CONVERGENCE | AI + ERP

MIAMI | 2025

Smarter Selling: Empowering Distributors, Manufacturers and Retailers through digital Channels

Shalabh Jain

Yufei Huang

Sponsored By Microsoft

Hosted By DYNAMICS USER GROUP

Agenda

- Modern B2B commerce ecosystems
- Challenges with B2B selling
- Dynamics 365 Commerce + Dynamics 365 SCM can help
  - Plan for demand – Stay profitable with intelligent planning
  - Order capture –Sell anywhere, Stay consistent
  - Order orchestration & fulfillment – Streamline fulfillment without delay
- Q&A

Modern B2B commerce ecosystem

Omnichannel pricing & Inventory

Trade agreement | Price list | Promotions | Inventory visibility

Flexible Pricing Management

Inventory visibility

Planning

Signals | Forecast | Master Plan | Allocate stock

Demand Planning

Supply Planning

Procurement

Sourcing | RFX | SRM | On-board | Supplier communication

Procure to pay

Omnichannel Order

In Store | App | B2B Portal | Email | Call Center

Catalog | Social Media | AI Chat | Marketplace | EDI

Order capture across channels

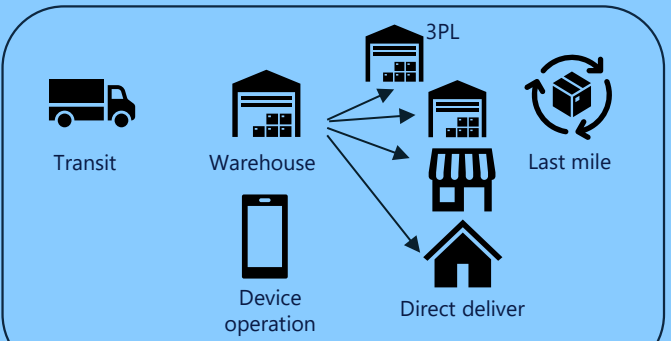
Intelligent Order Orchestration

Returns

Drop off | Home pickup | Return in store

Reverse logistics

Distribution



Warehouse Management

Transportation Management & integration

Challenges with B2B selling

Omnichannel pricing & Inventory

Trade agreement | Price list | Promotions | Inventory visibility

Flexible Pricing Management

Inventory visibility

Complex & opaque pricing models

Limited visibility into true customer demand resulting in excess or inadequate inventory

Planning

Signals | Forecast | Master Plan | Allocate stock

Demand Planning

Supply Planning

Unpredictable lead times

Procurement

Sourcing | RFX | SRM | On-board | Supplier communication

Procure to pay

Unplanned disruptions such as Tariffs, Pandemic etc.

Omnichannel Order

Emerging channels disruption

Manage Integration complexity

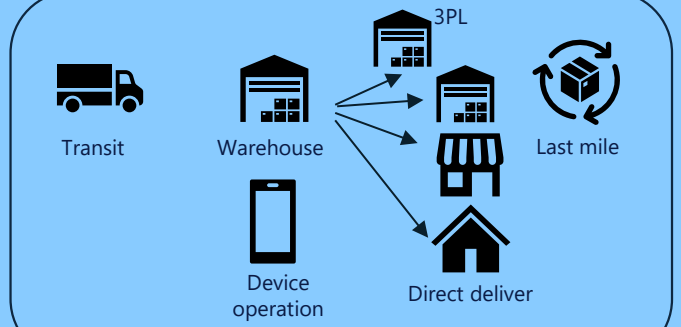
In Store | App | B2B Portal | Email | Call Center

Catalog | Social Media | AI Chat | Marketplace | EDI

Order capture across channels

Intelligent Order Orchestration

Distribution



Warehouse Management

Transportation Management & integration

Meet tight delivery timelines

Manage partial shipments

Returns

Drop off | Home pickup | Return in store

Reverse logistics

Simply returns for customers

Reduce costs for returns

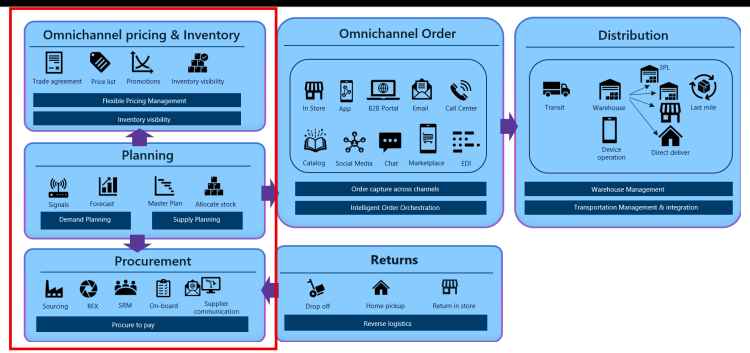
Dynamics 365 Commerce + SCM + Copilot can help



Plan for demand

- Stay profitable with intelligent planning

Prepare for channel distribution and sales



Unified Pricing
- Pricing rules
- Promotion rules

signal

Demand Planning
- Forecast inventory level
- Forecast on promotion

Supply Planning/MRP
- production
- procurement

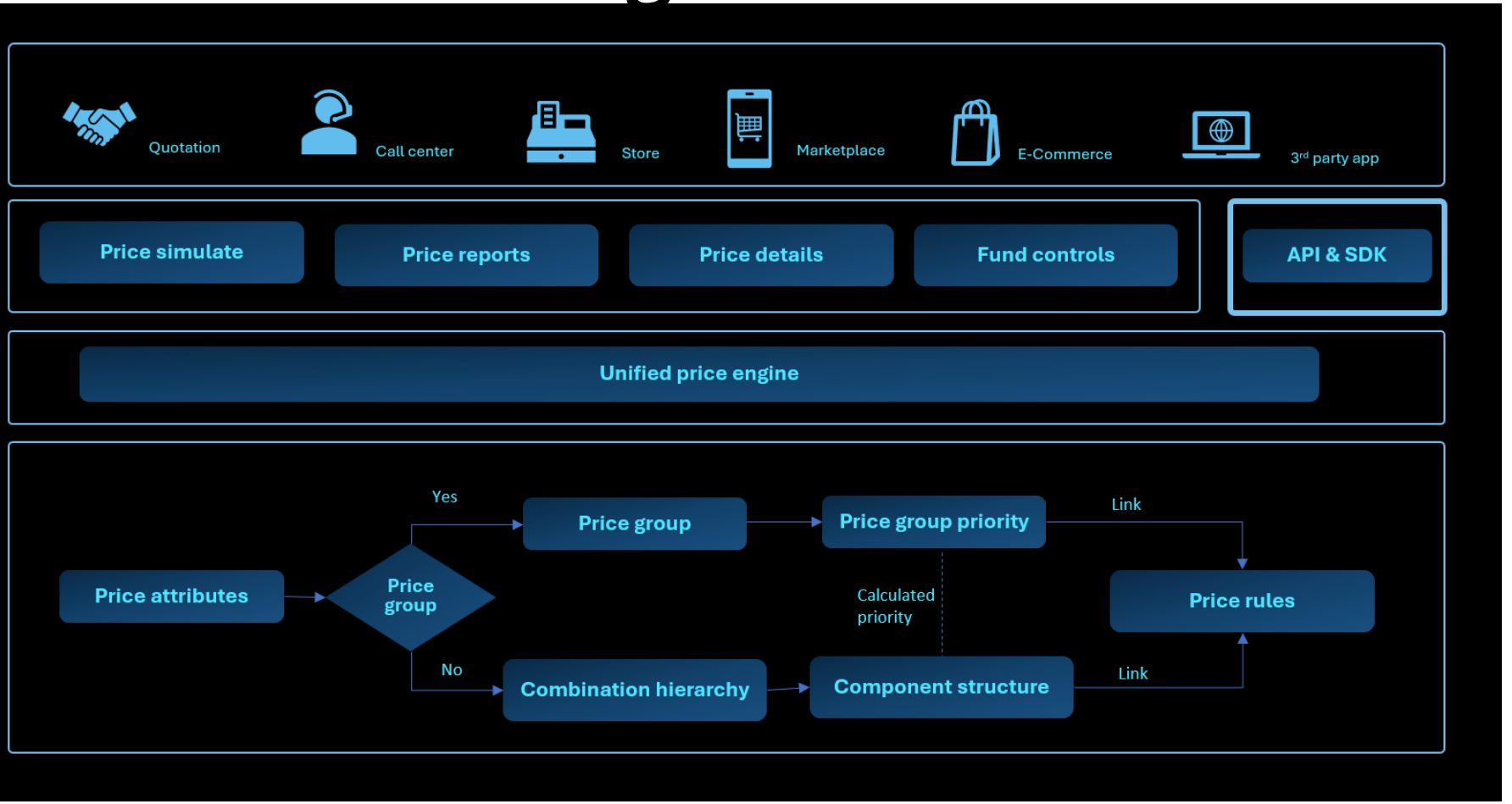
WMS/Inventory Management
- Update physical Inventory

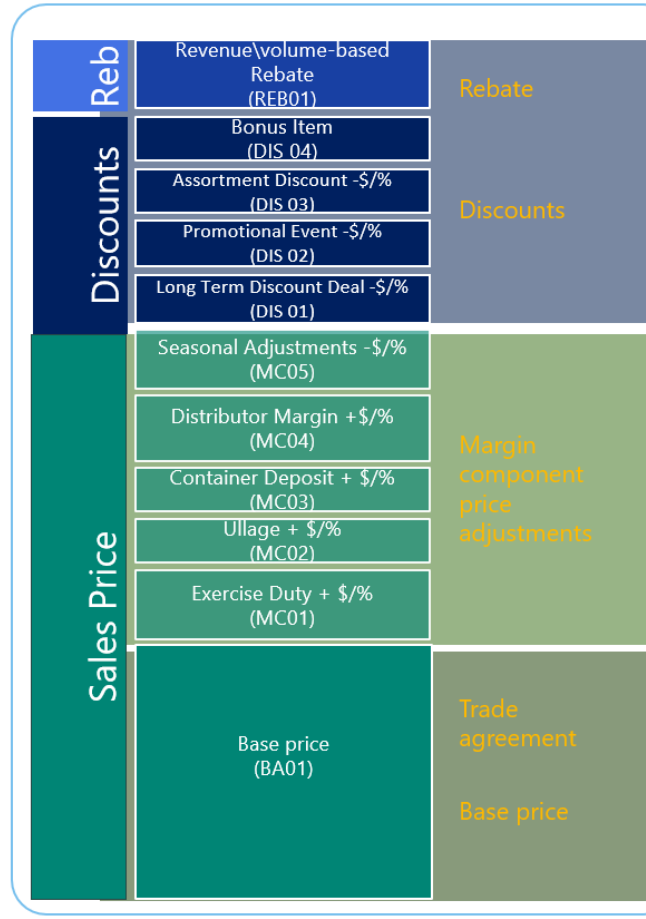
Omnichannel allocation plan

Inventory Visibility
- Validate stock availability
- Execute allocation

Plan to execute

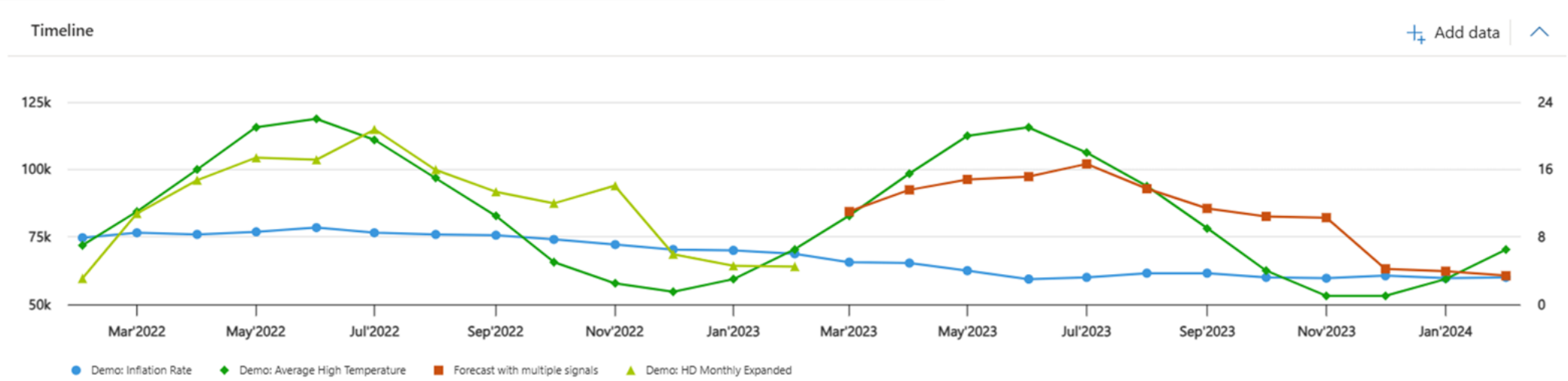
Unified Pricing across channels





What's New: 1. support customized attributes; 2. Generic Currency (10.0.47)

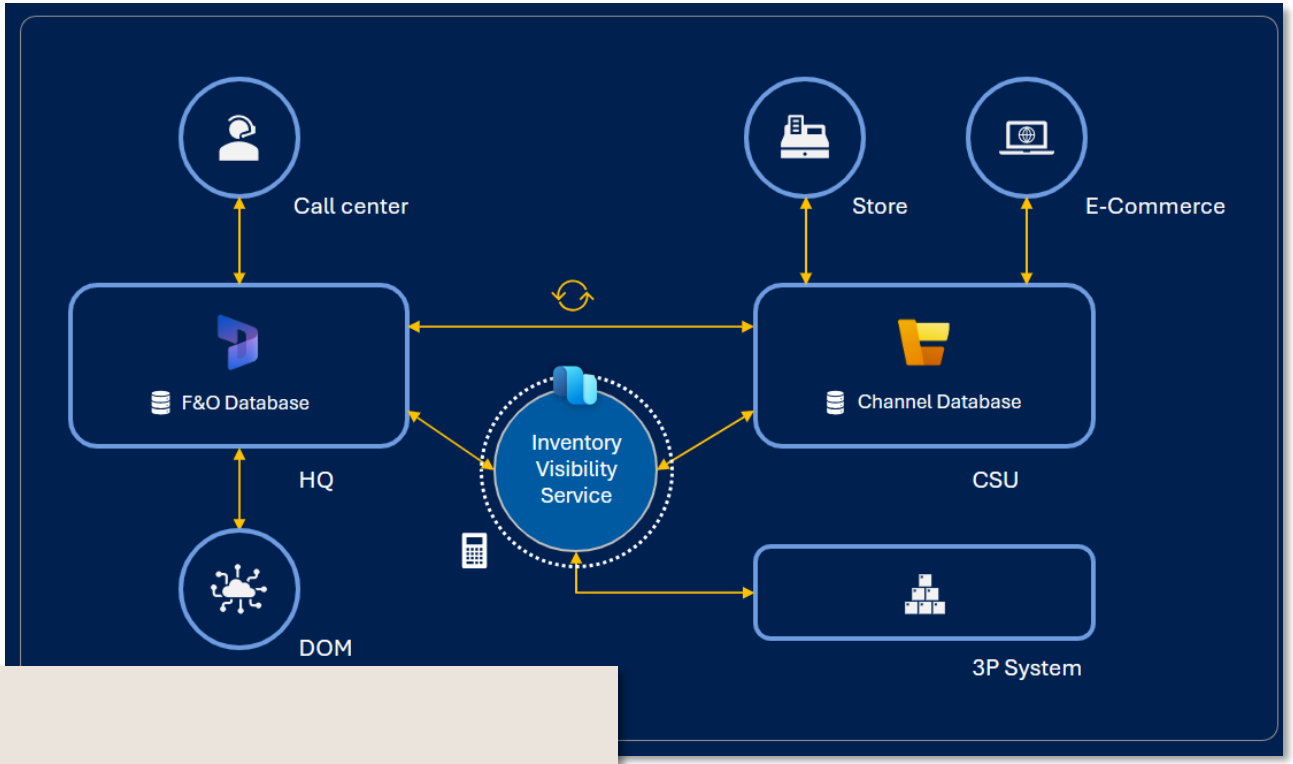
Forecast with multiple signals

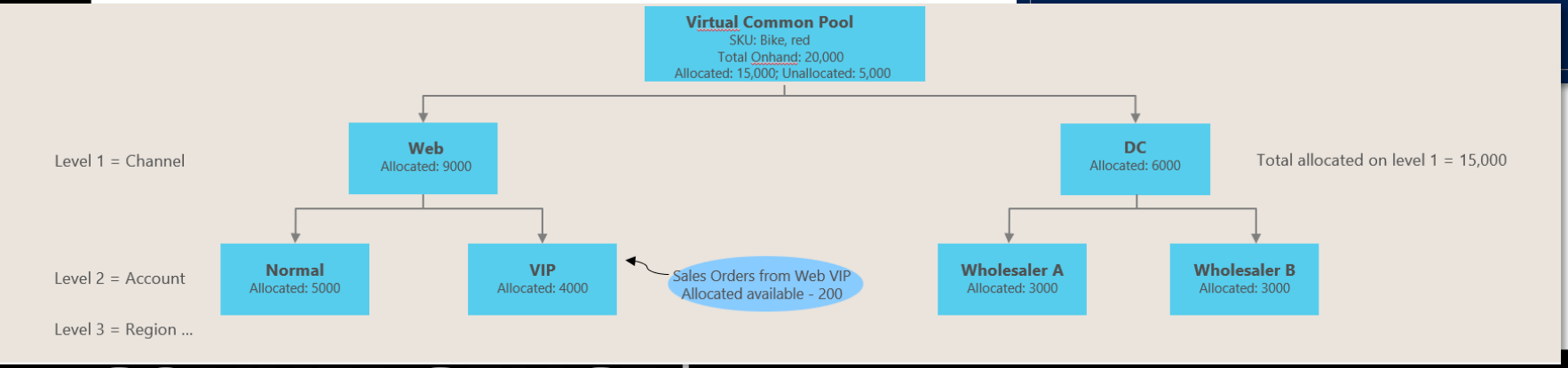


Real-time Inventory Visibility

For centralized real-time inventory tracking across all Dynamics 365 Commerce and SCM channels, legal entities and locations

What's New: Cross-legal entity support for inventory look-up (planned 2026 W1)

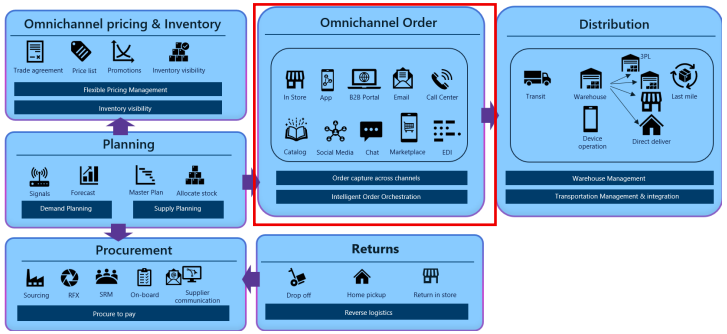




Order capture

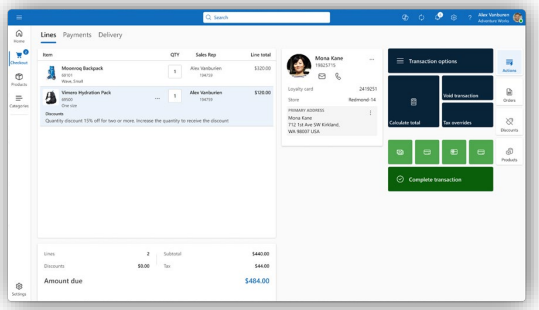
- Sell anywhere, Stay consistent

Order capture

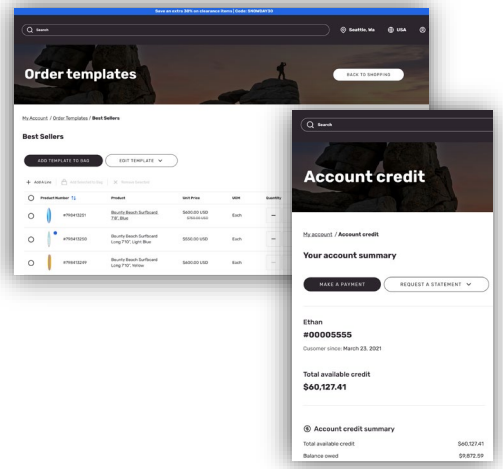


Dynamics 365 Commerce empowers businesses to take orders from **any channel with unified business logic**. It ensures **consistent pricing, promotions, and validation rules** across touchpoints, delivering a seamless omnichannel experience.

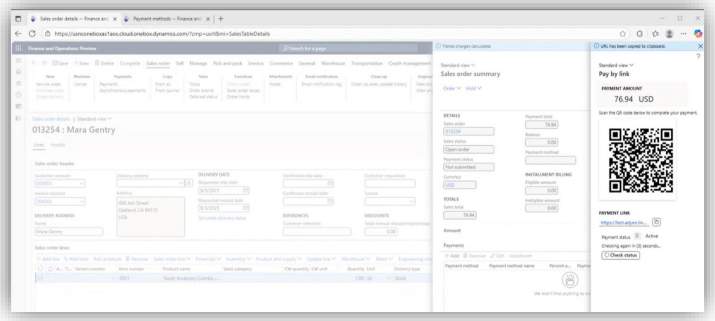
Point of Sale



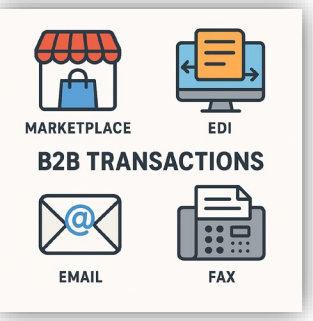
B2B e-commerce portal



Call center for order entry & edit



Headless & Agentic



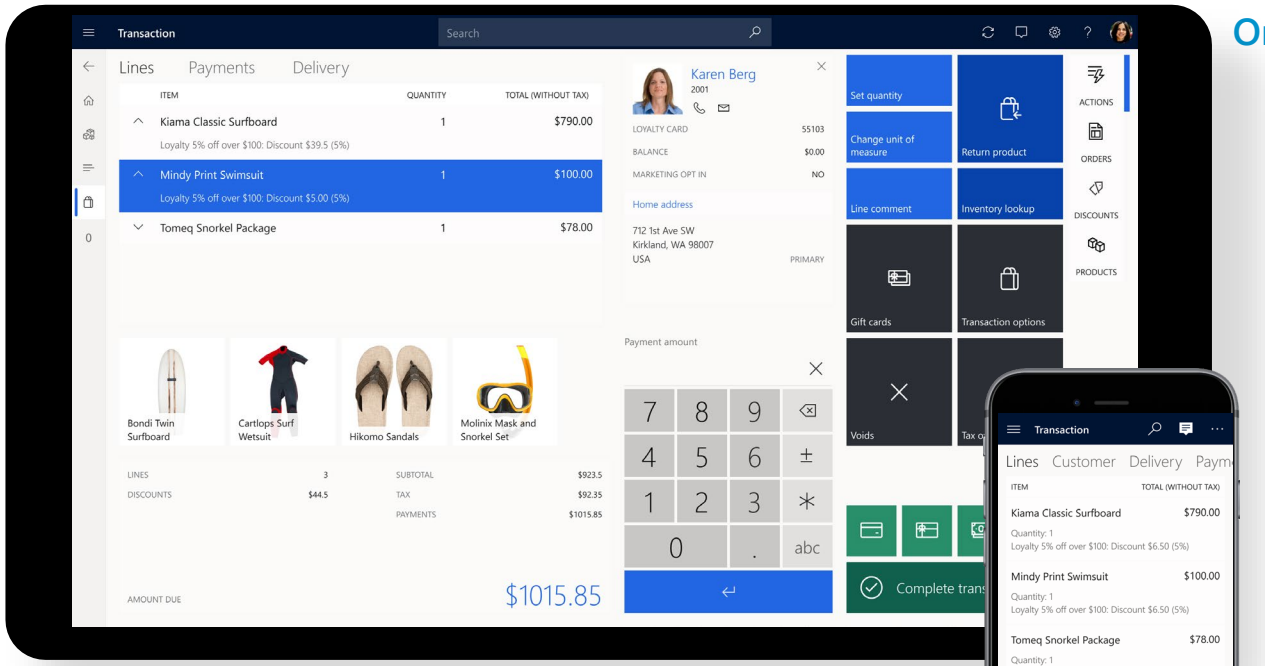
Point of Sale

Cross-platform & Offline

- Windows, iOS, Android, Web
- PCs, tablets, phones
- Offline resiliency across platforms
- Modern React based UI
- SoftPOS
- Self-checkout kiosks

Product search & Adv. Pricing

- Product attributes-based search
- Inventory visibility across stores & warehouses
- Attributes based pricing e.g., price by customer, item, brand, custom attributes
- Configure all commonly used promotions
- Margin visibility



Customer management

- Advanced customer search
- Quick customer creation & modification
- Credit balance checks and account payments
- Invoice payments & auto settlement

Order management & Operations

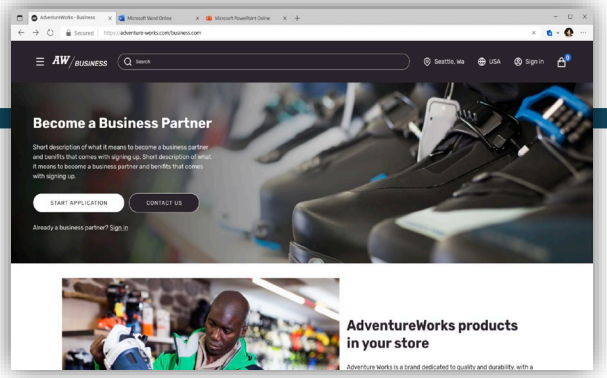
- AI assisted selling
- Place orders from current or other stores/warehouses
- Hybrid ordering (carryout and ship)
- Support for modern payments (cards, wallets, payment links, on credit, etc.)
- Store fulfillment (pick, pack, ship)
- Cross channel returns
- Inventory operations (count, receive, adjust and transfer)

Deep link to other applications[1]

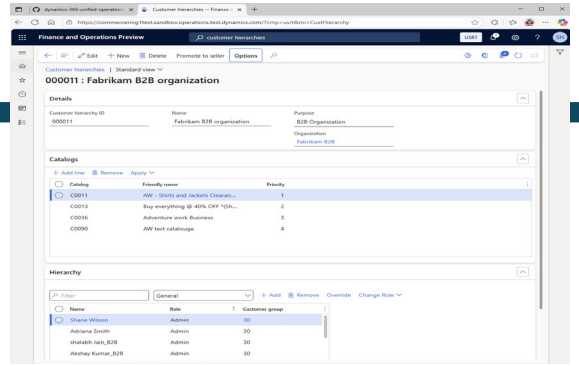
- Integrate POS into any business process
- Leverage PowerApps for building custom experiences within POS

[1] In active development

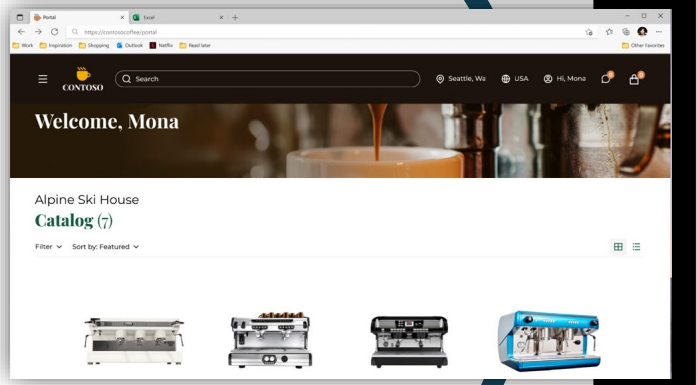
B2B e-commerce portal



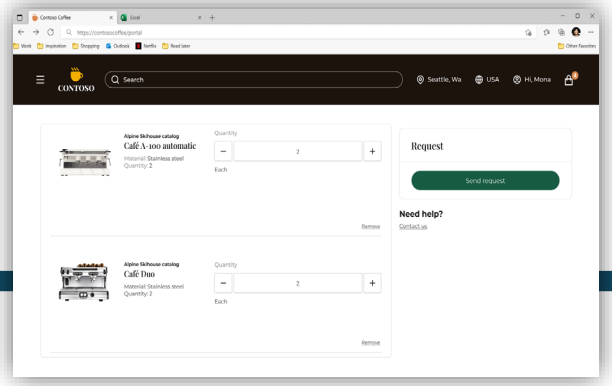
1 Capture leads with business partner applications on the B2B portal



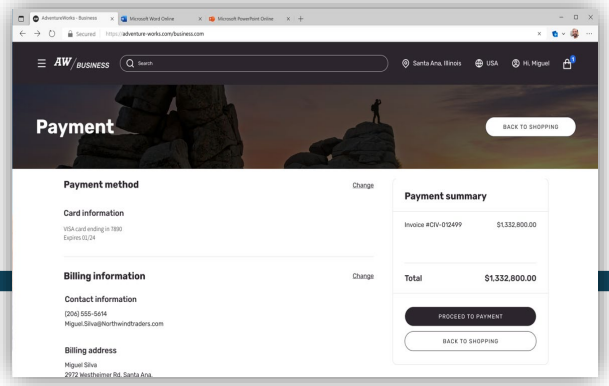
2 Qualify, and onboard the business accounts



3 Optimize with targeted customer specific catalogs and contract pricing



4 Fast ordering in bulk by buyers or account managers (on behalf of buyers)

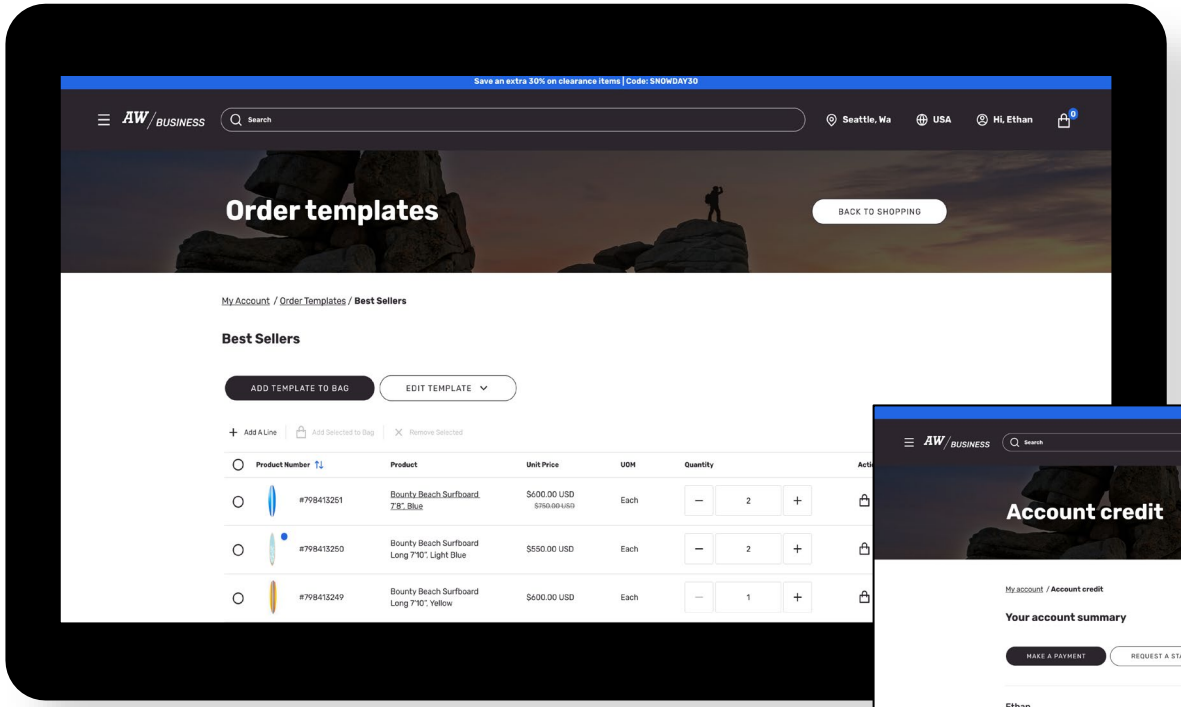


5 Collect payment (order or invoice)

B2B e-commerce portal

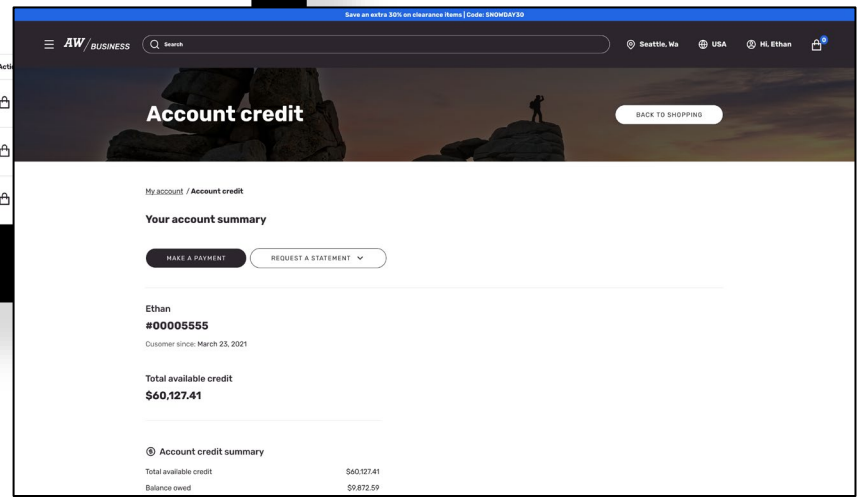
Quick ordering

- Order by SKU
- Matrix ordering view
- Reusable order templates
- Easy re-orders
- On Behalf of Ordering
- Upload order by CSV*
- Return order*
- Request for quotation*
- Punchout*



Account management

- Account on boarding
- User management
- Order history and statements
- Invoice payments
- Credit limits and adjustments



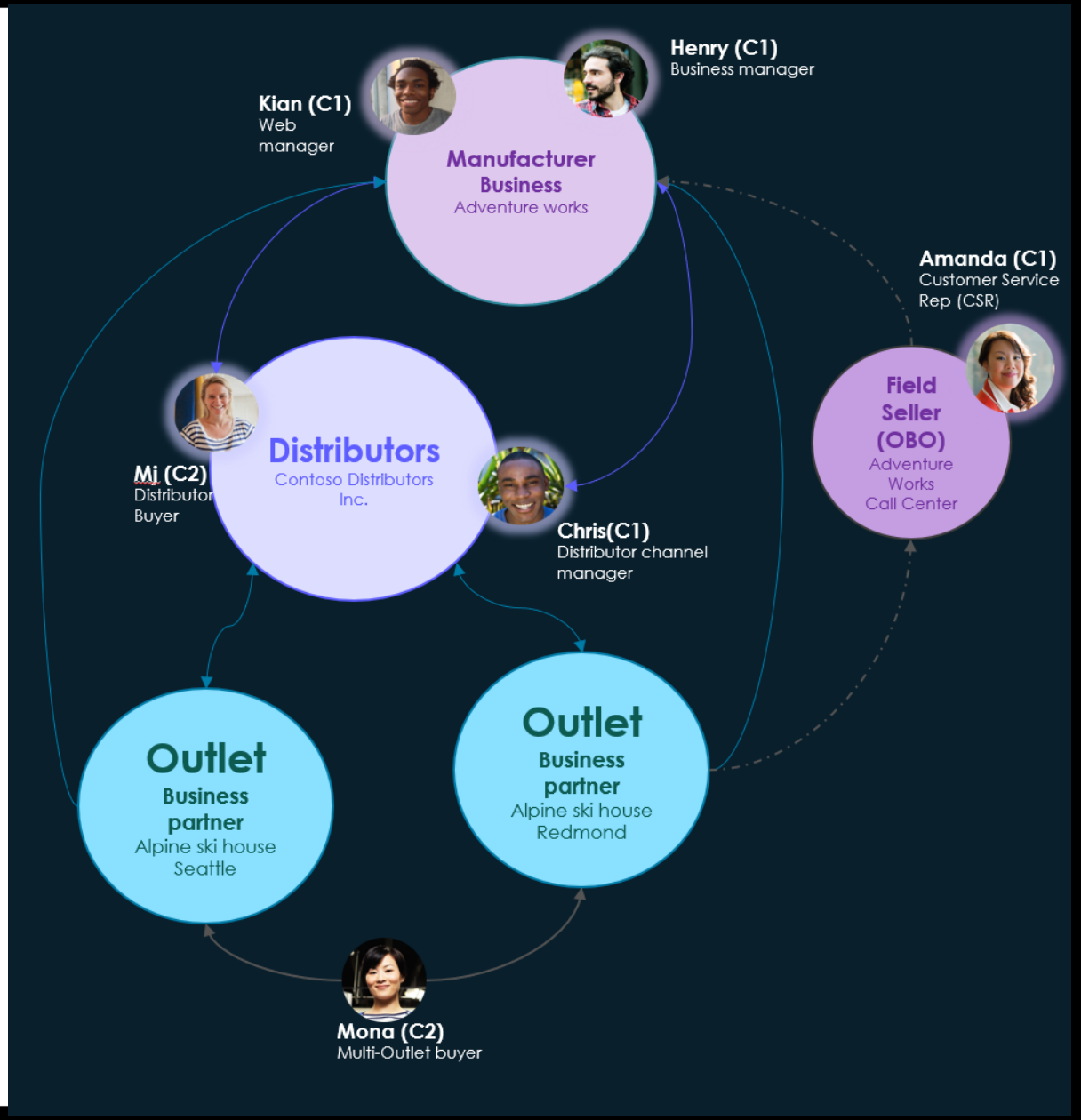
Catalogs and pricing

- Copilot generated product descriptions
- Customer specific catalogs
- Contract pricing
- Catalog download*

* Enabled via B2B accelerator

Indirect selling on e-commerce (B2B2B)

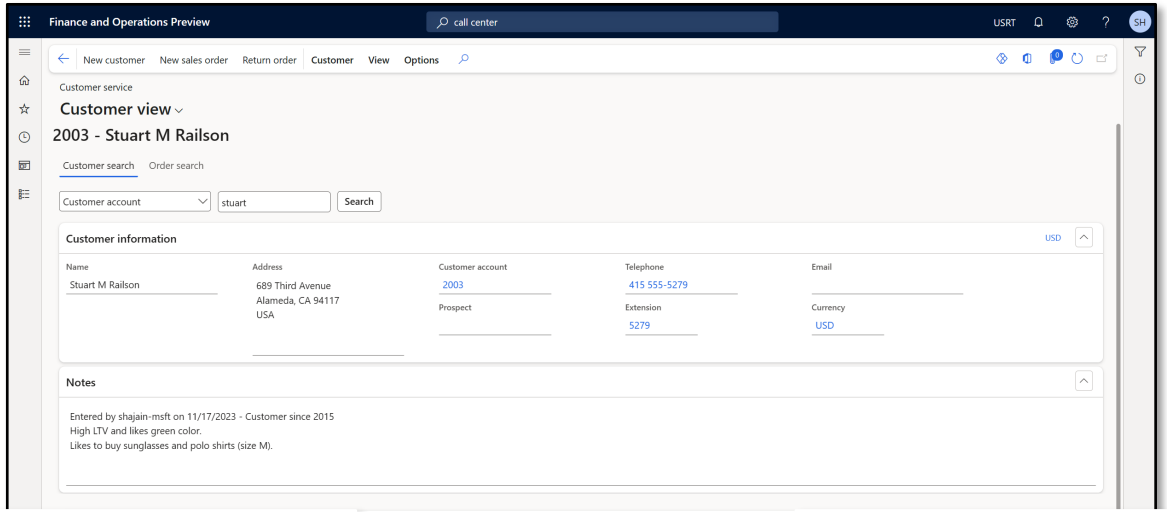
- Indirect selling models can be a valuable tool for CPG manufacturers looking to reach a **wider audience**, **save money**, **improve customer service**, and **grow their business**
- Multi-outlet support enables a buyer to order for multiple outlets **without managing multiple user accounts**

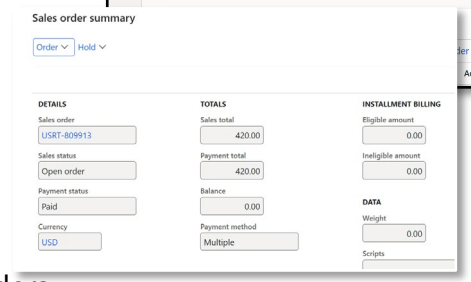


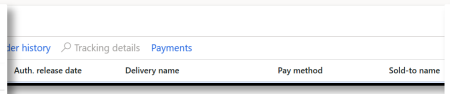
Call center for order capture & edit

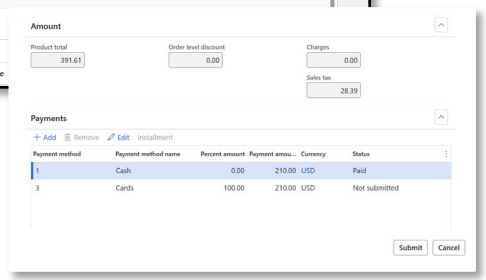
Omnichannel Order Management

- Unified view of all orders across all channels
- Create orders (regular, direct delivery, intercompany)
- Return & Replacement orders
- Edit & Cancel orders
- Price matching & Order credit









Call center payments

- Capture payments for orders
- Enforce full or partial payments
- Support for modern payment methods
- Reserve orders with payment links
- Enable fraud checking for orders

Continuity & Future orders

- Ability to create recurring orders
- Capture recurring order payments automatically
- Future orders with automatic inventory reservation & delayed payment capture

Catalog based pricing

- Ability to take orders based on catalog ID
- Ability to perform analysis on catalog performance

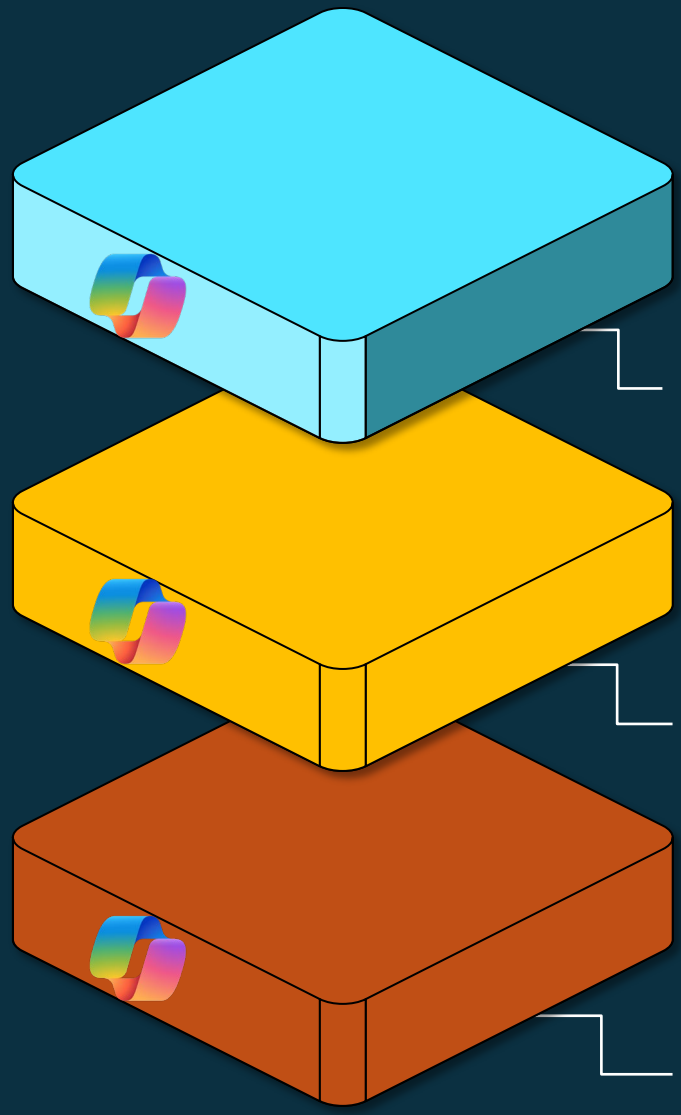
Recency, Frequency & Monetary analysis

- Evaluate data generated by customer purchases

Microsoft Confidential: Content is shared under NDA

Headless commerce

- Dividing front-end and back-end aspects of a Commerce platform offers greater adaptability and authority over their customers' shopping experiences
- With Copilot available across all the components of Commerce boosts employee productivity enables agentic ordering

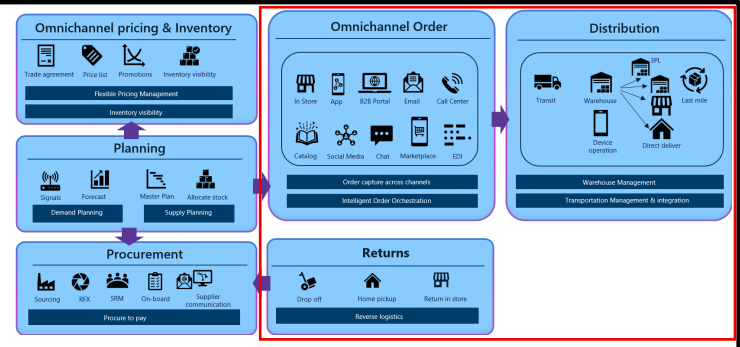



VanArsdel
Brewing Co.
0:01 / 3:29
1x

Order orchestration & fulfillment

- Streamline fulfillment without delay

Channel agnostic order promising



Unified Pricing
- Pricing rules
- Promotion rules

signal

Demand Planning
- Forecast inventory level
- Forecast on promotion

Supply Planning
- Planned production
- Planned procurement

WMS/Inventory Management
- Update physical Inventory

- SO creation
- DOM fulfillment
- Soft to hard reservation

Release to WMS
- Pick/pack/ship

Omnichannel allocation plan

Inventory Visibility
- Validate stock availability
- Execute allocation

Order promising with allocated availability

Soft reserve/Consume allocated inventory per channel

Reallocate

Plan to execute

Order to Cash

Complex fulfillment Strategy via DOM

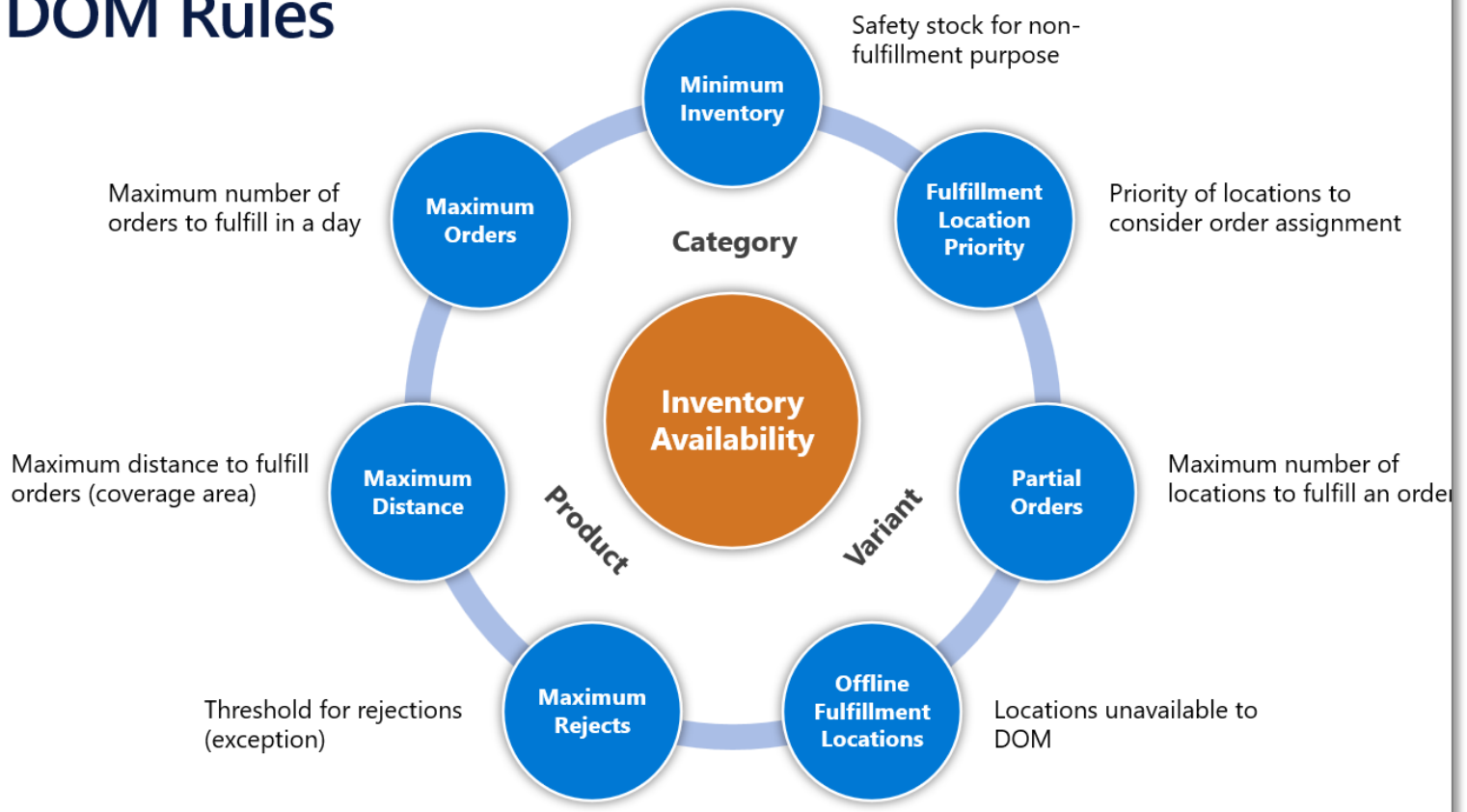
Fulfillment Profile

Cost factors
Optimization objectives
(distance, costs)

Conditions
Optimization scopes
(order, location)

Rules
Business constraints

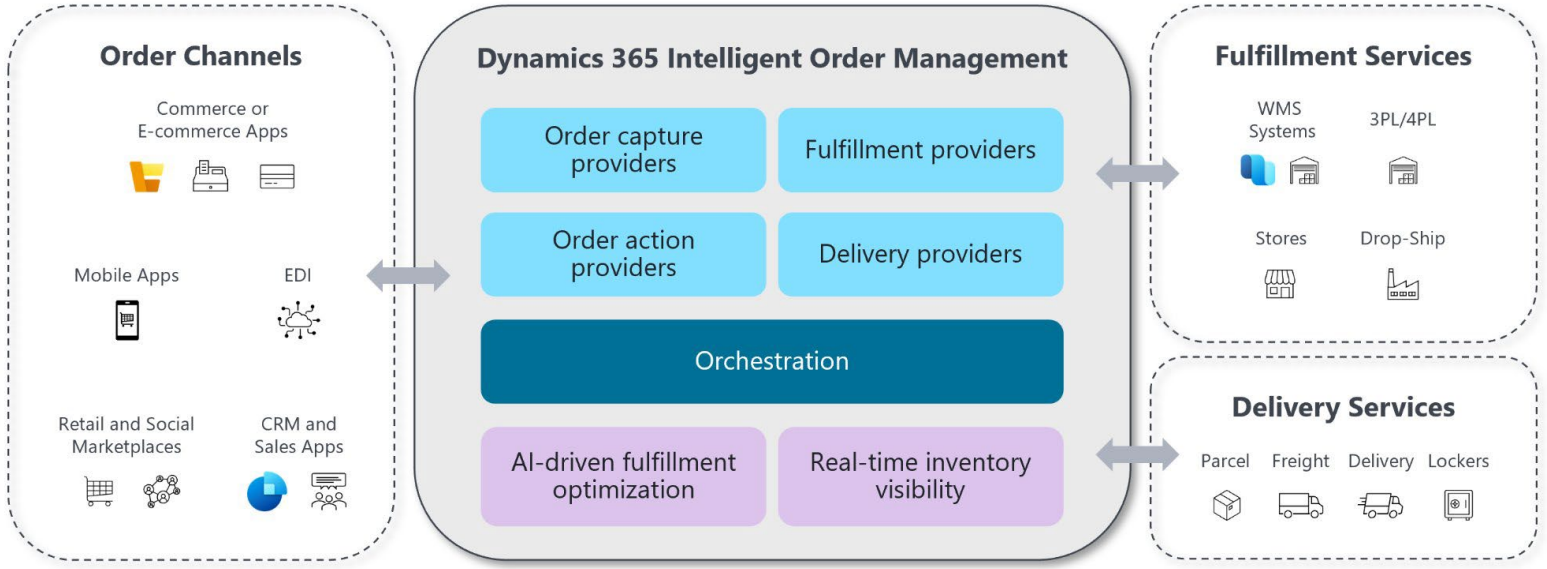
DOM Rules



Omnichannel order orchestration and fulfillment via IOM

- Channel agnostic order ingestion
  - via APIs, events, and Power Automate and custom connectors across 1st and 3rd party platforms
- Orchestration
  - Automate and optimize order journeys with event-driven flows and drag-and-drop design
- Fulfillment optimization
  - Deliver right quantities of an item from the right source at the right time
- Inventory visibility
  - Ensure optimal fulfillment decisions made on real-time stock levels across the channels

What's New: Enterprise readiness for Intelligent Order Management



Intelligent Inventory fulfillment via MCP

Real-time inventory intelligence for on-the-fly fulfillment decisions

Omnichannel Sales Inquiries

- Store Commerce app
- Call center/other SO
- Copilot/Teams Chat
- 3rd Party agent/email

Instant validation

- Soft Reserve
- Check product, Check onhand stock
- Check price

Alternative fulfillment

- ATP for next available date same store
- Transfer/Direct delivery from other store/warehouse
- Propose substitute

Ordering

- Create transfer order
- Create sales order (attach soft reservation ID/attach discount)
- Calculate expected delivery schedule

Pick/Pack/Ship

- Warehouse operations
- Offsets IVS

Process payment,invoice

- Make payment
- Post invoice


CONVERGENCE | AI+ ERP
QUESTIONS
Sponsored By Microsoft
Hosted By DYNAMICS USER GROUP

CONVERGENCE | AI + ERP

THANK YOU

Shalabh Jain
Principle Product Manager

Yufei Huang
Senior Product Manager on Microsoft AI ERP, Dynamics 365 Supply Chain Management a...

Sponsored By Microsoft

Hosted By DYNAMICS USER GROUP