Candidate visits careers site for job opportunities
- Profile creation via uploaded resume
- Evaluate the fitment based on the job application

D365 HUMAN RESOURCES RECRUITING

Candidate Assessment





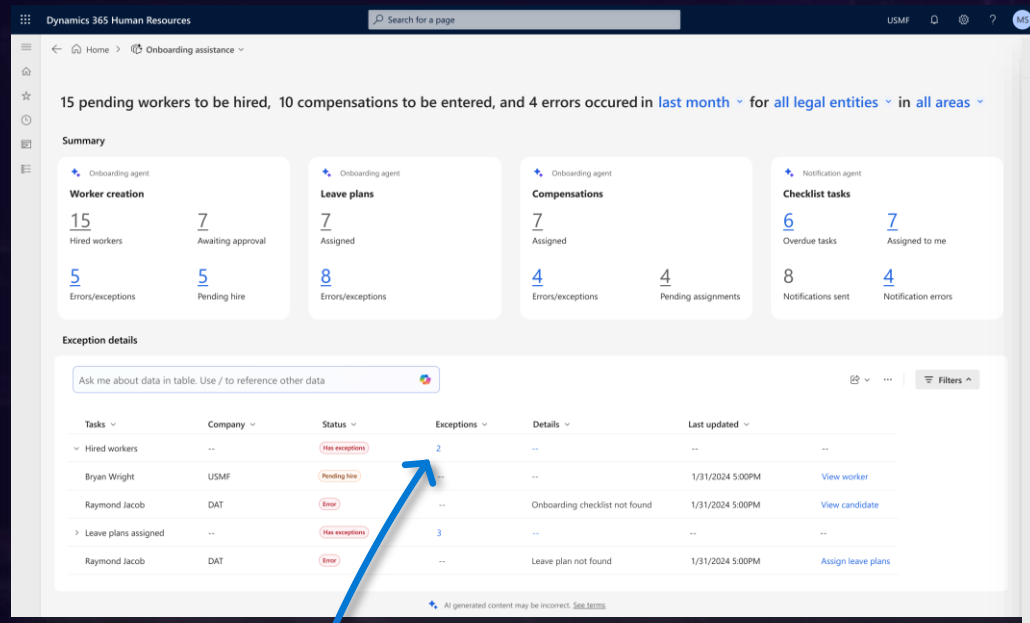
Dynamics 365 Human Resources

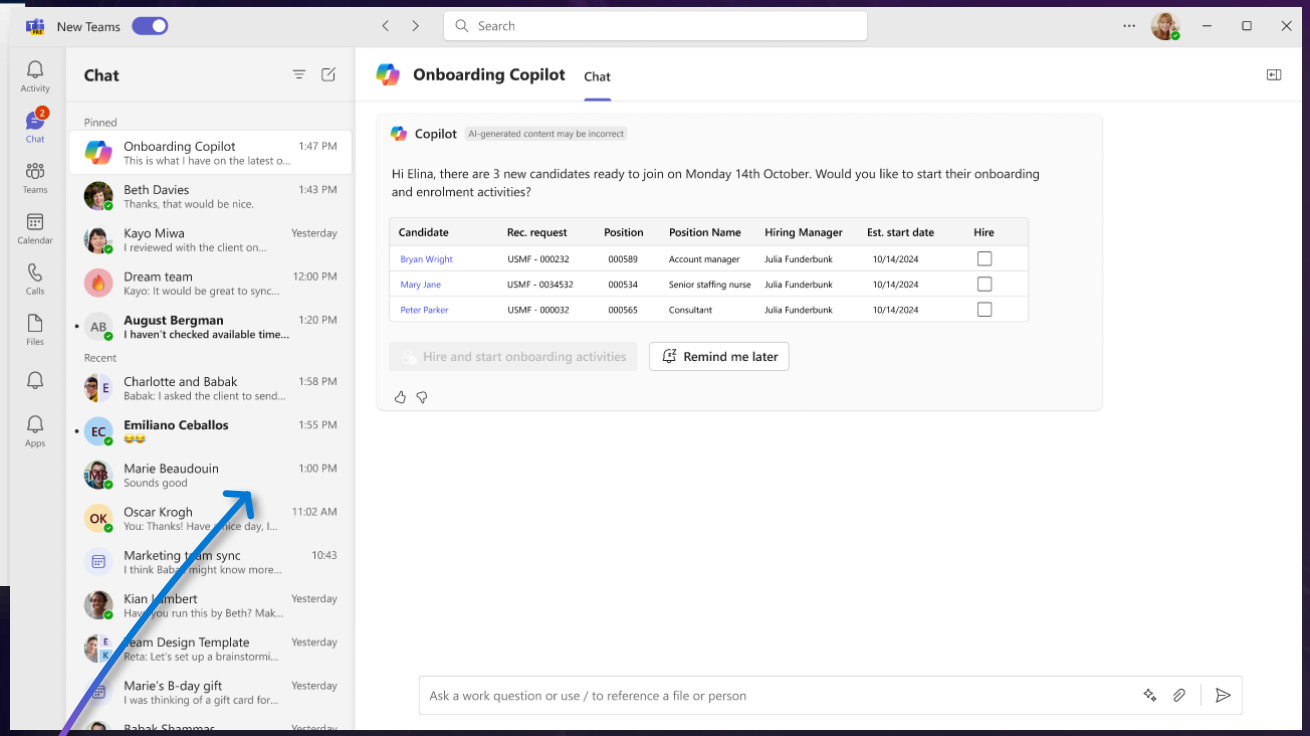
Onboarding

Private Preview

Onboarding Agent – HR Managers

- **Reduces manual workload** by automating repetitive onboarding tasks like data collection and validation.
- **Ensures consistency and compliance** across all new hires with standardized onboarding flows.
- **Minimizes errors and follow-ups** through intelligent data parsing and real-time employee self-service.





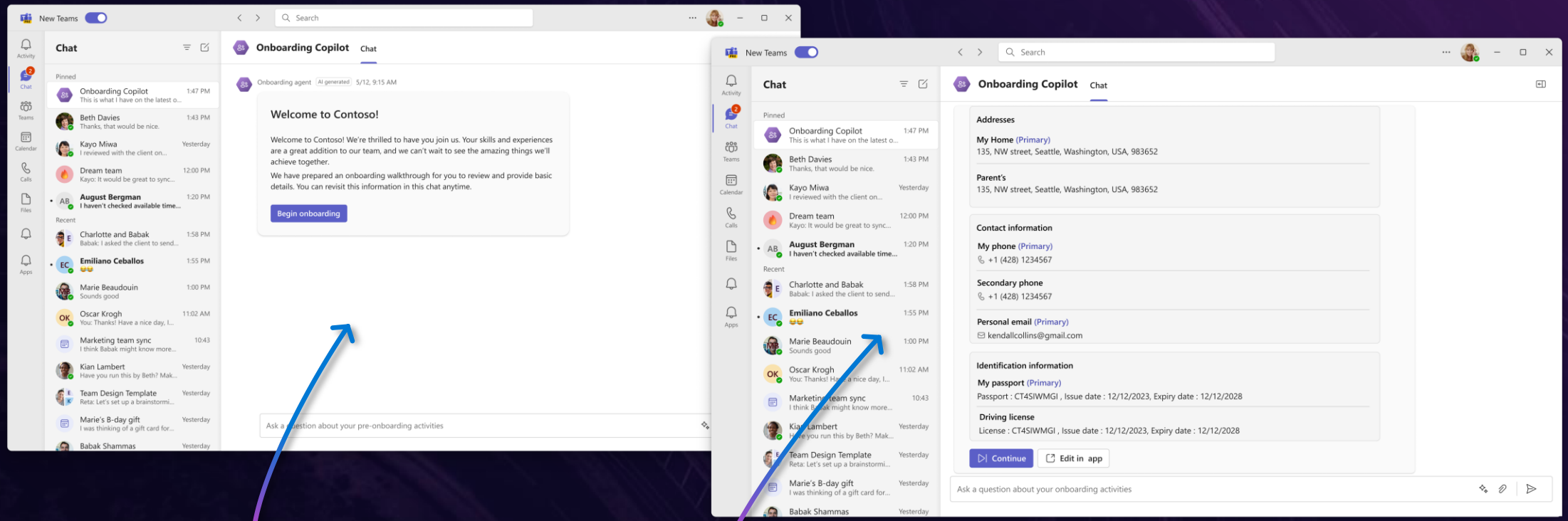
HR business partners get updates and recommendations throughout the process

Agent guides the HR manager through the process

Private Preview

Onboarding Agent – New Hires

One place to get started - finish pre-joining and Day 1 entirely in Microsoft Teams, with adaptive cards guiding every step.
Less paperwork, fewer surprises - submit personal details, IDs, and documents in a guided 8-step wizard with instant validation, so nothing comes back for rework.
Productive from Day 1 - get a personalized welcome kit, recommended learning, and a self-service way to introduce yourself to the team, no chasing HR for what to do next.



New hires will be able to complete the Day 1 tasks seamlessly

Agent provides the guided steps and detailed summary and next steps

DYNAMICS 365
HUMAN RESOURCES

Onboarding Agent for New Hires

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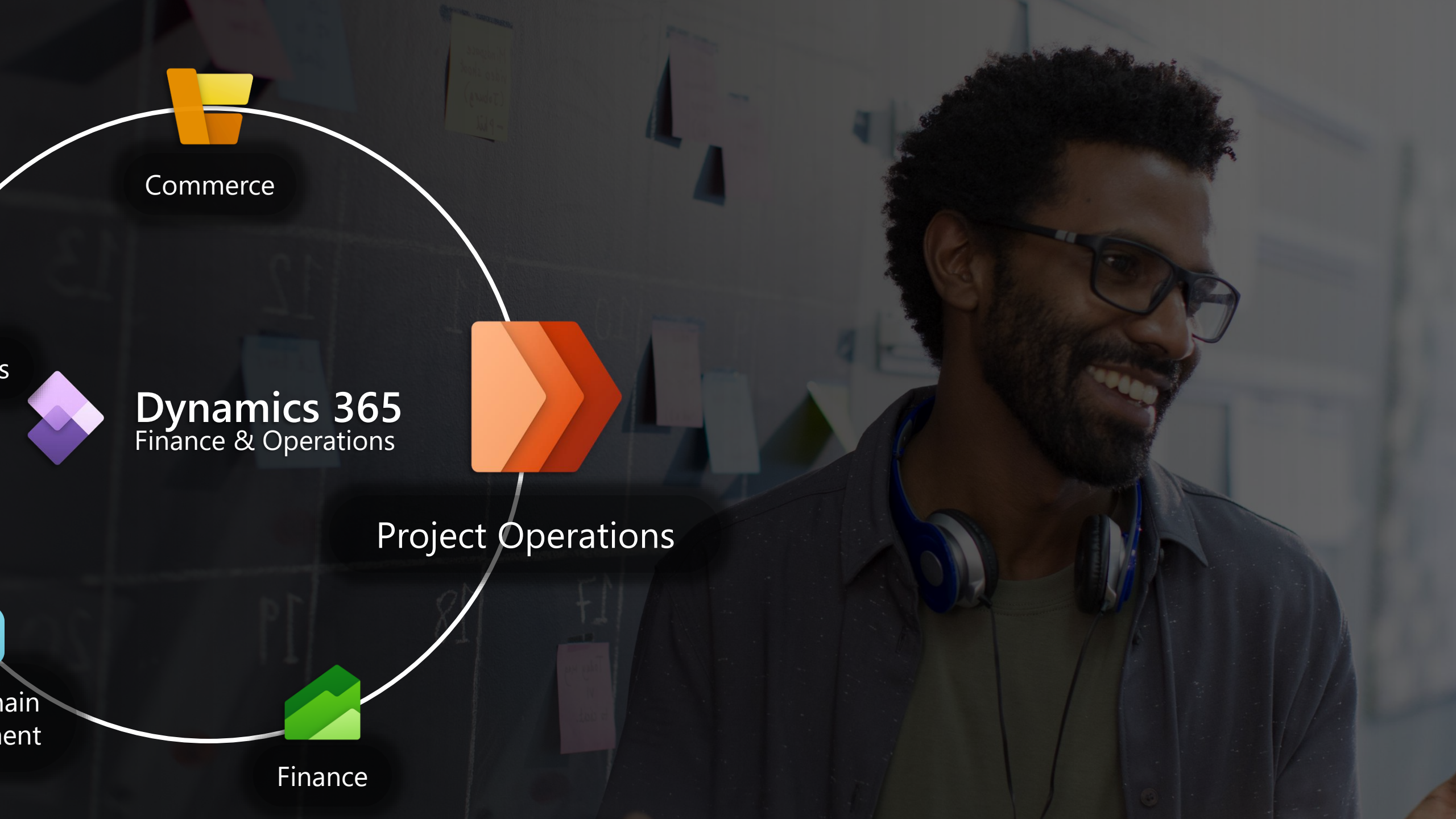
Commerce
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Project Operations
Finance

Elevating our service-centric offering with 200+ new capabilities

Key innovations delivered across the last 12 months

Forecast to Plan	Source to Pay	Order to Cash	Project to Profit	Hire to Retire		Service to Deliver	Record to Report	Globalize	Platform
Copilot Cowork ERP Plugin	Procurement agent supplier communication	Finance Agent in M365 Copilot	Time and Expense Approvals Agent	Copilot bulk resume assessment	Copilot Cowork ERP plugins	Scheduling operations agent	Account reconciliation agent	Tax calc enhancments	ERP MCP Server
Analytics MCP Server (Preview)	Procurement agent impact analysis	ERP MCP Server	ERP MCP Server	Candidate assessment agent (Preview)	ERP MCP Server	Explore Dataverse data with M365 Copilot	ERP MCP Server	E-invoicing and reg reporting updates	Analytics MCP Server (Preview)
What if scenarios for plans and estimates	ERP MCP Server	Copilot Cowork ERP plugins	Proj Ops + FS Q&A with Copilot	Copilot bulk resume upload	Onboarding agent HR managers new hires (Preview)	Predictive AI for asset maintenance	Analytics MCP Server (Preview)	Country expansion: Turkey, Argentina	Copilot Cowork ERP Plugins
Business performance planning templates	Copilot Cowork ERP plugins	Modern UX: quotes and invoices	Copilot Cowork ERP plugins	Copilot to generate job descriptions	Streamline interview scheduling	Copilot Cowork ERP plugins	Copilot Cowork ERP plugins	Regulatory template updates	Deep links from Copilot responses
Sustainability enhanced modeling	AI extraction and suggestion for invoice capture	Subscription billing enhancements	What-if analysis on project quotations	Job board integration – LinkedIn	Project Ops time-entry integration	Maintenance plans and predictive service	Finance Agent in M365 Copilot	Brazil tax reform	Immersive home and adaptive experiences
Extensibility of BPA data models	PO + subcontractor invoice matching	Sub billing, project fee journals	Auto-match credit card expenses	Expand hiring via external agencies	Leave and absence improvements	Project progress from field execution	LLM based Invoice Capture (preview)		Extend Copilot with client actions
BPP and BPA data integration	Supplier engagement app (Preview)	Bank reconciliation automation	Team member utilization view	Offer mgmt – DocuSign and AdobeSign	Benefits administration – HSA/401K	Mobile notes, offline profiles	New financial journals high-scale		Connect AI agents to F&O data and logic
New data models in BPA for Fixed Assets, Acquire to Dispose	Vendor invoice matching performance	Cash discounts on customer invoices	Expense mobile app	Retire outdated jobs and job titles		Improved mobile performance	Multi-ledger		Boost agent performance with optimal tool paths
	Auto clearing, bridged vendor pmts	Auto clearing, bridged cust pmts	Investment projects	Pre-joining workflow (BGV, compliance)		Bookings in Outlook and Teams	Enhancements to financial tags		Archive framework, parallel processing
		Improvements to prepayment	Project-specific approval policies			Finance, SCM, Project Ops, Field Service integration	Fixed asset enhancements		
			Time entry: new calendar and mobile app			Modernized mobile and schedule board	New BPA models: fixed assets		
			Resource booking modernization			Asset lifecycle with predictive maint at scale	Advanced emissions calculation		
							Sustainability reporting and modeling		
							Finance integration with Sustainability (green ledger)		

Agentic

Core

Security

Enterprise Scale & Performance

Regulatory Requirements

Data Archival and Storage

Recent Product Updates

Project Estimation and Planning

Support for larger Projects

What if analysis on estimates

Task-level schedule modes and calendars

*Multiple project baselines

*Improved quote and contract experience with time phased estimates



Sales and Account Managers

Project Execution

Bulk updates on task grid

Modern time entry grid by default

Enhanced team member experience

Approvals agent project filtering

Enhanced subcontractor support



Project Manager

Project financials

Support for larger invoice using Achromous DW

*Subscription billing

Multi-currency actuals on projects actuals on projects

Invoice-level accounting date

Revenue recognitions using cost estimate



Finance and Practice Managers

Fundamentals: Performance, Reliability & User Interaction Patterns

Confident Quotes and Change Management

using Project Operations

INPUTS

- Project Estimates
- Resource Rates
- Material Costs
- Contracts & Scope
- Schedule

1. CREATE QUOTE

Accurate pricing and clear scope

2. REVIEW & COLLABORATE

Align with team and stakeholders

3. SEND & APPROVE

Win better work with confidence



PROJECT MANAGER

Single source of truth.
Real-time visibility. Better decisions.

OUTCOMES

- Profitable Projects
- Financial Control
- Reduced Risk
- Stronger Client Relationships
- On Time. On Budget.

Two directions, three investment pillars

01 Deepen professional services

Tax · Consulting · Legal · Advisory
Moving from billable hours to outcome-based pricing

02 Expand beyond professional services

Asset-led services · Construction
Projects that build and maintain physical assets

Both directions run on the same three investment pillars

PILLAR 1 **Agentic experiences**	MCP business skills	Time, Expense and Approvals agents	Team member productivity
PILLAR 2 **Project-to-cash gaps**	What-if analysis	Project change management	Asset-centric projects
PILLAR 3 **Performance and ecosystem**	Scale and throughput	Interaction patterns	Sales and partner enablement

Future Product Updates

Project Estimation and Planning

Governed change control

What-if-analysis for budget and projects

Resource availability within sales estimates

Built-in ETC and EAC forecasting



Sales and Account Managers

Project Execution

Project Budgeting and time-phased forecasting

Simpler time and expense capture

Configurable mobile experience

Bookings managed in the flow of work



Project Manager

Project financials

New recurring revenue models

Project to Ledger reconciliation

Invoicing without volume limits

Subcontract lifecycle control



Finance and Practice Managers

Fundamentals: Performance, Reliability & User Interaction Patterns


Project Operations
Commerce
Finance
Dynamics 365
Finance & Operations
Human Resources
Supply Chain Management


Project Operations
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Field Service Major GA Features 2025-2026

Empower frontline workers

Field Service Mobile App

- More configurable Agenda view for bookings
- Sync field work with Outlook calendars
- Easily switch EntraID tenants
- **Improved geo-location tracking**
- Upload multiple images to inspections
- Compressed image uploads
- Improved signature control for customer signoff

Copilot and Mixed Reality on Mobile

- **Update work orders with your voice**
- Summarize work orders with Copilot
- Access Remote Assist from Teams

Offline Management

- More admin control over what syncs offline
- **Select table columns for offline sync**
- Monitor offline sync status
- Sync settings configurable per user
- Performance & memory optimization
- Online data access in offline-first mode

Performance

- Enhanced battery performance
- Faster app launch times
- High-density mobile lists (see more data, tap less)

Optimize service operations

Work Order Management

- **Collaborate with subcontractors** (preview)
- Improved work order experience
- Extended customer detail view
- **Facility management enhancements**
- Complete work orders & bookings with status logic
- Customize work order experience
- Manage worker certifications

Copilot on the Web

- Extend Copilot Sidecar with your own knowledge
- Configure Copilot summaries
- Enhance Copilot on web app
- Generate inspections from PDFs

Admin & Platform

- Contractor SKU support

Integrations

- Connect Field Service with Business Central
- Connect Field Service with Dynamics 365 Finance & Operations
- Connect Field Service with Project Operations

Resource scheduling

AI & Scheduling Optimization

- Scheduling Operations Agent – single resource optimization
- **Single Resource Optimization** (SRO) improvements

Improved user experience

- Share schedule board views
- Booking across time zones
- 60% faster create booking time
- 50% faster schedule assistant searches
- 30% faster schedule board cold load
- Satellite map views in schedule board
- Day-of-week dropdown
- Short booking visuals improvements
- Simplified address entry
- New schedule board for all users
- Break down complex/long-duration bookings
- Manage daily crew membership
- Optimize navigation on schedule board
- Show proportional bookings on multiday views
- **Multi-day scheduling support**
- Multiple recurrences in calendar

2026 Priorities

Fundamental and stay secure initiative

Continue focus on customer and service health by focusing on security, monitoring & alerting, test automation, and platform standardization

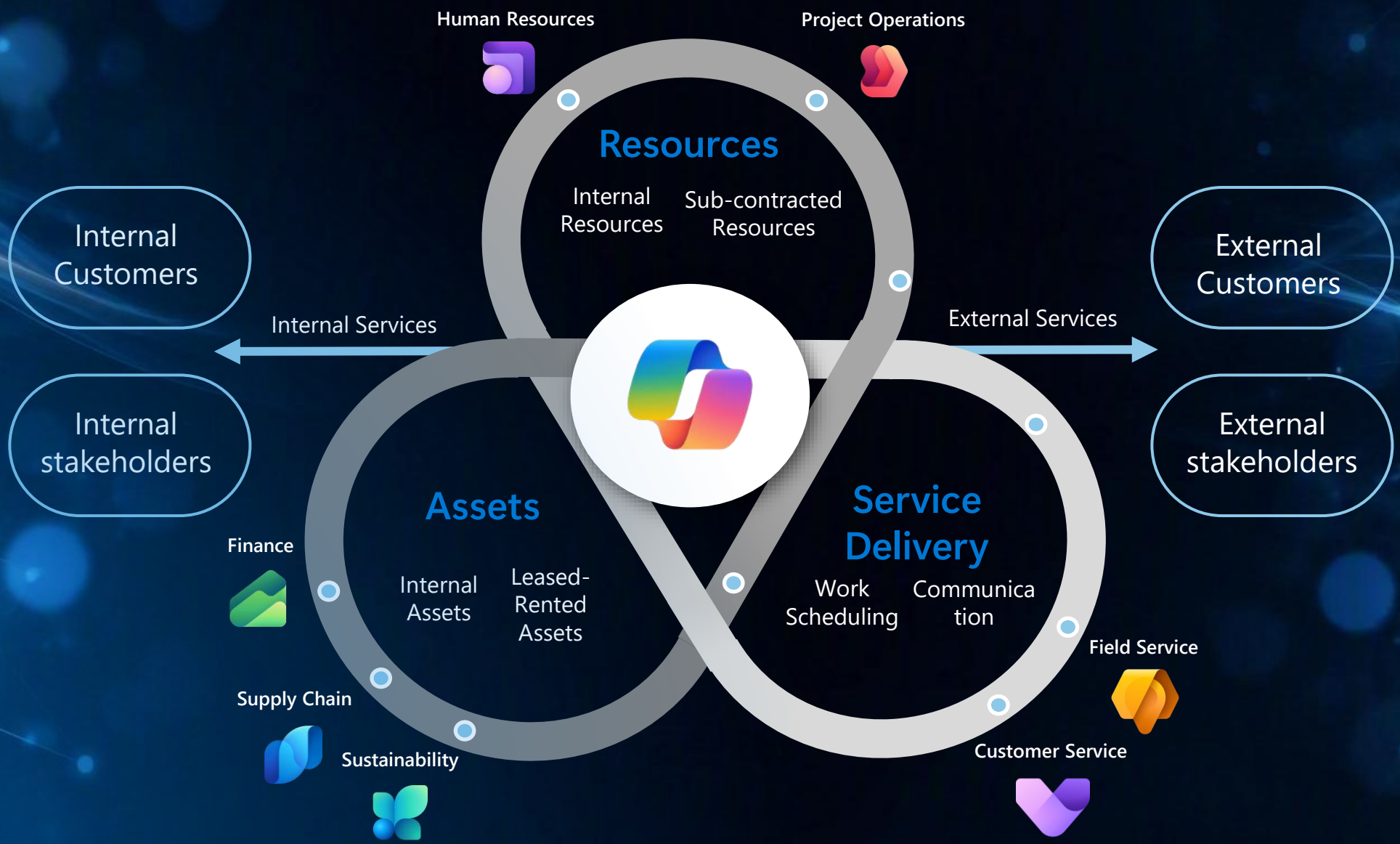
Core Product Evolution

Evolve core product capabilities, usability, and deepen workflows and integration within the Dynamics 365 portfolio

Evolve Field Service with Copilot and Agents

Continue to infuse FS across back office and technicians with Gen-AI and Agents that transform productivity with new capabilities

Field Service – Where Sales, Service, and Project Execution Meet



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Work, the way you work



Break-fix

Reactive work dispatched on demand

E.g., Appliance repair, emergency callout



Planned maintenance

Scheduled, recurring work to keep assets running

E.g., Scheduled inspections, PMs

Now natively supported



Project-based service

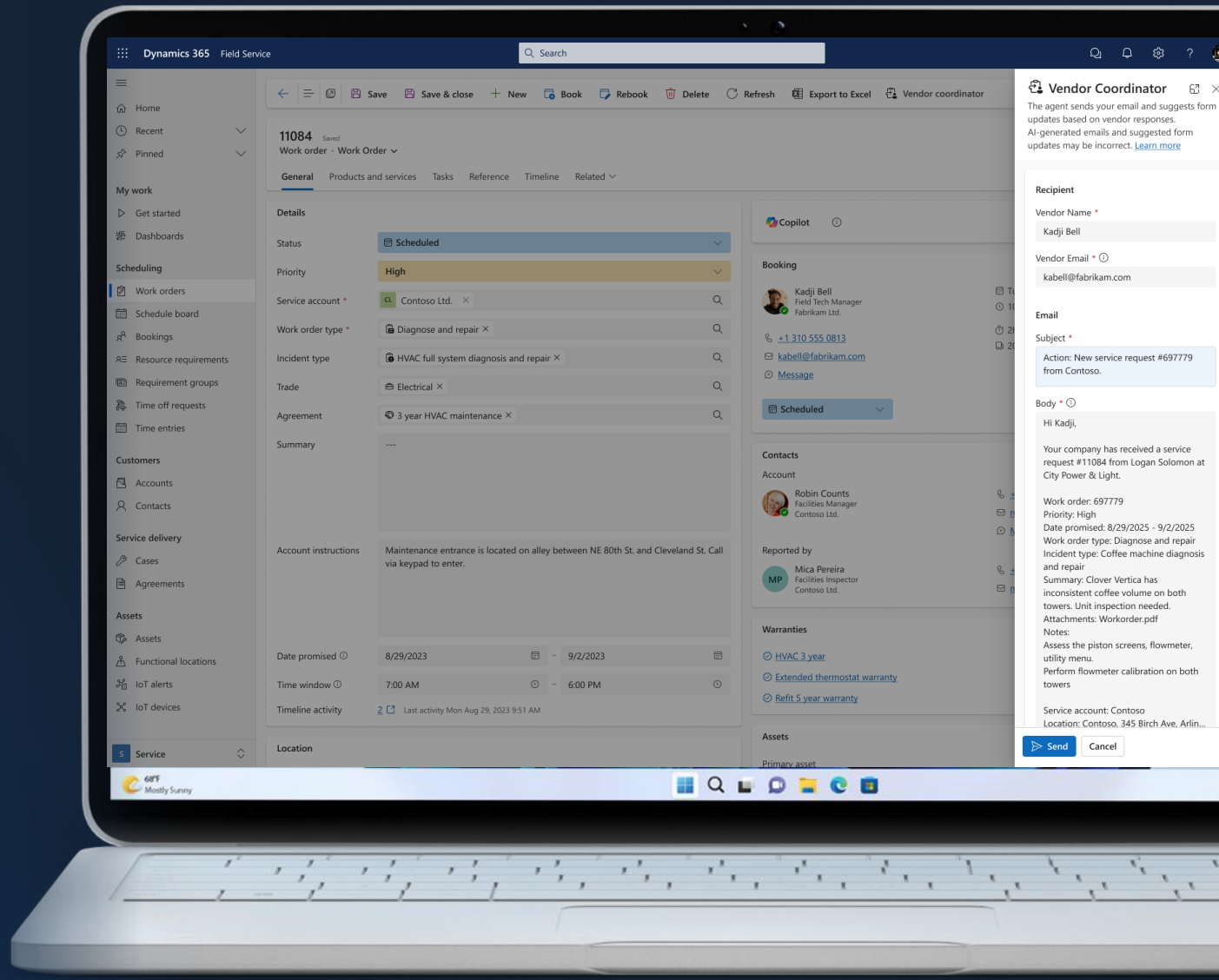
Multi-phase service engagements with task dependencies, multiple crews, and project-level cost tracking

E.g., Multi-week retrofits, asset installations

Coming soon

Bring subcontractor work into the light

Streamline subcontractor collaboration and turn updates into action, without the follow-up chase.



DEMO

Work Ingestion Agent

Automating subcontractor work coordination in Dynamics 365 Field Service

Smarter Scheduling for Better Outcomes

Increase Operational Efficiency

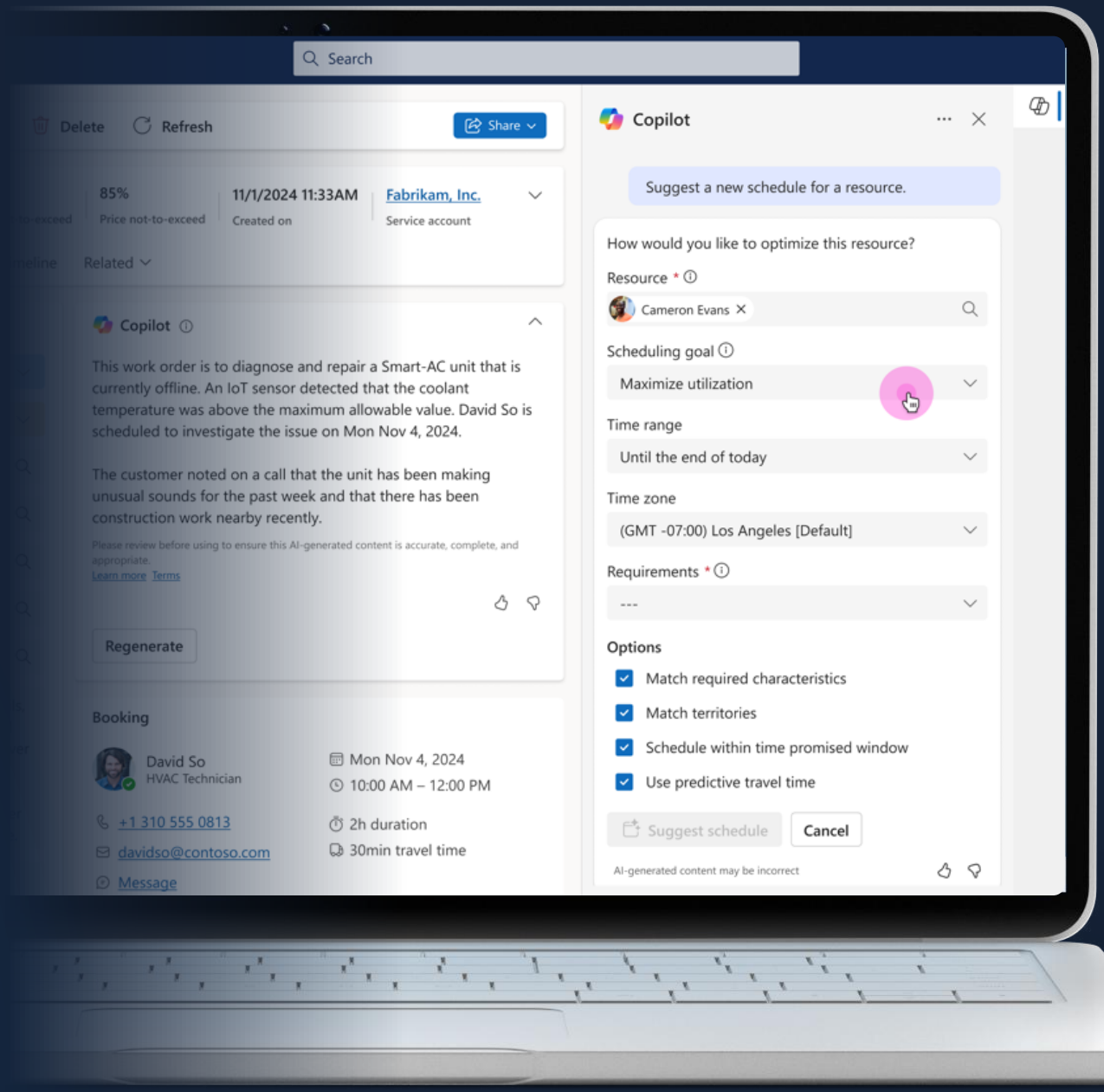
Reducing the time spent manually scheduling and addressing errors.

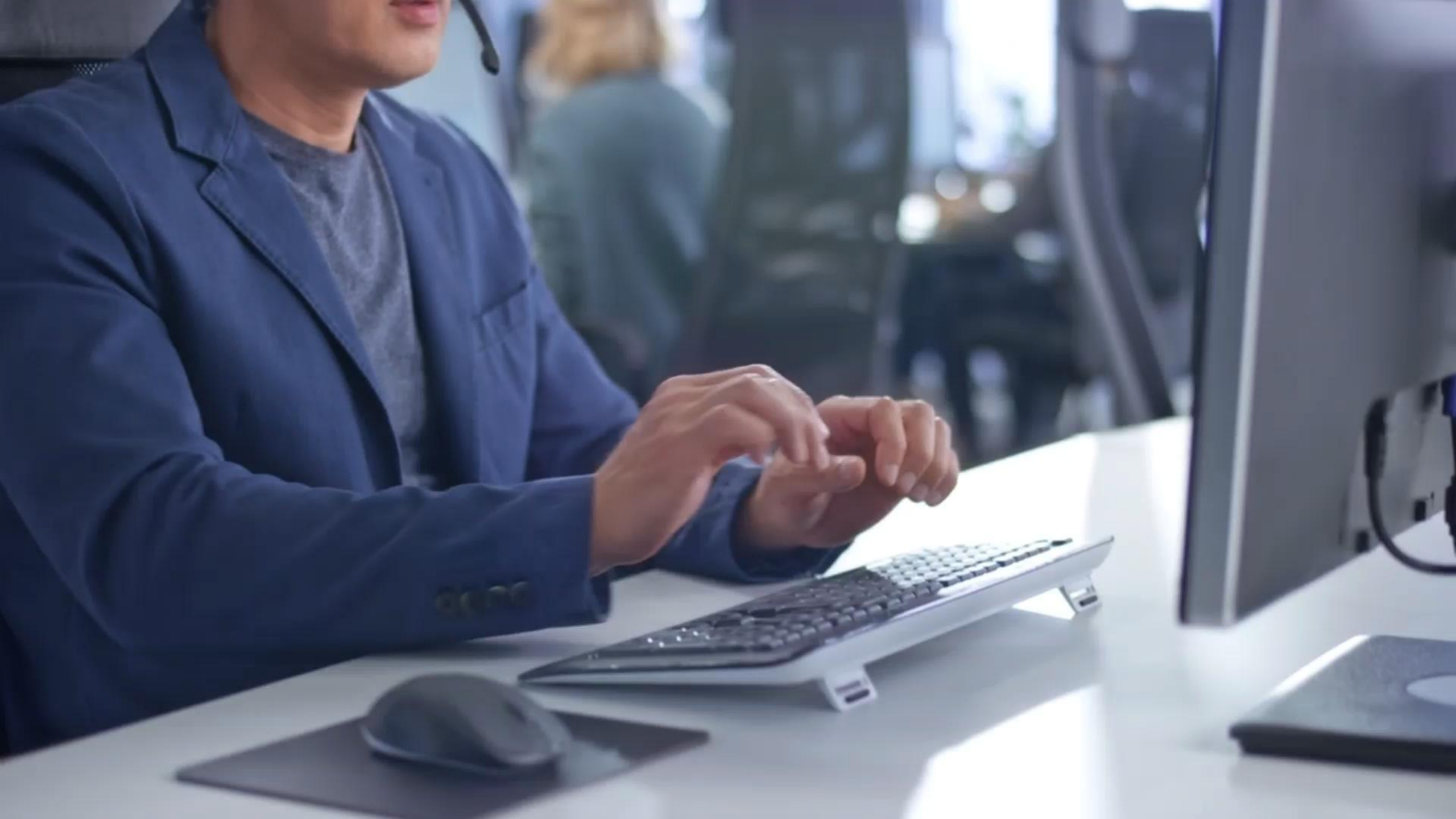
Higher Technician Utilization

Spend less time travel and get more jobs done per day per technician.

Faster Decision-Making

Easily compare the optimizations before committing the change to the schedule.





SOA - High Level Roadmap

Available now	Rolling out now	Up Next	*Future*
Q2 CY25	Q2 CY26	Q3 2026	Q2 CY27 GA	Future (TBD)
Single Resource Optimizations	**Multi-resource + Large Batch Optimizations**	**Scheduled Large Batch Optimizations**	**Multiday & dispatch of high effort work items**	**Continuous scheduling optimization**
Run an optimization on one resource via the schedule board or Copilot chat	Create custom goals, scopes, and run optimizations in simulation.	SOA has parity with current RSO feature set, with improved algorithm & performance	Handle multiday / high effort work & add support for crews & requirement groups	Continuous trigger / event based optimizations.

Preset goals + 1 resource → **Custom Goals** → **Feature parity with RSO** → **Additional feature development**

*Continuous optimization is a long-term roadmap item where timing is to be determined.

Coming soon

Bring Field Service to Every AI Experience

Connect Dynamics 365 Field Service to any agent, assistant, or workflow using the Dynamics 365 MCP Server.

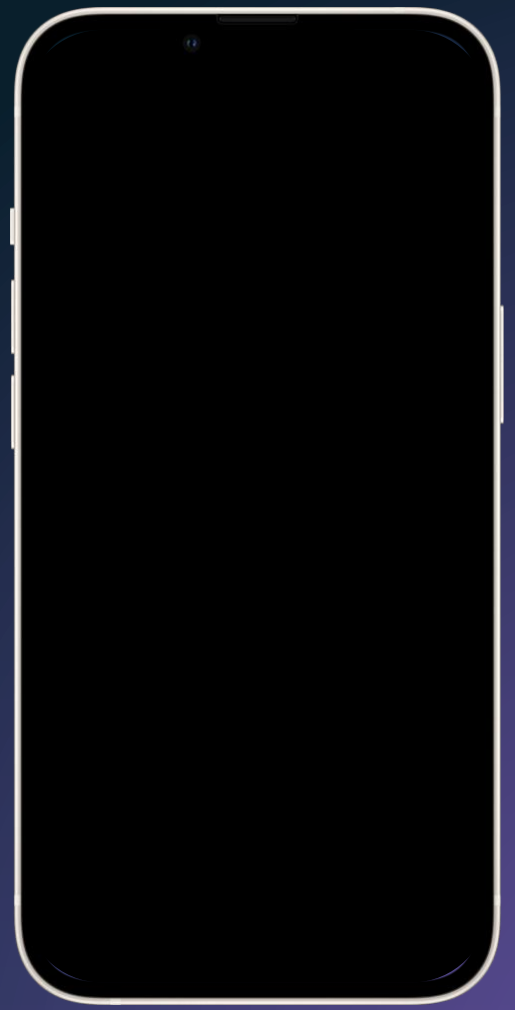


Coming soon

Field Service Agent Mobile

Technicians prepare for the day, gather customer insights and work order context.

They stay in the flow of work while capturing task completion and real time status updates.



Recent and upcoming releases

Enhanced workflows

- Native Integration with Project Operations, Finance, Supply Chain
- ➢ Subcontractor agent
- ➢ Field service MCP server
- Improved Copilot sidecar experience with support for 1PP and 3PP agents
- Raise work orders without needing a service account (raised against a contact)
- ➢ Manage rental demand with work order request
- Keep project staffing and field service scheduling aligned
- Book work orders with multiple requirements
- Generate work orders from copied project plans
- Support multiple payers across work orders
- Configure work order service as time or material transactions
- Automatically complete project tasks when field work is finished
- Enhanced visibility into work order financial performance
- Support multiple warehouse assignments for field technicians
- Track cost for non-billable field work
- Capture expenses from work orders
- Bring project material plans into field execution



Service managers

Better experience

- Improved mobile controls
  - Enhanced lists
  - Non-clickable lookups
  - Mobile friendly lookups
  - Faster update of booking status
  - Enhanced note taking experience
  - Better note reading experience
- Respect device accessibility zoom up to 130%
- Offline Profile Fetch XML editor
- Faster Android cold-start load time (up to 70% faster!)
- ➢ Quick actions in the agenda view
- ➢ Bulk-Add, Bulk Close Work Order Services, Tasks, and Products.
- ➢ Improved usability of Duration selection
- ➢ Native Offline Sync Engine for faster, more reliable sync performance
- ➢ Background up-sync & up-sync notifications
- ➢ Offline Related Table Sync optimization
- ➢ AI-Supported Offline Profile optimization
- ➢ Copilot chat experience with support for 1PP and 3PP agents



Technicians

Faster scheduling

- Full screen map mode
- Week numbers on the schedule board
- Bulk update – reassign to another resource
- Bulk update – move to a different date/time
- Partial cancelation support for multi-day bookings
- Performance improvements
  - Schedule board load & refresh times
  - Multiday booking create and update
  - Requirement group book, create, and update
- Scheduling Operations Agent
  - Interactive Optimizations
  - Large batch optimization
  - Schedule large batch optimization
  - Custom goals
  - Booking-level lock options
  - ➢ Crew & Requirement Group Support
  - ➢ General Availability



Schedulers

- Available now
- ➢ Coming soon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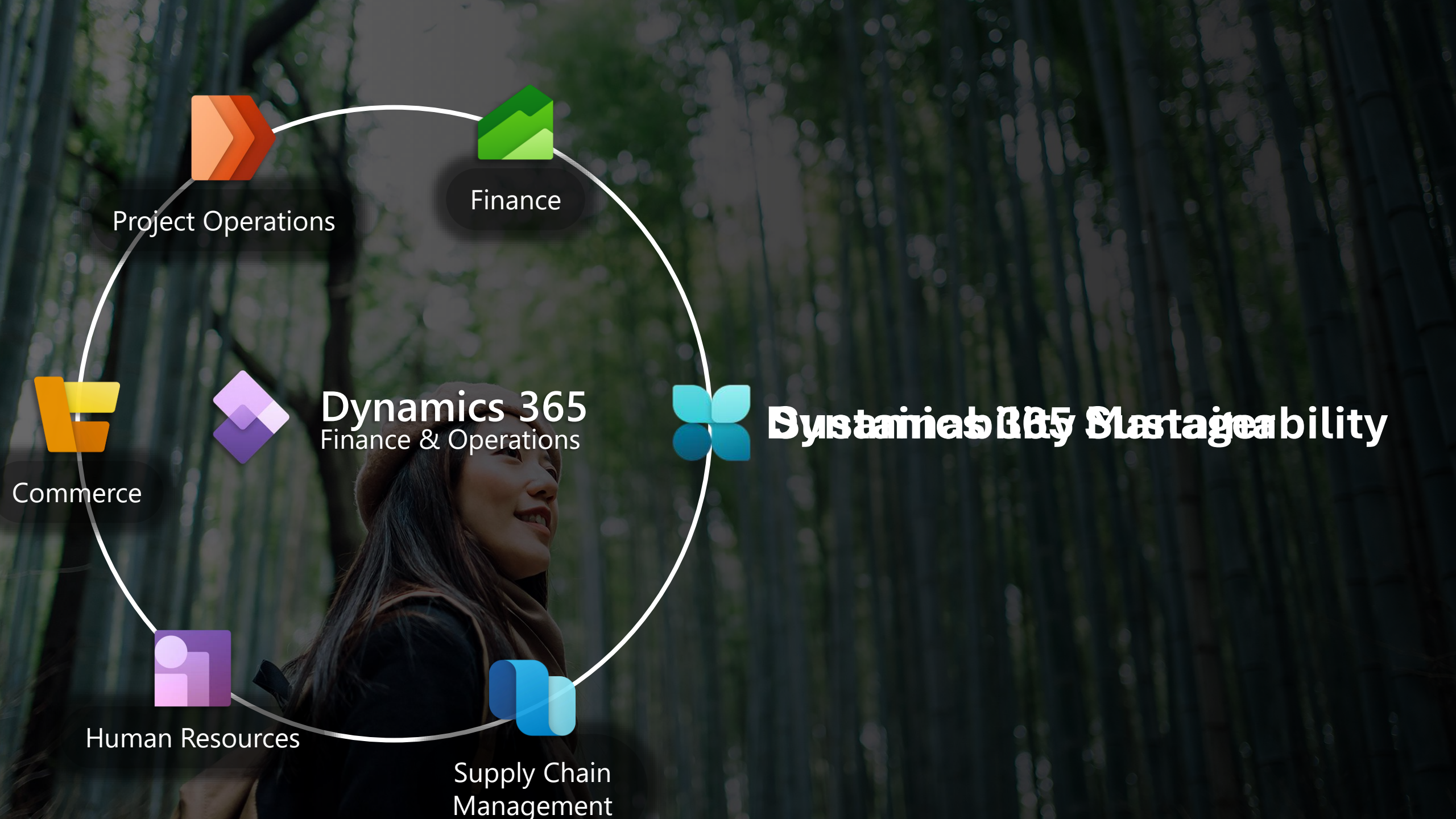
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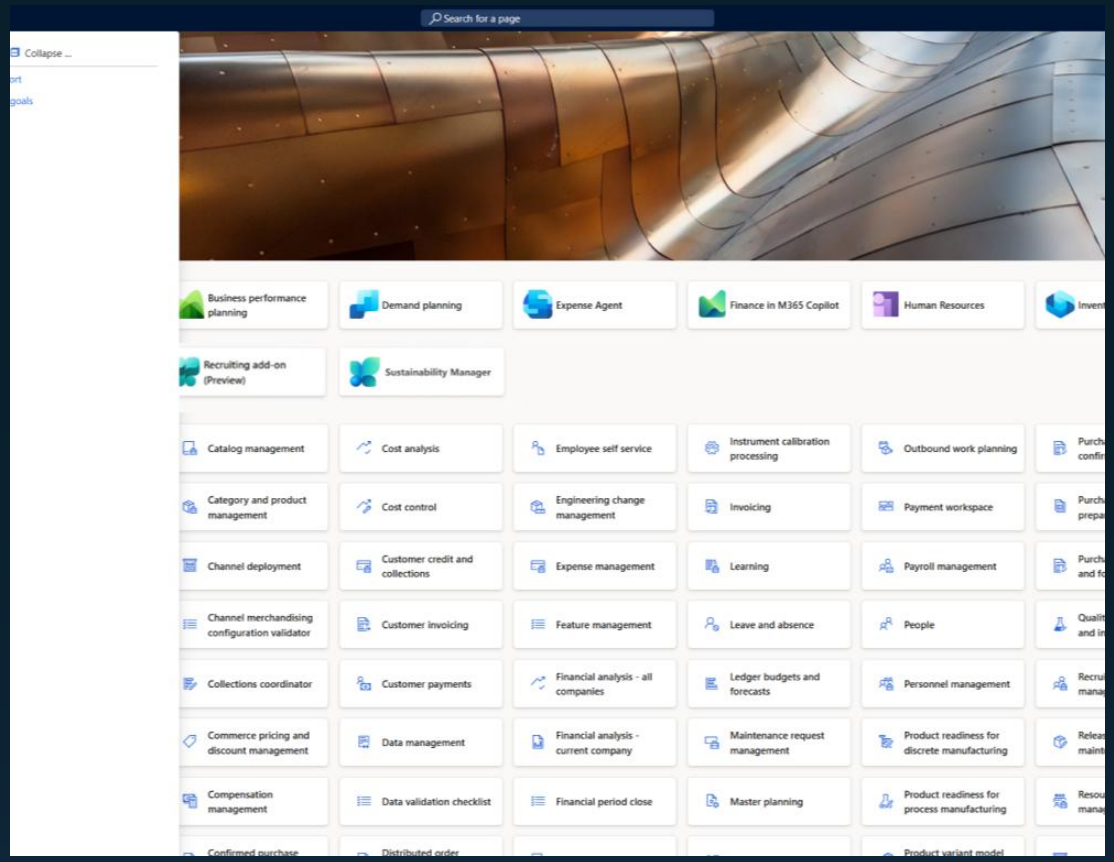
Sustainability Ledger in Finance and Operations



- Sustainability Ledger in Dynamics 365 FnO brings carbon and sustainability data into the financial system, enabling organizations to measure, manage, and report sustainability impact through a trusted, auditable ledger.

How it works – Environmental metrics

From ERP transactions to actionable sustainability insights.



Invoices, POs, utility bills, supplier spend and more.

Extract and normalize activity data through native integration.

Apply versioned spend- or activity-based factors.

Create transaction-level, traceable sustainability records.

Power dashboards, KPIs, audit and reporting.

✓ Spend-based calculations ✓ Scope 1, 2 and 3 visibility ✓ Traceable factors ✓ Audit-ready records

Dynamics 365 Sustainability

- Streamline **ESG internal data collection**
- Calculate **spend-based carbon** using Sustainability ledger
- Capture **snapshot-based data trails**
- Configure granular **reporting-period locking**
- Enhance **external sustainability reporting** (GA Sep 2026)
- Generate **advanced emissions calculation** outcomes
- Use up-to-date **regulatory templates**
- Ensure **GRI compliance** with latest template **updates**
- Allocate sustainability data
- Calculate **product carbon footprints**
- Post emissions with **Sustainability ledger** in Finance (GA Sep 2027)


Takk for oss!