

Copilot Capabilities in Dynamics 365 Finance and SCM

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Agenda

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- Copilot capabilities in Dynamics 365 SCM
 - Confirmed purchase order changes workspace
 - Warehouse mobile app insights
 - Product hover
 - Product details summary
 - Vendor summary
 - Purchase order summary
 - Sales order summary
 - Copilot capabilities in Dynamics 365 Finance
 - Collections coordinator summary
 - Workflow history summary
 - Customer page summary
 - Q&A

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Already available



Procurement with Copilot

Enhancing Procurement Efficiency with Dynamics 365

Enhanced Decision-Making in Procurement: Dynamics365 Copilot introduces advanced tools for managing purchase order changes, enabling informed decision making

Streamlined Purchase Order Management: The tool simplified tracking and confirming purchase order alteration, significantly improving process efficiency

Already available! [Read the blog](#)

Assess downstream impact of order changes and disposition them

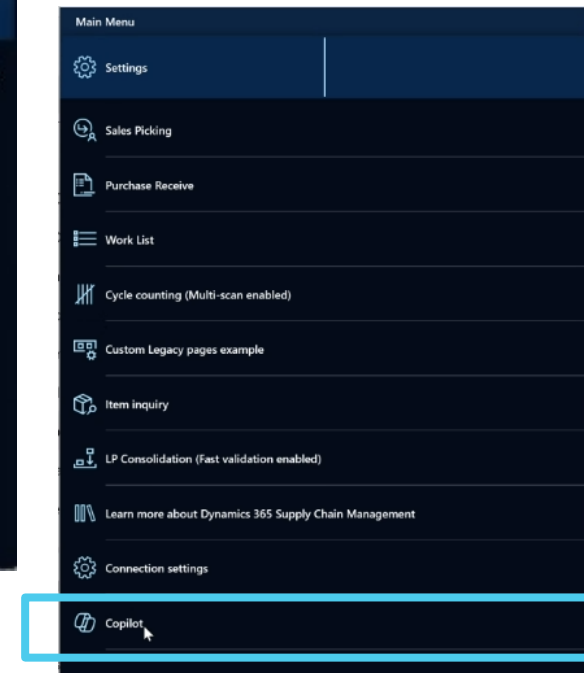
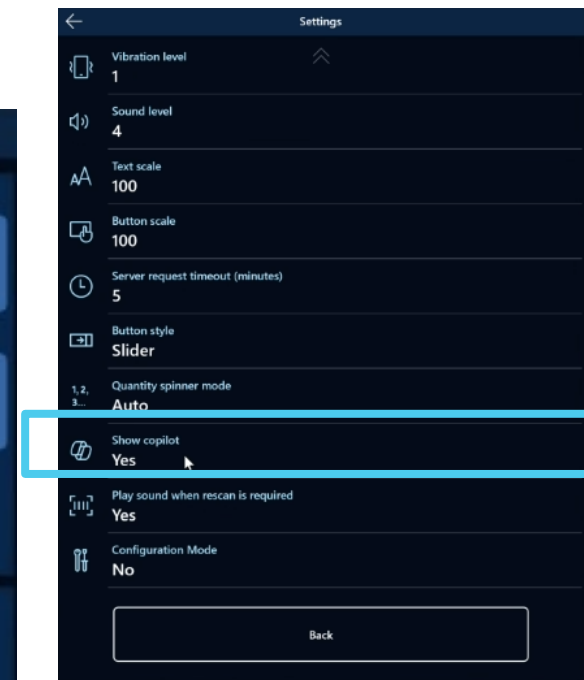
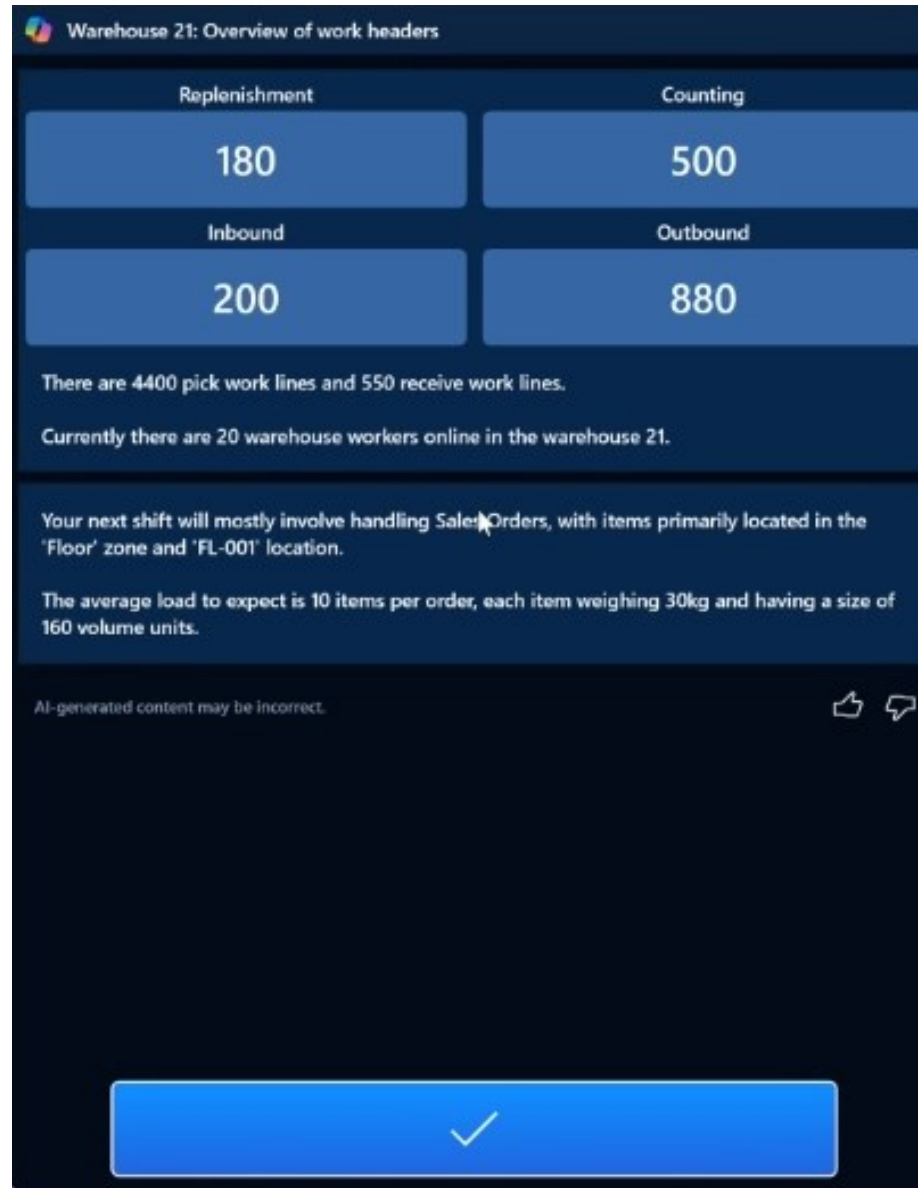
The screenshot displays the 'Confirmed purchase order changes' section in Dynamics 365. It features three summary cards: 'Low impact changes: 0', 'High impact changes: 5', and 'Impacted downstream orders: 39'. A blue arrow points from the 'Assess downstream impact of order changes and disposition them' text to the 'High impact changes' card. Below these cards is a table titled 'Purchase order changes with risk for downstream impact (5)'. A blue arrow points from the 'Streamlined Purchase Order Management' text to the 'Confirm purchase order' button above the table. The table lists purchase orders with columns for Purchase order, Vendor account, Vendor name, Requested, Item number, Product name, Status, Original quantity, and Changed quantity. To the right of the table, a list of impacted downstream orders is shown, including 'Planned kanban - High-end speakers - Standard crossover, 340 pieces' and 'Production line - Surround speaker system - Standard crossover, 220 pieces'.

Purchase order	Vendor account	Vendor name	Requested	Item number	Product name	Status	Original quantity	Changed quantity
0087611	US-105	Datum receivers	6/11/202	MC004	Standard coss...		1,163.00	1,087.00
0087622	US-102	Tailspin Parts	6/13/202					
0087704	US-102	Tailspin Parts	6/16/202					
0087801	US-102	Tailspin Parts	6/18/202					
0197201	US-101	Fabrikam Electronics	6/24/202					

Enhanced Vendor Communication

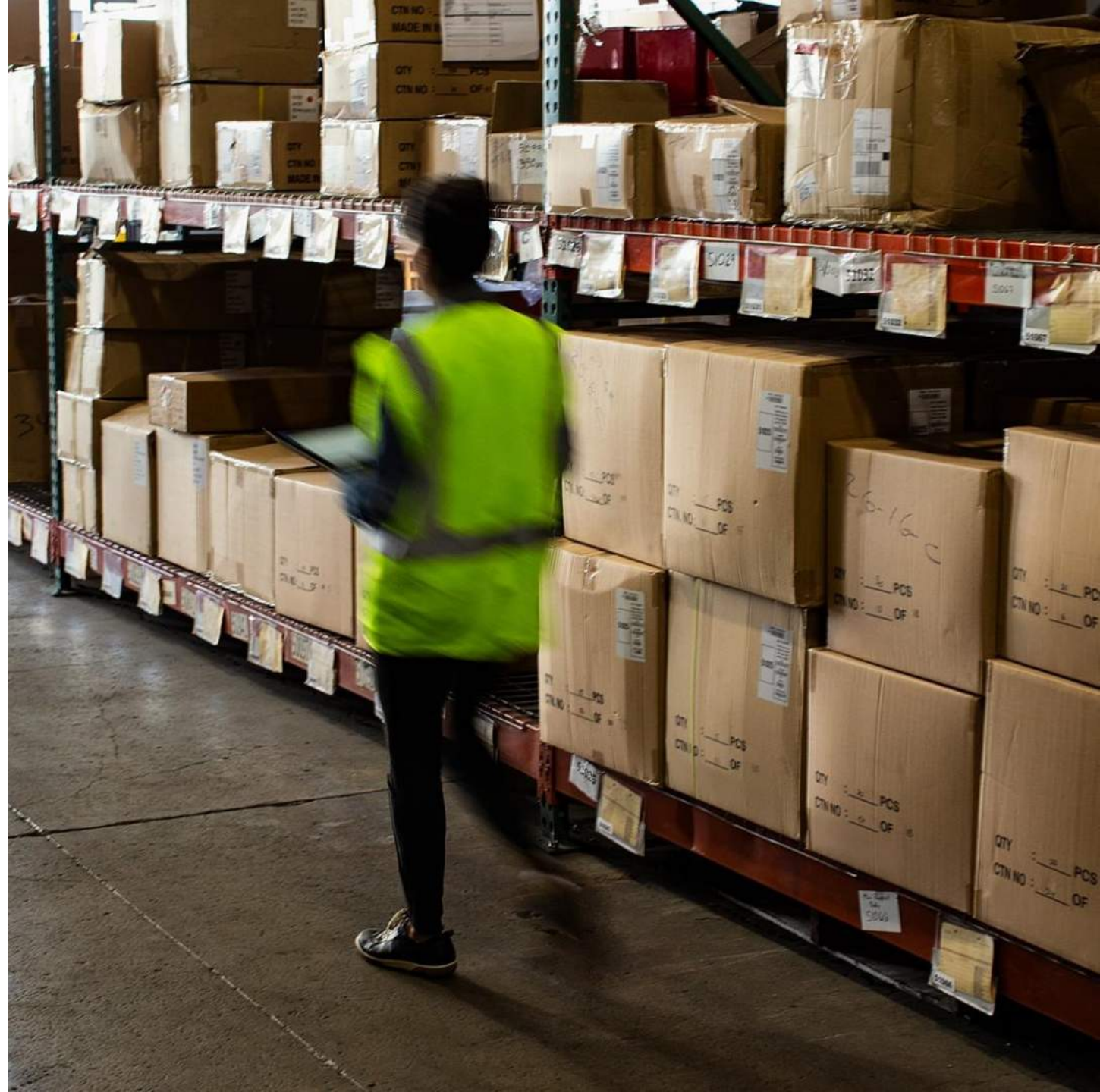
WMA app insights

- **Insights into open work** on the warehouse
- Requirements:
 - FnO 10.0.38 on feature management
 - **“Context-aware worker summary screen in WMA”**
 - WMA app version 2.3.2.0
- Disable
 - Feature on feature management
 - On menu – just for user (not show copilot)



Context aware summarization

Dynamics 365 Supply Chain
Management



Product hover

- When hovering over the item number **in any form** it will add a product summary **according to your most used forms and context**. Feature: Product summary when hovering on item

The screenshot displays the SAP S/4HANA Finance and Operations Preview interface. The main header shows the title 'Finance and Operations Preview' and a search bar. The left sidebar contains navigation icons and a 'Sales order details' section with a dropdown for 'My view'. The central area shows a sales order header for '012525 : Mathew Toll' and a list of sales order lines. The bottom table shows the following data:

Variant number	Item n	Item description	Unit	Quantity
VN-002095	81119	Slim Fit Plaid Shirt / Slim ...	1.00 ea	

A hover tooltip is displayed over the item number '81119', showing a 'Generated Product Summary' for 'Slim Fit Plaid Shirt'. The summary includes the following information:

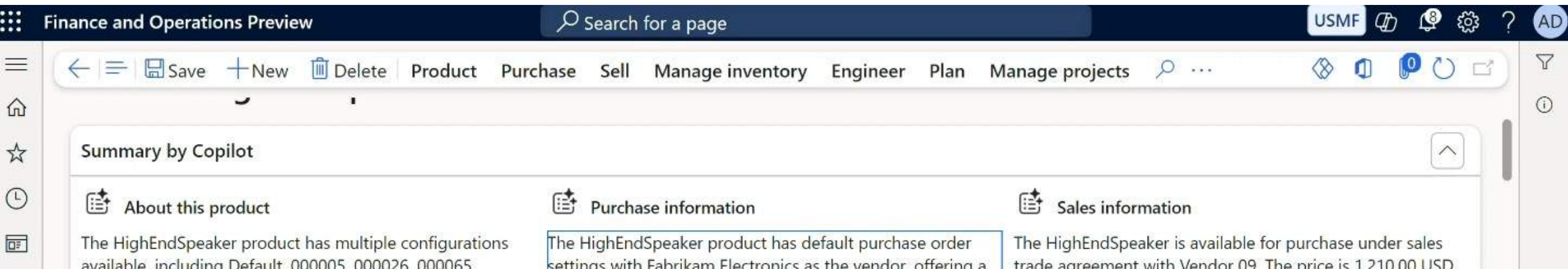
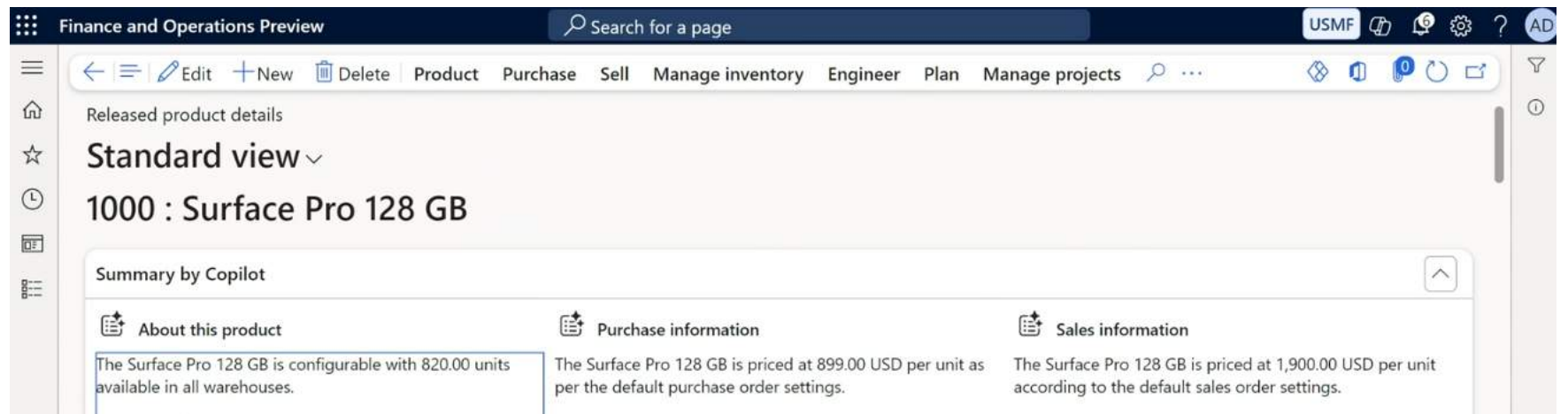
- Product number:** 81119 : 42 : Red/White : Reg...
- Description:** Slim Fit Plaid Shirt
- Product name:** Slim Fit Plaid Shirt
- Item number:** 81119
- Product type:** Item
- Item group:** Fashion
- Default order type:** Purchase order
- Procurement category:** External item text
- Default vendor:** 1002
- External item number:**

The summary also includes a description: 'This Slim Fit Plaid Shirt is a casual shirt with a red and white color combination. It comes in size 42 and has a regular style.' and pricing information: 'The purchase price for this shirt is \$40.00 USD per unit. The sales price is \$59.99 USD per unit.' and a note: 'The price was last updated on 03/06/2017. The shirt can be shipped with other items and does not have direct delivery. The cost price is also \$40.00 USD per unit.' and availability: 'This shirt is available in 1 color, 5 sizes, and 2 styles.'

The right sidebar shows a 'Risks' section with a message: 'AI summary generation has failed.'

Product details summary

- On the released product details it will add a product summary **according to your most used forms and context**. Feature: Product details summary



Vendor summary

- Vendor summary includes status information and additional insights for the vendor. The vendor's information provided as status and insight cover vendor currency, accounting currency, vendor hold status, number of purchase orders, posted vendor invoices, and payment status. It also includes number of overdue vendor invoices, purchasing agreements, and active rebates agreements.

All vendors

My view 

US-108 : City Power & Light

Summary by Copilot

 Status

The total outstanding balance of posted vendor invoices is 0.00 USD, and the total unsettled amount of posted vendor payments is also 0.00 USD. There are 10 overdue vendor invoices with a total amount of -248,889.42 USD. There is 1 purchase order with an open status, and no purchase orders with a received or invoiced status. There are no purchase agreements on hold or effective, and no rebate agreements or deals. The vendor currency and accounting currency are both USD, and the vendor is not on hold.

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



 Insights

There are currently 10 overdue invoices from the vendor, with a total amount of -248,889.42 USD. The invoice with the most overdue days is 0, and the maximum number of overdue days is also 0. Additionally, the invoice with the maximum overdue amount is 0. There are 24 pending vendor invoices, all of which have errors. Finally, there are no delayed product receipts at the moment.



General

40 | Not Active

[Change party association](#)

IDENTIFICATION

Vendor account

Name

City Power & Light

ORGANIZATION DETAILS

Number of employees

ABC code

None

Known as

Purchase order summary

- It gives an overview of what is the **status of the purchase order** (number of lines confirmed/received/invoiced and if partially or fully) and **selected insights** (summary of lines that are overdue or nearly overdue (receipt date equal current date)).
- Feature management: **Purchase order summary**

Finance and Operations Preview

Search for a page

USMF | Contoso Entertainment Syste...

SaveNewDeletePurchase orderPurchaseManageReceiveInvoiceRetailWarehouseTransportationGeneralOptions

All purchase orders | Standard view

00000125 : 1001 - Acme Office Supplies

Open orderApproved

LinesHeader

Summary by Copilot

Status

There are 4 order lines in total, with 3 not fully received and 1 fully received but not fully invoiced. The order is approved and open for further processing.

Filter to not fully received linesFilter to received not fully invoiced lines

Insights

There is 1 order line that is either overdue or nearly overdue. Additionally, there are 2 order lines with missing confirmed receipt dates.

Filter to overdue linesFilter to not confirmed lines

AI-generated content may be incorrect. Learn more

Purchase order header

Purchase order lines

Add lineAdd linesAdd productsRemovePurchase order lineFinancialsInventoryProduct and supplyUpdate lineWarehouseEngineering change

	T...	Budget ch...	Line number	Item number	Product name	Procurement category	Variant number	Site	Warehouse	CW quantity	CW unit	Quantity	Unit	Unit price	Adjusted u...	Discount	Discount p...	Net amount	Adjusted n...	Quality order sta
			1	D0001	MidRangeSpeaker			1	11			5.00	ea	302.71	0.00000			1,513.55	0.00	
			2	D0002	Cabinet			1	11			4.00	ea	148.42	0.00000			593.68	0.00	
			3	D0003	StandardSpeaker			1	11			2.00	ea	168.64	0.00000			337.28	0.00	
			4	D0004	HighEndSpeaker / High E...		00013	1	11			1.00	ea	1,068.77	0.00000			1,068.77	0.00	

Sales order summary

- It gives an overview of what is the **status of the sales order** (number of lines confirmed/received/invoiced and if partially or fully) and **selected insights** (summary of lines that are overdue or nearly overdue (ship date equal current date)).
- Feature management: **Sales order insights**

Finance and Operations Preview

Search for a page

USMF | Contoso Entertainment System...

Home

Star

Clock

Calendar

List

Navigation

Home

Star

Clock

Calendar

List

Generate

Quality management

Journals

Generate picking list

Post packing slip

Picking list registration

Pro forma packing slip

Intercompany picking list

Non conformances

Quality orders

Picking list

Packing slip

Sales order details | My view

000860 : Contoso Retail San Diego

Open order

Lines

Header

Summary

Status

Insights

There are 3 order lines in total, with 1 line not fully picked, 1 line not fully shipped, and 1 line not fully invoiced. The order is currently open.

There is 1 order line missing a confirmed ship date, and 1 order line that is nearly overdue or already overdue.

Filter to not fully picked lines

Filter to not fully shipped lines

Filter to overdue or nearly overdue lines

Filter to lines missing confirmed ship date

AI-generated content may be incorrect. Learn more

Feedback icons

Sales order header

Sales order lines

+ Add line

+ Add line

+ Add products

Remove

Sales order line >

Financials >

Inventory >

Product and supply >

Update line >

Warehouse >

Retail >

Engineering change >

Context aware summarization

Dynamics 365 Finance



Collections coordinator summary

- This feature provides a collections coordinator (collections agent) with a summary of the aging amounts, payment history and remaining credit for a customer. It also creates an AI-generated email to edit and then send to a customer to remind them of their overdue payments.
- The primary goal is to gather all relevant data points for a customer with overdue balances in one place, so collections coordinators spend less time looking for the details and more time contacting the customers.
- Feature management: Collections coordinator summary and Collections coordinator workspace

US-003 : Forest Wholesales

Pool


Customer account

US-003

[Overview](#) [Open transactions](#) [Disputed invoices](#) [Promised to pay](#) [Unsettled payments](#)

Forest Wholesales has "good" credit rating and usually pays on time, and recently defaulted on 38,241.06.

Summary by Copilot

 Balances and payment history


Forest Wholesales has a payment history of Usually Pays on time. They have been sent 3 invoices in the past six months, with a balance due of 75,302.37 USD, of which 38,241.06 USD is overdue. Their last payment was received on 5/1/2024 for 4,755.71 USD. With a remaining credit amount of 308,109.68 USD, their consistency in on-time payments indicates a reliable customer.

[Create reminder email](#)

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

Workflow history summary

- This feature provides a concise summary of a workflow process including the submitter name, submitted date, workflow status, due date, comments and the most recent approval/rejection/change status history.
- The primary goal is to speed up the approval process by showing all relevant details at the top of the workflow history page so decisions can be made quicker.
- Feature management: Workflow history summary

[Workflow history](#) | 00640 : WFGGenJrn | Standard view 

000924 : Journal batch number: 00640, WFGGenJrn

Summary by Copilot

Workflow status

The workflow was submitted by Julia Funderburk on May 21, 2024, with adjustments for month-end, and it is currently in a pending status. The workflow history includes the following actions:


Resubmitted by Julia Funderburk on May 21, 2024, with a comment stating "second time."

Rejected by Julia Funderburk on May 21, 2024, with a comment indicating "rejection test."


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


Customer page summary

- This feature provides a comprehensive summary of customer account statuses and insights using transaction data like invoices, payments, sales orders, sales agreements, rebates, overdue invoices, delayed order lines from the past year.
- The primary goal is to enhance operational efficiency and minimize the time users spend navigating between forms and modules.
- Feature management: **Customer page summary**



[All customers](#) | [My view](#) 


US-001 : Contoso Retail San Diego

Summary by Copilot 



 **Status**

In the last year, there were 4 customer invoices totaling 2,874.30 USD, with an outstanding balance of 2,474.30 USD. One customer payment of 400.00 USD was made, settling the amount in full. Additionally, there was one sales order invoiced for 514.80 USD, while there were no sales orders delivered and two sales orders open. There were no sales agreements on hold or effective, and no active rebate agreements or deals during this period.

 **Insights**

In the last year, there is 1 overdue customer invoice totaling 214.50 USD, with a maximum overdue of 51 days on invoice FTI-00000023. Additionally, there is 1 sales order invoiced but not confirmed. No customer invoices have different currency than the customer master data, no delayed sales order lines, and no active rebate deals.

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

Benefits for releasing directly to General Availability

1. **Strategic utilization of existing data**

- Existing transactional data within the system
- No end-user access to the prompt

2. **Compliance with customer agreements**

- Features can only be on-by-default if they are in GA

3. **Significant user value**

- Intended to enhance user efficiency by allowing them to focus on high-value activities
- Demonstrate tangible benefits using Copilot capabilities in ERP systems

4. **Enhanced user engagement and feedback**

- Many more users can provide Microsoft with feedback that is crucial for ongoing improvement

5. **Low-risk implementation**

- Existing data and non-invasive approach
- Will not compromise the integrity or security of our system's operations

New summarization scenarios

- In the coming weeks, customers will be subject to **auto installation/enablement of Copilot features in Dynamics 365 Finance and SCM**.
- Languages: <https://releaseplans.microsoft.com/en-US/availability-reports/?report=copilotfeaturereport>
- In build **10.0.38** from PQU5 and **10.0.39** from PQU3 of Dynamics 365 finance and operations apps, Copilot features through respective feature flags will be **automatically installed and enabled by default**, such as feature *Purchase order summary*.
- From build **10.0.40**, Copilot capabilities will be always on.
- The respective solutions that enable the copilot capabilities with Azure OpenAI will be automatically installed in their respective instances.

Microsoft's Responsible AI Framework



Fairness

AI systems should treat all people fairly.

Reliability & Safety

AI systems should perform reliably and safely.

Privacy & Security

AI systems should be secure and respect privacy.

Inclusiveness

AI systems should empower everyone and engage people.

Transparency

AI systems should be understandable.

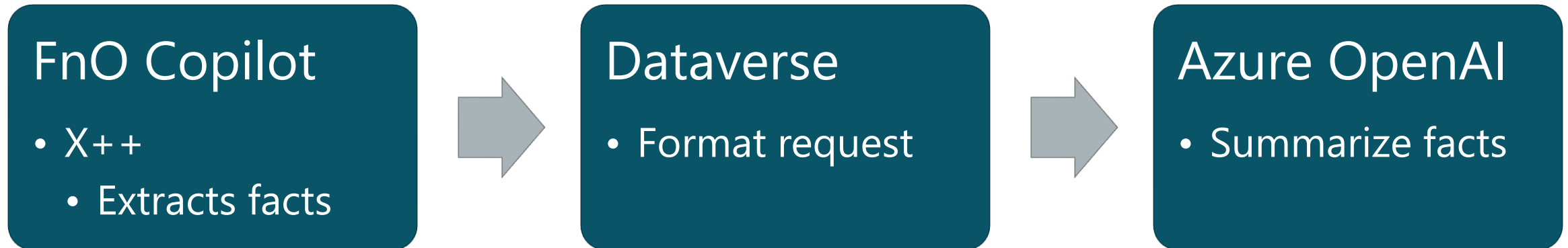
Accountability

People should be accountable for AI systems.

[Learn More](#)

<https://www.microsoft.com/en-us/ai/responsible-ai>

Architecture



Q&A

