CONVERGENCE | AI + ERP

MIAMI | 2025

The Partner Opportunity for AI Experiences in Dynamics 365 ERP

Sponsored By Microsoft

Hosted By DYNAMICS USER GROUP

Agenda

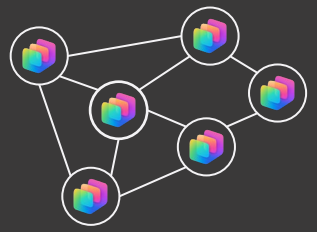
- What to build
- How to build it
- How to deploy and maintain it

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

Our Agent Ecosystem is expanding

1st party

Outcome-focused 1st party agents

3rd party

Partners building agents on MCP

Custom

Custom agents enabled with Copilot Studio

Finding quantifiable value

Language

Natural language understanding and generation

Unstructured data

Converting unstructured data to structured data

Reasoning

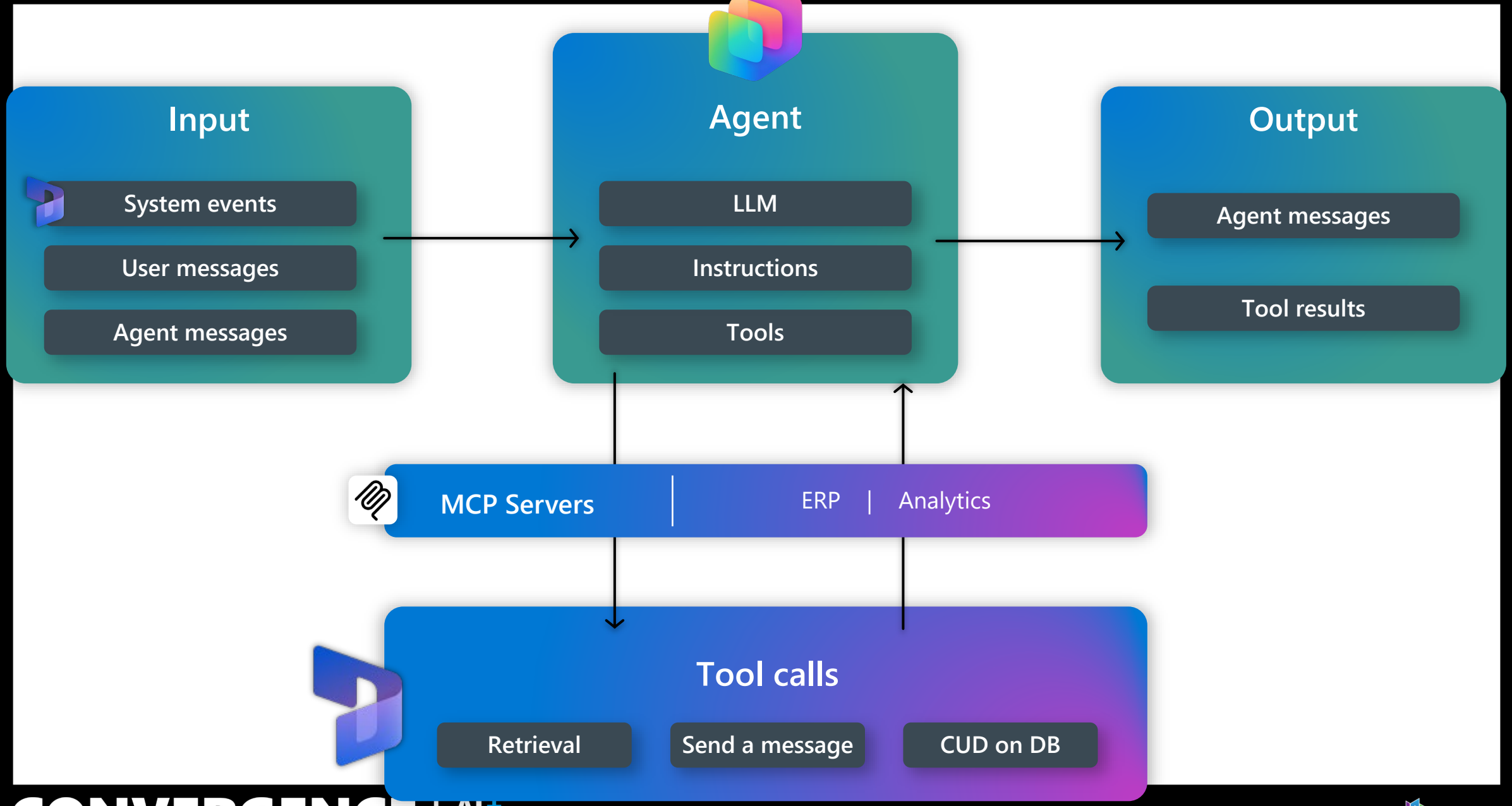
Reasoning and problem solving – with tools and context

Automation

Agentic behavior and task automation

Model Context Protocol

An open protocol that standardizes how applications provide context to LLMs


Input
System events
User messages
Agent messages
Agent
LLM
Instructions
Tools
Output
Agent messages
Tool results
MCP Servers
ERP | Analytics
Tool calls
Retrieval
Send a message
CUD on DB

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

May 2025 release

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Actions

From static to dynamic ERP

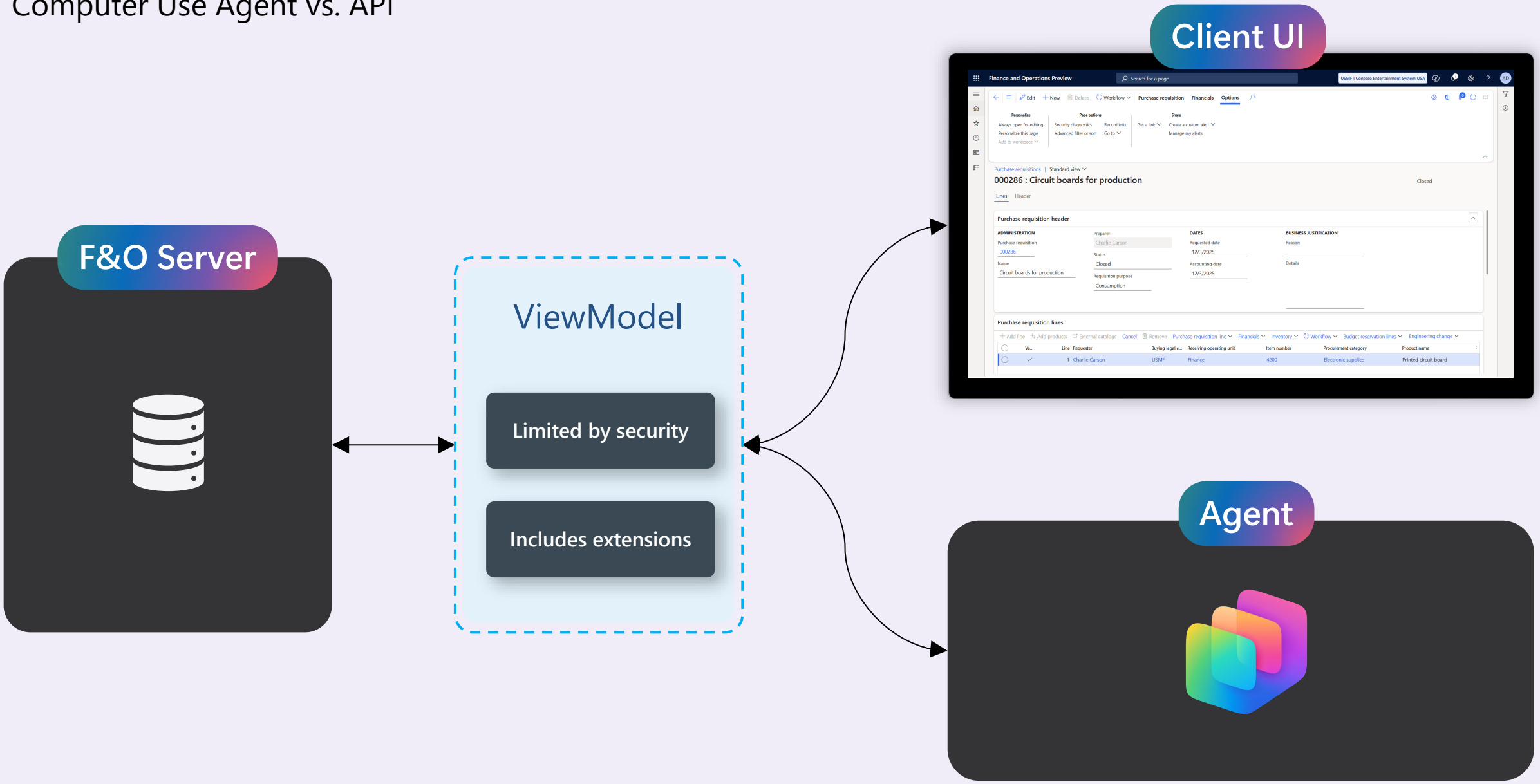
Now

500,000+

Actions

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

Computer Use Agent vs. API



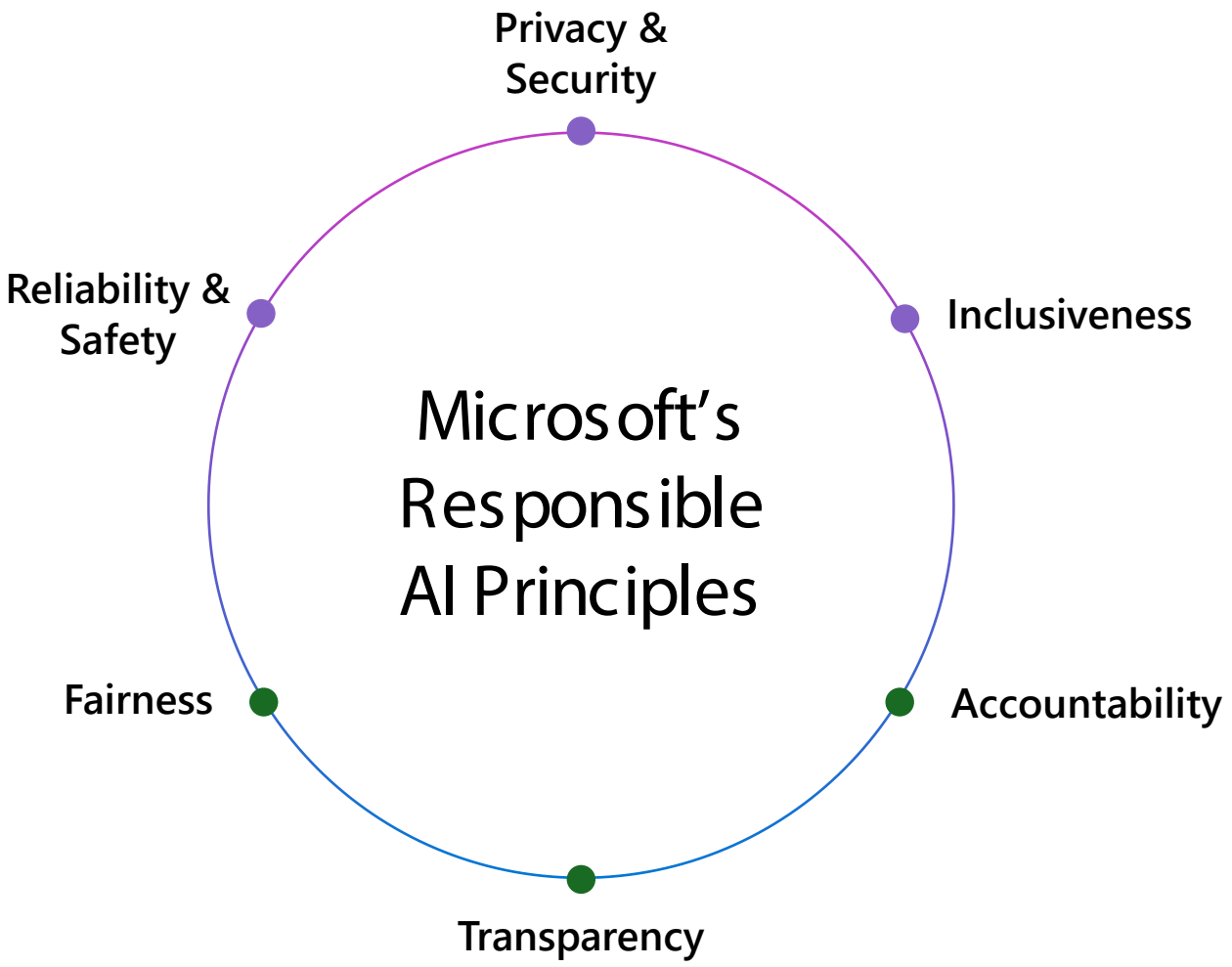
Demo

Building agents for Dynamics 365 ERP

Security

MCP supports enterprise-grade authentication and authorization

All tools/operations secured by F&O security configuration


Privacy & Security
Inclusiveness
Accountability
Transparency
Fairness
Reliability & Safety
Microsoft's Responsible AI Principles

Reliability and Safety

A system is reliable and safe when it works as intended for its supported uses, under diverse conditions, over its lifetime, and under attack by adversaries.

How we build generative AI systems

We use a multi-layered approach to manage and mitigate risks for generative AI systems across the AI development lifecycle

Govern

Roles and responsibilities
Documented processes
Culture of risk management

Map

Impact assessment
Red teaming
Privacy and security reviews

Measure

Metrics for testing
Analysis of test results

Manage

User agency
Human oversight
Transparency
Ongoing monitoring

Impact Assessment

1

Project overview

System profile and system lifecycle stage

System description, purpose and features

Geographic areas, languages and deployment mode

Intended uses

2

Intended uses

Assessment of fitness for purpose

Stakeholders, potential benefits & potential harms

Stakeholders for Goal-driven requirements

Fairness considerations

Technology readiness assessment, task complexity, role of humans, and deployment environment complexity

3

Adverse impacts

Restricted Uses

Unsupported uses

Known limitations

Potential impact of failure on stakeholders

Sensitive Uses

4

Data requirements

Data requirements

Pre-defined data sets

5

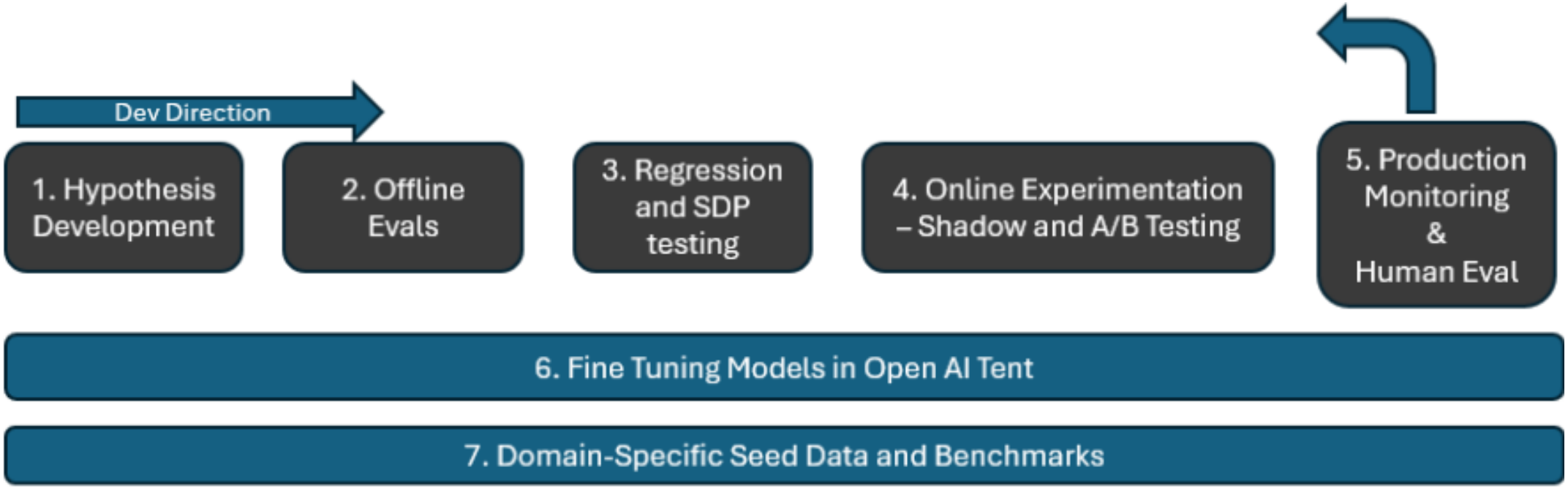
Summary of impact

Potential harms and preliminary mitigations

Goal applicability

Signing off on the Impact Assessment

Science Flow



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QUESTIONS

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THANK YOU

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