

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' interface in Dynamics 365. It features a summary section with three key metrics: 'Low impact changes: 0', 'High impact changes: 5', and 'Impacted downstream orders: 39'. Below this is a table titled 'Purchase order changes with risk for downstream impact (5)'. The table lists purchase orders with columns for purchase order number, vendor account, vendor name, request date, item number, product name, status, original quantity, and changed quantity. A table with 8 columns: Purchase order, Vendor account, Vendor name, Requested, Item number, Product name, Status, Original quantity, Changed quantity, and Order number. The last row is highlighted in blue.

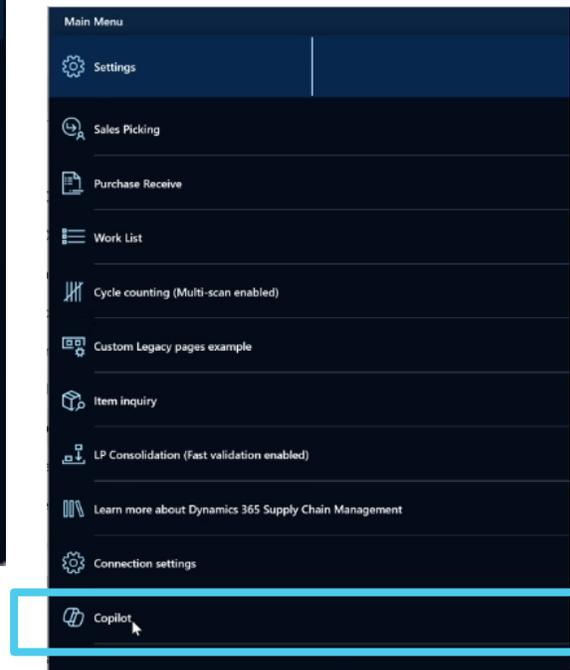
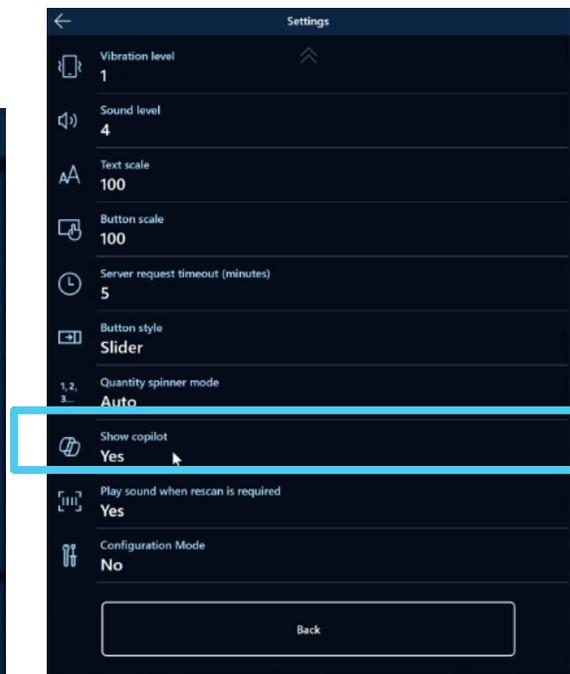
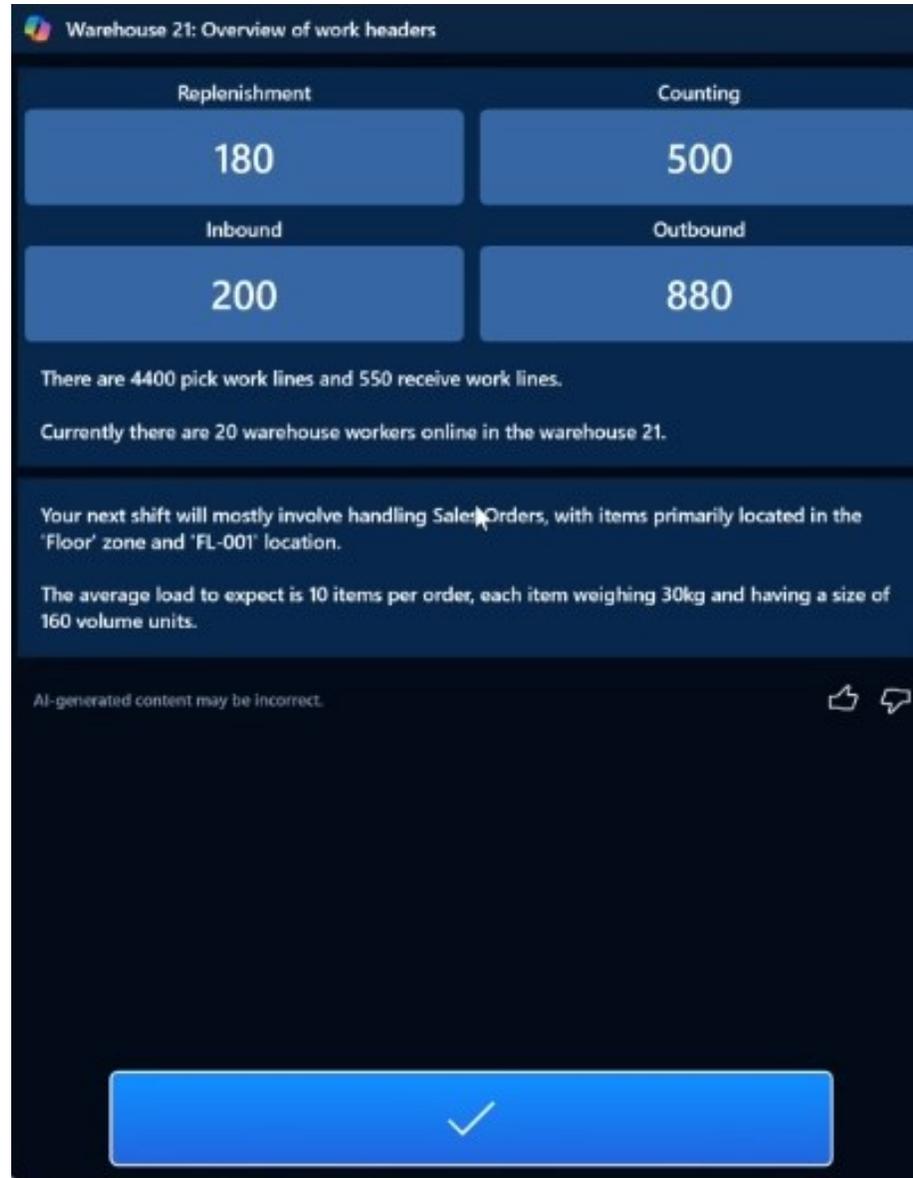
Purchase order	Vendor account	Vendor name	Requested	Item number	Product name	Status	Original quantity	Changed quantity	Order number
0087611	US-105	Datum receivers	6/11/202	M0004	Standard coss...	⚠	1,163.00	1,087.00	12
0087622	US-102	Tailsin Parts	6/13/202						
0087704	US-102	Tailsin Parts	6/16/202						
0087801	US-102	Tailsin Parts	6/18/202						
0197201	US-101	Fabrikam Electronics	6/24/202						

On the right side of the interface, there is a list of impacted downstream orders, including 'Planned kanban - High-end speakers - Standard crossover, 340 pieces', 'Planned kanban - Mid-range speakers - Standard crossover, 250 pieces', 'Production line - Surround speaker system - Standard crossover, 220 pieces', 'Production line - Outdoor speakers - Standard crossover, 164 pieces', 'Production line - Bookshelf speakers - Standard crossover, 113 pieces', 'Production line - Car audio set - Standard crossover, 46 pieces', and 'Production line - Car audio speakers - Standard crossover, 30 pieces'. A blue callout box at the top right points to the 'High impact changes: 5' section, and a purple callout box at the bottom points to the 'Purchase order changes with risk for downstream impact (5)' table.

Enhanced Vendor Communication

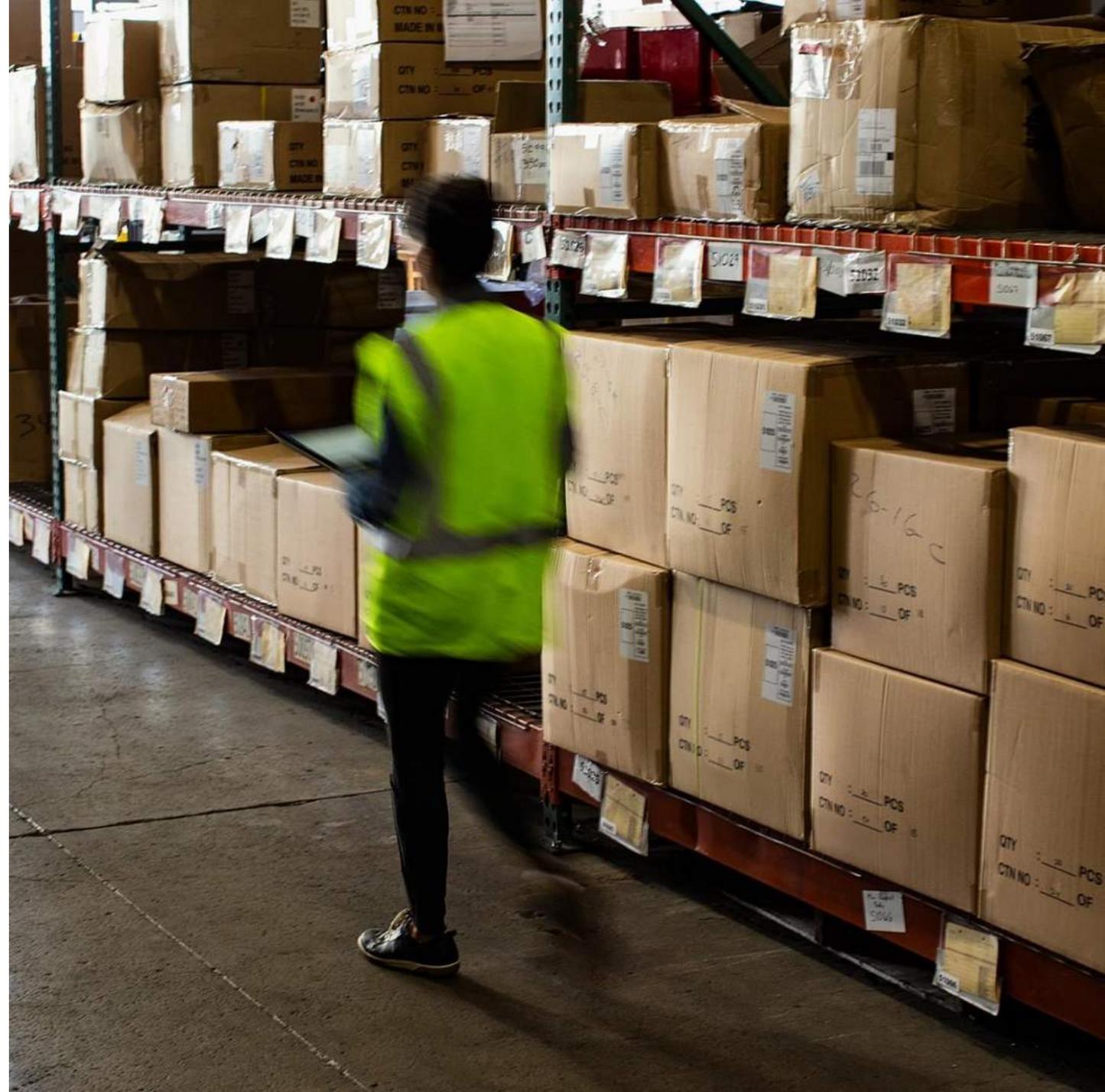
WMA app insights

- 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 interface for a sales order. The main focus is on the product details for item 81119, 'Slim Fit Plaid Shirt'. A 'Generated Product Summary' is visible, providing a detailed description of the product and its pricing. The interface includes various navigation and action buttons, as well as a table at the bottom showing the sales order lines.

Generated Product Summary

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.

The purchase price for this shirt is \$40.00 USD per unit. The sales price is \$59.99 USD per unit.

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.

This shirt is available in 1 color, 5 sizes, and 2 styles.

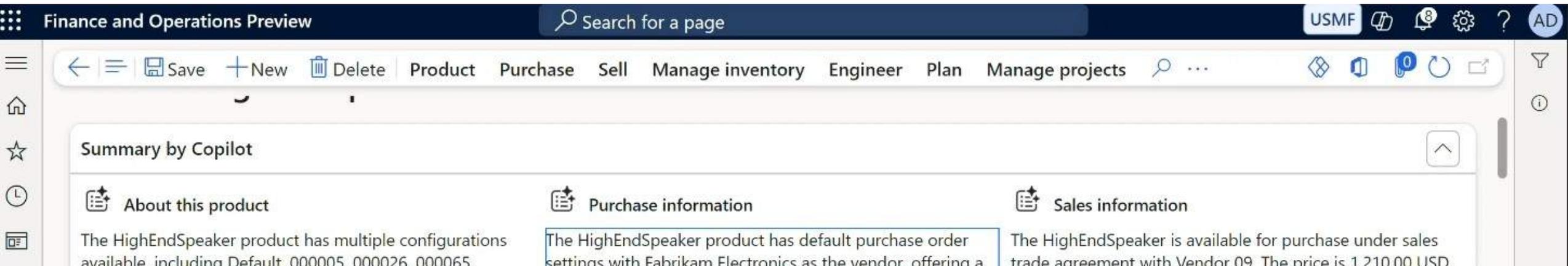
See variant details

AI-generated content may be incorrect

Delivery type	CW deliver...	Adjusted u...	Unit price	Discount	Discount p...	Net amount	Adjusted n...
Stock		0.00000	59.99			59.99	0.00

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.

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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**

The screenshot displays the 'Purchase order summary' page in Dynamics 365. The page title is '00000125 : 1001 - Acme Office Supplies'. The status is 'Approved' and the order is 'Open order'. The page is divided into several sections:

- Summary by Copilot:** This section provides a high-level overview. The **Status** indicates that 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. The **Insights** section highlights that there is 1 order line that is either overdue or nearly overdue, and 2 order lines with missing confirmed receipt dates. Filter options are provided for 'not fully received lines', 'received not fully invoiced lines', 'overdue lines', and 'not confirmed lines'.
- Purchase order header:** This section contains the header information for the purchase order.
- Purchase order lines:** This section contains a table of the purchase order lines.

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**

The screenshot displays the Microsoft Dynamics 365 interface for a sales order summary. The top navigation bar includes the 'Finance and Operations Preview' title, a search bar, and the user profile 'USMF | Contoso Entertainment System...'. The main navigation menu contains options like 'Sales order', 'Sell', 'Manage', 'Pick and pack', 'Invoice', 'Commerce', 'General', 'Warehouse', 'Transportation', 'Credit management', and 'Options'. The 'Pick and pack' sub-menu is expanded, showing options such as 'Generate picking list', 'Post packing slip', 'Non conformances', 'Picking list', and 'Quality orders'. The main content area shows the sales order details for '000860 : Contoso Retail San Diego'. The 'Summary' section is divided into 'Status' and 'Insights'. The 'Status' section indicates that 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 'Insights' section highlights that there is 1 order line missing a confirmed ship date and 1 order line that is nearly overdue or already overdue. Below the summary, there are filters for 'Filter to not fully picked lines' and 'Filter to not fully shipped lines'. The 'Sales order header' and 'Sales order lines' sections are partially visible at the bottom of the screen.

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

[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 : WFGenJrn | Standard view 

000924 : Journal batch number: 00640, WFGenJrn

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

<h4> Status</h4> <p>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.</p> <p> </p>	<h4> Insights</h4> <p>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.</p> <p> </p>
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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.**
- 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.
- Languages: <https://releaseplans.microsoft.com/en-US/availability-reports/?report=copilotfeaturereport>

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.

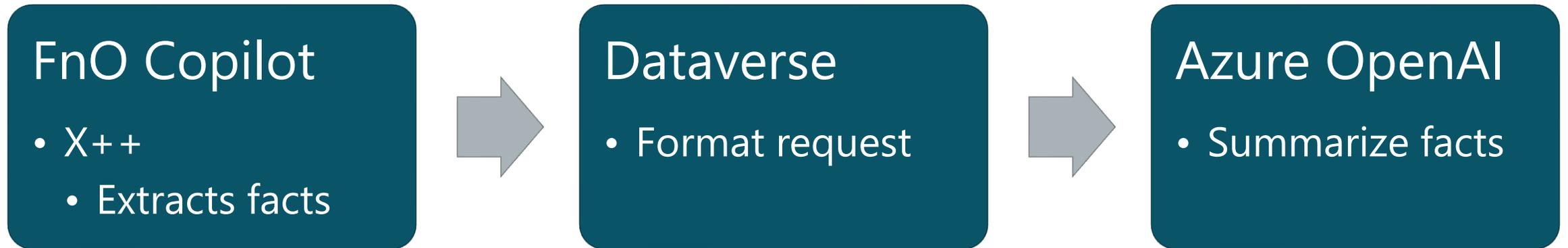
Accountability

People should be accountable for AI systems.

[Learn More](#)

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

Architecture



Q&A

