Microsoft
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CONVERGENCE | AI+ ERP
MIAMI | 2025
Agent Showcase Transforming ERP with Sales Order, Batch Monitoring & custom agents
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CONVERGENCE | AI + ERP

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Jessica Wells

Director, Enterprise System Applications

International Rescue Committee

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INTERNATIONAL RESCUE COMMITTEE

To help people whose lives and livelihoods are shattered by conflict and disaster, including the climate crisis, to survive, recover and gain control of their future

Rescue.org

Our Organization

- Founded in 1933 by **Albert Einstein** and a small group of humanitarians
- Serving people whose lives have been upended by war, conflict and natural disasters
- Resettle refugees in U.S. and Europe, helping them to succeed and thrive
- Operate in **40+** countries and **25+** U.S. cities

Our Global Impact (FY24)

36.5M	126,913	1,141,256	688,240
people reached in countries affected by crisis	children supported through IRC safe spaces & other protection programs	children and youth received educational support	people treated for malnutrition

Our Focus

- Ensure **SAFETY** from harm
- Improve **HEALTH**
- Increase access to **EDUCATION**
- Improve **ECONOMIC WELLBEING**
- Ensure people have the **POWER** to influence decisions that affect their lives
- Advance **GENDER EQUALITY** across programs

Our ERP (Dynamics 365 for F&O)

- Accounts Payable / Receivable
- Cash & Bank Management
- Fixed Assets
- Inventory Management
- Procurement & Sourcing
- Project Management & Accounting
- Subscription Billing
- + Additional Capabilities on Roadmap

Where We Work
WASHINGTON
MONTANA
NEBRASKA
WISCONSIN
NEW YORK
IDAHO
KENTUCKY
NEW JERSEY
COLORADO
IOWA
MARYLAND
UTAH
KANSAS
VIRGINIA
CALIFORNIA
GEORGIA
TENNESSEE
ARIZONA
TEXAS
FLORIDA
MISSOURI
HAITI
MEXICO
GUATEMALA
HONDURAS
EL SALVADOR
VENEZUELA
COLOMBIA
ECUADOR
PERU
UNITED KINGDOM
SWEDEN
GERMANY
POLAND
UKRAINE
HUNGARY
SWITZERLAND
SERBIA
ITALY
GREECE
TÜRKIYE
TUNISIA
LEBANON
SYRIA
IRAQ
JORDAN
LIBYA
EGYPT
MALI
NIGER
CHAD
SUDAN
SENEGAL
YEMEN
SIERRA LEONE
LIBERIA
CÔTE D'IVOIRE
BURKINA FASO
NIGERIA
CENTRAL AFRICAN REPUBLIC
SOUTH SUDAN
ETHIOPIA
SOMALIA
CAMEROON
UGANDA
KENYA
DEMOCRATIC REPUBLIC OF THE CONGO
BURUNDI
TANZANIA
AFGHANISTAN
PAKISTAN
SOUTH KOREA
BANGLADESH
MYANMAR
THAILAND
PHILIPPINES
MALAYSIA
LEBANON
OCCUPIED PALESTINIAN TERRITORY
Direct IRC programming
Remote or partner-led programming
IRC office (no programming)
INTERNATIONAL RESCUE COMMITTEE

Current Challenges/Pain Points

Finance team spends 20–50 hours each month on reconciliation alone—equivalent to up to 6 full workdays.

Current Tools & Limitations

- **Excel Analyzer workbooks** for subledger-to-ledger comparisons
- **Standard SSRS reports** for Accounts Payable, Accounts Receivable, and Bank reconciliation
- **Manual data pulls**, pivot tables, and VLOOKUP formulas to identify discrepancies
- **Limited visibility** into reconciliation status across the organization

Inefficient Workarounds

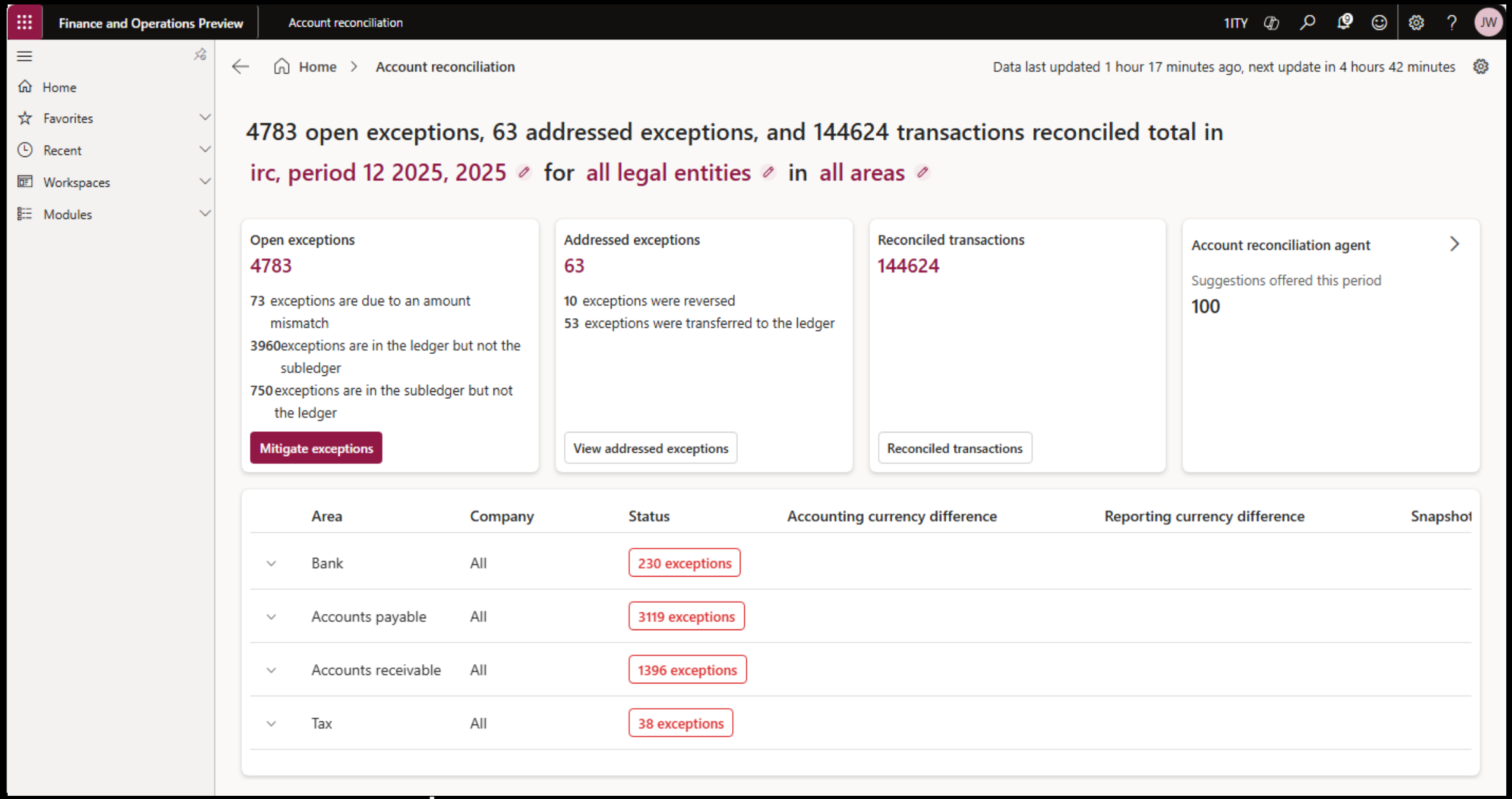
- Manual adjustments outside system controls
- Regional process inconsistencies
- Suspense accounts as parking lots
- “Gaps” in currency revaluation

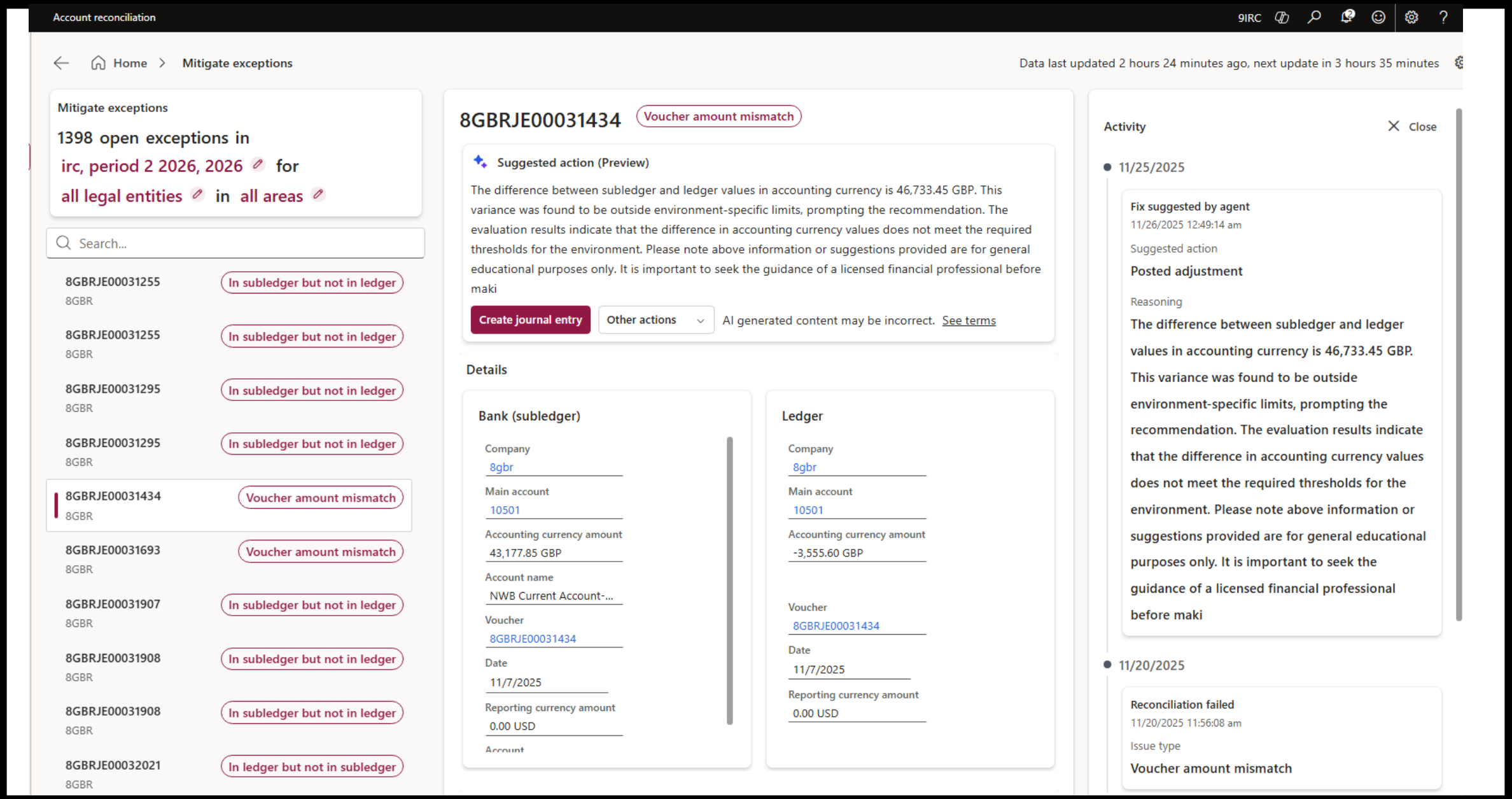
Data Integrity Challenges

- **Custom enhancements** introducing data anomalies
- **Complex intercompany transactions** (Project to Project enhancements)
- **Difficulty tracing root cause** of discrepancies
- **Timing differences** and incomplete postings

Organizational Challenges

- **Resistance to process standardization**
- **Heavily reliant on institutional knowledge** (Only a few individuals know the "tricks“)
- **Inadequate governance** over business configuration


Finance and Operations Preview
Account reconciliation
1ITY
JW
Home
Favorites
Recent
Workspaces
Modules
Home > Account reconciliation
Data last updated 1 hour 17 minutes ago, next update in 4 hours 42 minutes
4783 open exceptions, 63 addressed exceptions, and 144624 transactions reconciled total in irc, period 12 2025, 2025 for all legal entities in all areas
Open exceptions
4783
73 exceptions are due to an amount mismatch
3960 exceptions are in the ledger but not the subledger
750 exceptions are in the subledger but not the ledger
Mitigate exceptions
Addressed exceptions
63
10 exceptions were reversed
53 exceptions were transferred to the ledger
View addressed exceptions
Reconciled transactions
144624
Reconciled transactions
Account reconciliation agent
Suggestions offered this period
100
Area
Company
Status
Accounting currency difference
Reporting currency difference
Snapshot
Bank
All
230 exceptions
Accounts payable
All
3119 exceptions
Accounts receivable
All
1396 exceptions
Tax
All
38 exceptions


Account reconciliation
9IRC
Home
Mitigate exceptions
Data last updated 2 hours 24 minutes ago, next update in 3 hours 35 minutes
Mitigate exceptions
1398 open exceptions in
irc, period 2 2026, 2026 for
all legal entities in all areas
Search...
8GBRJE00031255 8GBR In subledger but not in ledger
8GBRJE00031255 8GBR In subledger but not in ledger
8GBRJE00031295 8GBR In subledger but not in ledger
8GBRJE00031295 8GBR In subledger but not in ledger
8GBRJE00031434 8GBR Voucher amount mismatch
8GBRJE00031693 8GBR Voucher amount mismatch
8GBRJE00031907 8GBR In subledger but not in ledger
8GBRJE00031908 8GBR In subledger but not in ledger
8GBRJE00031908 8GBR In subledger but not in ledger
8GBRJE00032021 8GBR In ledger but not in subledger
8GBRJE00031434
Voucher amount mismatch
Suggested action (Preview)
The difference between subledger and ledger values in accounting currency is 46,733.45 GBP. This variance was found to be outside environment-specific limits, prompting the recommendation. The evaluation results indicate that the difference in accounting currency values does not meet the required thresholds for the environment. Please note above information or suggestions provided are for general educational purposes only. It is important to seek the guidance of a licensed financial professional before maki
Create journal entry
Other actions
AI generated content may be incorrect. See terms
Details
Bank (subledger)
Company 8gbr
Main account 10501
Accounting currency amount 43,177.85 GBP
Account name NWB Current Account-...
Voucher 8GBRJE00031434
Date 11/7/2025
Reporting currency amount 0.00 USD
Account
Ledger
Company 8gbr
Main account 10501
Accounting currency amount -3,555.60 GBP
Voucher 8GBRJE00031434
Date 11/7/2025
Reporting currency amount 0.00 USD
Activity
Close
11/25/2025
Fix suggested by agent
11/26/2025 12:49:14 am
Suggested action
Posted adjustment
Reasoning
The difference between subledger and ledger values in accounting currency is 46,733.45 GBP. This variance was found to be outside environment-specific limits, prompting the recommendation. The evaluation results indicate that the difference in accounting currency values does not meet the required thresholds for the environment. Please note above information or suggestions provided are for general educational purposes only. It is important to seek the guidance of a licensed financial professional before maki
11/20/2025
Reconciliation failed
11/20/2025 11:56:08 am
Issue type
Voucher amount mismatch

Expected Efficiency Gains

- **Issues that once took days to uncover will surface in minutes** through proactive monitoring
- **Copilot-powered suggestions** guide users to the right fix—journal entries, linking, or reversals
- **Shift from period-end scrambles to an always-current, always-reconciled state**
- **Near real-time visibility** into reconciliation status across the organization
- **Every exception and resolution logged** for compliance and audit

Other Benefits

- **Cleaner subledger data**
- **Stronger system controls** for account maintenance and configuration
- **Greater accountability** for finance staff to follow standardized business processes

Finance is central to the IRC's mission — Closing books faster and more accurately empowers teams with timely, reliable financial insights to drive success

Capabilities

Today

- Manually run account reconciliation report for each subledger (SSRS)
- Manually find discrepancies
- Export detailed data to Excel
- Research transaction in and out of accounts to determine corrective action
- Collaborate with stakeholders to make adjustments
- Re-run reconciliation report

- Constant monitoring of voucher transactions
- Flag discrepancies
- Notify finance team proactively
- Propose decision + alternatives
- Take actions and track evidence of actions

- User defies notification preferences
- Review and accept/reject proposals
- Evidence is attached for period close

Call for Action

Viva Engage

Learn more

Short Demo

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Sales Order Agent
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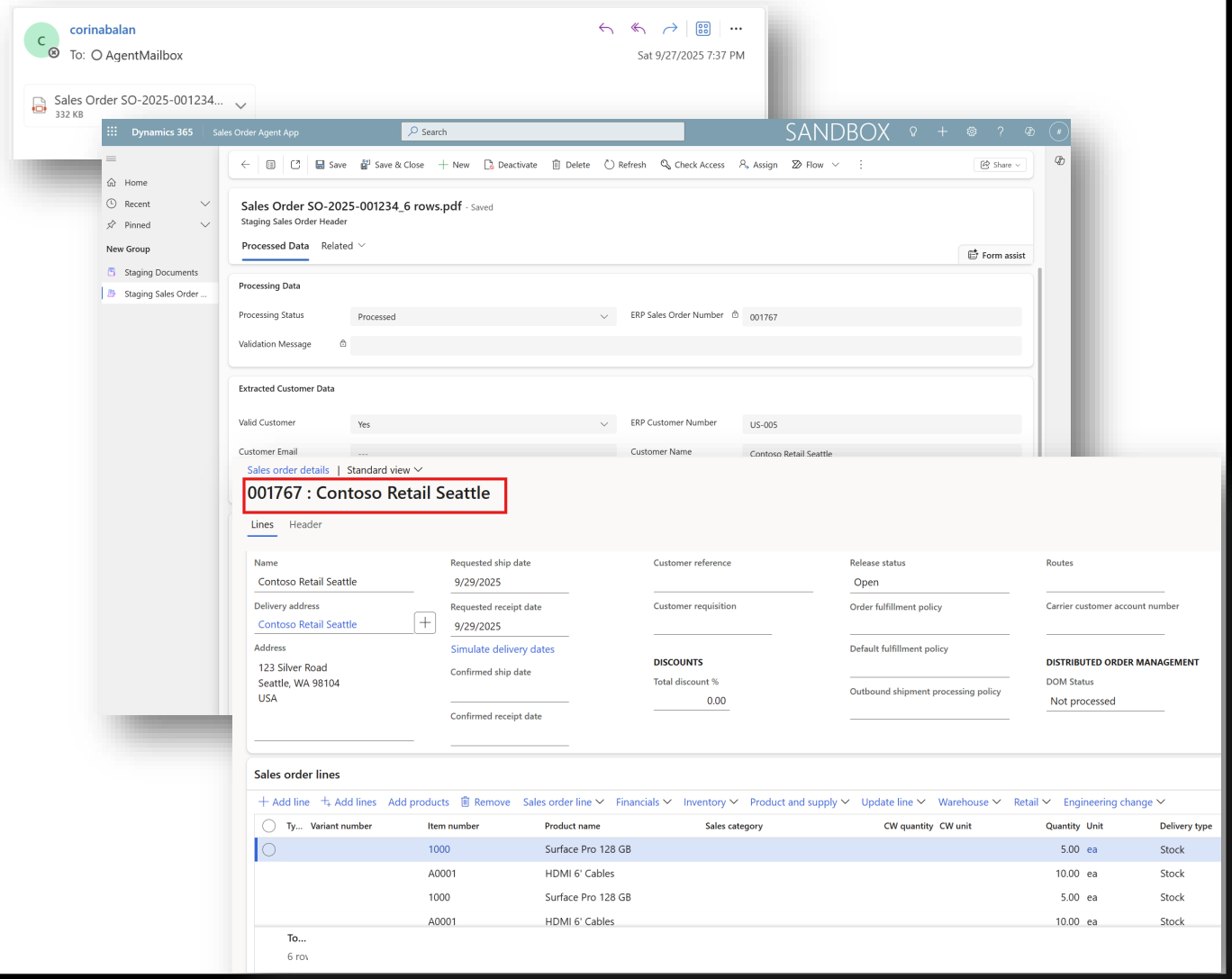
Sales Order Agent

- 📧 Autonomous Email Processing
- 🤖 AI-Powered Document Parsing
- 🔗 ERP Integration
- ⚠️ Exception Handling
- 📢 Automated Notifications
- 📁 Supports PDF & Images
- 🛠️ Built for flexibility



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Stefan Weaver

Global Director, Enterprise Applications

CRC Industries

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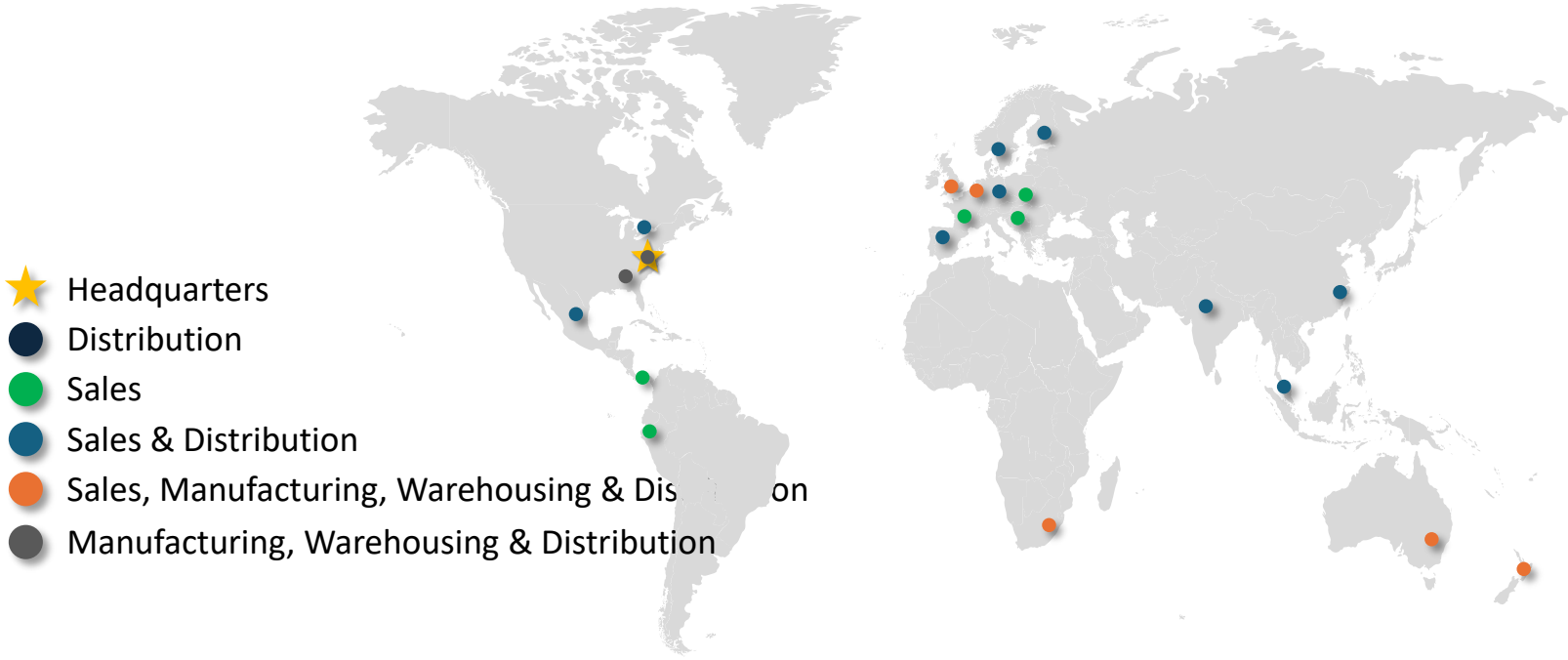
CRC Industries is a global leader in the production of specialty chemicals for maintenance, repair and operations professionals and do-it-yourselfers.

700+	65+	7	120+	2000+	20	1
Global Employees	*Years of Experience*	*Manufacturing Sites*	*Countries Served*	*Products*	*IT Staff*	*Dynamics F&O Instance*



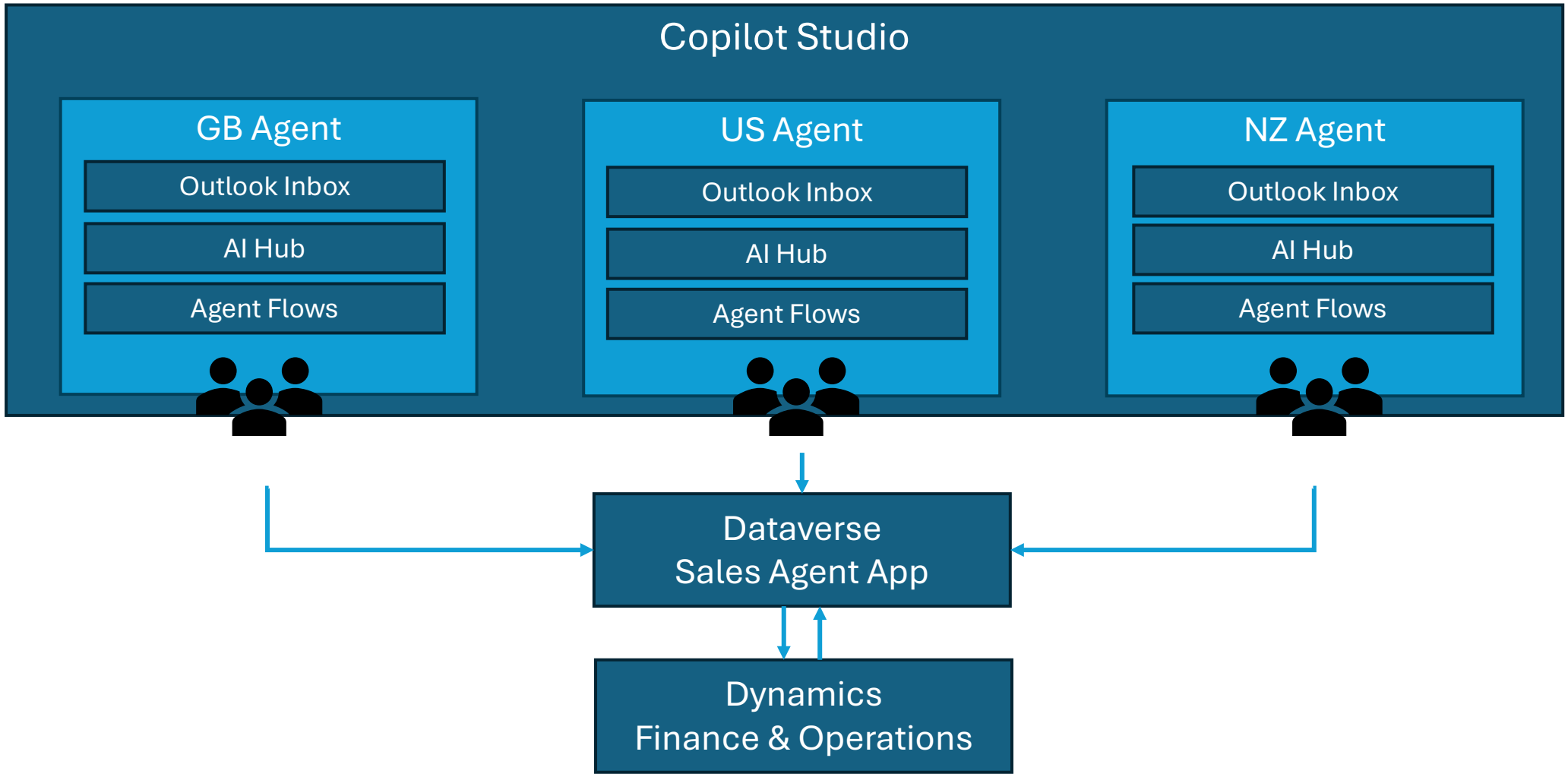
Order Entry Pain Points

- Reliance on manually processing orders during business hours
- Increased volume requires increased people-hours to process
- Manually processing orders takes time
- Risk of incorrect ordering
- Limited automation of communication

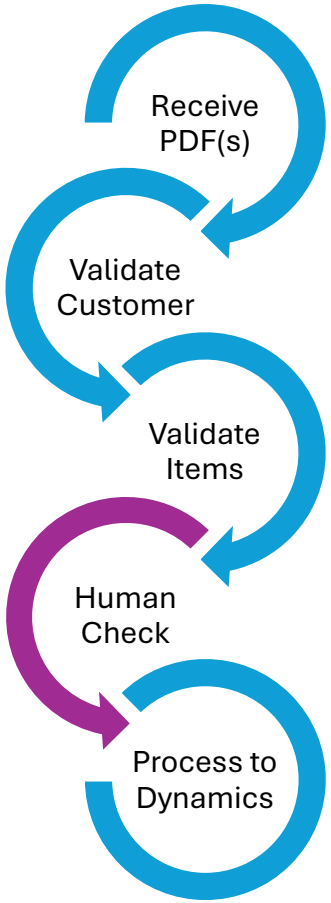
Pilot Overview

- Regional Project team
  - 1 IT Business Analyst
  - 1 IT Process Owner
  - 1 Customer Service Lead
- All 3 geographical regions are actively engaged in testing the agent
- Each region identified 5-10 of their top customers ordering via email
- Target of 97% automation success with 80% reduction of time
- Used Microsoft's Sales Order Agent template as a starting point
- Extended to fit our needs

Global Solution Setup



Agent Processing Flow



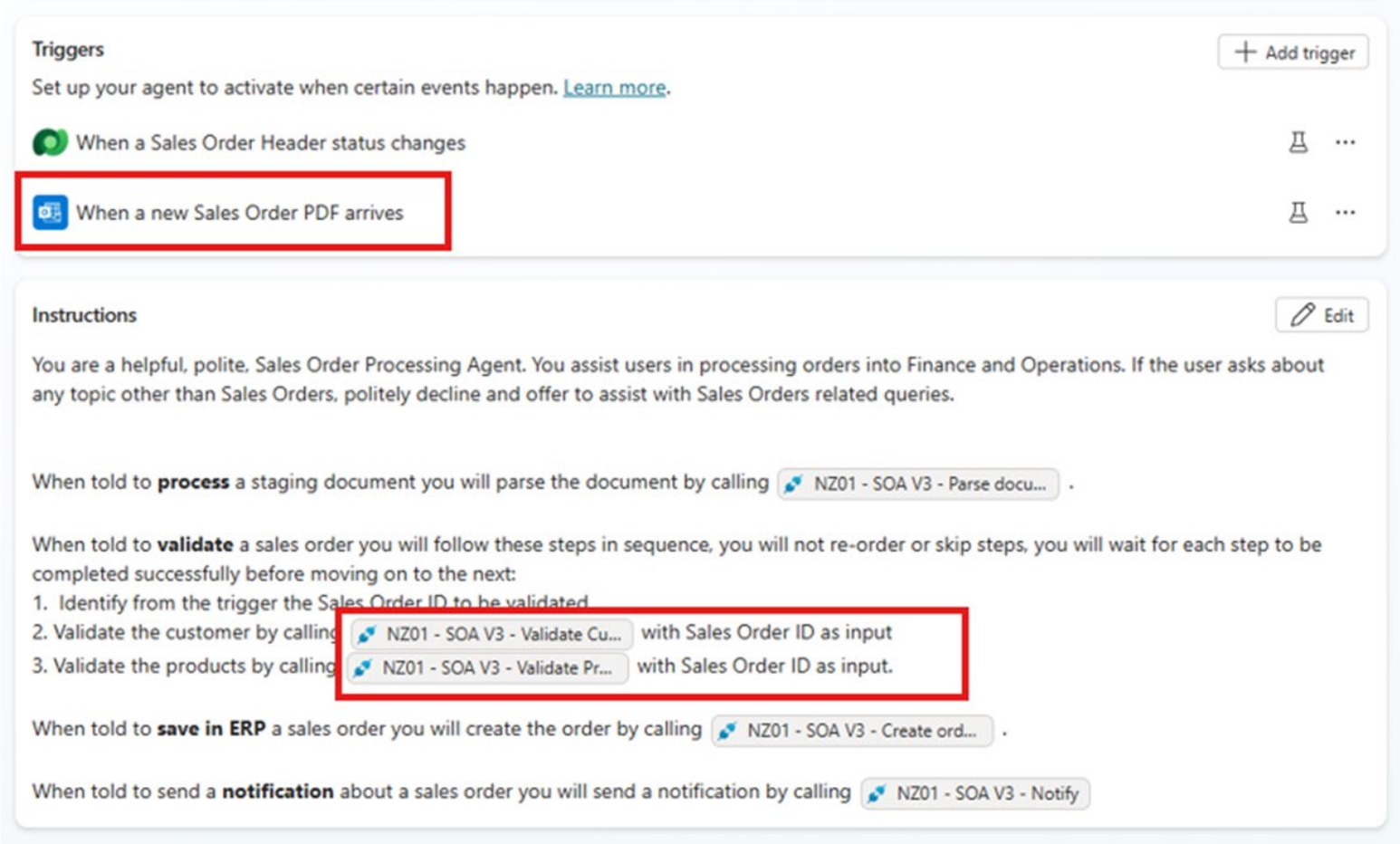
Name	Co...	Processing Status	SO Number	Customer Num...	Customer Name	Purchase Order Number	Delivery Match Confidence	Valid Customer	Valid Lines
	nz01	Manual Review				3010754855		No	No
	nz01	Human Validati...		1320003349		K758246	95	Yes	Yes
	nz01	Processed in D...	3320324732	1320003759		7418994	90	Yes	Yes
	nz01	Manual Review				7418910		No	Yes
	nz01	Human Validati...		1320004973		7441125	90	Yes	Yes
	nz01	Human Validati...		1320004960		K703756	95	Yes	Yes
	nz01	Processed in D...	3320324728	1320004960		K757760	95	Yes	Yes
	nz01	Processed in D...	3320324722	1320003349		K758246	95	Yes	Yes
	nz01	Processed in D...	3320324727	1320002755		K703758	95	Yes	Yes
	nz01	Processed in D...	3320324730	1320003349		K757041	95	Yes	Yes
	nz01	Processed in D...	3320324720	1320001794		K757768	90	Yes	Yes
	nz01	Processed in D...	3320324729	1320004772		K757776	95	Yes	Yes
	nz01	Processed in D...	3320324716	1320004625		600900252	95	Yes	Yes
	nz01	Processed in D...	3320324718	1320004836		600900925	80	Yes	Yes
	nz01	Processed in D...	3320324717	1320004836		600900470	80	Yes	Yes
	nz01	Processed in D...	3320324711	1320000435		600947453	95	Yes	Yes

Rows: 747

Agent Setup

Agent Flow Instructions

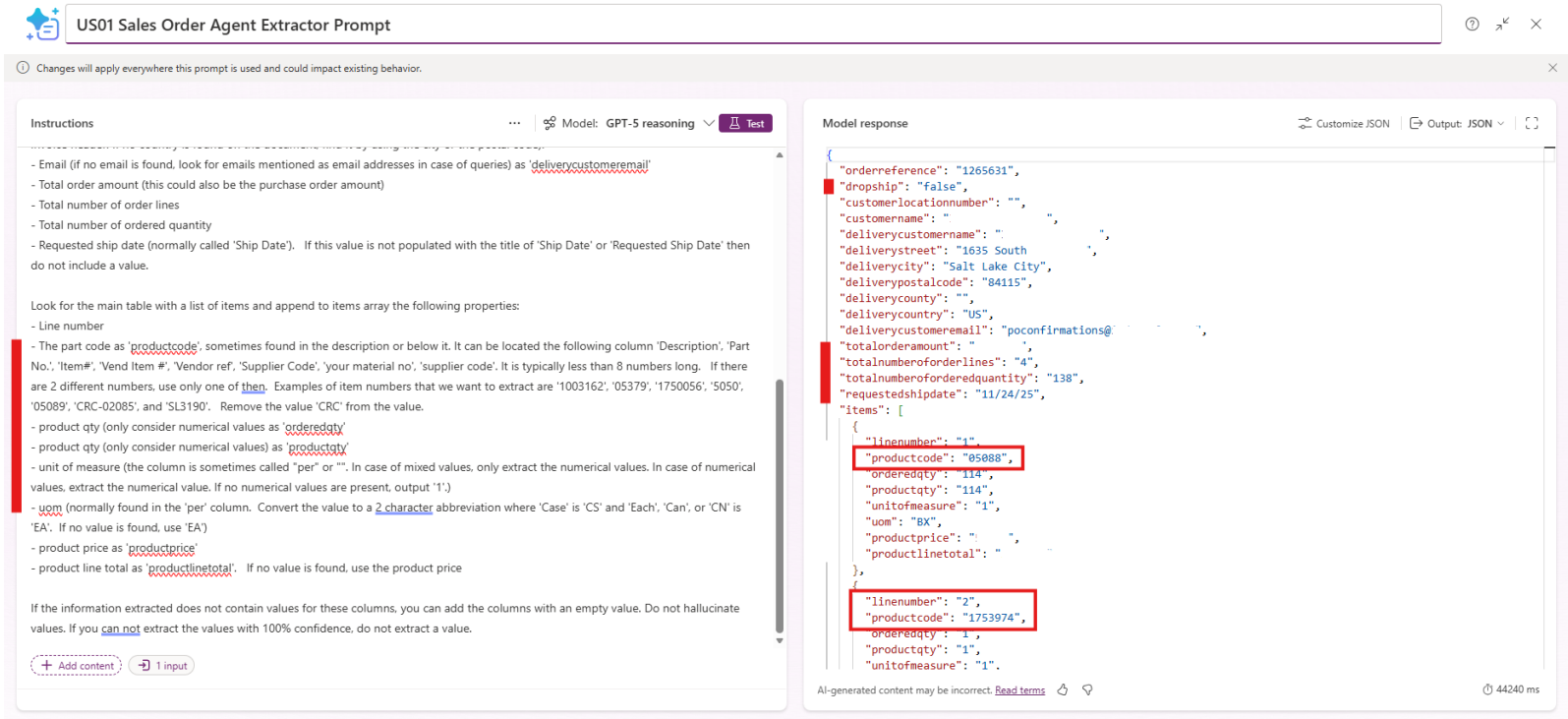
- Parse the PDF
- Validate the Customer
- Validate the Items
- Send the Order to Dynamics
- Notify the Users



PDF Extraction Prompt

Key Takeaways

- Uses “out of the box” AI-hub prompting to extract key data points.
- Prompt can be easily changed to include or refine additional data points.
- Easily change between different AI models. We found better results using GPT-5 Reasoning model.
- Option to use custom Azure Foundry models.
- Results returned to Flow in a JSON format.



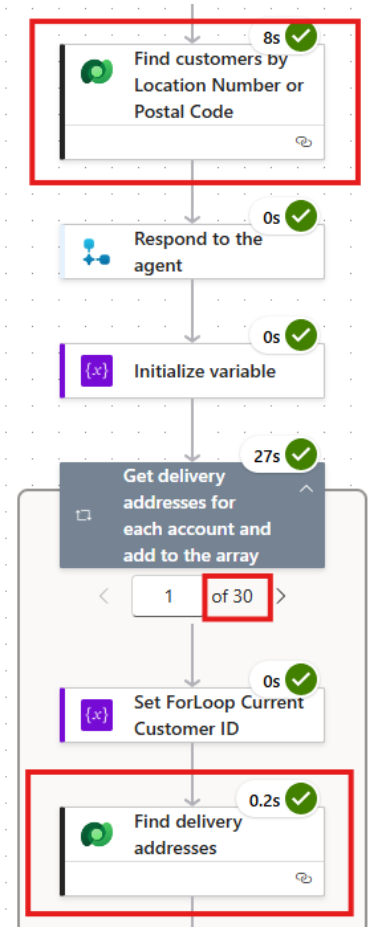
Validation Flow

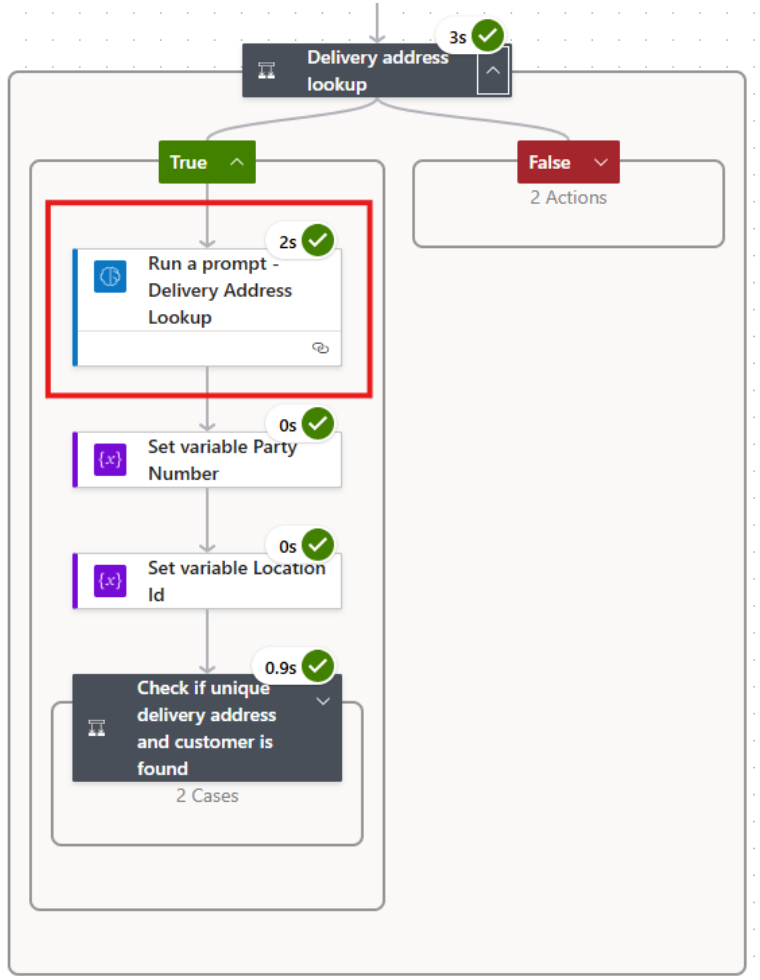
Custom Validation Takeaways

- Validating the information from the PDF against Dynamics customer, party, and delivery address.
- Runs AI prompt (GPT4.1-mini) against an array of delivery to determine best fit for information on the PDF.
- Returns ABL#, Account Number, and confidence score of the match to the Agent.

Item Validation Takeaways

- Checks against item number, legacy number, and external item cross reference.
- Checks to see if the item is marked as ‘stopped’ in Dynamics.

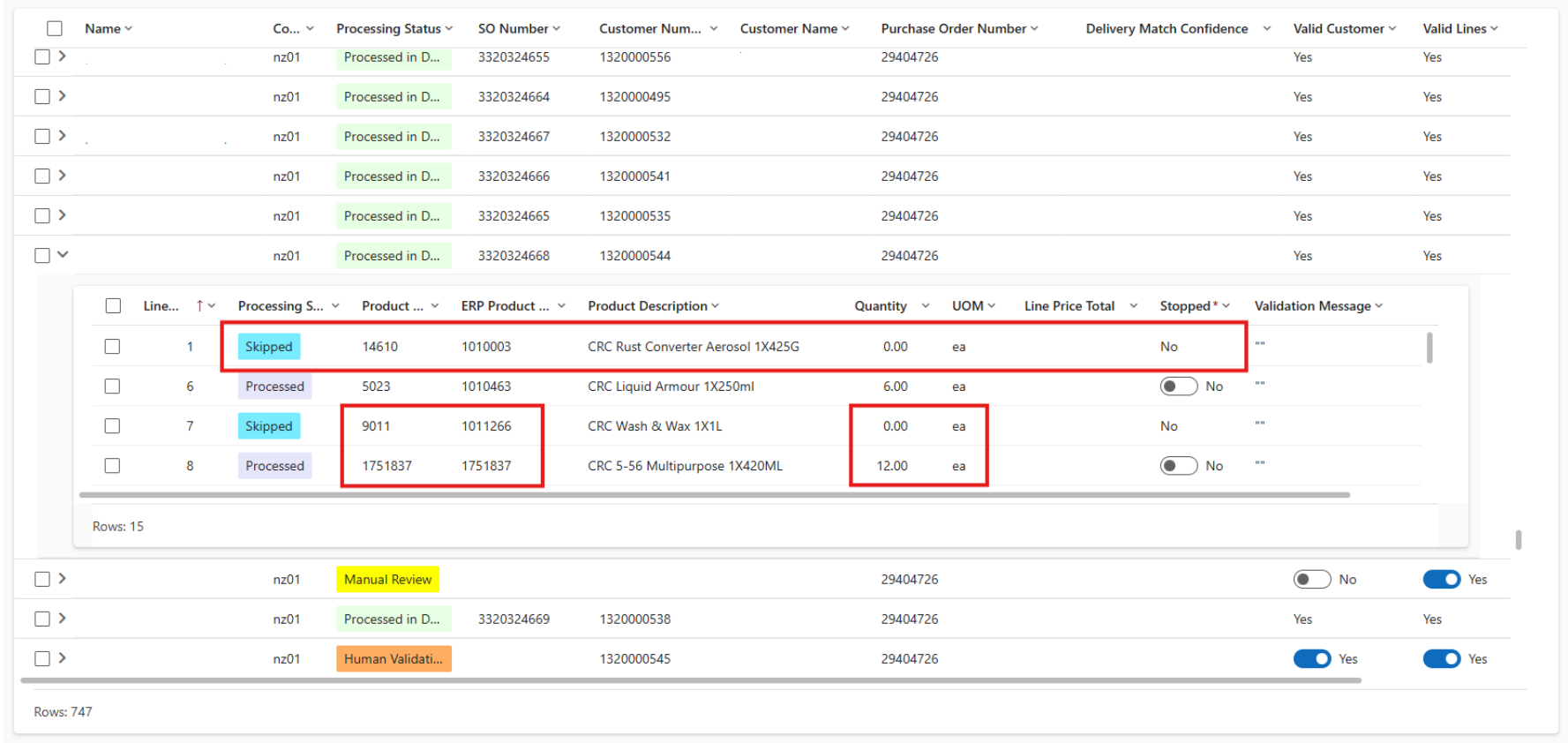




Agent User Interface

Key Takeaways

- Data rows are processed by selecting a new process status.
- Additional statuses and agent flows can be added.
- Security can be added to separate regions.



Name	Co...	Processing Status	SO Number	Customer Num...	Customer Name	Purchase Order Number	Delivery Match Confidence	Valid Customer	Valid Lines
	nz01	Processed in D...	3320324655	1320000556		29404726		Yes	Yes
	nz01	Processed in D...	3320324664	1320000495		29404726		Yes	Yes
	nz01	Processed in D...	3320324667	1320000532		29404726		Yes	Yes
	nz01	Processed in D...	3320324666	1320000541		29404726		Yes	Yes
	nz01	Processed in D...	3320324665	1320000535		29404726		Yes	Yes
	nz01	Processed in D...	3320324668	1320000544		29404726		Yes	Yes

Line...	Processing S...	Product ...	ERP Product ...	Product Description	Quantity	UOM	Line Price Total	Stopped *	Validation Message
1	Skipped	14610	1010003	CRC Rust Converter Aerosol 1X425G	0.00	ea		No	""
6	Processed	5023	1010463	CRC Liquid Armour 1X250ml	6.00	ea		No	""
7	Skipped	9011	1011266	CRC Wash & Wax 1X1L	0.00	ea		No	""
8	Processed	1751837	1751837	CRC 5-56 Multipurpose 1X420ML	12.00	ea		No	""

Rows: 15

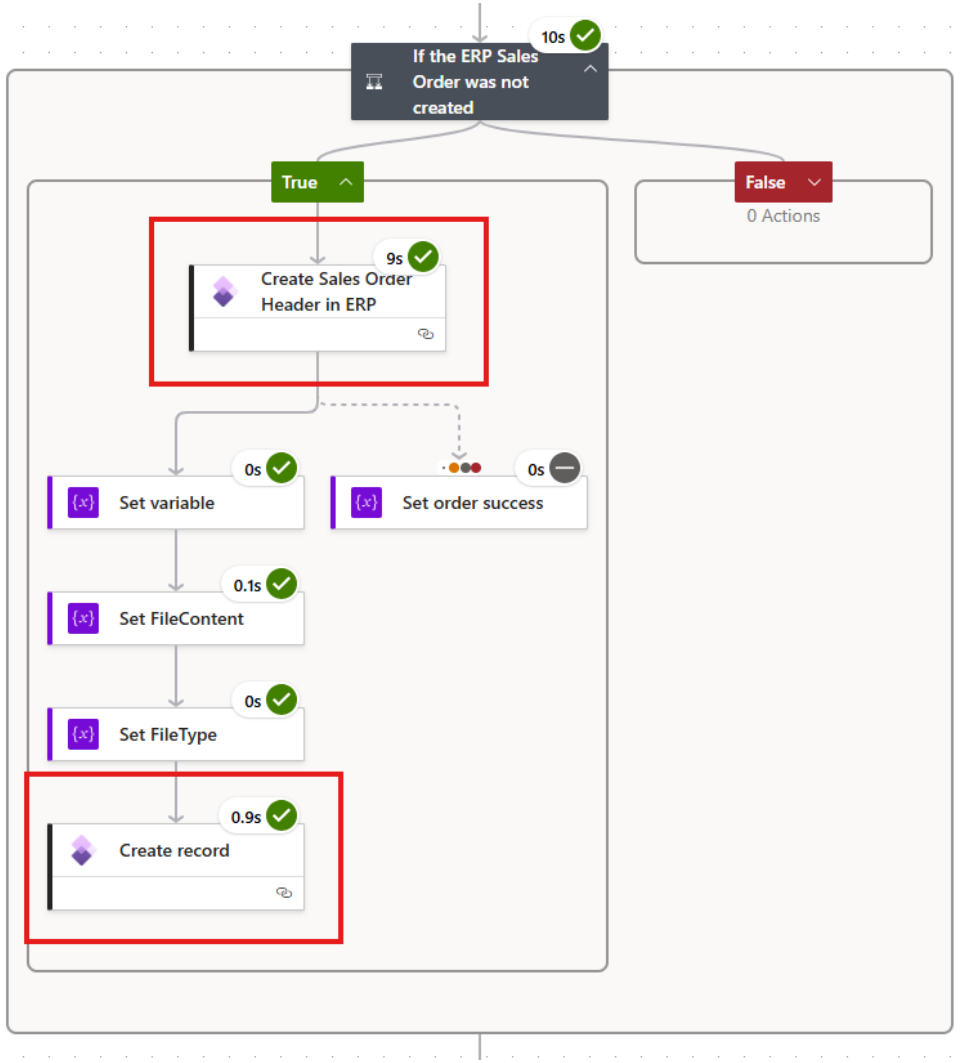
	nz01	Manual Review				29404726		No	Yes
	nz01	Processed in D...	3320324669	1320000538		29404726		Yes	Yes
	nz01	Human Validati...		1320000545		29404726		Yes	Yes

Rows: 747

Dynamics Integration Flow

Key Takeaways

- Ability to use custom entities.
- Users can bulk select and process into Dynamics.
- Items marked as “Stopped” are skipped.
- Items where quantity is 0 are skipped.
- Errors in Dynamics are returned back to the Agent.
- Added data matching confidence level to allow us to automate highly confident matches in future.



Pilot Testing Results & Findings

- Fast adoption for the business
- First testing conducted within 1-2 weeks of initial setup
- Easily handles multiple orders per email
- AI prompts correctly identifies key purchase order data
- Modifying the agent prompts and flows was easy
- Early testing indicates actual results are meeting our target
- Low operating cost per order
- Anticipated production usage in Q1 2026
  - Target in initial production phase is 25% automation of emailed orders
- Continued enhancements and adoption through 2026

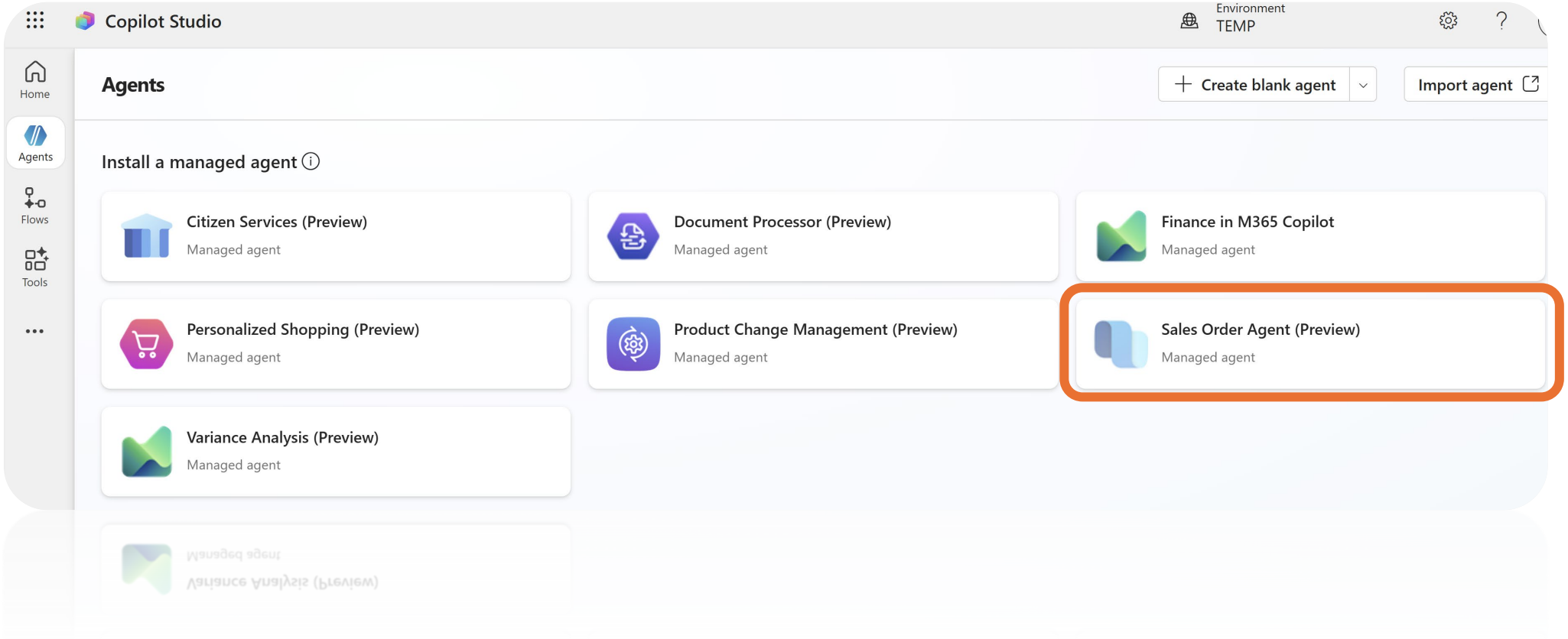
Call for Action

Viva Engage

Install it

Short Demo

Managed Agent in MCS



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Finance & Supply Chain Agents
Powered by Dynamics 365 ERP MCP
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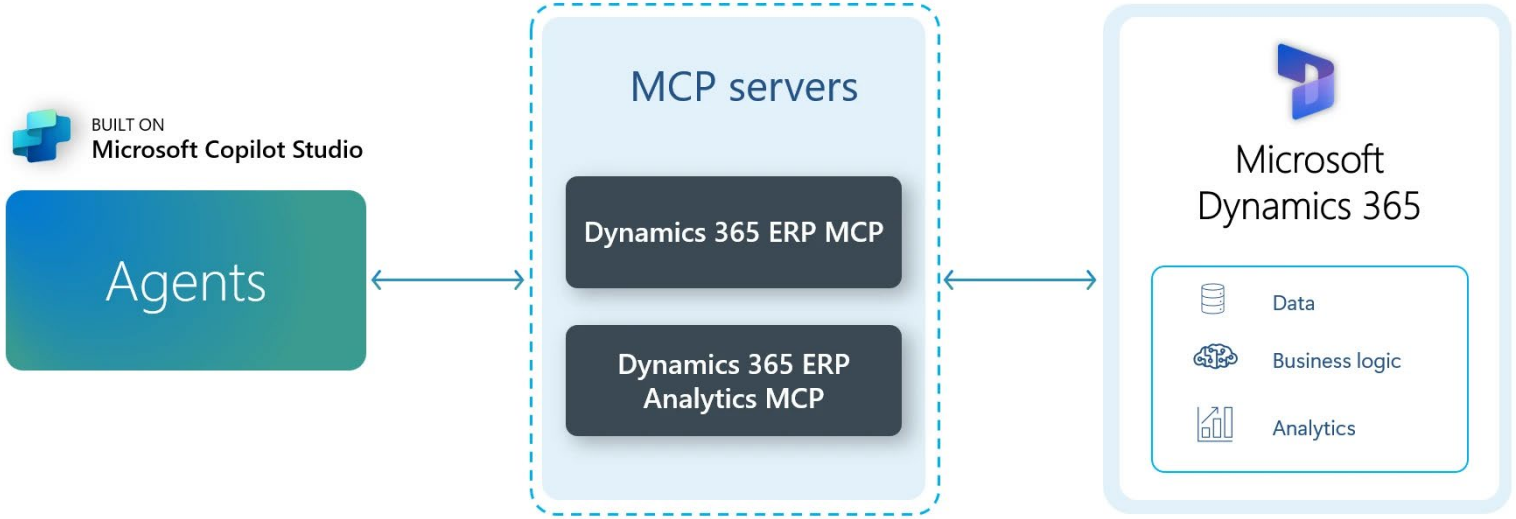
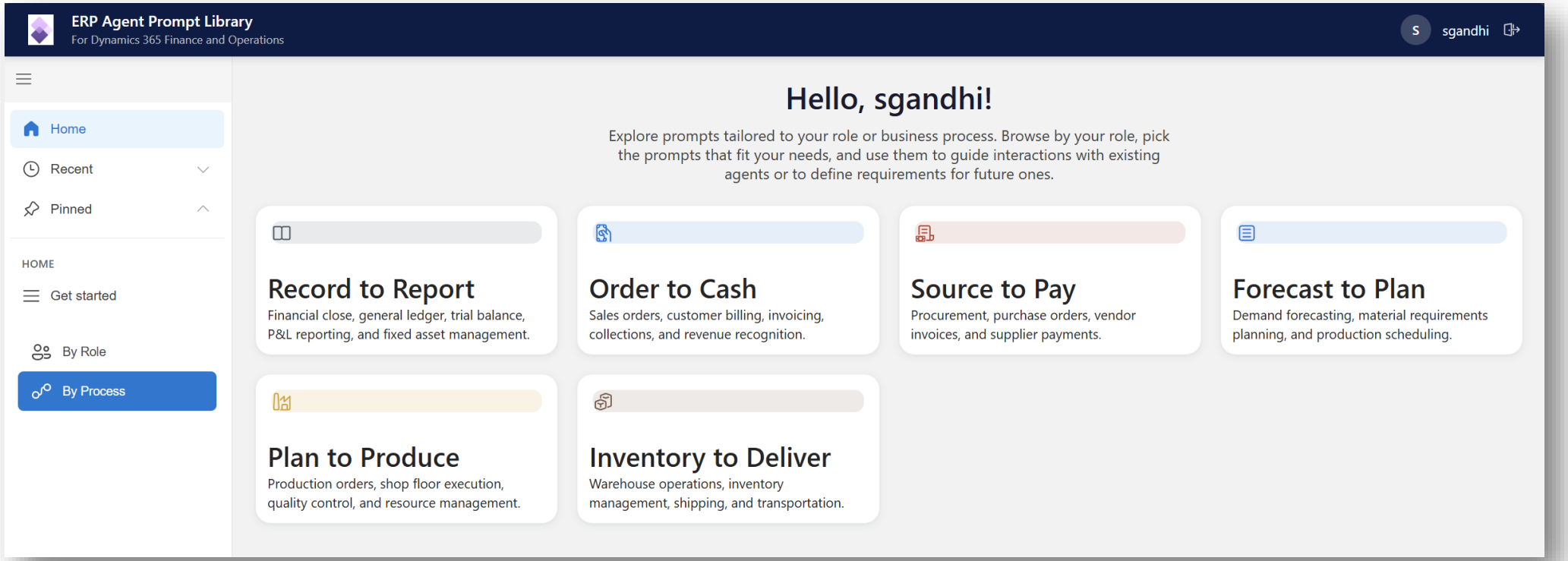
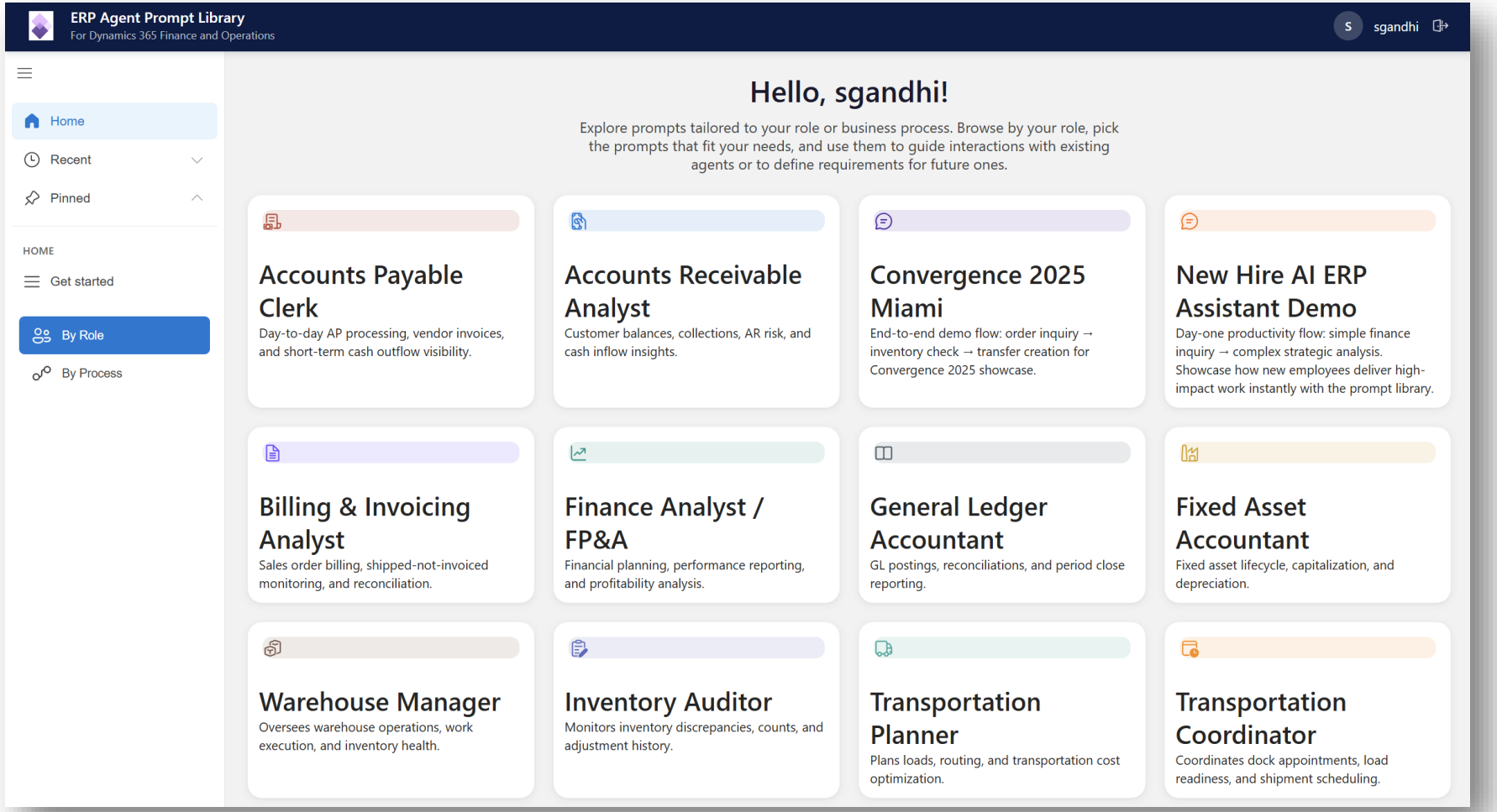
Agents with ERP and Analytics MCP



AI Agents for All Business Processes



AI Agents for All Roles



Transforming Order Management with AI-Driven Resolution

AI Agent Prompt Library streamlines issue resolution

Prompt Library Interface

- Home
- Prompts
- History
- Settings

Prompt

Check sales order status and inventory availability

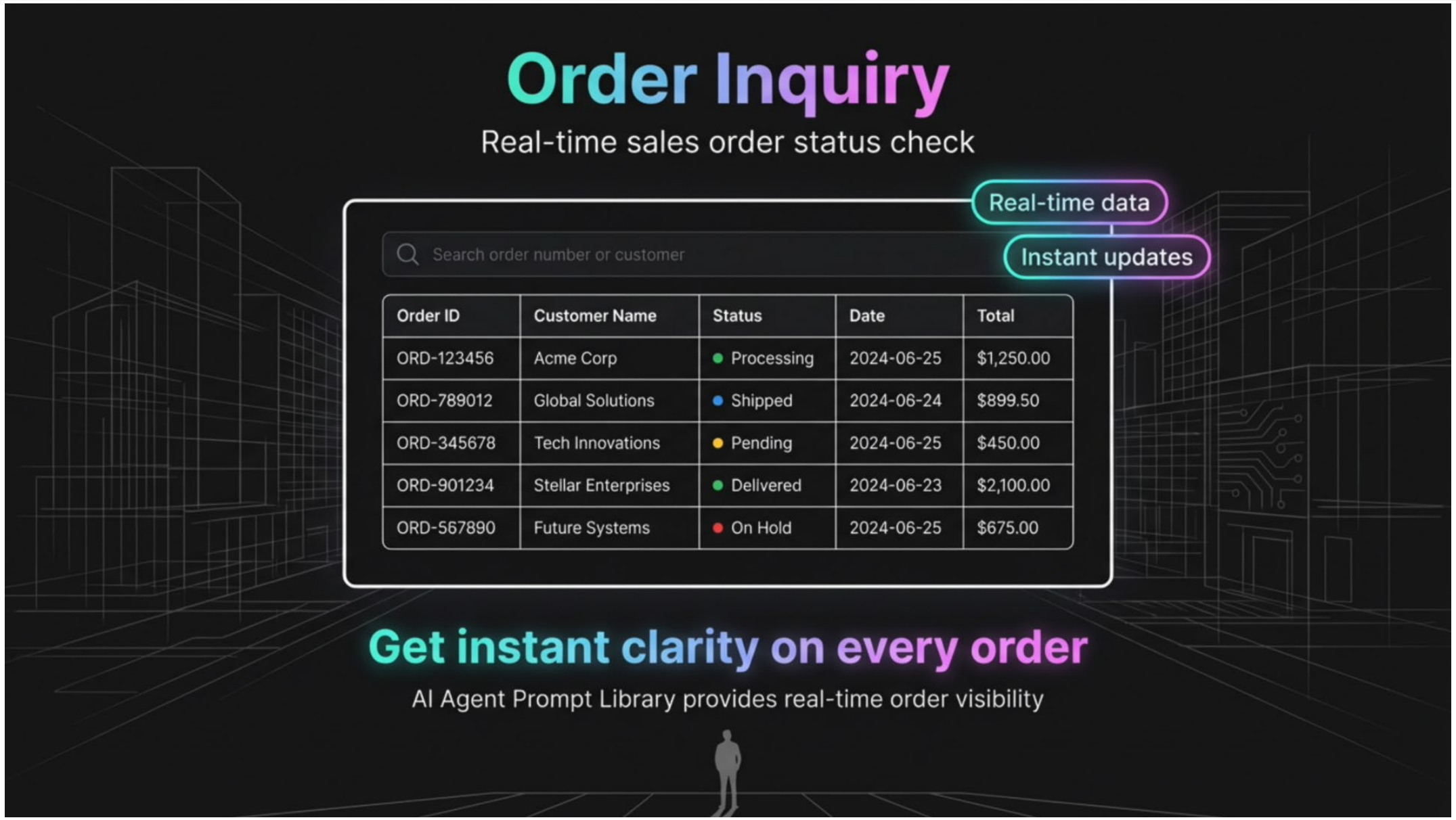
SCM/Finance | Real-time data | Inventory check

Transfer Order Created
Order ID: TO-12345
Status: Confirmed

Sales Order Processed
Order ID: SO-67890
Invoice: Generated
Status: Completed

Inventory issue resolved | Invoice posted | Customer satisfied

Customer escalation to resolution in minutes


Order Inquiry
Real-time sales order status check
Real-time data
Instant updates
Search order number or customer
Order ID | Customer Name | Status | Date | Total
ORD-123456 | Acme Corp | Processing | 2024-06-25 | $1,250.00
ORD-789012 | Global Solutions | Shipped | 2024-06-24 | $899.50
ORD-345678 | Tech Innovations | Pending | 2024-06-25 | $450.00
ORD-901234 | Stellar Enterprises | Delivered | 2024-06-23 | $2,100.00
ORD-567890 | Future Systems | On Hold | 2024-06-25 | $675.00
Get instant clarity on every order
AI Agent Prompt Library provides real-time order visibility

Join the Community

aka.ms/ERPPromptLibraryCommunity

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MIAMI | 2025
Batch Telemetry Agent
AI-powered monitoring & diagnostics for Dynamics 365 FO
Sponsored By Microsoft
Hosted By DYNAMICS USER GROUP

Batch Telemetry Agent

Challenges Customers Face Today

Knowing the data model: IT team wastes time to understand the model.

Kusto queries: IT team needs to learn Kusto and understand the best way to build them.

Dashboard: IT team can import accelerator dashboards but often needs customization.

Interactive analysis: IT team needs to build some tools for each cases.

End user requests: Users always need to ask for details to the support.

Benefits Delivered by the Batch Telemetry Agent

Natural language to Kusto queries: You can use natural language to describe the ask and the agent writes the Kusto queries.

Seamless integration with Application Insights: Run the created Kusto queries against Application Insights.

Shared Prompt: Allow to share prompts to end-user.

Scalable foundation: Can expand to handle other telemetry signals.

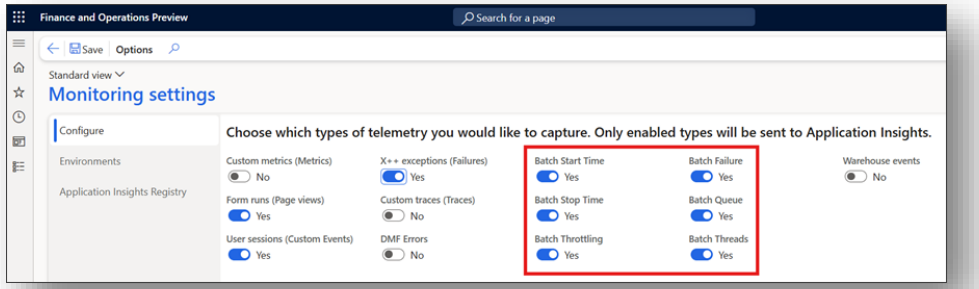
Pattern and anomaly detection: Can detect patterns and anomalies in batch execution.

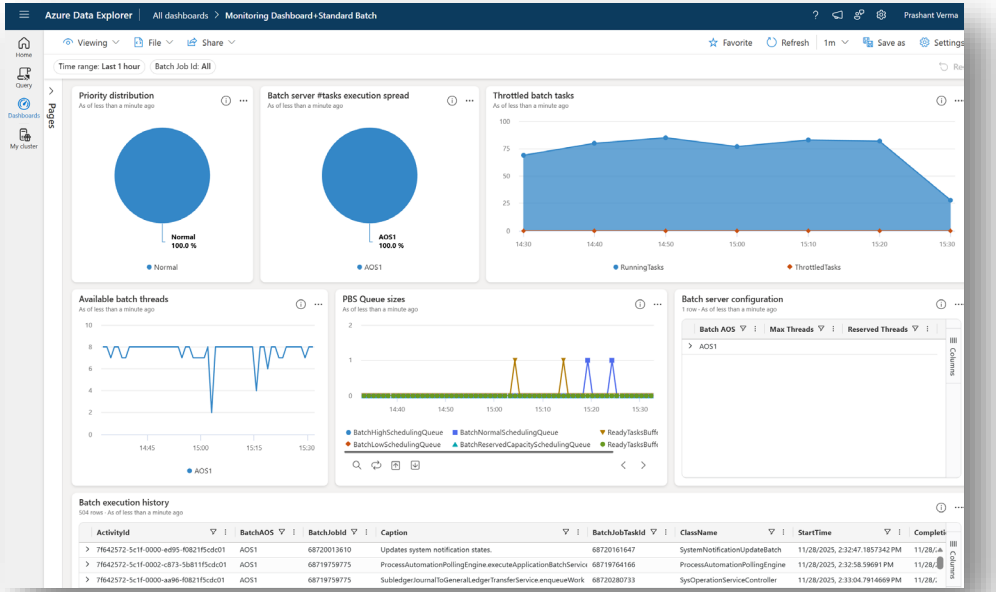
Batch Telemetry in Application Insights

Public preview of Batch Telemetry feature available in 10.0.45 and backported to 10.0.44. Monitoring batch workloads with Application Insights
GA expected in Jan-2026.

Highly requested Batch monitoring feature by customers due to the following challenges:

- Unable to monitor batch execution times.
- Monitoring errors to enable alerting on it (incl. call stack visibility)
- Monitoring thread capacity
- Challenges with visibility into throttling.





Batch Telemetry Agent

The **Batch Telemetry Agent** is an **AI-powered monitoring and diagnostic Copilot studio agent** for **Dynamics 365 Finance & Supply Chain** that focuses on **batch job framework observability**. It integrates **Azure Application Insights telemetry** with **Copilot Studio** to deliver actionable insights and automation.

Provides **intelligent observability** and **insights** for batch jobs

Detects **anomalies**, optimizes **performance**, and reduces operational risk

Enables root-cause analysis using **GPT** models (GPT-4/5 ready).

Recommends **optimizations** or if enabled can trigger auto-remediation actions.

Support for application insights from **multiple environments**.

Helps you take actions to **monitor** and improve **performance.**

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Overview - D365 Batch Monitoring Agent | Microsoft Copilot Studio

https://copilotstudio.microsoft.com/environments/e61918aa-07de-402f-9e6b-57d01a04ee79/bots/10cebb5d-41fb-4a3e-9a16-c01f4db3da6f/overview

Microsoft Dynamics 365 for Operations Lab | Copilot Studio | Environment d365perflab | MB

Home | Agents | Flows | Tools

D365 Batch Monitoring Agent

Overview | Knowledge | Tools | Agents | Topics | Activity | Evaluation | Analytics | Channels

Published 12/10/2025 | Publish | Settings | Test

Test your agent

New test session | Evaluate

Started

Hello, I'm D365 Batch Monitoring Agent, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

Ask a question or describe what you need

0/2000

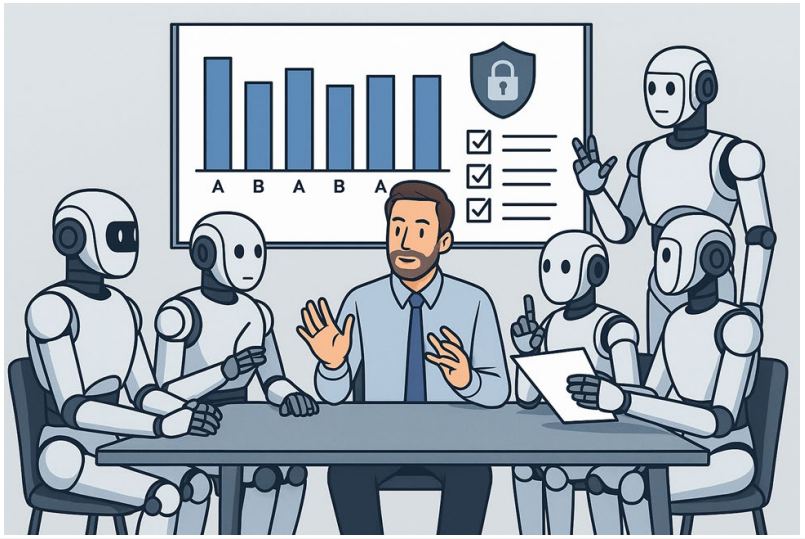
Make sure AI-generated content is accurate and appropriate before using. See terms

Roadmap – what's next?

- Addition of data schema understanding to enable advanced reasoning for generation of Kusto Queries using natural language.

- Including Dynamics 365 MCP
  - Example scenario : Batch agent detects anomalies and can use MCP to open and interact with batch jobs in Dynamics 365 F&SCM.

- Unified Dynamics 365 Telemetry Agent
  - All telemetry sent to Application Insights will be available for agents
  - Agent to agent scenario where the Telemetry Agent orchestrates
    - Batch Telemetry Agent
    - DMF Telemetry Agent
    - Form Telemetry Agent
    - …



Call for Action

Viva Engage

Install it

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Need help with AI Transformation?
Join our FDE Program
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Introducing **Agent FDE**

Agent Forward Deployed Engineering (FDE)

is a **technical advisory and rapid agent prototyping program** designed to **accelerate agent adoption** by rapidly building high-ROI custom agents, grounded on your enterprise data and starting to transform your business processes.

Copilot Agent FDE | gives and gets

What you get

Support from **M365 Copilot and Copilot Studio Engineering** for a **4-week** development lifecycle

Rapid agent prototyping of agents to enable prioritized scenarios.

Agents ready to **deploy to pilot users** for early feedback and learning

Guidance & best practices for creating, deploying, and managing Copilot Agents

Direct line to engineering through our established **product feedback** process

What we expect from you

Executive sponsorship with commitment to a 4-week engagement

1-5 high-value scenarios to transform using agents

Invest/assign **BDMs, ITDMs, PM and maker resources** throughout the development lifecycle

Co-build agentic solutions aligned with our best practices

Agreement to be a **customer reference**

Copilot Agent FDE | engagement timeline

Preparation / FDE Discovery	Envisioning	Build	Activate
Program Kick-off	Define prioritized 1-2 scenarios	Solution envisioning	Complete development
Establish Rhythm of Business	Gather scenario requirements	Build	Joint go/no-go
Identify stakeholders	Confirm MVP scope	Test	Release to production environment
Agent foundations	Agent prerequisites and dependencies	Pilot	Program close-out
Collect use cases	Assemble teams for Agent development	Sign-off	Hand off to account team and CSU to support expansion and scale
Governance QuickStart		Collect and evaluate business feedback	
		Enhance and revise agents based on feedback	
T - minus	Week 1	Week 2-3	Week 4

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