



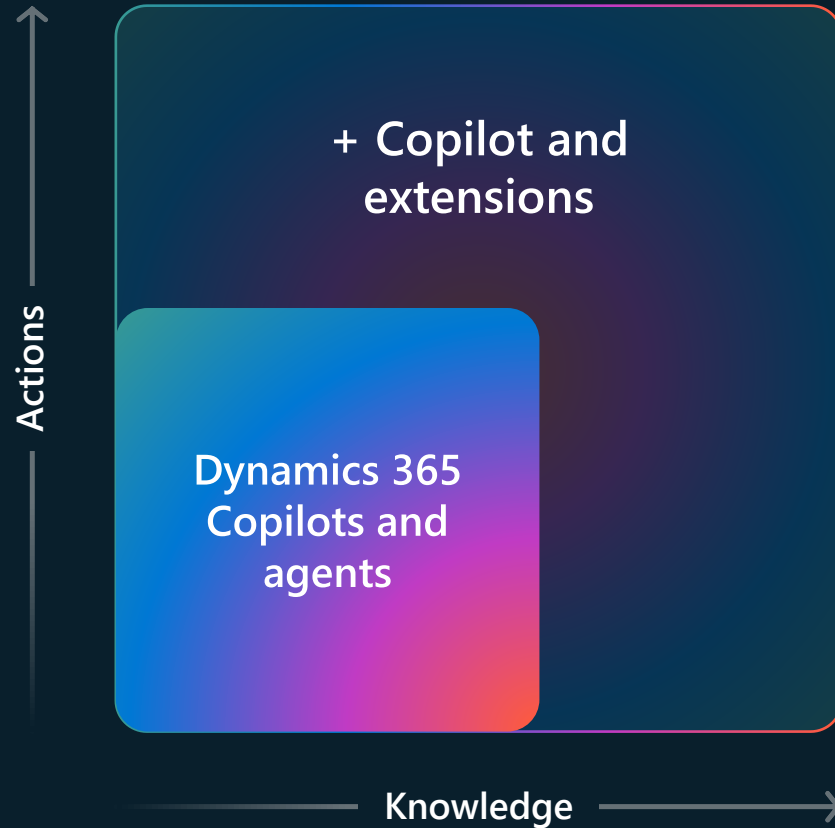
Accelerating AI agent development for Dynamics 365 ERP

Jared Hall

Principal Program Manager

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Copilot and agent extensions



Enrich and focus with

- ✓ Your business data
- ✓ Your apps
- ✓ Your workflows
- ✓ Your automation

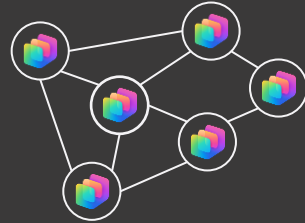
Agentic ERP



Copilot Adaptive Experience

ERP Agent Foundation

Powered by
Copilot Studio



1st party agents

3rd party agents

Build your own agents

Headless Business Services

Actions and data tools Powered by **Model Context Protocol (MCP)**



Finance



Sustainability



Supply Chain
Management



Human
Resources



Commerce



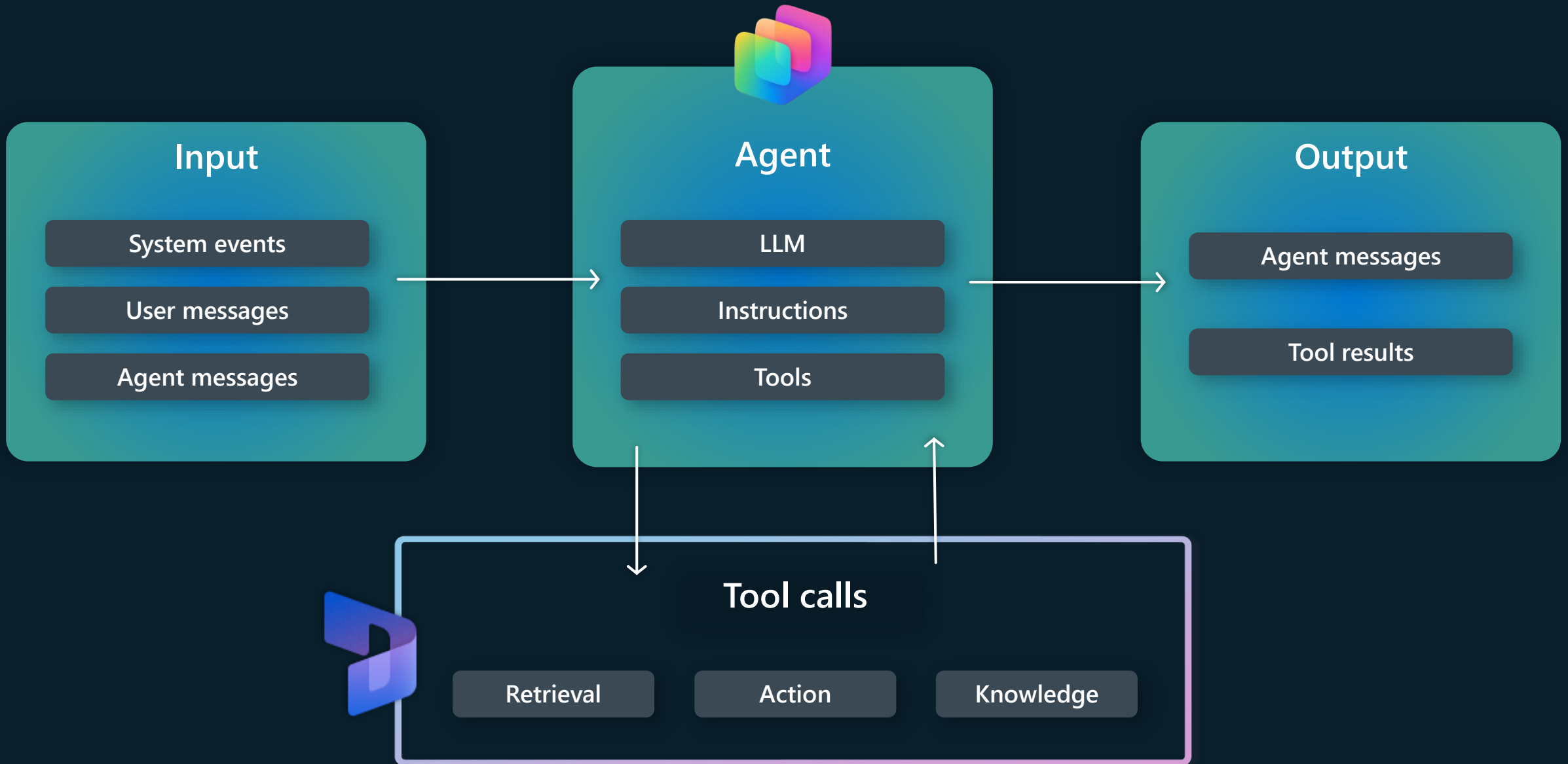
Field
Service

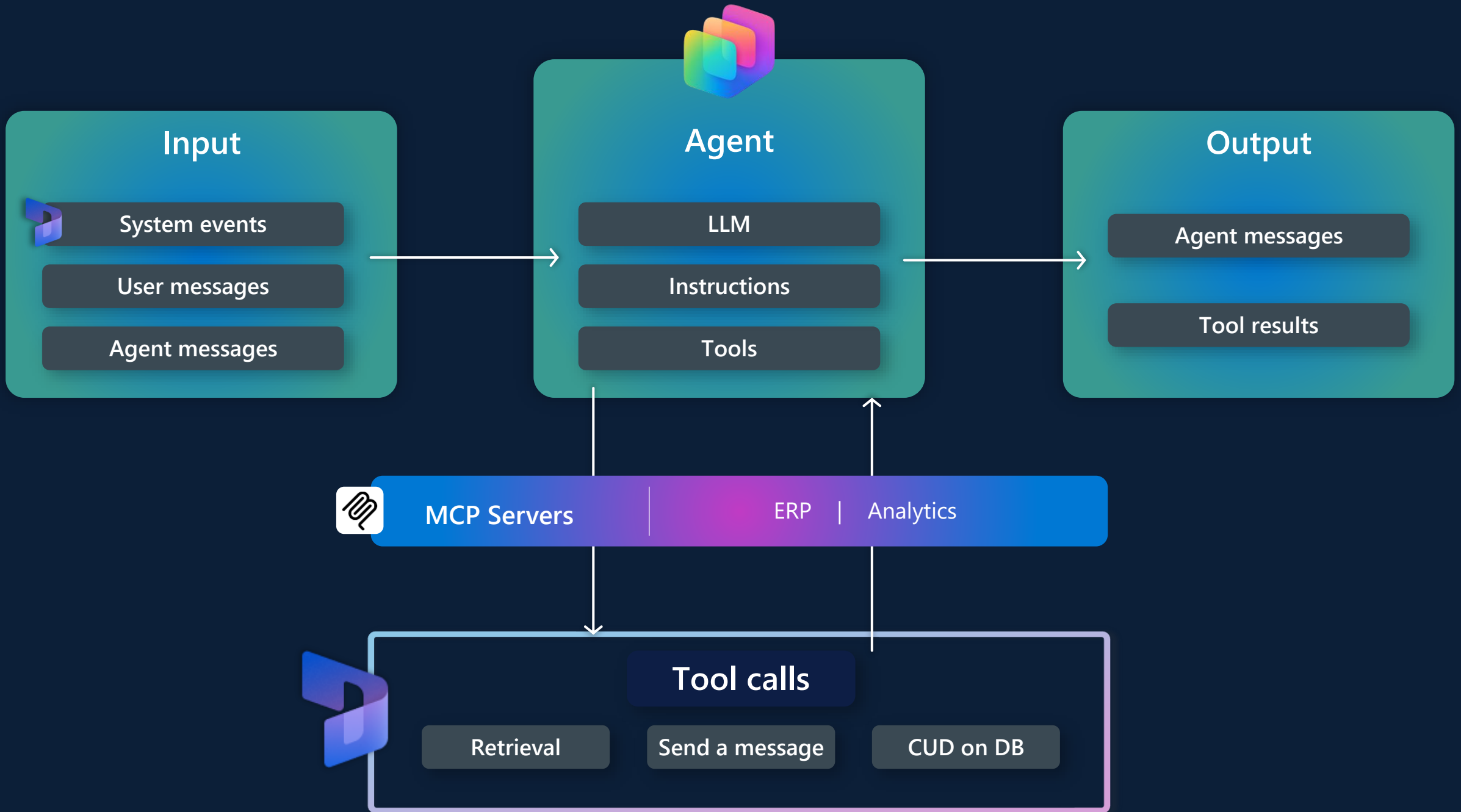


Project
Operations

Model Context Protocol

An open protocol that standardizes how applications provide context to LLMs





Why Model Context Protocol?

Streamlined workflow

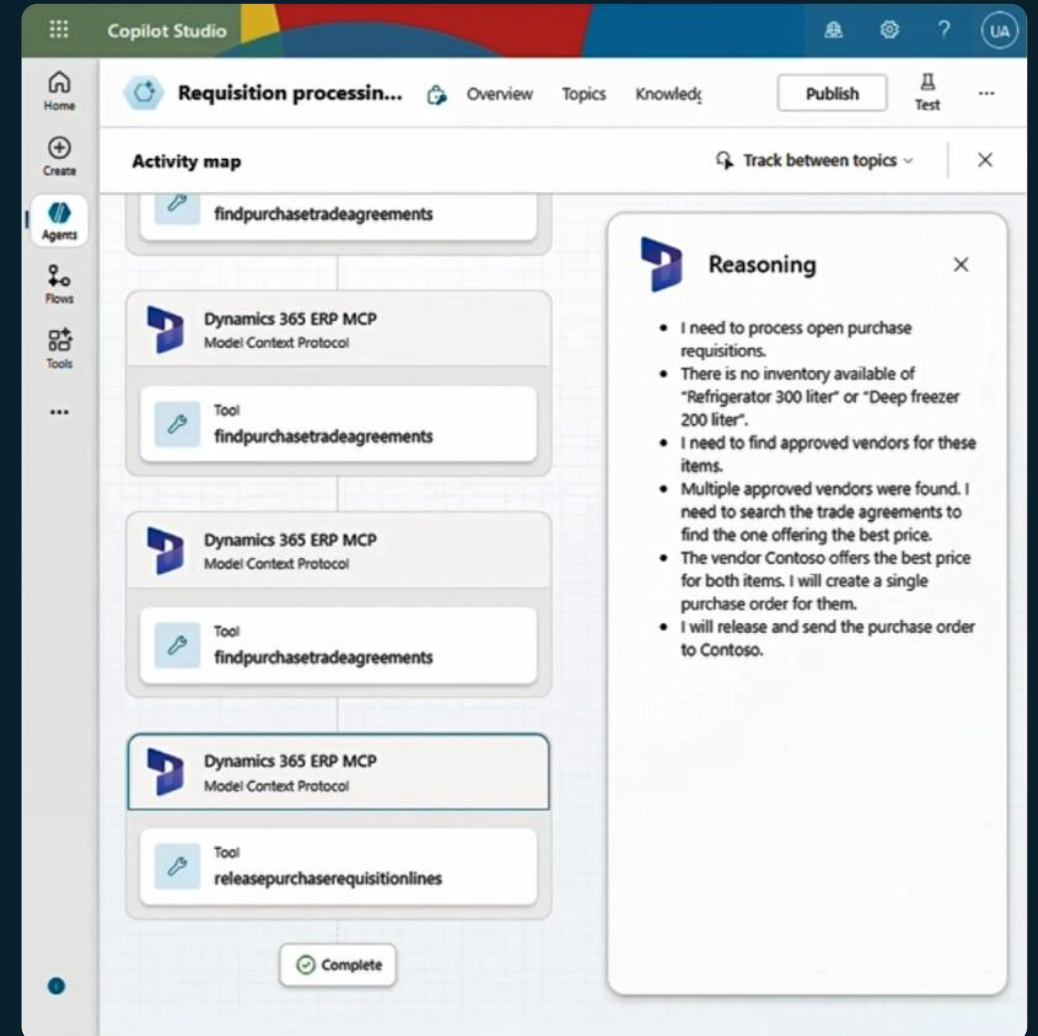
- Seamless integration with IDE and dev environments
- Productivity boost

Single standard protocol

- No custom code
- Standardized integration

No hardcoding

- Effortless scalability
- No client code rework



Finding quantifiable value



Automation

Agentic behavior and task automation



Language

Natural language understanding and generation



Unstructured data

Converting unstructured data to structured data



Reasoning

Reasoning and problem solving – with tools and context

MCP primitives

Tools

Functions invoked by the model

Retrieve / search

API calls

CUD operations on DB records

Resources

Data providing context to the application

Files

Database records

API responses

Prompts

Predefined templates for AI interactions

Document Q&A

System prompts

Few-shot examples

Dynamics 365 ERP MCP

Available static tools

- Find approved vendors
- Find requisitions
- Release purchase requisition lines
- Find inventory
- Create transfer order for single item
- Find purchase trade agreements
- Find released products
- Find invoice overview
- Find invoice match status
- Match invoice
- Notify responsible employee
- Find unmatched invoices
- Submit invoice to workflow

Dynamics 365 ERP MCP

Available dynamic tools

Tool	Description
click_control	Clicks a control on the form
close_form	Closes the current form
filter_form	Applies a filter to a form field
filter_grid	Filters a grid column by a specified value
find_actions	Find actions available to invoke
find_menu_item	Finds a menu item by filtering with a search term
invoke_action	Invokes an action
open_lookup	Open a lookup control on the form
open_menu_item	Opens a specified menu item in a given company context
open_or_close_tab	Opens or closes a tab on the form
save_form	Saves form
select_grid_row	Selects a row in a grid
set_control_value	Sets the value of a control on the form
sort_grid_column	Sort a grid by a grid column

Dataverse MCP

Available tools

<code>create_record</code>	Insert a row into a table in Dataverse and returns the GUID of the created row.
<code>describe_table</code>	Get the table schema of the requested table in Dataverse.
<code>execute_prompt</code>	Execute a prompt from the list of available predefined prompts in the environment
<code>list_knowledge_sources</code>	Returns a list of knowledge sources available in Dataverse
<code>list_prompts</code>	List predefined prompts available in the environment
<code>list_tables</code>	List tables that are available in the environment
<code>read_query</code>	Read data from tables in Dataverse
<code>retrieve_knowledge</code>	Use a preconfigured knowledge source to answer questions
<code>update_record</code>	Update a row in a Dataverse table

May 2025 release

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Actions

From static to
dynamic ERP

Now

500,000+

Actions

An agent can do almost anything a person can do in ERP



Security

MCP supports enterprise-grade authentication and authorization

All tools/operations secured by F&O security configuration

Demo

Dynamics 365 ERP MCP

<https://aka.ms/igniteMCPBlog>

https://aka.ms/dynamicsfnocopilot_mcp