



Revolutionizing Supply Chain Management With AI Unleashing the Power of Copilot Features & Built-In Agents

December 2025

Microsoft
Partner











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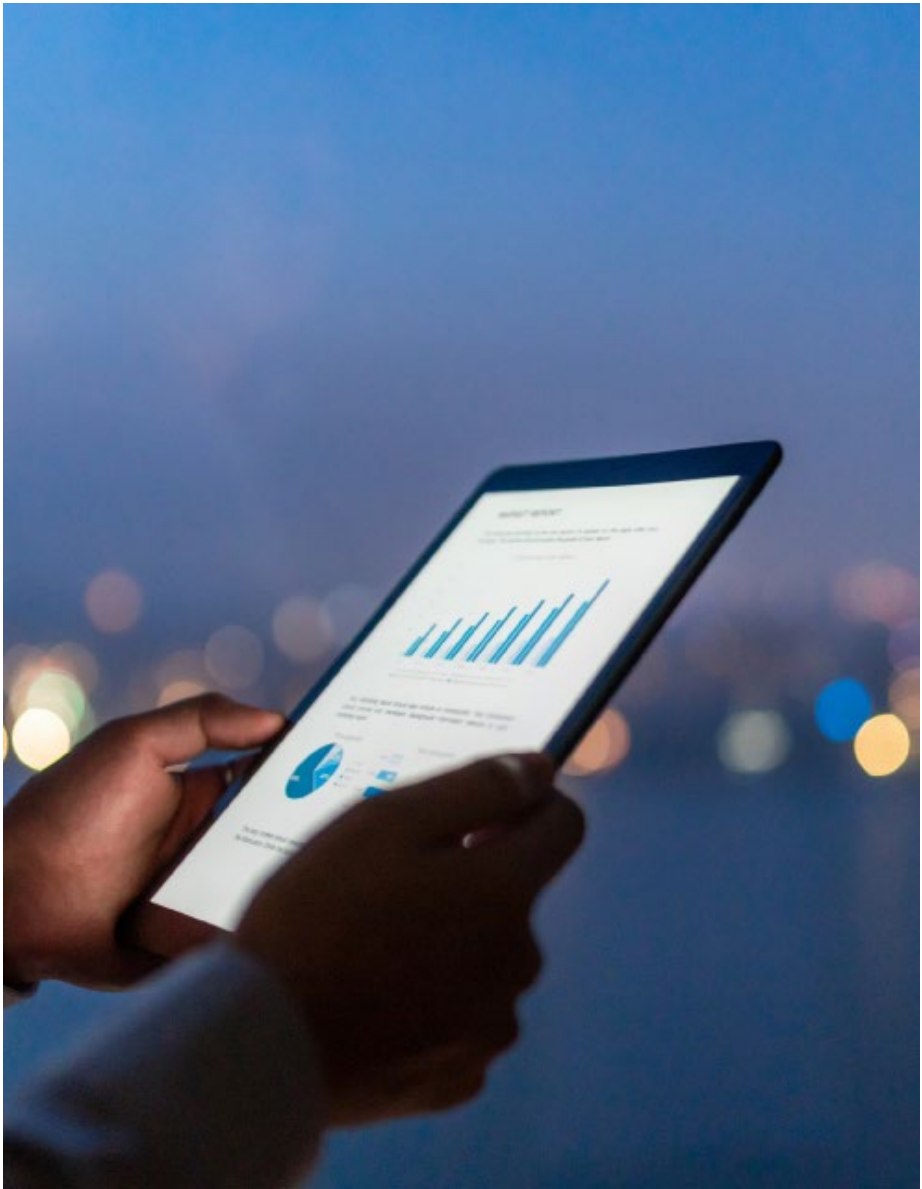
Business Technology Services

We solve for business challenges & support innovation through technology solutions.

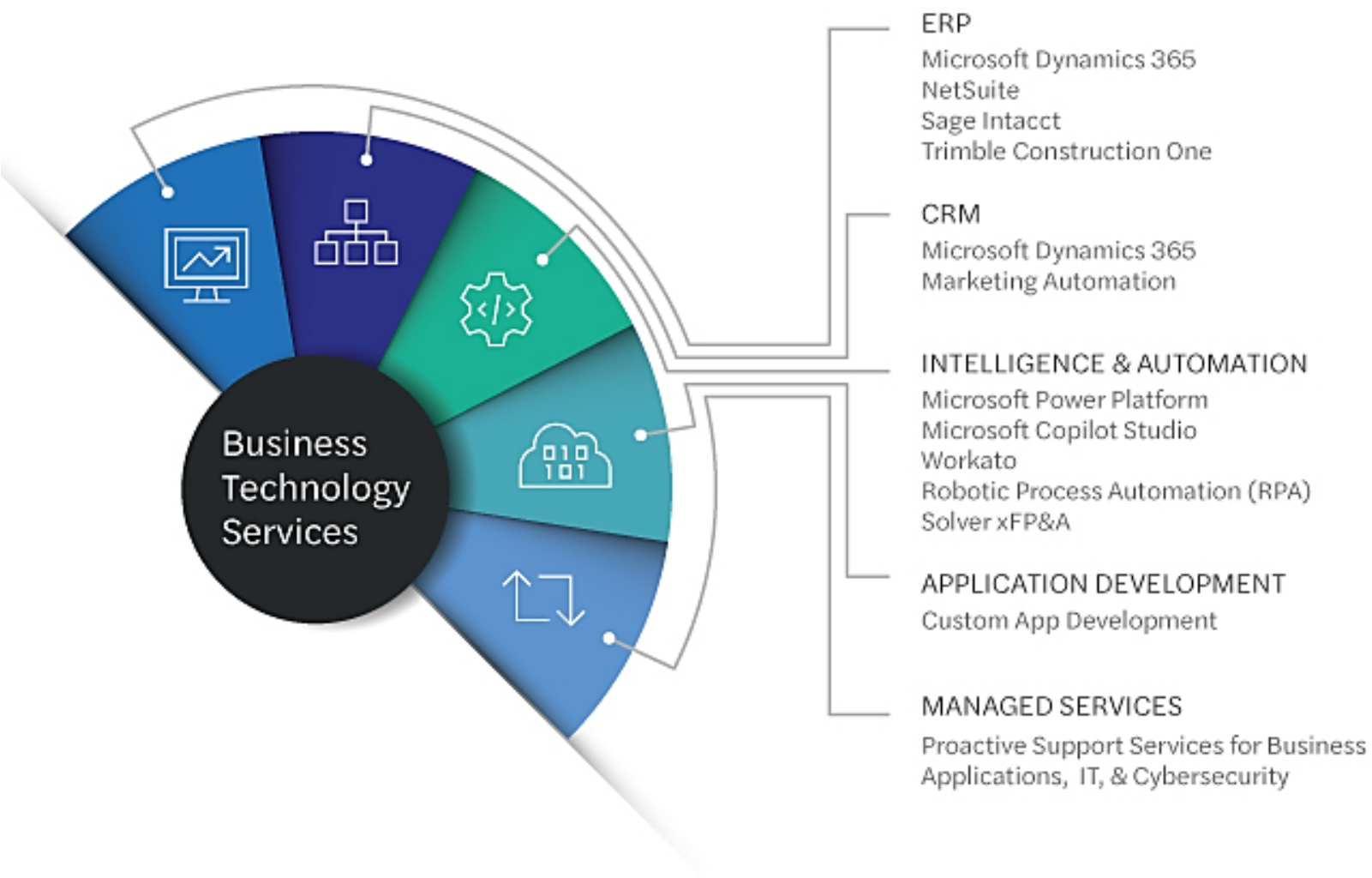
Our toolbox is equipped with leading enterprise resource planning (ERP), customer relationship management (CRM), artificial intelligence (AI), automation, & business intelligence (BI) tools.

Our end-to-end technology solutions & managed services help clients achieve their digital transformation goals. Services include:

- | | | | |
|--|--------------------------------------|---|--|
|  | Solution Assessment & Selection |  | Implementation Project Rescues |
|  | System Implementation & Integration |  | Business Intelligence (BI) & Analytics |
|  | Process & Technology Design |  | Robotic Process Automation (RPA) |
|  | Upgrades, Enhancements, & Automation |  | Custom Application Development |
|  | Training, Monitoring, & Support |  | IT & Cybersecurity Managed Services |



Premier Technology Partnerships



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Today's Presenters



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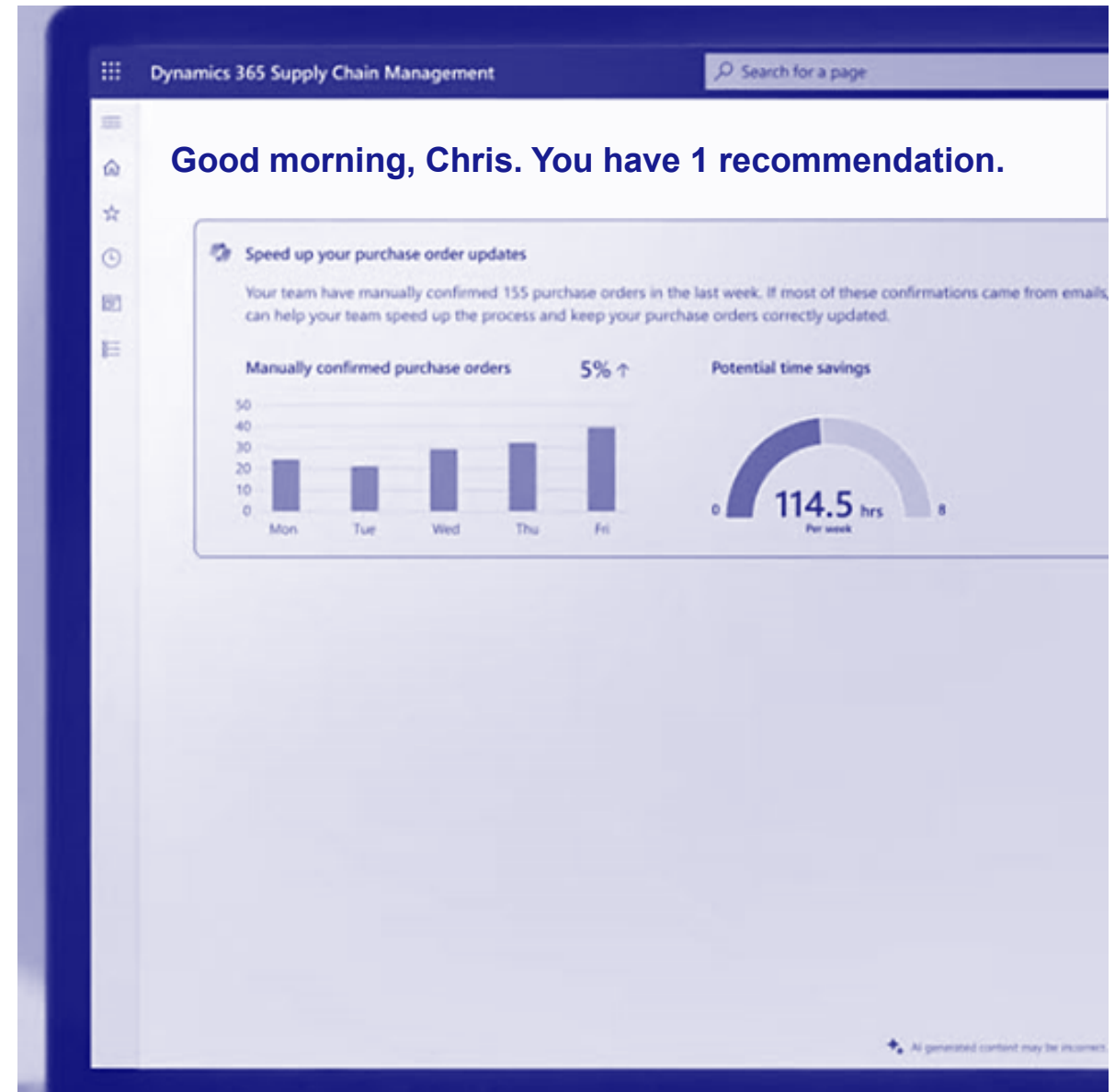
Learning Objectives

1. Recognize the role of AI agents in supply chain optimization
2. Describe how Microsoft Copilot & Copilot Studio can be used for practical AI deployment
3. Identify key steps to build an AI-ready supply chain strategy



Agenda

1. Overview
2. Look Under the Hood:
 - Copilot Features
 - Built-In Agents
 - Custom Copilot Studio Agents
 - Azure AI Foundry
3. Impact of AI Agents on Your Organization
4. Starting Your Agentic ERP Journey



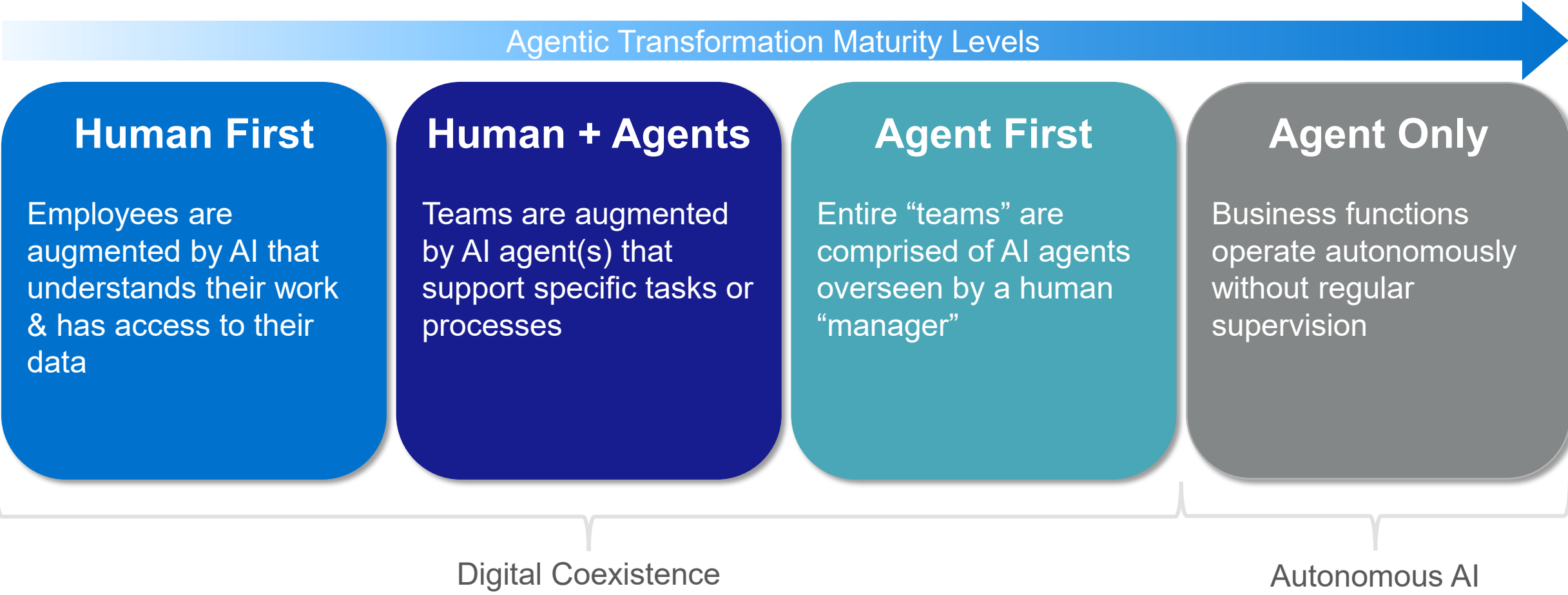
01

Overview



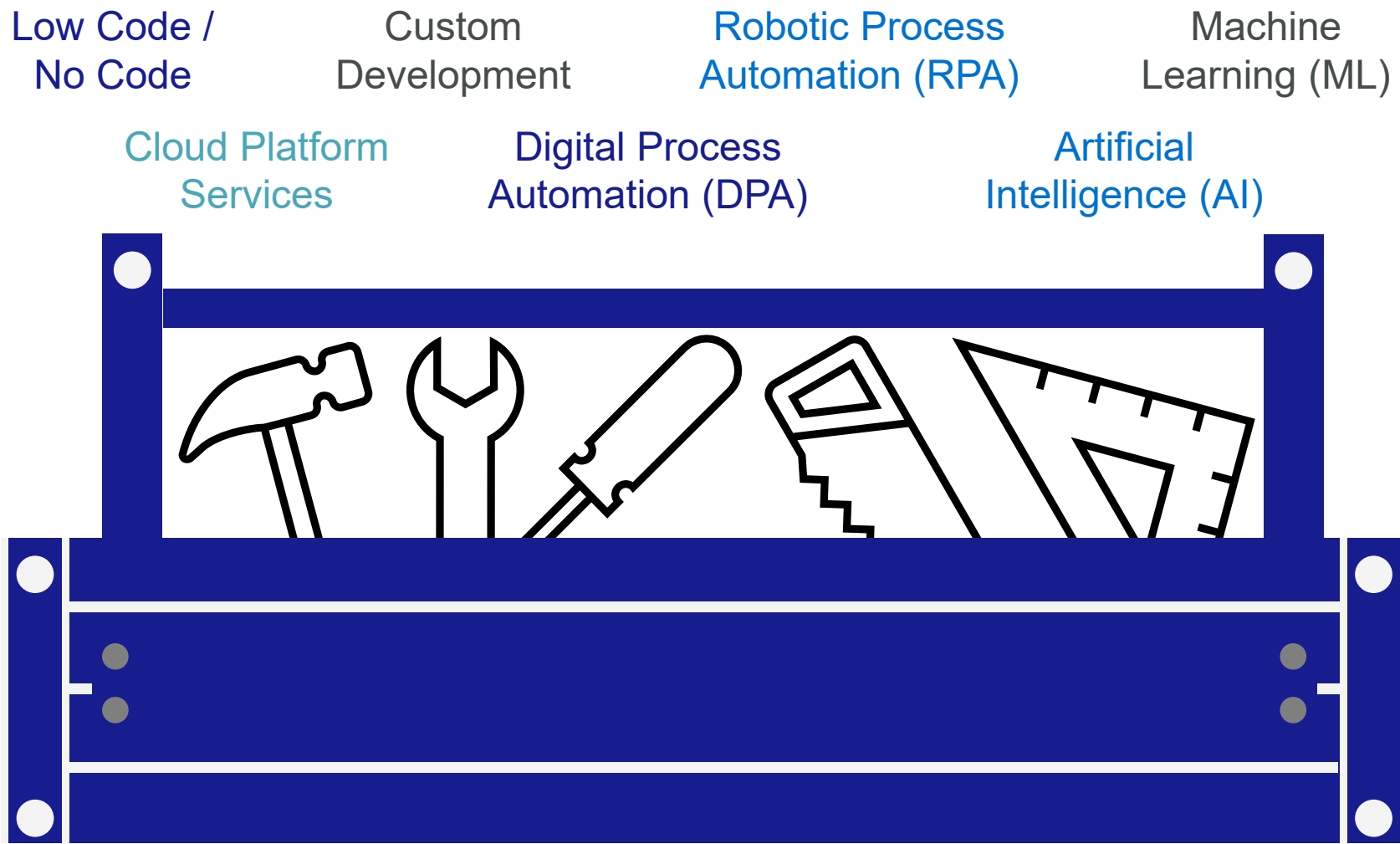
Looking Into the Future

Agentic Transformation



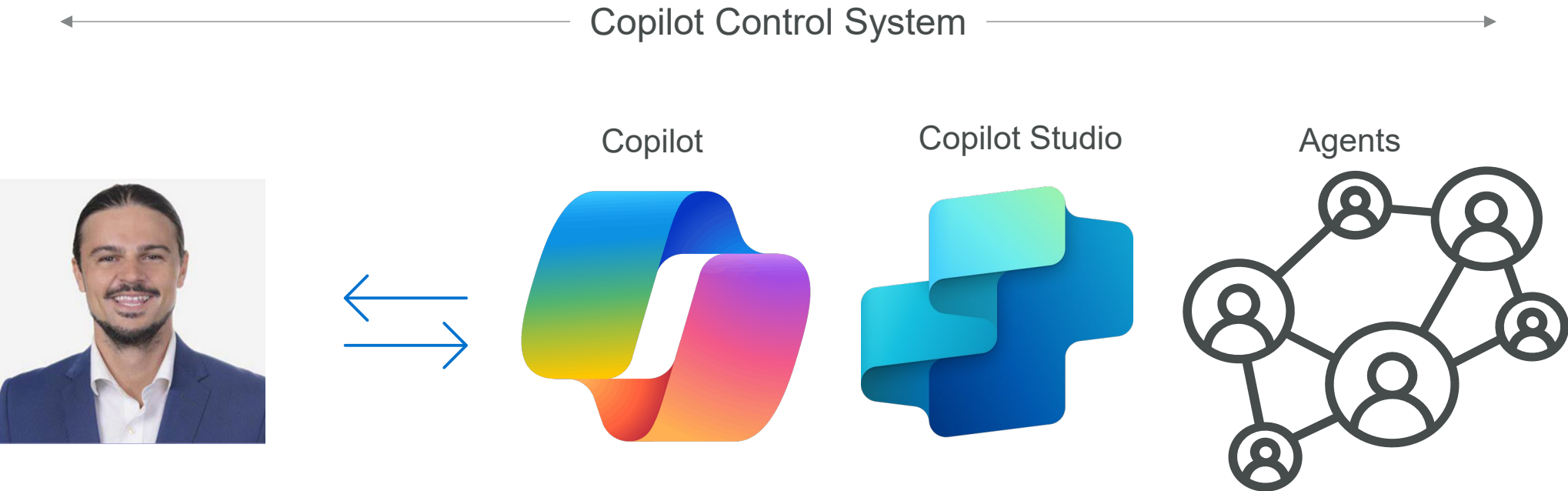
You Have a Toolbox

Use the Right Tool for the Job



Microsoft Dynamics 365

Business Applications for the Future



From (Past):

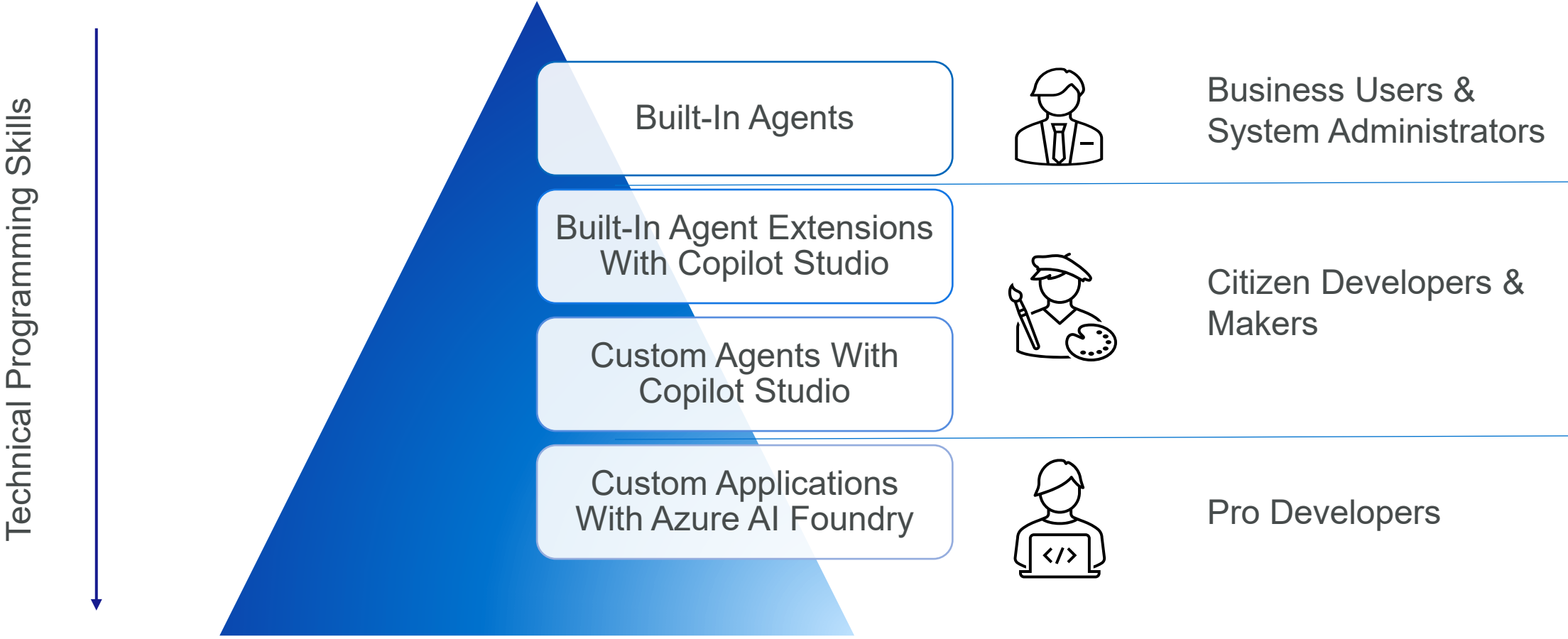
- App as UI
- Workflows
- Data

To (Now):

- Copilot as UI
- Agents (Nested Agents)
- Knowledge

Microsoft Dynamics 365

Business Applications for the Future



Breadth of Capabilities

02

Look Under the Hood

 Copilot Features



Microsoft Dynamics 365

Business Applications for the Future

Design to retire	Engineering change management	Product lifecycle management 	Pricing management		Supplier collaboration
Source to pay	Procurement 	Sourcing	Supplier management 	Accounts payable 	Manufacturing operations management
Plan to produce	Production scheduling	Manufacturing execution	Quality management	Production costing	
Project to profit	Project management 	Project accounting	Time tracking 	Expense management 	
Inventory to deliver	Warehouse management 	Transportation management	Quality management	Inventory management	Retail & commerce 
Order to cash	Sales order management 	Accounts Receivable	Customer management 	Credit & collections 	Employee & manager self-service
Hire to retire	Time & attendance 	Human resources	Leave & absence	Benefits & compensation management	
Acquire to dispose	Fixed assets	Enterprise asset management	Asset leasing		
Forecast to plan	Enterprise performance management	Integrated business planning	Supply chain planning 	Financial planning & analysis 	Workforce planning
Record to report	Cash & bank management	Budgeting	General ledger	Cost accounting	Tax & globalization

02

Look Under the Hood






Built-In Agents

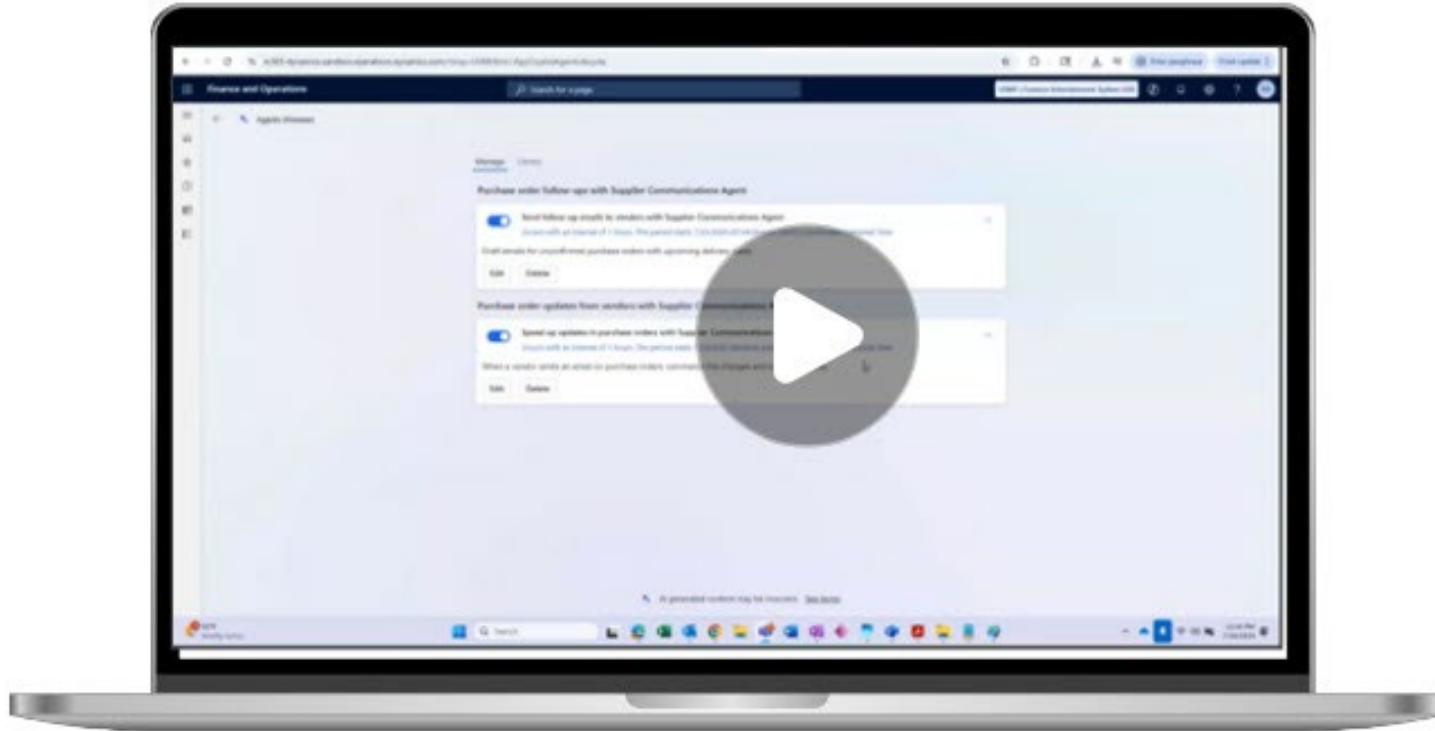


Microsoft Dynamics 365 Agent Capabilities in ERP

Sales Order Agent Responds to customer inquiries about products & catalogs, generates sales quotations, & intakes sales orders.	Supplier Comms. Agent Processes purchase order confirmations, follows up with suppliers on pending purchases, & helps navigate through the impact of changes to inbound supply.	Account Reconciliation Agent Autonomously reconciles ledger & subledger accounts, flags discrepancies, & carries out corrections based on business logic.	Financial Reconciliation Agent Cleanses financial data from multiple sources & reconciles the data, flagging discrepancies for further review, & suggesting mitigations.	Time & Expense Agent Drafts time entries based on projects forecast & calendars, creates expense reports based on email receipts, & reviews submitted time & expense reports for compliance with policies.
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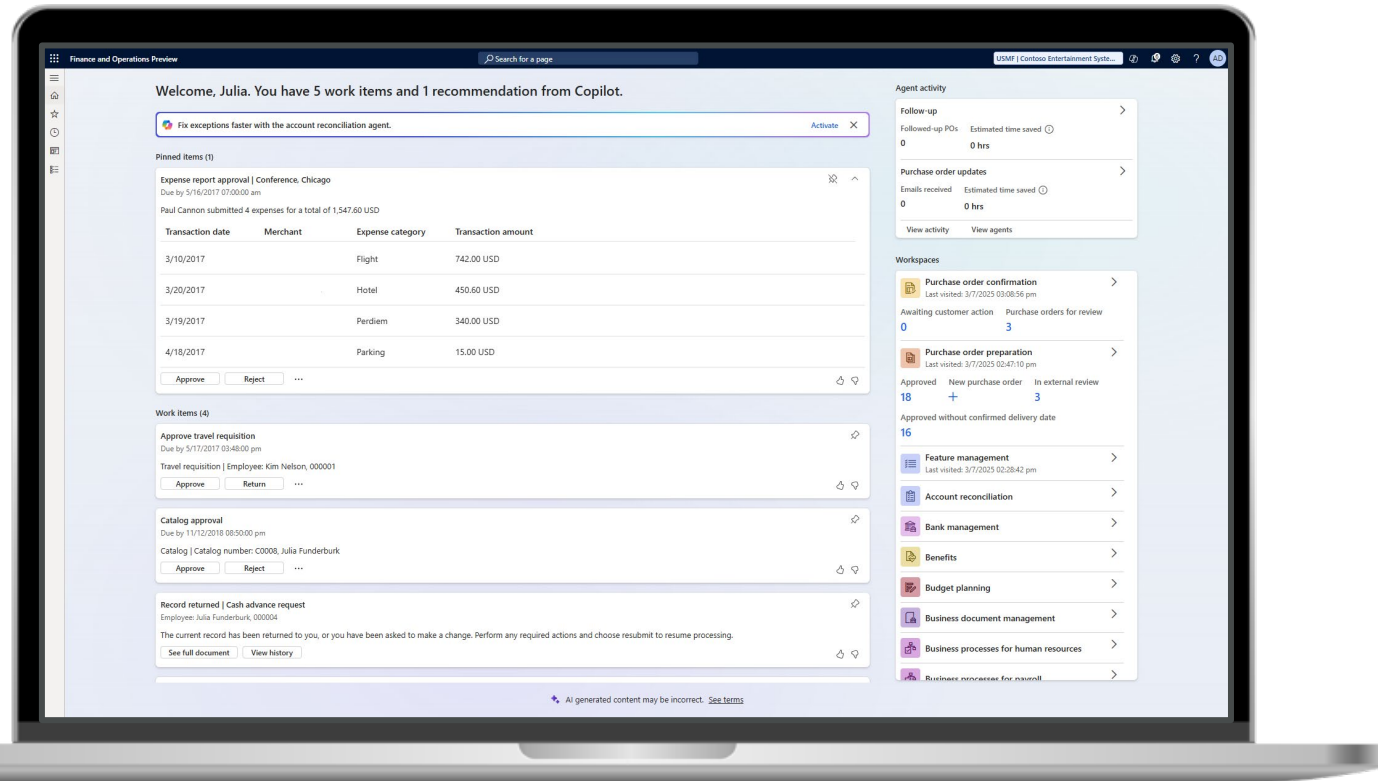
Available to:

 Dynamics 365 Business Central	 Dynamics 365 Supply Chain Management	 Dynamics 365 Finance & Operations	 Copilot for Finance	 Dynamics 365 Project Operations
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Built-In Agents – Supplier Communications Agent Demo

Agent Management – Workspace Demo



02

Look Under the Hood



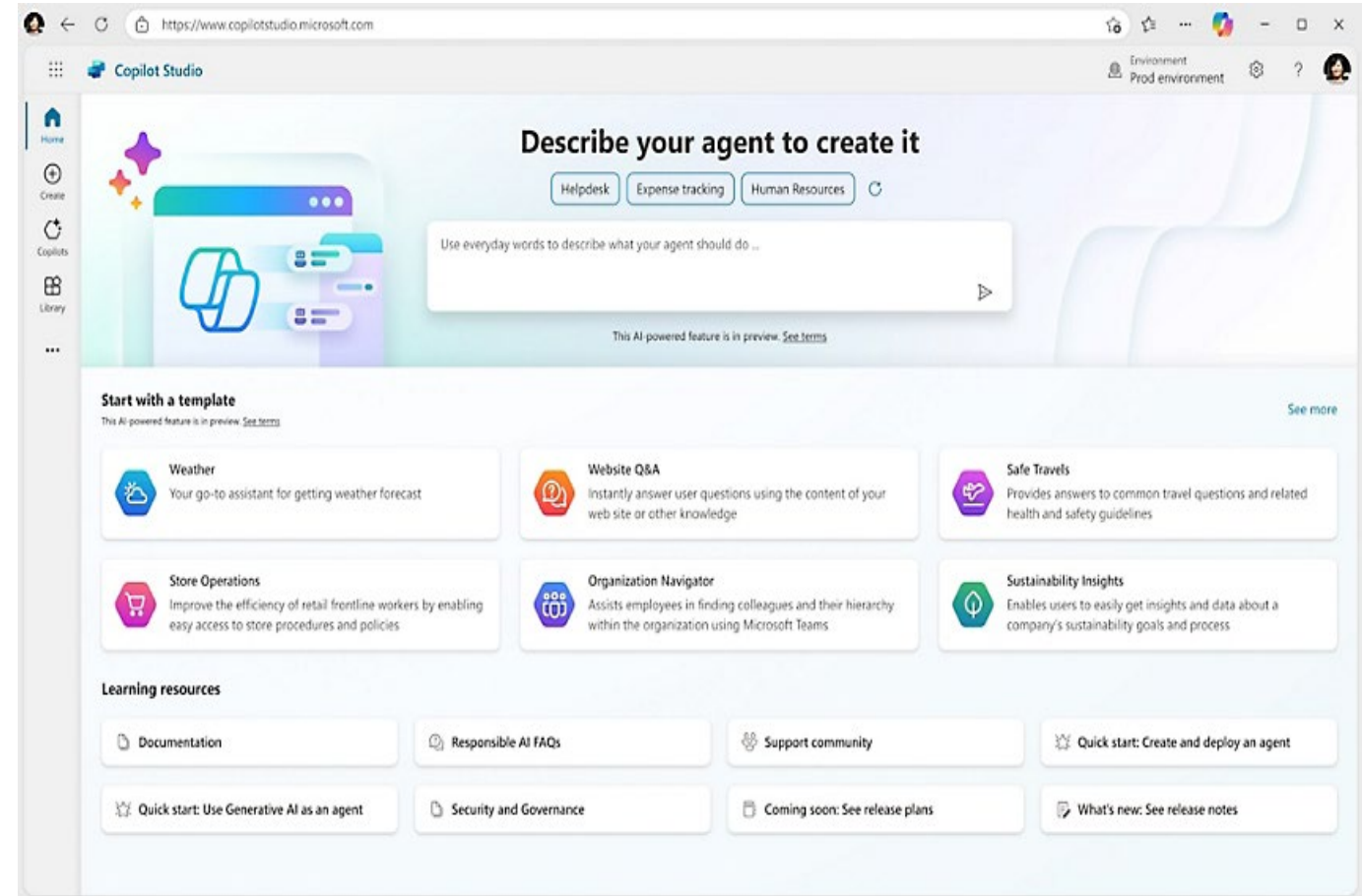
Custom Copilot Studio Agents



Custom Agents With Copilot

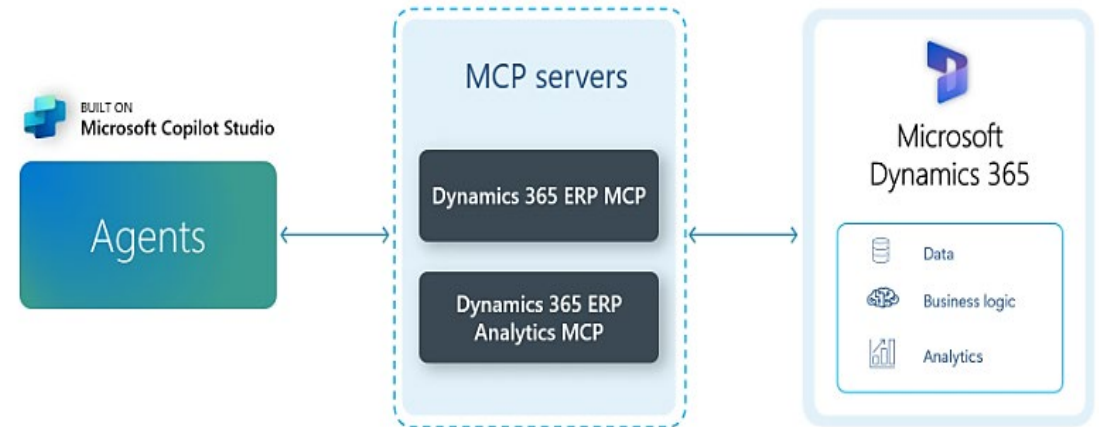
Copilot Studio (low-code/no-code) enables users to design, deploy, & manage their own Copilots tailored to specific business processes, roles, or customer interactions.

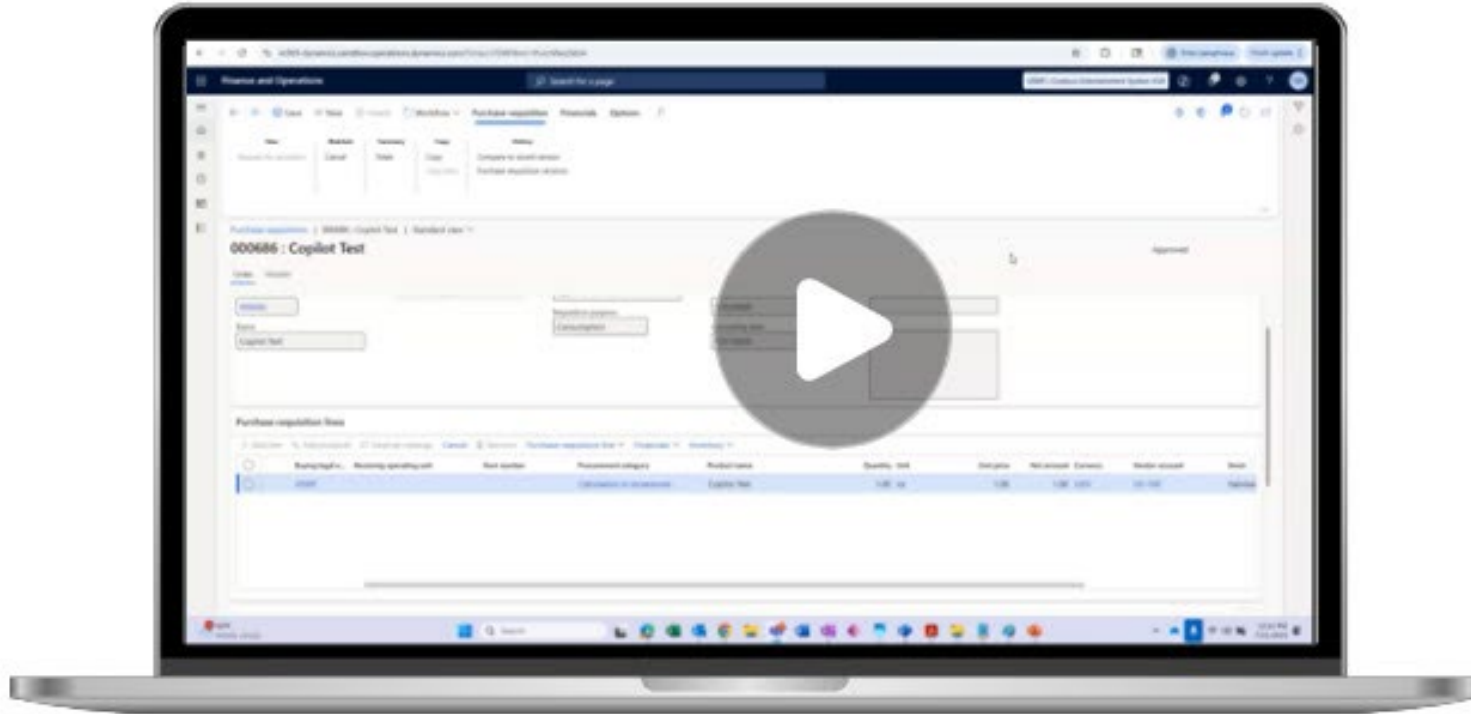
- Low-code & no-code development
- Data connectivity with 1,500 data connectors
- Can deploy to various channels



MCP Server for ERP

- The initial ERP MCP server launched at Build 2025 as a static implementation with a curated set of 13 tools for Dynamics 365 Finance & Supply Chain Management. The **new dynamic ERP MCP server**, now available in public preview, transitions from a fixed catalog of tools to a dynamic framework
- The tools in the new server work by enabling the agent to navigate server forms to complete tasks. Agents work with the application data & business logic through server APIs just like humans perform tasks in the application client
- Each function inherits ERP's existing controls for permissions, auditing, & security, allowing IT to scale innovation while preserving compliance






Copilot Studio With MCP Server Demo

Copilot Studio

Available Tools in MCP Server for ERP

Dynamics 365 ERP MCP tools

The following tools are available in the Dynamics 365 ERP MCP (Preview) server. The agent orchestration uses these tools to translate natural language prompts into actions in the finance and operations apps environment.

 Expand table

Tool name	Description
click_control	Select a control or a subelement of a control on the form. Clicking on a subelement of a control is done through the actionId parameter.
close_form	Close form
filter_form	Applies a filter on the form
filter_grid	Filter on a grid
find_menu_item	Find a menu item
find_actions	Finds actions available to invoke
invoke_action	Invokes an action
open_lookup	Open a lookup control on the form
open_menu_item	Opens menu item
open_or_close_tab	Open or close a tab on the form
save_form	Saves form
select_grid_row	Select a row in a grid
set_control_value	Set the value of a field
sort_grid_column	Sort a grid by a grid column

02

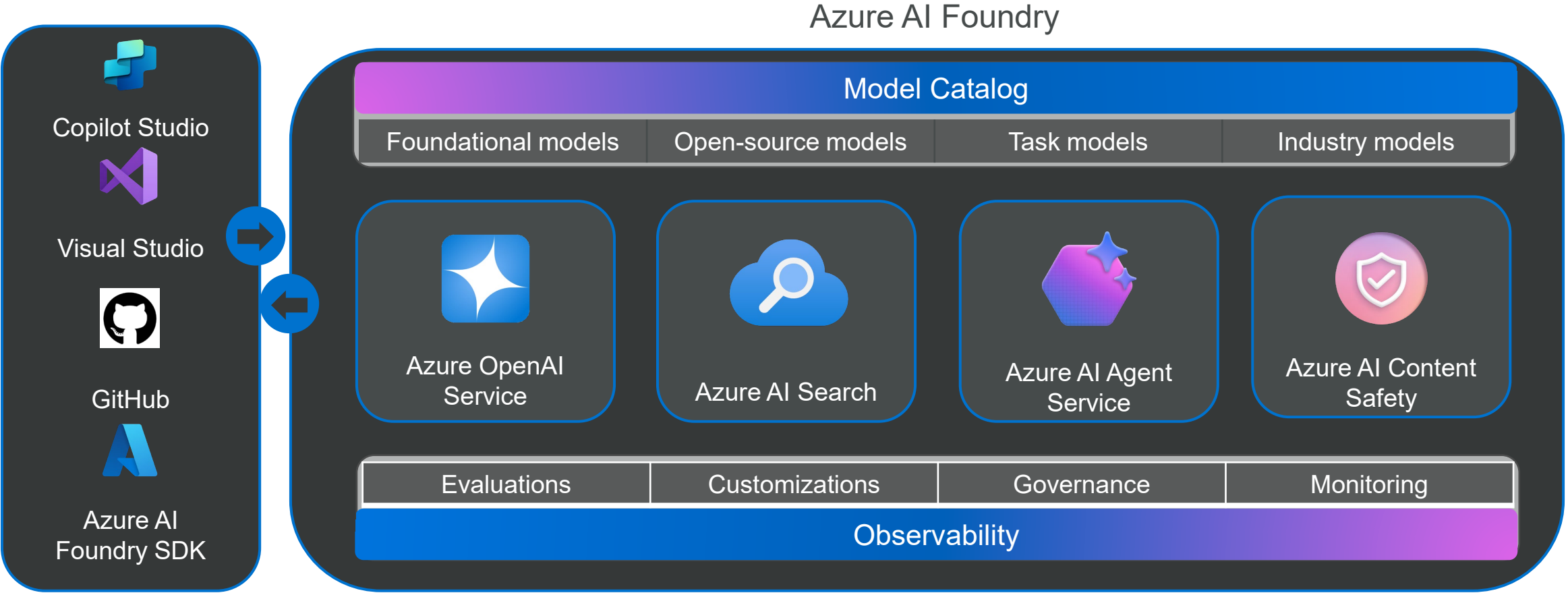
Look Under the Hood

Azure AI Foundry (Custom Development)



Azure AI Foundry

Custom AI Development Platform




03

Impact of AI Agents on Your Organization



Impact Potential AI & AI Agents

We help you utilize agentic AI & automation to deliver deeper reasoning, sharper insights, & real-time visibility.



Productivity

Shift to higher-value tasks, strategic decision making, & skill set transformation.



Employee Experience

Reduce manual data entry, increase automation, & improve workflows & role satisfaction.



Customer Experience

Increase accuracy & speed of customer information, reduce friction in interactions.



Cost Efficiency

Improve key performance metrics & advance forecasting to help decrease incurred expenses.

04

Starting Your Agentic ERP Journey



AI Center of Excellence Frontier Approach



Initiate

Exploring With Curiosity

- Planning with project leadership
- Confirming project vision, scope, outcomes, roles, & responsibilities
- Requesting documentation
- Developing a project work plan & schedule
- Conducting a kick-off meeting with key IT & executive staff
- Providing a Power Platform Center of Excellence (CoE) overview



Strategize & Design

Readying the Environment

- Review relevant documentation & generative AI/automation use cases
- Evaluate & prioritize use cases
- Conduct CoE governance & administration requirements gathering sessions
- Confirm licensing & environment strategy
- Review & configure Power Platform data loss prevention policy
- Define & standup the CoE processes, operating model, & RACI
- Procure licenses & environments (as necessary)



Develop & Implement

Implementing With Foresight

- Review use case prioritization & advance the highest priority use cases through the CoE process
- Pilot the CoE process
 - Design the AI solutions
 - Execute governance review processes
 - Develop & test solutions
 - Complete transition to services preparation activities
- Deploy developed solutions to production
- Review automation solutions against success criteria & KPIs

Key Deliverables

Project Charter & Plan

Requirements, Design, & Operating Model

AI Solutions & KPIs

AI Capabilities Transformation Journey

01 Current State & Readiness Assessment
AI Strategy Articulation & Roadmap
Use Case Identification & Prioritization
Operational Efficiencies Analysis

02 Regulatory Matrix & Compliance
Control Identification
ROI Measurement & Tracking
Governance Development & Integration

03 Infrastructure Readiness
Data & IT Architecture
Data Lineage, Engineering, & Preparation
Governance Effectuation

04 Training & Awareness
Executive Buy-In Support
Bias & Fairness Screening
Acceptable Use

05 AI Center of Excellence, Program Management
Security & Access Control
Use Case Evaluation
Data Set Ingestion

06 Agentic AI Implementations
Machine Learning Model Development
GenAI Integration

07 AI Risk Assessment
Regulatory Matrix & Compliance
AI Inventory & Reporting
Control Identification & Testing

08 Data Privacy
Cyber Risk & Testing
Third-Party Risk (TPRM)
AI Model Risk (MRM)

1 AI Strategy

2 Governance

3 Preparation

5 Pilot

4 Change Enablement

6 Implement

7 Monitor

8 Audit

Q&A



Business
Technology
Services

Questions?

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