



Business Applications Day

La era de la IA y Copilot en ERP

Madrid, Jueves 28 de noviembre





Bienvenida



Juan Chinchilla
Director de Aplicaciones de negocio
Microsoft España

AYÚDANOS A CALCULAR NUESTRA HUELLA DE CARBONO

Tiempo medio de respuesta: 1 minuto!!!



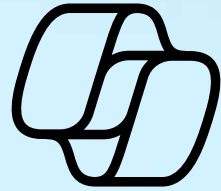
Agenda

- 9h:30 **Registro de Asistentes**
- 10h:00 **Apertura y Bienvenida**
Juan Chinchilla. Director de Aplicaciones de Negocio, Microsoft España
- 10h:05 **Keynote: La nueva era de la IA en los ERPs**
Diego Arteaga. Sales Manager - Business Applications, Microsoft España
- 10h:30 **Modern Finance: Finanzas inteligentes para el futuro**
Ana Cantero. Technology Specialist Dynamics 365, Microsoft España
- 11h:00 **Coffee Networking**
- 11h:30 **Optimización de la cadena de suministros con IA**
Ana Cantero. Technology Specialist Dynamics 365, Microsoft España
- 12h:00 **Gestión eficiente de proyectos: Mejorando la productividad**
Aida Antón. Digital Technical Specialist, Microsoft España
- 12h:30 **Commerce: La revolución digital en el comercio**
Aida Antón. Digital Technical Specialist, Microsoft España
- 13h:00 **Debate y preguntas**
- 13h:15 **Extra Bonus – Voluntario. Migración de On premise al Cloud: Cómo dar el salto a la nube**
Ana Cantero. Technology Specialist Dynamics 365, Microsoft España
Aida Antón. Digital Technical Specialist, Microsoft España
Juan Miguel Hernández Arquero. Cloud Solution Architect, Microsoft España
- 14h:00 **Despedida y Cierre**

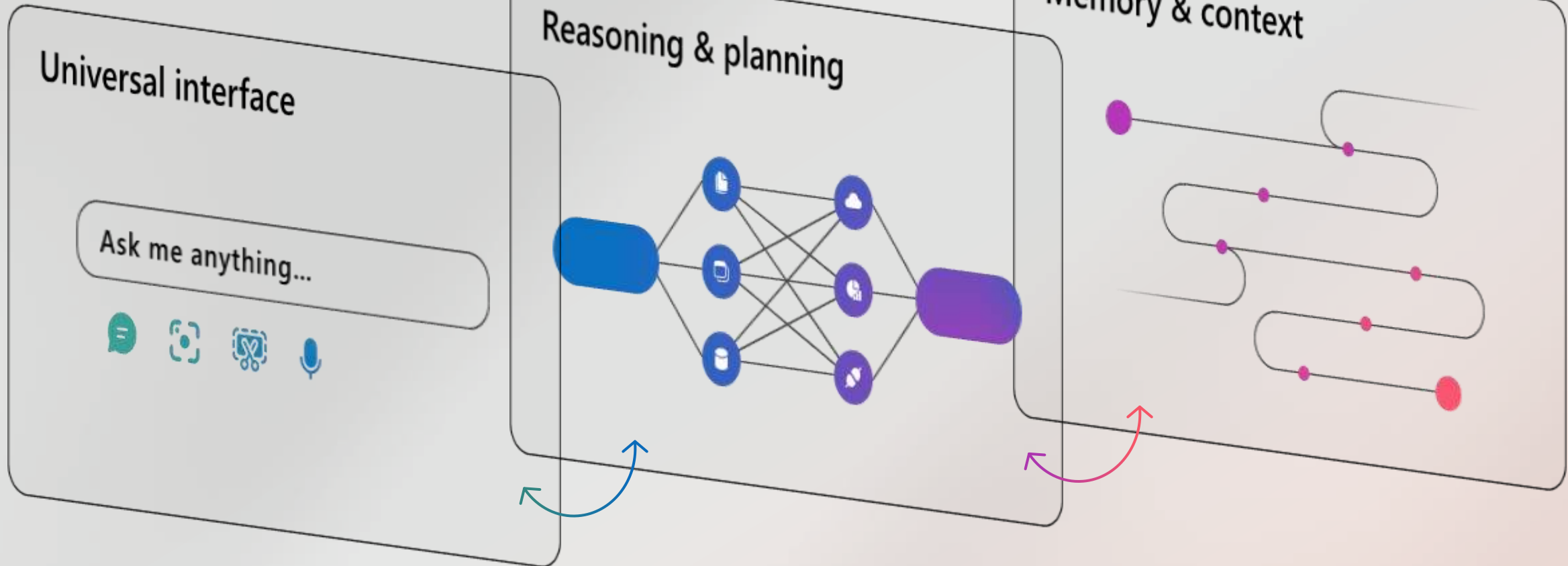
Keynote: La nueva era de la IA en los ERPs

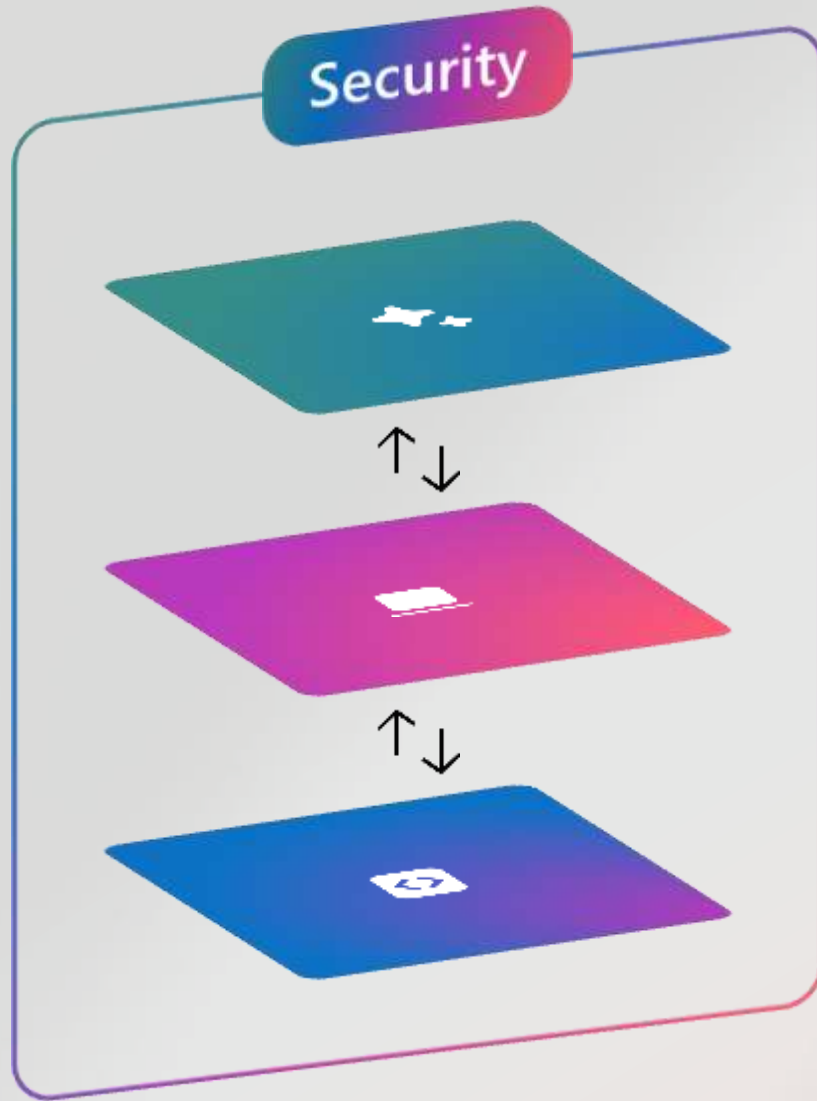


Diego Arteaga
Sales Manager - Business Applications
Microsoft España



Copilot is the UI for AI



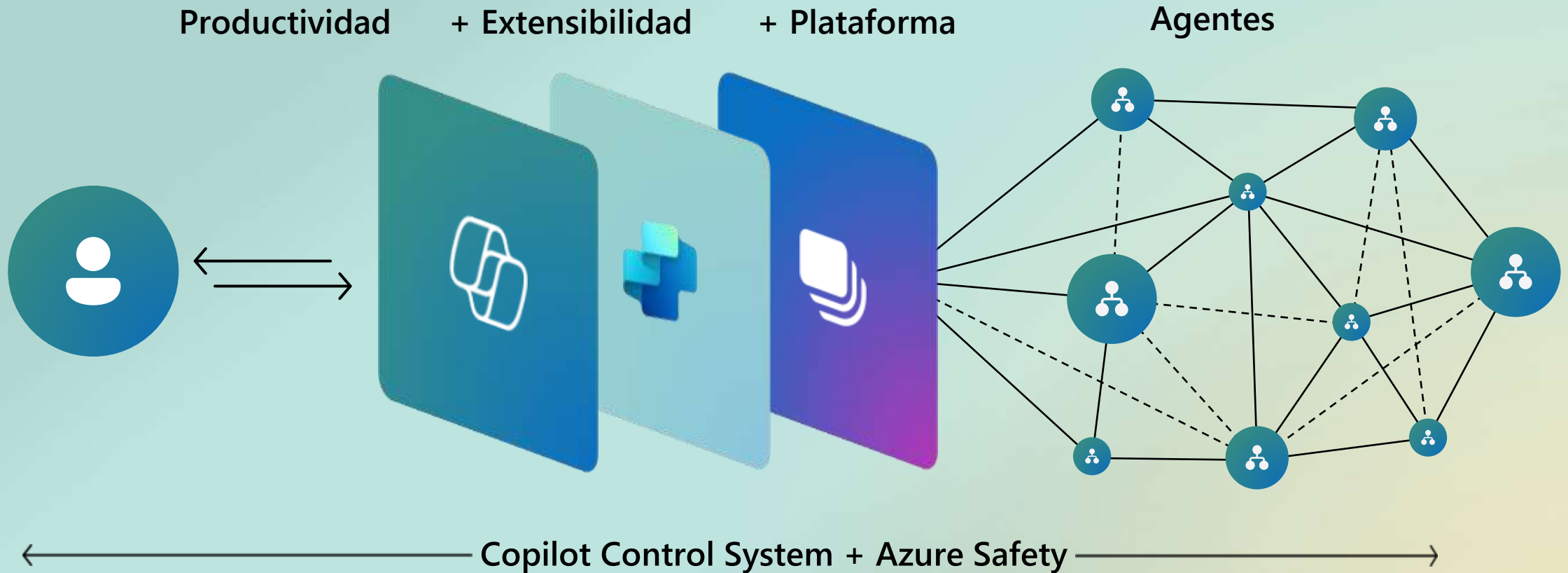


Copilot

Copilot devices

Copilot & AI stack

Copilot is the UI for AI



Building an agentic world



Personal
agents



Organizational
agents

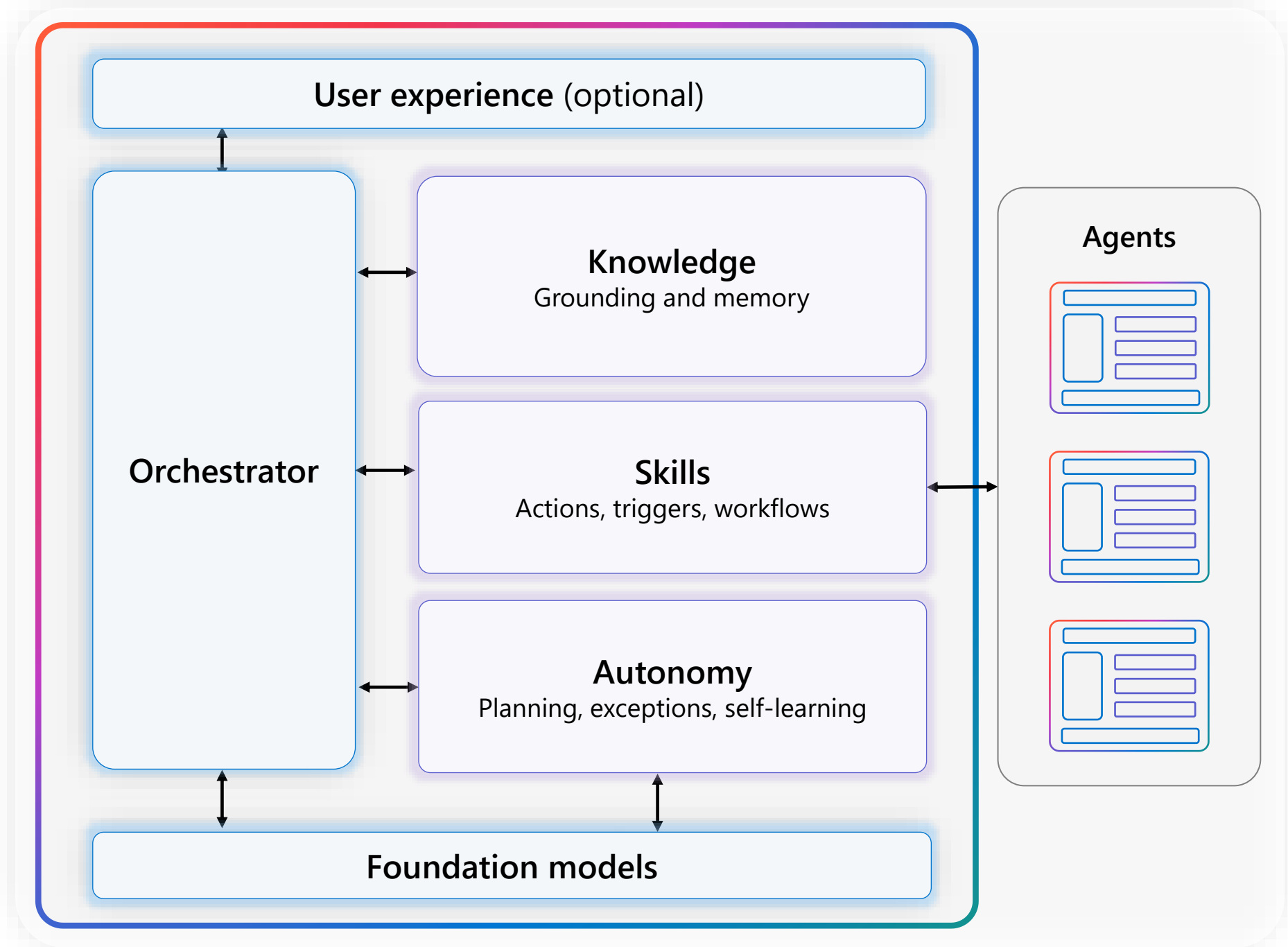


Business process
agents

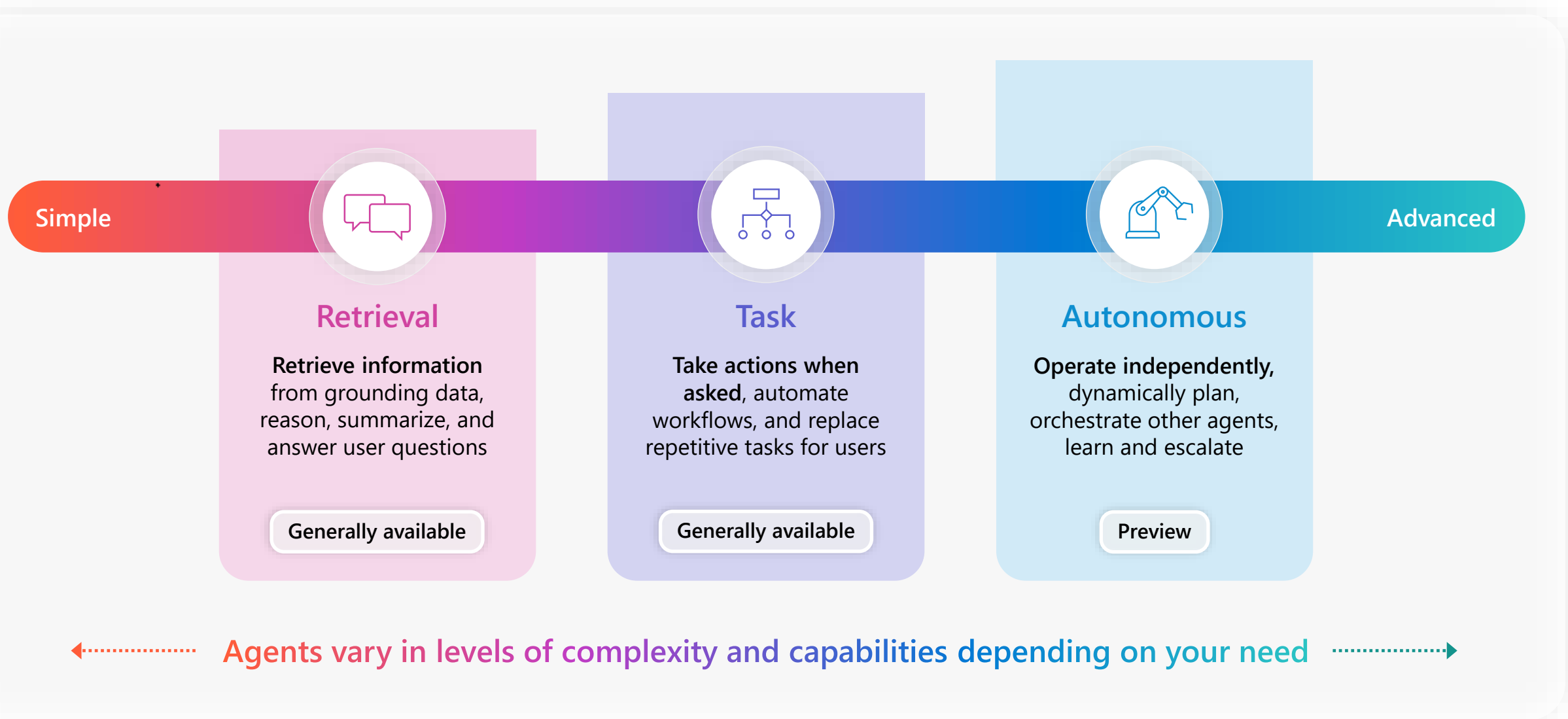


Cross-org
agents

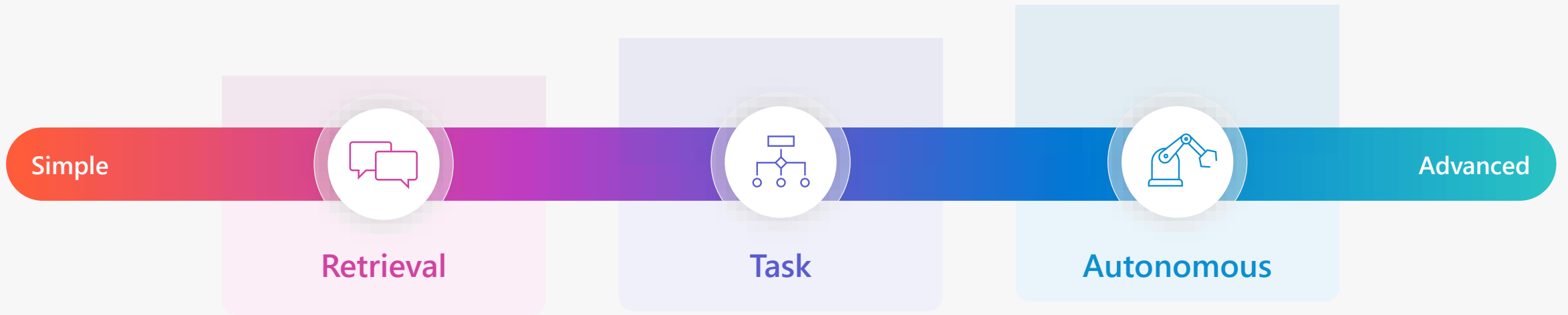
Copilot + Agents



Spectrum of agents



Begin your AI transformation



2 Empower

- Empower users with a new technology
- Enable every function and department

1 Modernize

- Apply new technology to an existing problem
- Optimize existing business processes

3 Innovate

- Apply new technology to new problems
- Unlock new business value





Modern Finance:

Finanzas inteligentes para el futuro



Ana Cantero
Technology Specialist Dynamics 365
Microsoft España

Finance Portfolio

Capability view

Business Performance Planning, Business Performance Analytics, Business Performance Insights

Procure to Pay	Quote to Cash	Record to Report	Plan to Perform	Acquire to Retire
Accounts Payable	Accounts Receivable	General Ledger	Business performance planning	Purchase requisitions
Vendor Management	Credit and Collections	Cash & Bank Management	Business performance analytics	Asset tracking
Configurable E-Invoice and Payments	Configurable E-Invoice and Payments	Financial close	Enterprise policies & rules	Depreciation and amortization
Invoice capture and workflow (OCR)	Subscription billing and revenue recognition	Consolidations and reporting	Receipt capture (OCR)	Multi-GAAP reporting
Core Financials, and Globalization Studio (Tax, localization, Regulatory Reporting and Compliance, Regulatory Discovery & Alerting Service)				



Copilot for Finance



Copilot in Dynamics 365



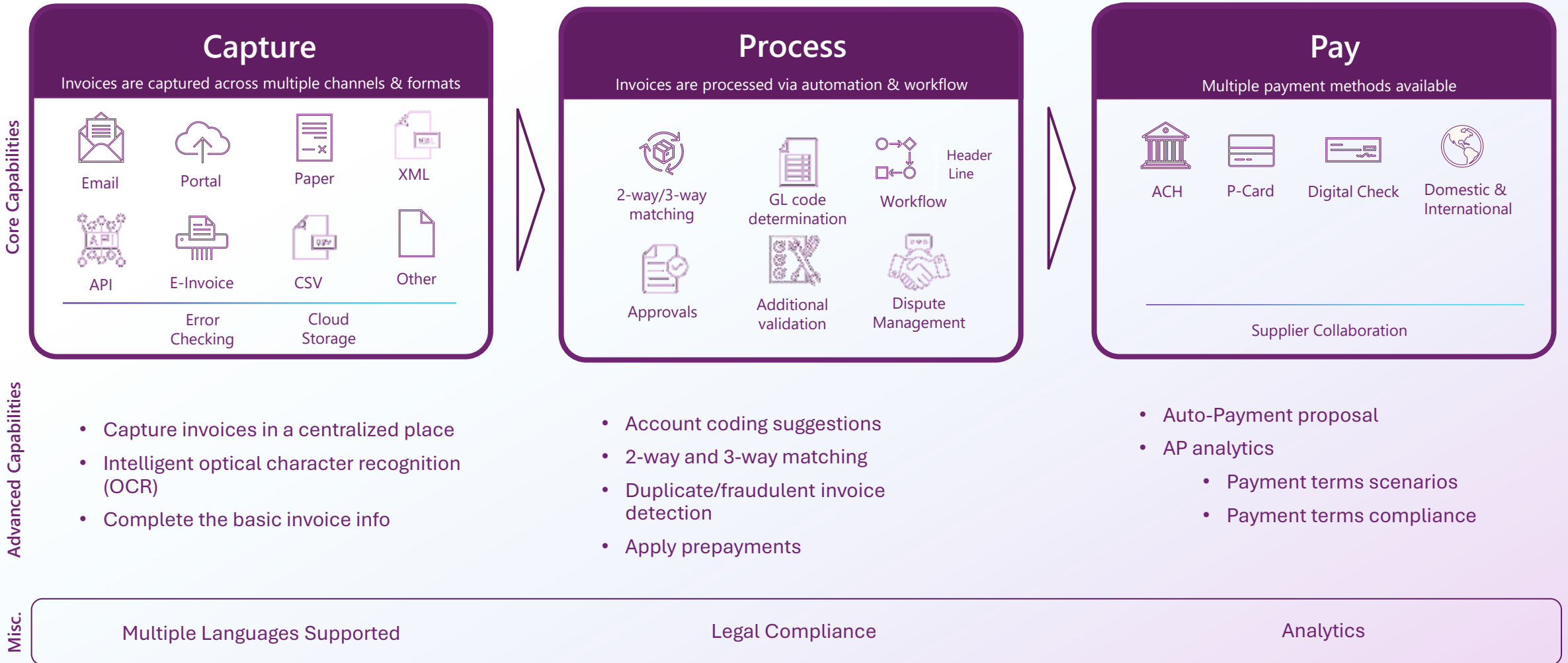
Copilot Studio

Extend

MICROSOFT CLOUD	Connectors & Common Data Framework	Copilot	Collaboration	Security	AI & Analytics	Low-Code Agility	Sustainability
	 Dataverse, Azure Synapse, Azure Data & AI		 Microsoft 365 & Teams	 Microsoft Security	 Power BI	 Power Apps, Power Automate & Power Pages	 Cloud for Sustainability

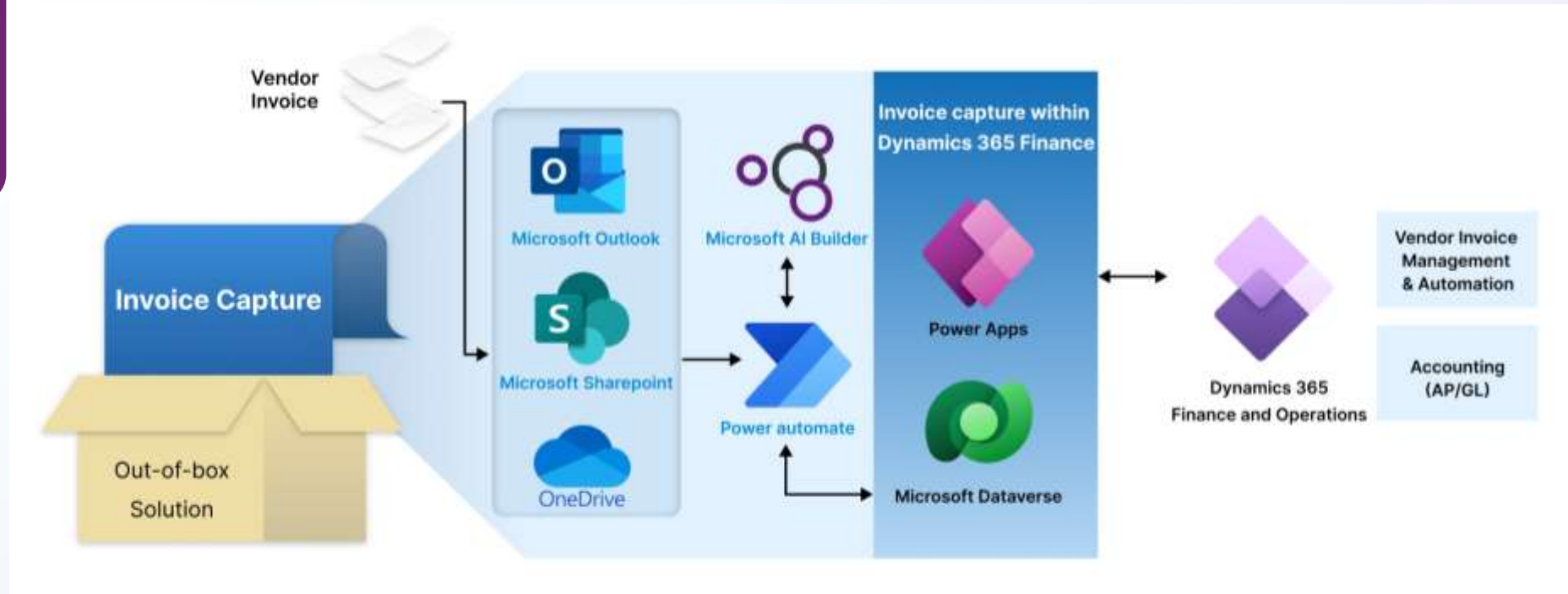
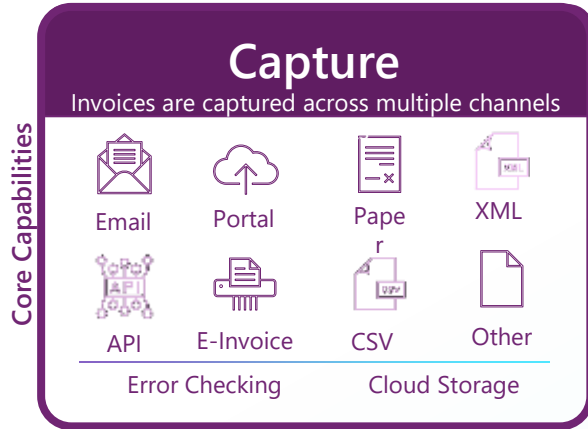
Procure to Pay

Overview & Vision



Procure to Pay

Overview & Vision



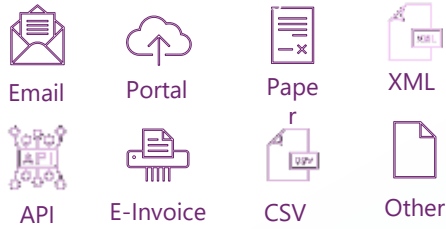
Procure to Pay

Overview & Vision

Core Capabilities

Capture

Invoices are captured across multiple channels



Error Checking

Cloud Storage

The screenshot displays the 'Invoice capture' interface in Dynamics 365 Finance. The main view shows a captured invoice for 'Fabrikam Electronics' with invoice number 0000200. The interface includes a navigation pane on the left, a central invoice preview, and a 'Messages' panel on the right. The invoice details include the vendor name, address, and invoice date. The 'Invoice Lines' table lists items such as 'Mikungipower', 'Cabinet', 'Stromnetzgerät', and 'Highendkabel' with their respective quantities and prices. The total amount is 18,267.40.

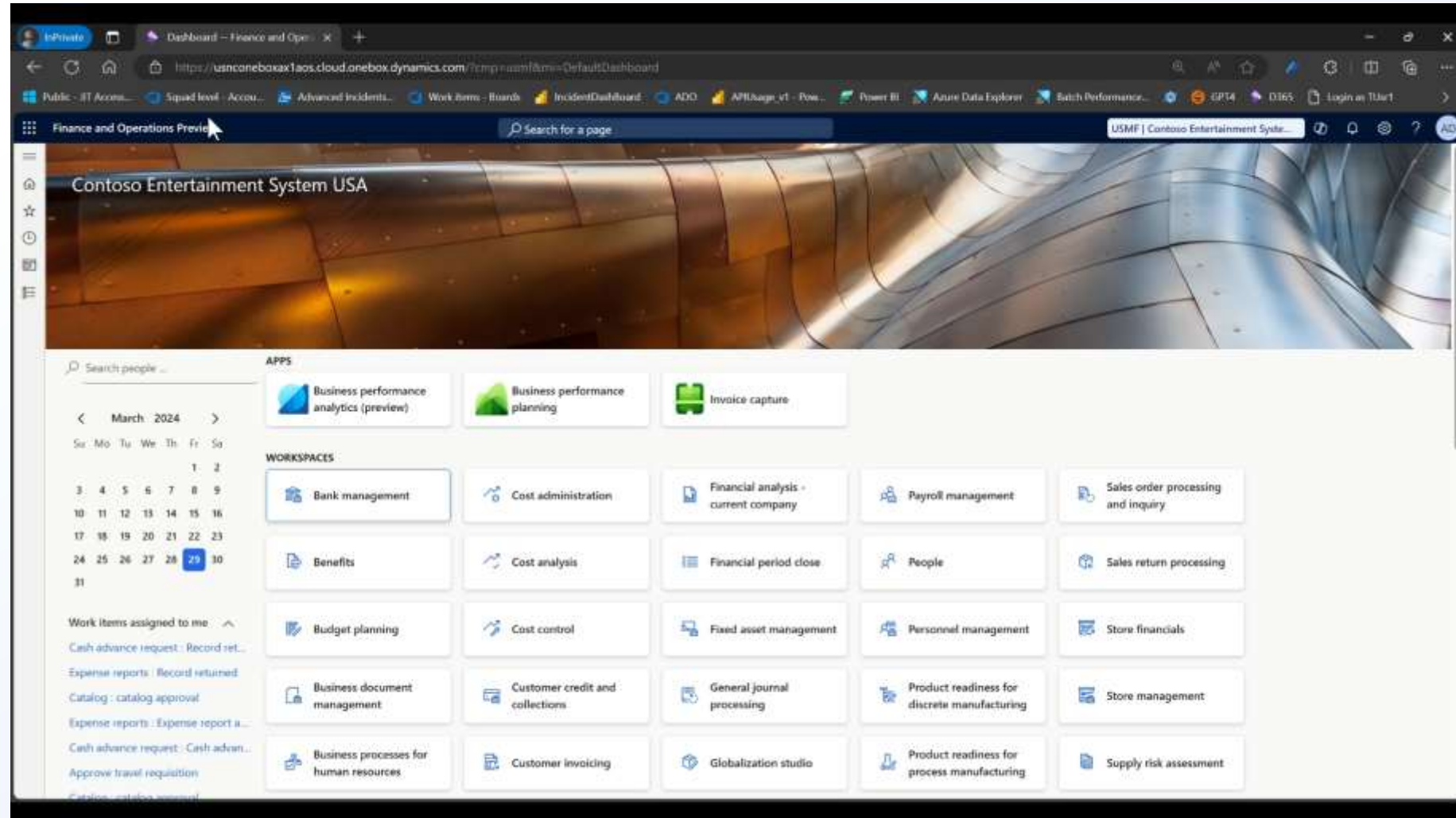
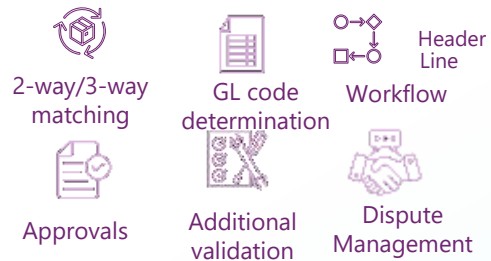
Line ID	DESCRIPTION	QTY	UNIT PRICE	TOTAL
1	Mikungipower	10	302.70	3027.00
2	Cabinet	20	145.40	2908.00
3	Stromnetzgerät	10	145.40	1454.00
4	Highendkabel	10	1068.77	10687.70

Procure to Pay

Overview & Vision

Process

Invoices are processed via automation &



Procure to Pay

Overview & Vision

Pay

Multiple payment methods available

ACH P-Card Digital Check Domestic & International

Supplier Collaboration

The screenshot shows the Dynamics 365 Supply Chain Management interface for Vendor payments. The dashboard includes a summary section with several key metrics:

Metric	Value
New vendor pay run	46
Vendor pay run - not posted	4
Vendor pay run - not posted, assigned to me	0
Electronic payments sent, need bank confirmation	0
Summarized payments	317
Invoices past due	84
All vendors	1
Vendors on hold	1

Below the summary, there is a section for Process automations, showing a list of Vendor payment proposals with their status (COMPLETED or ERROR) and a 'View results' button for each.

Finance Portfolio

Capability view

Business Performance Planning, Business Performance Analytics, Business Performance Insights



 Copilot for Finance

 Copilot in Dynamics 365

 Copilot Studio

Extend



Finance Insights - Customer Payment Predictions

Finance

🔔 ⚙️ ? 👤

TRANSACTIONS PREDICTED TO BE PAID LATE

Late probability
▼

Customer account	Name	On time probability	Invoice	Voucher	Transaction type	Date	Due date	Description	Amount in transaction cur
US-001	Contoso Retail San Diego	27% ●	INV000901	CIV-000129	Sales order	6/1/2021	7/1/2021	Comment	26,000.00
US-001	Contoso Retail San Diego	21% ●	INV000904	CIV-000130	Sales order	6/12/2021	7/12/2021	Comment	1,000.00
US-001	Contoso Retail San Diego	18% ●	INV000905	CIV-000110	Sales order	6/10/2021	7/10/2021	Comment	32,000.00
US-003	Forest Wholesales	8% ●	180000045	000077	Project	5/27/2021	6/25/2021	Comment	67,800.00
US-003	Forest Wholesales	34% ●	INV000906	CIV-000016	Sales order	5/22/2021	7/1/2021	Comment	1,000.00
US-004	Cave Wholesales	29% ●	180000094	000085	Project	6/5/2021	7/20/2021	Comment	1,000.00
US-008	Sparrow Retail	15% ●	180000089	000081	Project	5/21/2021	6/21/2021	Comment	3,100.00
US-008	Sparrow Retail	27% ●	180000088	000080	Project	6/5/2021	7/20/2021	Comment	2,000.00
US-008	Sparrow Retail	14% ●	180000080	000079	Project	6/5/2021	8/19/2021	Comment	2,000.00
US-008	Sparrow Retail	25% ●	180000114	000110	Project	6/5/2021	7/19/2021	Comment	2,000.00
US-008	Sparrow Retail	48% ●	180000119	000117	Project	6/5/2021	8/10/2021	Comment	2,000.00
US-008	Sparrow Retail	26% ●	INV1000003	CIV-000020	Sales order	6/5/2021	7/19/2021	Comment	2,000.00
US-008	Sparrow Retail	21% ●	INV000012	CIV-000036	Sales order	6/5/2021	7/19/2021	Comment	2,000.00
US-008	Sparrow Retail	17% ●	INV1000007	CIV-000022	Sales order	6/5/2021	7/19/2021	Comment	2,000.00
US-009	Owl Wholesales	38% ●	INV1000405	CIV-000054	Sales order	5/18/2021	7/2/2021	Comment	2,000.00
US-010	Sunset Wholesales	40% ●	INV0000222	CIV-000031	Sales order	5/31/2021	7/4/2021	Comment	531,200.00
US-012	Contoso Retail New York	15% ●	INV1000086	CIV-000087	Sales order	6/11/2021	7/11/2021	Comment	25,000.00
US-012	Contoso Retail New York	48% ●	INV000062	CIV-000056	Sales order	5/22/2021	6/22/2021	Comment	1,000.00
US-015	Contoso Retail Chicago	41% ●	INV1000115	CIV-000016	Sales order	6/1/2021	7/1/2021	Comment	159,300.00
US-018	Contoso Retail Detroit	14% ●	INV0000189	CIV-000220	Sales order	6/10/2021	7/10/2021	Comment	31,800.00
US-020	Orchid Shopping	6% ●	INV1000140	CIV-000140	Sales order	6/1/2021	7/1/2021	Comment	104,000.00
US-022	Contoso Retail Virginia	25% ●	INV1000170	CIV-000170	Sales order	6/1/2021	7/1/2021	Comment	200,000.00
US-023	Shrike Retail	26% ●	INV0000157	CIV-000320	Sales order	6/3/2021	7/3/2021	Comment	1,000.00
US-023	Shrike Retail	2% ●	INV1000202	CIV-000203	Sales order	6/3/2021	7/3/2021	Comment	1,000.00
US-023	Shrike Retail	11% ●	INV0000189	CIV-000222	Sales order	6/3/2021	7/3/2021	Comment	1,000.00
US-023	Shrike Retail	39% ●	INV1000231	CIV-000232	Sales order	6/3/2021	7/3/2021	Comment	1,000.00

Related information

● The model predicts that this invoice will be paid late. The prediction is based on analysis of historical data.

27%
On time

40%
Late

33%
Very late

Balance (USD) 268.13

Top factors

- Amount
- Location
- Payment method

Prediction model performance: 79%

[About payment predictions](#)

Prediction model accuracy

80%

Last model run 12 min ago
Trained 2 days ago

[Improve accuracy](#)

Customer insights

- Open invoices: 34
- Late invoices: 32
- Cases: 3
- Activities: 3

Summary Metrics

- Average amount late: 13,450.33
- Average days late: 20
- Credit limit (USD): 500,000.00
- Amount due balance: 321.75
- Packing slip subtotal amount: 4,179.53
- Open order subtotal amount: 110.00
- Credit available: 495,388.72

Customer history

Last 3 months: 18 invoices

142k

● On time ● Late ● Very late

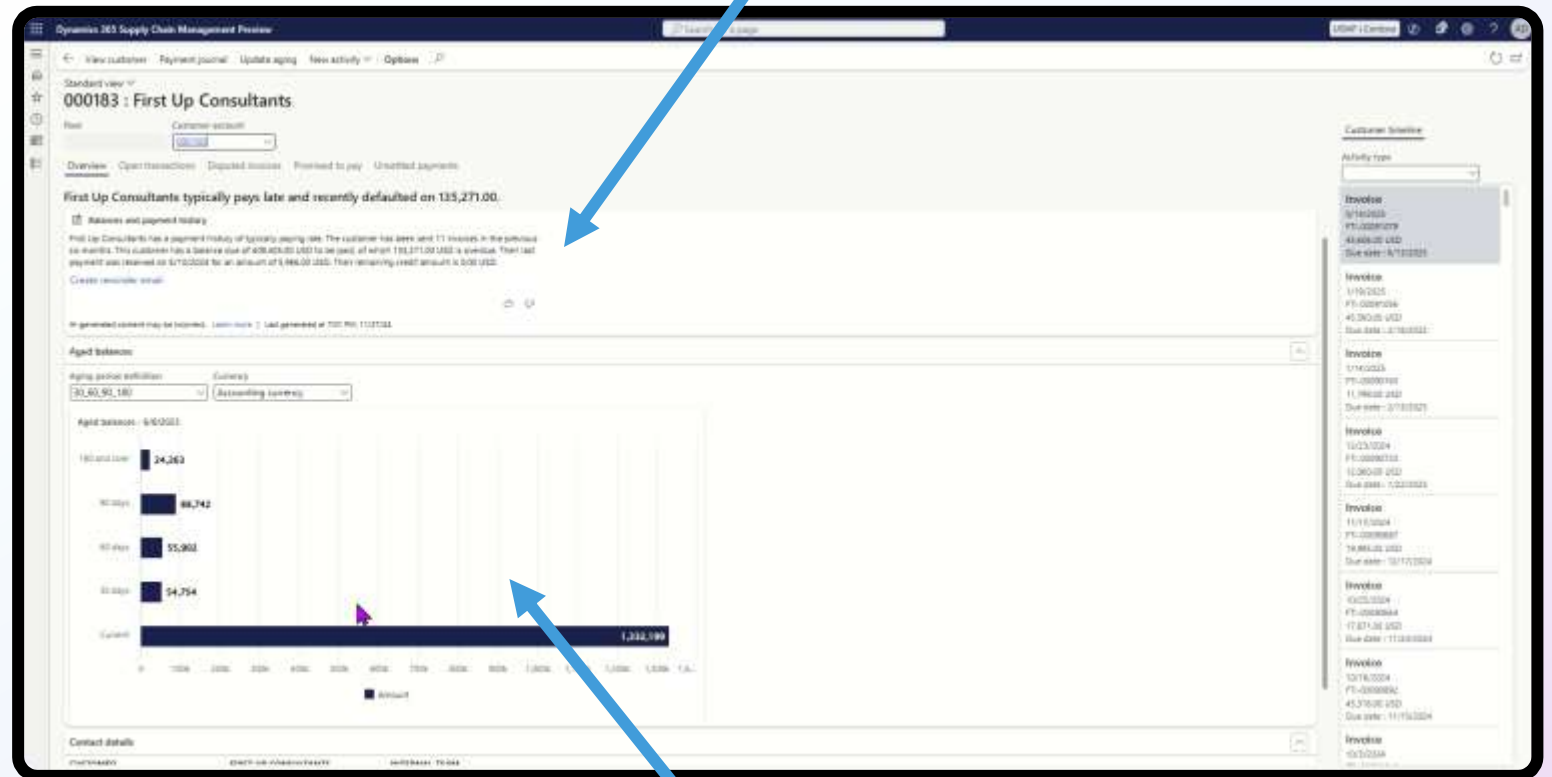
Largest amount paid on time: 24,535.00

Copilot-powered collections management

Improve collections management with the collections coordinator workspace, which consolidates critical data into a single view

Reduce time spent manually preparing data and emailing customers about outstanding payments with Copilot-generated collections letters

Copilot-generated emails decrease time spent on manual communications



Quickly view relevant information for collections

Bank reconciliation Copilot

The screenshot displays the 'Bank reconciliation worksheet' in the 'Finance and Operations Preview' environment. The interface includes a top navigation bar with a search function and user information (USMF | Contoso Entertainment System USA). Below the navigation, there are action buttons: Save, Run matching rules, Subtotal, Mark as reconciled, Mark as reconciled in batch, Print reconciliation statement, and Options. The main content area is titled 'Bank reconciliation worksheet' and shows a 'Bank account overview' for '00008 : Demo' in 'Standard view'. The overview includes a date filter (9/14/2024), currency (USD), and amount (0.00). Two tabs are visible: 'Unmatched transactions' (active) and 'Matched transactions'. The 'Unmatched transactions' section shows a summary: 'Selected bank statement transactions' with a total of -400.00 (1 line) and 'Selected bank transactions' with a total of 0.00 (0 lines). A 'Correction > 0.00' is also indicated. Below the summary are buttons for 'Match', 'Generate payment journal', and 'Generate voucher'. The interface is divided into two main panels: 'BANK STATEMENT TRANSACTIONS' and 'BANK TRANSACTIONS'. The 'BANK STATEMENT TRANSACTIONS' panel has a 'Propose matching' button and a table with columns: Booking date, Debit, Credit, Bank transaction code, Document number, and Trading party. One transaction is listed: 9/1/2024, Debit 400.00, Credit 200, Bank transaction code 200, and Trading party Land Packaging. The 'BANK TRANSACTIONS' panel also has a 'Propose matching' button and a table with columns: Date, Debit, Credit, Bank transacti..., and Document type. It lists five transactions: 9/1/2024 (Debit 400.00, Credit 12, Document type Others), 9/3/2024 (Debit 1,000.00, Credit 12, Document type Others), 9/3/2024 (Debit 400.00, Credit 12, Document type Others), 9/3/2024 (Debit 400.00, Credit 12, Document type Others), and 9/3/2024 (Debit 399.00, Credit 12, Document type Others). A footer note reads: 'Activate Windows. Go to Settings to activate Windows.'

Bank reconciliation Copilot

The screenshot displays the 'Bank reconciliation worksheet' in Microsoft Dynamics 365. The interface includes a top navigation bar with 'Finance and Operations Preview', a search bar, and user information 'USMF | Contoso Entertainment System USA'. Below the navigation bar, there are action buttons: 'Save', 'Run matching rules', 'Subtotal', 'Mark as reconciled', 'Mark as reconciled in batch', 'Print reconciliation statement', and 'Options'. The main content area is titled 'Bank reconciliation worksheet' and shows 'Bank account overview' for '00008 : Demo' in 'Standard view'. The current date is '9/14/2024' with a currency of 'USD' and a rate of '0.00'. There are two tabs: 'Unmatched transactions' (active) and 'Matched transactions'. The 'Unmatched transactions' section shows a summary: 'Selected bank statement transactions' with '(1 line) -400.00' and 'Selected bank transactions' with '(0 line) 0.00', resulting in a 'Correction > 0.00'. Below this, there are buttons for 'Match', 'Generate payment journal', and 'Generate voucher'. The 'BANK STATEMENT TRANSACTIONS' table has columns for 'Booking date', 'Debit', 'Credit', 'Bank transaction code', 'Document number', and 'Trading party'. One transaction is listed: '9/1/2024' with a debit of '400.00' and credit of '200', and trading party 'Land Packaging'. The 'BANK TRANSACTIONS' table has columns for 'Date', 'Debit', 'Credit', 'Bank transacti...', and 'Document type'. It lists five transactions: '9/1/2024' (400.00 debit, 12 credit), '9/3/2024' (1,000.00 credit, 12 credit), '9/3/2024' (400.00 credit, 12 credit), '9/3/2024' (400.00 credit, 12 credit), and '9/3/2024' (399.00 credit, 12 credit). All document types are 'Others'. A footer note says 'Activate Windows. Go to Settings to activate Windows.'

20,000 transactions were reconciled without exceptions, 5 exceptions need to be addressed

Fix exceptions faster with the subledger to ledger reconciliation copilot.

Summary

Open exceptions: **5** Automatically reconciled: **20,000**

Addressed exceptions: **6**

Open exceptions

4 open exceptions are in the ledger but not the subledger
1 open exception has a date mismatch

[Mitigate exceptions](#)

Group by: Area

Area	Company	Status	Exceptions	Accounting currency difference
Accounts payable	--	Has exceptions	3	--
Accounts payable	USMF	Has exceptions	2	100,000 USD
Accounts payable	USSI	Has exceptions	1	100,000 USD
Tax	--	Fully reconciled	0	--
Accounts receivable	--	Has exceptions	2	--
Fixed assets	--	Fully reconciled	0	--
Bank	--	Fully reconciled	0	--

Account Reconciliation Agent

Adaptive Experience

Agents are continuously learning

Agent activity tracking

The screenshot displays the Dynamics 365 Finance user interface for account reconciliation. On the left, a list of accounts is shown, with GNJL08154 selected. The main area displays the details for this account, including a 'Reconcile' button and sections for 'EXCEPTION DETAILS', 'TRANSACTION HEADER', 'ACCOUNTING CURRENCY', and 'REPORTING CURRENCY'. The 'EXCEPTION DETAILS' section shows 'Issue type' as 'Reconciled', 'Company' as 'UDVE', and 'Subledger' as 'Accounts payable'. The 'TRANSACTION HEADER' section shows 'Main account' as '308100', 'Date' as '1/15/2024', and 'Voucher number' as 'GNJL08154'. The 'ACCOUNTING CURRENCY' section shows 'Subledger balance - Accounting...' as '306.50 USD', 'Ledger balance - Accounting cur...' as '306.00 USD', and 'Difference - Accounting currency' as '0.58'. The 'REPORTING CURRENCY' section shows 'Subledger balance - Reporting c...' as '305.40 EUR', 'Ledger balance - Reporting cur...' as '305.00 EUR', and 'Difference - Reporting currency' as '0.06 EUR'. On the right, a 'Timeline' section shows a list of events, including 'Reconciled' on 1/16/2024, 'Agent accepted without change' on 1/16/2024, 'Reconciliation failed' on 1/20/2024, and 'Reconciliation started' on 1/20/2024.

In order to stay compliant, all the agent activities are tracked and logged so that it is easy to audit later

Finance Portfolio

Capability view

Business Performance Planning, Business Performance Analytics, Business Performance Insights

Procure to Pay	Quote to Cash	Record to Report	Plan to Perform	Acquire to Retire
Accounts Payable	Accounts Receivable	General Ledger	Business performance planning	Purchase requisitions
Vendor Management	Credit and Collections	Cash & Bank Management	Business performance analytics	Asset tracking
Configurable E-Invoice and Payments	Configurable E-Invoice and Payments	Financial close	Enterprise policies & rules	Depreciation and amortization
Invoice capture and workflow (OCR)	Subscription billing and revenue recognition	Consolidations and reporting	Receipt capture (OCR)	Multi-GAAP reporting
Core Financials, and Globalization Studio (Tax, localization, Regulatory Reporting and Compliance, Regulatory Discovery & Alerting Service)				

 Copilot for Finance

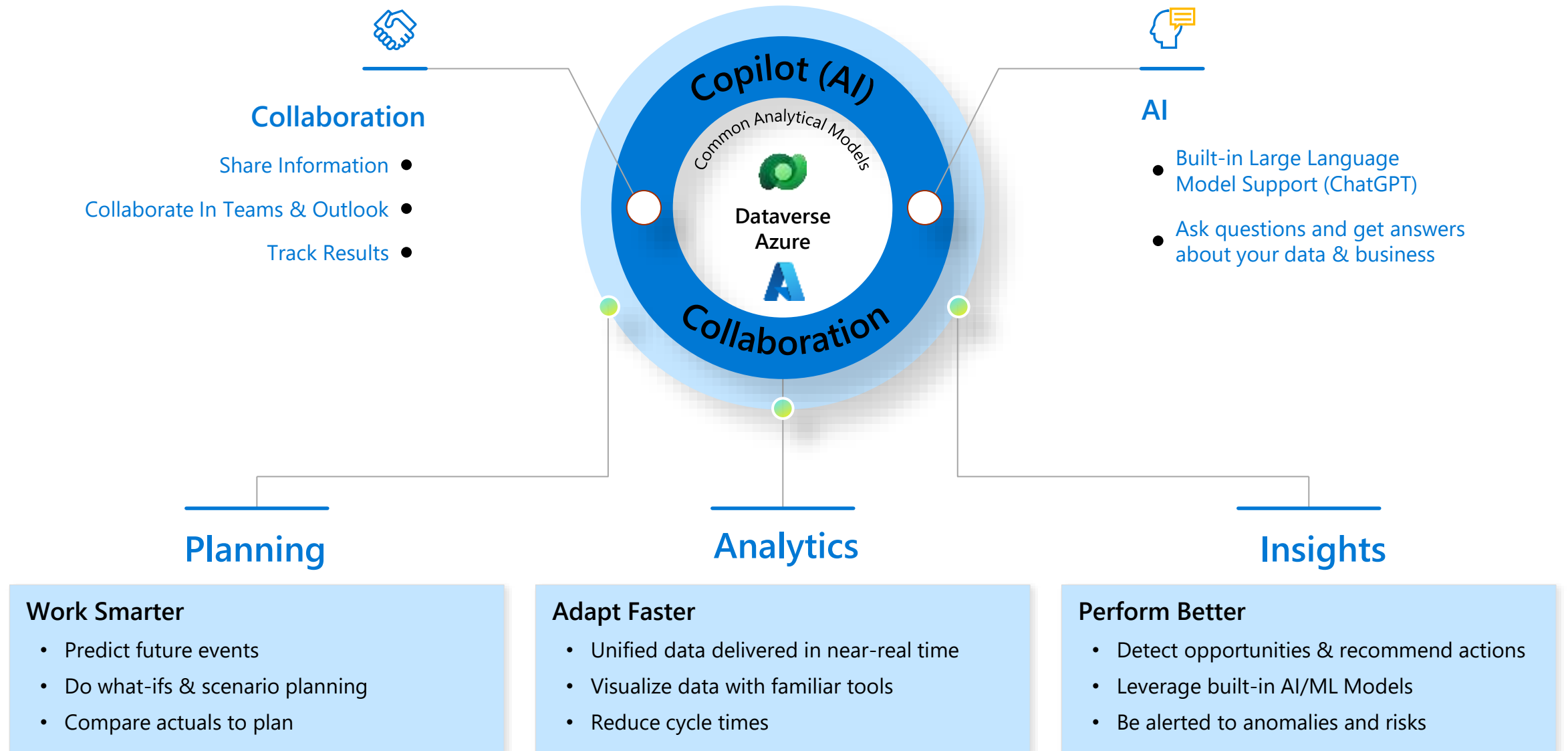
 Copilot in Dynamics 365

 Copilot Studio

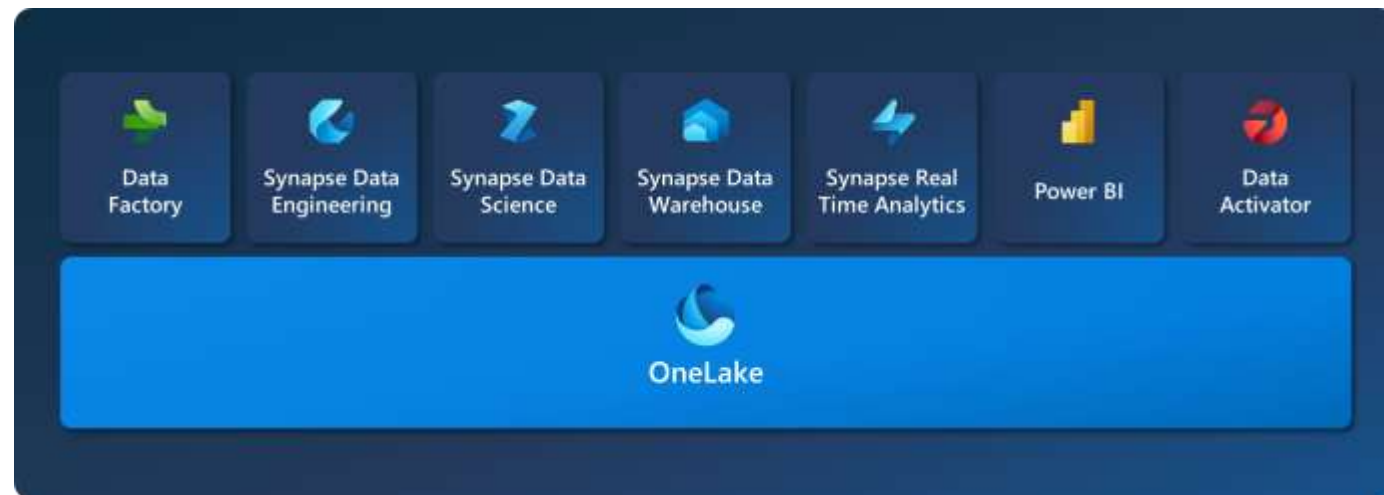
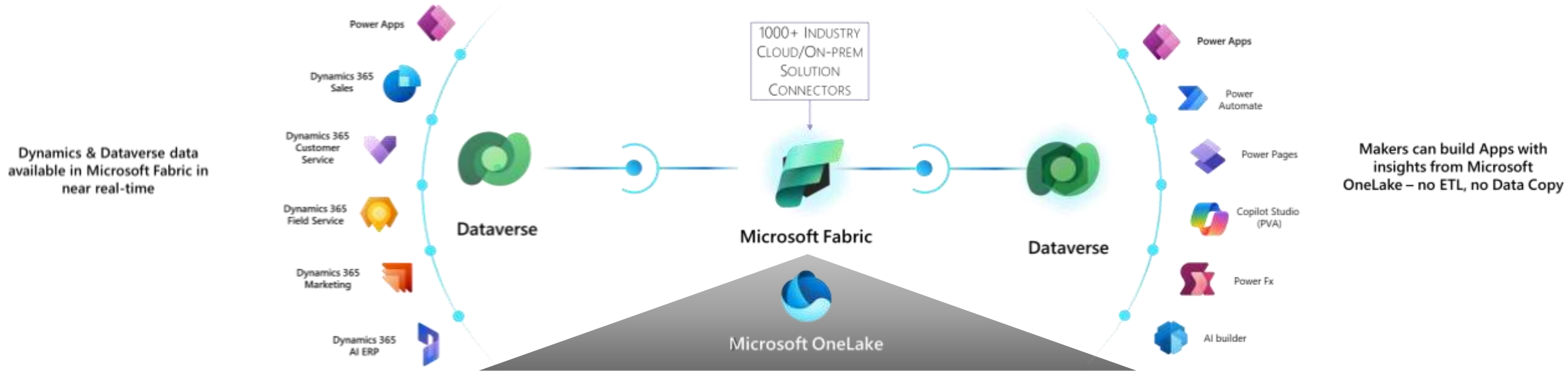
Extend

MICROSOFT CLOUD	Connectors & Common Data Framework	Copilot	Collaboration	Security	AI & Analytics	Low-Code Agility	Sustainability
	 Dataverse, Azure Synapse, Azure Data & AI		 Microsoft 365 & Teams	 Microsoft Security	 Power BI	 Power Apps, Power Automate & Power Pages	 Cloud for Sustainability

Solution Overview

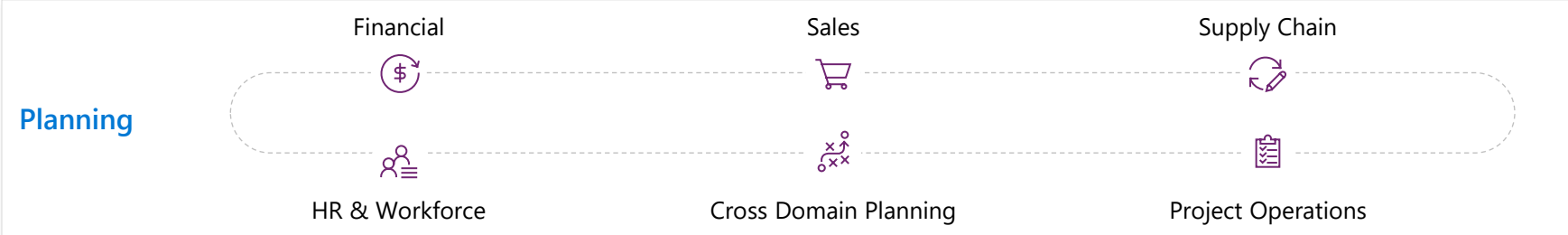


Microsoft Dynamics 365, Power Platform and Microsoft Fabric



Create a connected enterprise to fuel business agility

Core Capabilities



Purpose-Built Analytics

Power BI (bar chart icon) Excel (Excel icon)

Automated Insights

Data Insights (lightbulb icon) Process Insights (lightbulb icon)

Copilot Natural Language AI

CFO Advisor (people icon) Spend Advisor (people icon)

Regulatory Reporting

Word (Word icon) Electronic Submission (lightning bolt icon)

Collaboration & Tracking

Teams (Teams icon) Outlook (Outlook icon)

Extensibility

Power Apps (Power Apps icon) Power Automate (Power Automate icon)

Power BI (Power BI icon) AI Builder (AI Builder icon)

Global Scale (localized, regulatory support, multi-region)



Data Ingestion, Cleansing, & Enrichment

Systems of Record

Dynamics 365

Finance (Finance icon) Human Resources (Human Resources icon) Sales (Sales icon) Supply Chain (Supply Chain icon) Project Operations (Project Operations icon)

Other Systems & Data

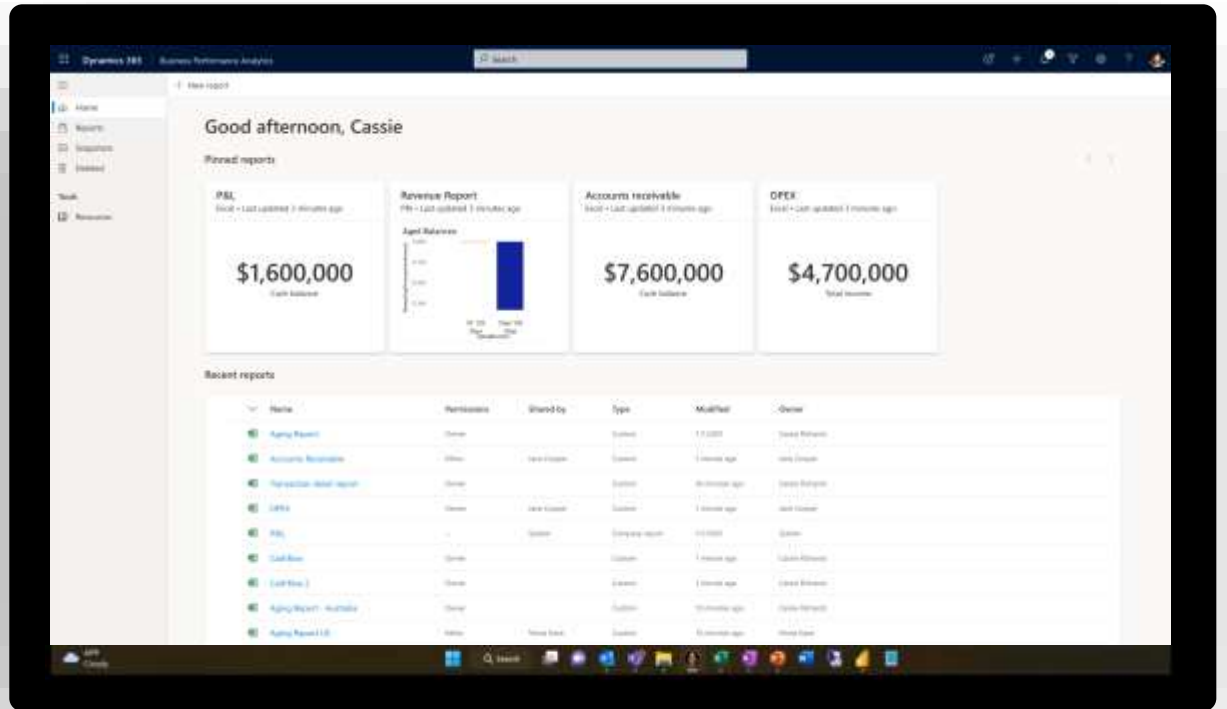
P2P (P2P icon) Contracts (Contracts icon) Other ERPs (Other ERPs icon) 3rd Party (3rd Party icon)

Business performance analytics

Bring data and insights closer to the point of decision. Gain near-real time access to secure cloud-based self-service reporting delivered through familiar tools like Power BI and Excel.

Learn more from the blog: [Dynamics 365 Finance business performance analytics - Microsoft Dynamics 365 Blog](#)

Announced: February 22, 2023



AI and Analytics



Power BI Excel

Power Platform



Power Apps Power Automate

Common Data Model



Dataverse Azure

Collaboration



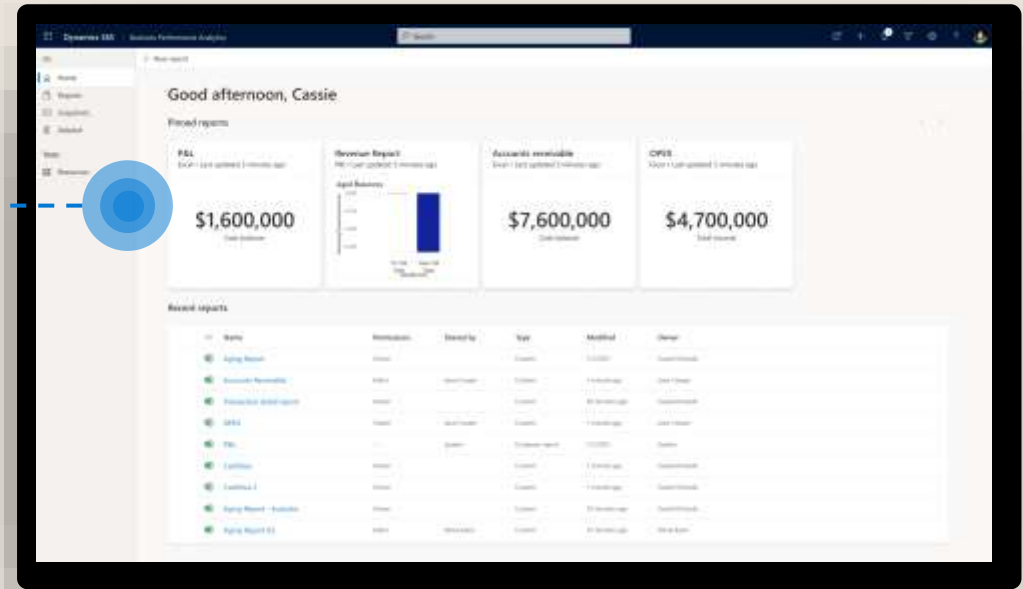
Teams

Make analysis easy and more accessible

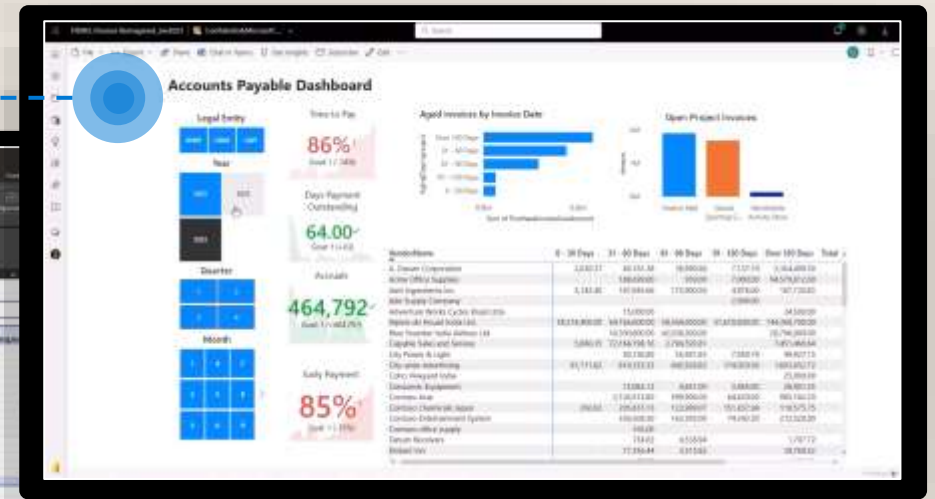
Delivered seamlessly through familiar and easy-to-use tools

Create, save, and share reports securely for easy collaboration

Enhance decision making with near-real time data and insights



Securely create, share, and collaborate with team members in the reporting hub

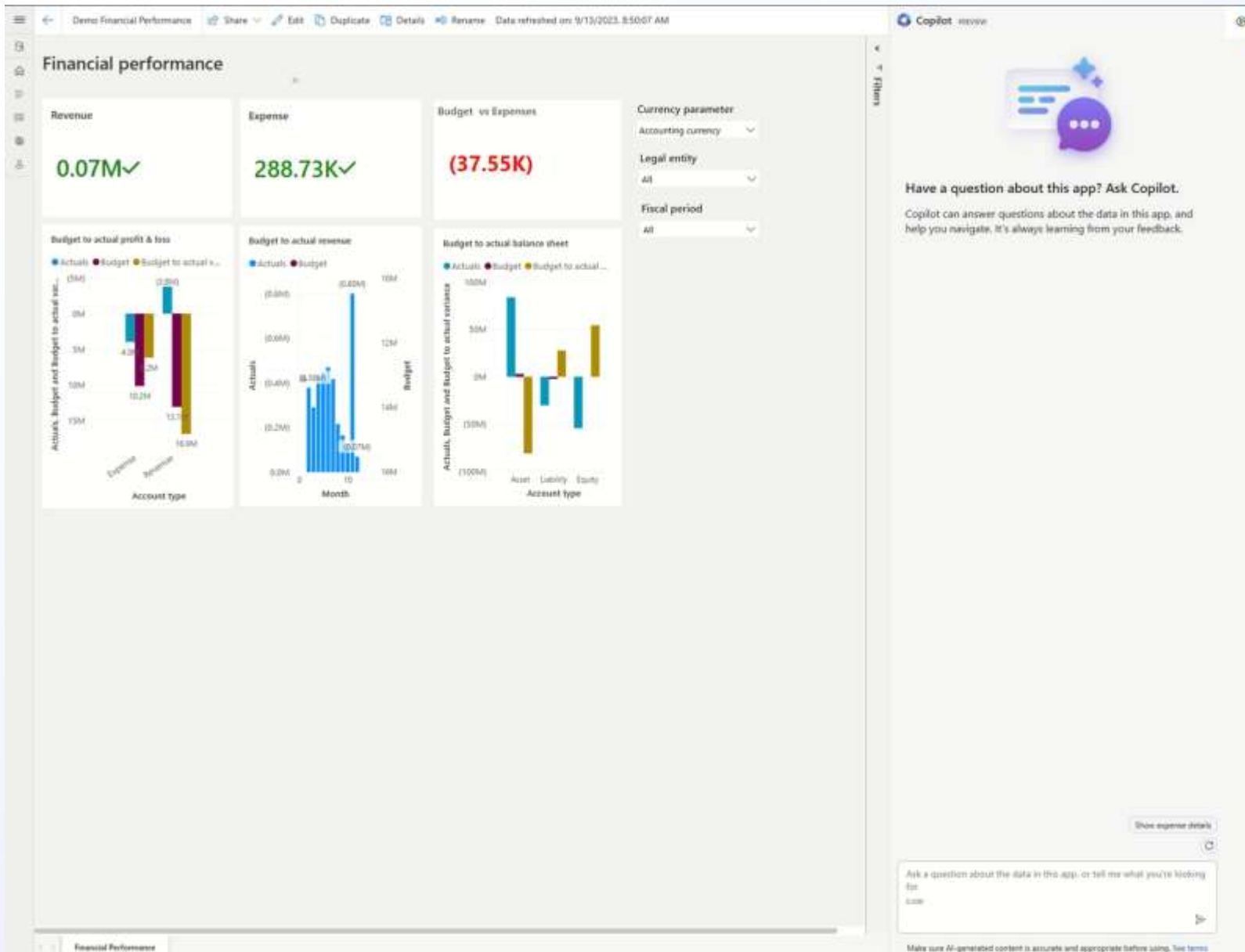


Visualize data your way—quickly analyze and drill down to the details with familiar tools like Excel & Power BI

Business performance analytics

Build reports with Microsoft Power BI and Microsoft Excel

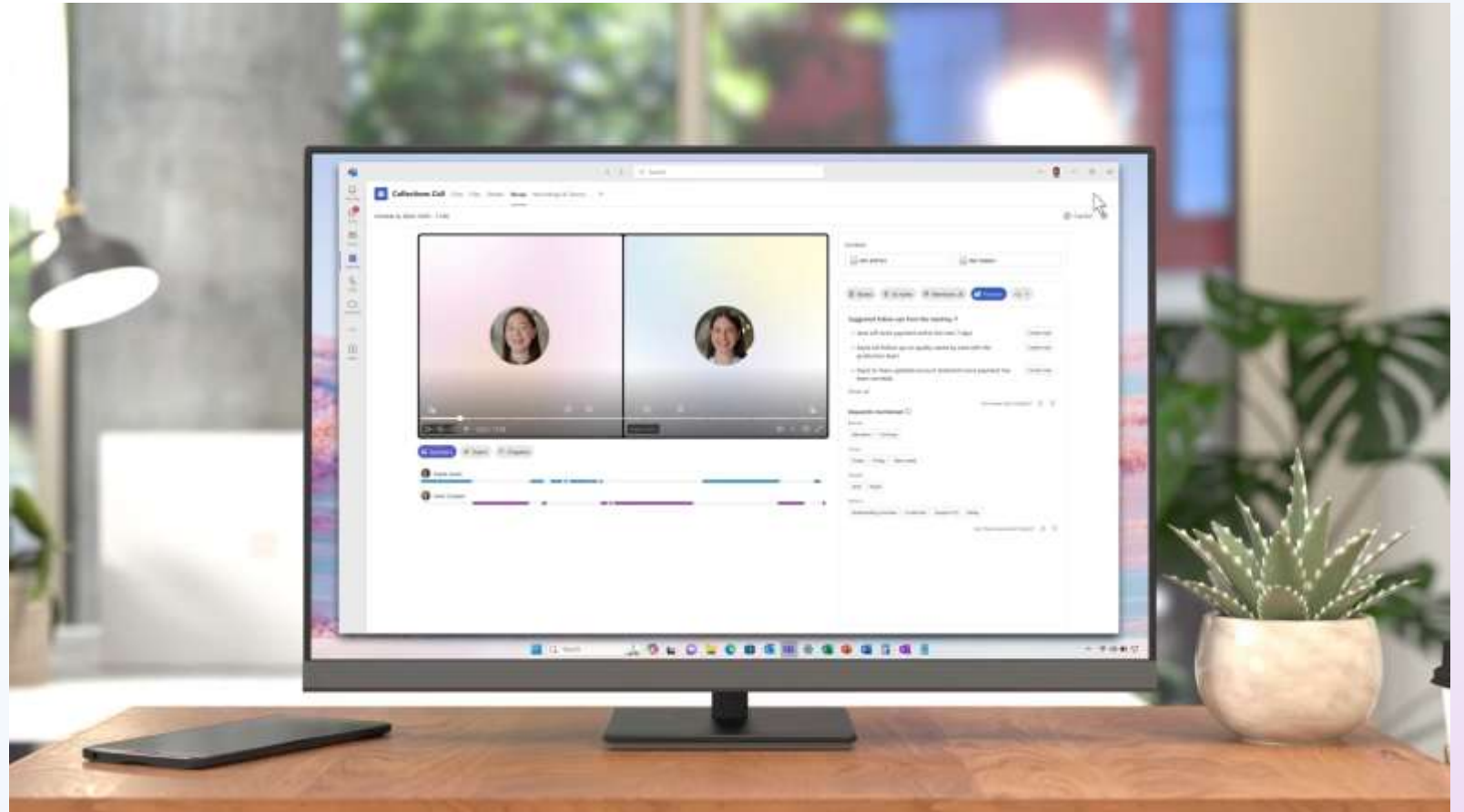
- Generate a new financial dashboard or report from a prompt
- Align plans, budgets, and forecasts with business strategy
- Make more informed business decisions supported by advanced predictive analytics



Copilot in Business Performance Analytics

With the help of Copilot, users can get assistance without leaving business performance analytics.

Users can ask Copilot questions about the application and receive responses without needing to manually find an answer themselves, saving time for our end-users and potentially their company's IT support division as well.



Get insights on your reports with copilot

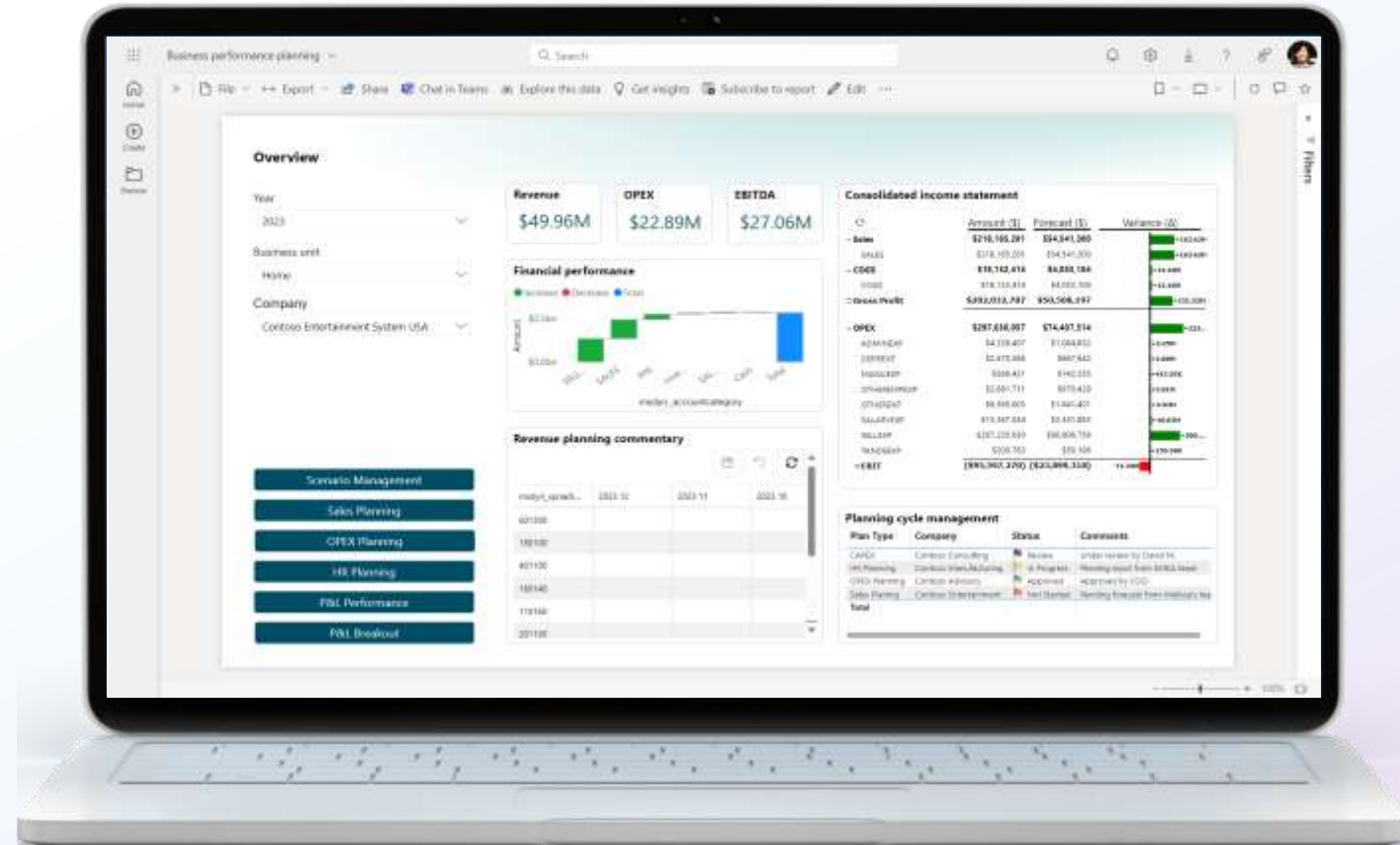
Business performance planning

Transform planning with the power of Microsoft

Encompassing crucial tasks of budgeting, forecasting, financial analysis, and corporate performance management—all from market leading business intelligence tools Microsoft Power BI and Excel.

AI guided experiences provide the ability to analyze vast amounts of data, uncover valuable insights, and enhance the accuracy of financial projections.

- Revenue planning
- Bottom-Up Planning
- Driver Based Planning
- Budgeting and Forecasting
- Long-range Planning
- M&A Valuation
- Cashflow planning
- **And many more...**



Reports & Analytics



Power BI Excel

Low-Code Agility



Power Apps Power Automate

Collaboration



Teams Outlook

AI & Insights



Copilot Automated Insights

- Pages
- Home
- Scenario Management
- Sales Planning
- OPEX Planning**
- HR Planning
- P&L Performance
- P&L Breakout

OPEX planning

Year: 2023

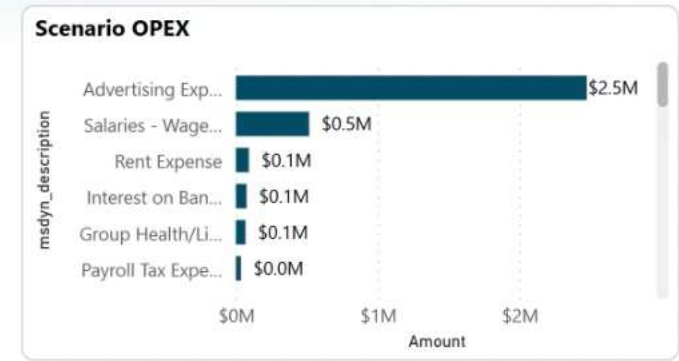
Business unit: Home

Company: Contoso Entertainment System USA

Scenario: Forecast

Department: Sales & Marketing

- Home
- Scenario Management
- Sales Planning
- HR Planning
- P&L Performance
- P&L Breakout



OPEX planning matrix

Business unit = 001 | Company = USMF | Currency = USD | Department = 022 | Scenario = Forecast

Account:Account category Account:Description Account	YearMonth ↑								
	2023_01	2023_02	2023_03	2023_04	2023_05	2023_06	2023_07	2023_08	2023_09
SELLEXP	\$427,820	\$502,820	\$502,820	\$127,820	\$52,808	\$53,808	\$127,820	\$127,820	\$127,820
Advertising Expense	\$425,000	\$500,000	\$500,000	\$125,000	\$49,988	\$50,988	\$125,000	\$125,000	\$125,000
601300	d15%	\$500,000	\$500,000	\$125,000	\$49,988	\$50,988	\$125,000	\$125,000	\$125,000
Selling Expense	\$2,820	\$2,820	\$2,820	\$2,820	\$2,820	\$2,820	\$2,820	\$2,820	\$2,820
SALARYEXP	\$46,409	\$46,633	\$52,355	\$45,887	\$46,228	\$45,841	\$45,743	\$51,004	\$45,743

Finance Portfolio

Capability view

Business Performance Planning, Business Performance Analytics, Business Performance Insights

Procure to Pay	Quote to Cash	Record to Report	Plan to Perform	Acquire to Retire
Accounts Payable	Accounts Receivable	General Ledger	Business performance planning	Purchase requisitions
Vendor Management	Credit and Collections	Cash & Bank Management	Business performance analytics	Asset tracking
Configurable E-Invoice and Payments	Configurable E-Invoice and Payments	Financial close	Enterprise policies & rules	Depreciation and amortization
Invoice capture and workflow (OCR)	Subscription billing and revenue recognition	Consolidations and reporting	Receipt capture (OCR)	Multi-GAAP reporting
Core Financials, and Globalization Studio (Tax, localization, Regulatory Reporting and Compliance, Regulatory Discovery & Alerting Service)				



Copilot for Finance














Copilot in Dynamics 365



Copilot Studio

Extend

MICROSOFT CLOUD	Connectors & Common Data Framework	Copilot	Collaboration	Security	AI & Analytics	Low-Code Agility	Sustainability
	   Dataverse, Azure Synapse, Azure Data & AI		  Microsoft 365 & Teams	 Microsoft Security	 Power BI	   Power Apps, Power Automate & Power Pages	 Cloud for Sustainability



Microsoft Copilot for Finance

Your everyday AI assistant for finance professionals

Natural Language



Large Language Models (LLMs)



Web grounding



Microsoft Graph grounding



Enterprise-grade data protection



ERP and Financial Systems



Commercial data protection



The Internet



Microsoft 365 Apps



Copilot Studio

Microsoft Dynamics 365 Finance
Finance-specific actions, insight,
and recommendations

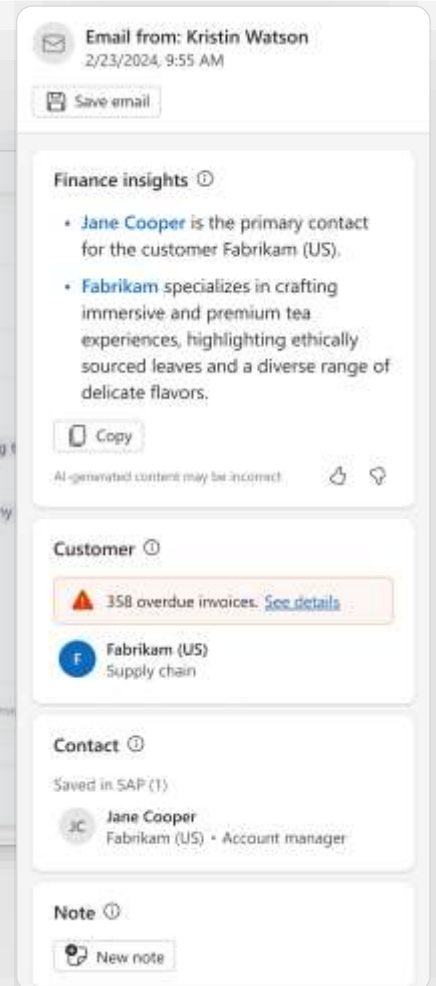
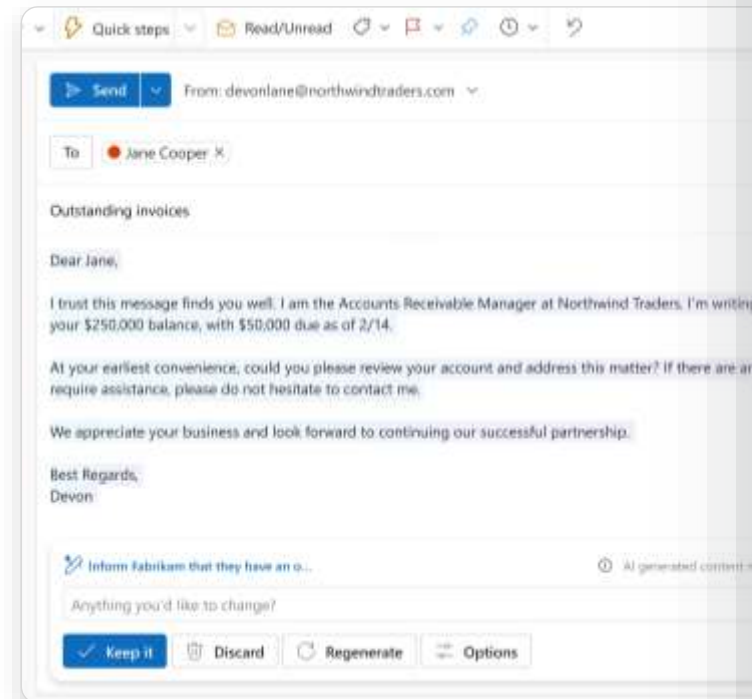
Quote to cash: accelerated collections

Reduce costs with Copilot for Finance for customer interactions

Review customer financial standing directly within Outlook

Share customer balance statements and invoice copies directly from Outlook

Summarize and save customer interactions for accurate and contextual collaboration



Financial period close: streamline data reconciliation

Accelerate time-to-close and reduce costs with Copilot for Finance for data reconciliation

Leverage intelligent data structures comparisons and guided troubleshooting in Excel

Analyze results with an auto-generated report summary that highlights discrepancies

Easily troubleshoot and resolve any discrepancies with recommendations and actions

Unmatched transaction (1)

Potentially matched transactions (5)

Document date	Net due date	Reference	Amount in doc. currency
•	11/4/2023	2121681058	
•	11/4/2023	2121702978	
•	11/4/2023	2121764113	
•	11/2/2023	2121786541D	2
•	10/15/2024	2121799904D	

Totals

Reconciliation report summary (1)

- Reconciliation Date: 02-28-2024
- Number of Invoices: 358
- Matched transactions: 357
- Discrepancy: 1 invoice
- The reconciliation process revealed that invoice **NWT-0434545456** is present in Northwind Traders' invoice list but not in Fabrikam's invoice list. **The discrepancy is due to the missing invoice in Fabrikam's records.**

Reconcile data

Select at least two columns, one of each type, for each table (1)

Copilot suggestion (1)

Table 1

- Fabrikam vendor invoice list
 - A invoice number
 - C Invoice amount

Table 2

- Fabrikam customer invoices
 - A Invoice ID
 - C Invoice base amount

AI-generated content may be incorrect

Adjust Regenerate Dismiss

Back Next Cancel

Planning & analysis: understanding variances

Accelerate impact with Copilot for Finance

Review anomalies, risks, and unmatched data results with annotations and supporting data

Follow-up with suggested contacts and auto-summarized analysis commentary

Turn data into presentation-ready visuals and reports ready to be shared across Outlook and Teams

The image shows a screenshot of a Microsoft Excel spreadsheet with a Copilot for Finance overlay. The spreadsheet displays financial data for February 2024 and March 2024. The Copilot overlay provides a detailed analysis of a variance in Washington state sales. To the right, a summary report panel titled 'Analyze variances' lists the criteria and variances identified.

	2/1/2024	3/1/2024	4/1/2024
Actual			Forecast
5,214,249	\$ 28,567,057		8 \$
2,300,202	\$ 6,297,544		7 \$
6,843,719	\$ 6,857,213		3 \$
7,811,033	\$ 5,043,858		4 \$
2,698,274	\$ 2,044,802		1 \$
7,834,662	\$ 5,812,568		1 \$
7,726,359	\$ 2,511,073		2 \$
2,499,150	\$ 25,164,531		6 \$
1,767,547	\$ 988,806		5 \$
585,231	\$ 1,054,967	\$ 1,107,715	\$ 1,339,487
598,882	\$ 907,969	\$ 873,047	\$ 1,286,271
1,403,186	\$ 511,754	\$ 492,071	\$ 325,931
801,886	\$ 1,458,221	\$ 1,402,136	\$ 43,536
980,614	\$ 1,210,106	\$ 1,163,563	\$ 1,499,784

Copilot
The variance of \$755,705, representing an approximately 12% decrease. Washington state sales was \$9,763 resulting in the biggest impact to actuals and driving difference to forecast. The second biggest contributor was Oregon.
12 February 2024 at 7:18
@mentions or comment

Analyze variances
Create summary report

Selected criteria and variances:

Criteria
February forecast varies from actuals more than 10%

Variances
2 pairs of variances have been identified that match this criteria.

E9 F9
The variance of \$755,705, representing an approximately 12% decrease. Washington state sales was \$505,685 resulting in the biggest impact to actuals and driving difference to forecast. The second biggest contributor was Oregon.
2 references

E12 F12
In February 2024, the actual loan proceeds reached \$2,044,802, marking a variance of nearly 25% from the initially forecasted amount of \$1,635,842 for the same period. The difference is due to the changes in "Lease and rent breakdown.xlsx."
2 references

AI-generated content may be incorrect.

Edit summary Regenerate

+ Add criteria

Northwind Traders

Forecast vs Actuals

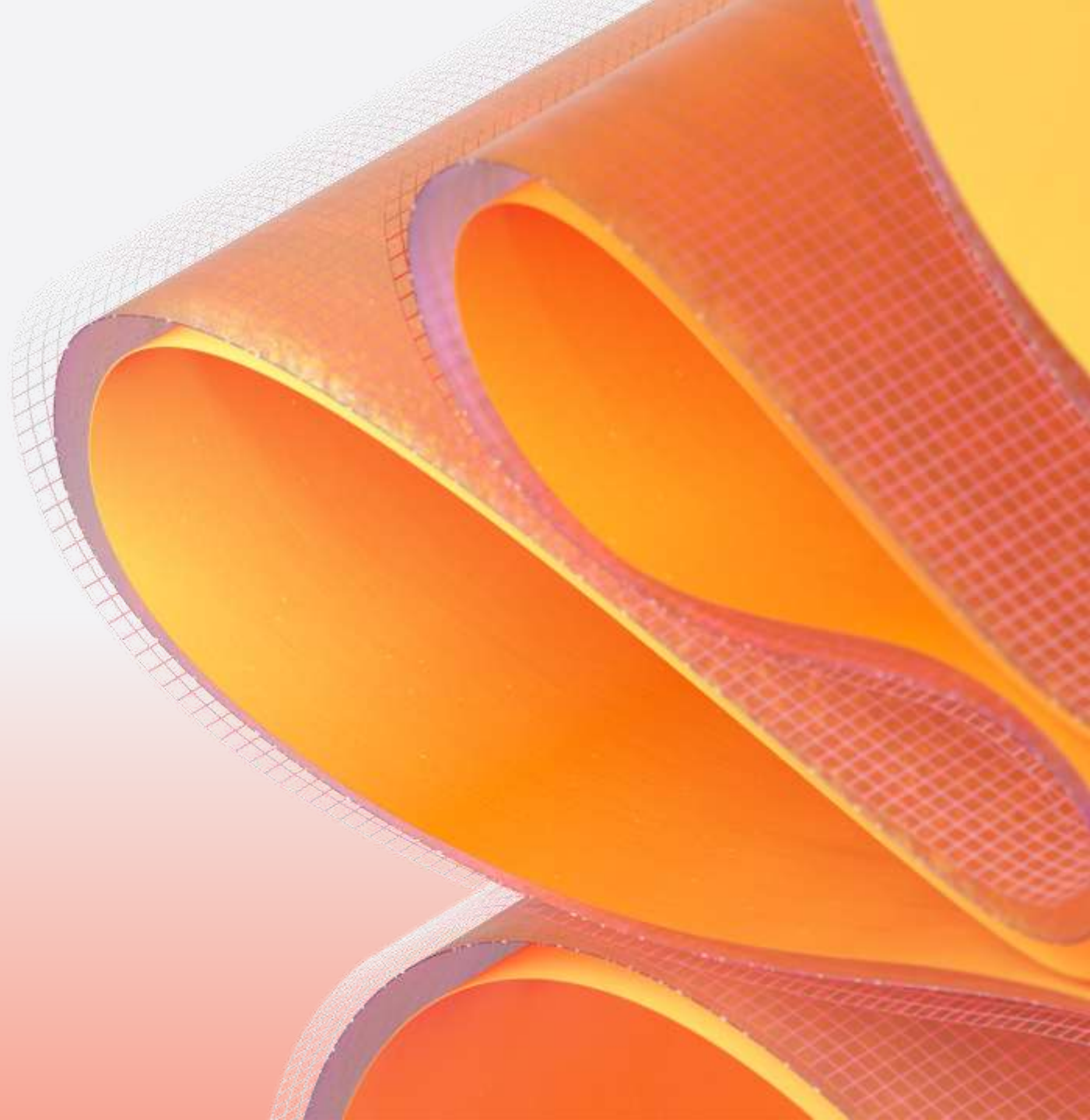
Cash flow

Sum of Amount	Column Labels												Grand Total	
	2023					2024								
	2023	2024				2024		2024		2024		2024		
	2023	2024	2024	2024	2024	2024	2024	2024	2024	2024	2024	2024		
Row Labels	Actual	Actual	Actual	Actual	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast		
Inflow	\$ 30,940,442	\$ 30,608,026	\$ 35,214,249	\$ 28,567,057	\$ 29,462,390	\$ 30,070,388	\$ 24,934,504	\$ 17,387,133	\$ 20,473,523	\$ 22,785,703	\$ 26,970,375	\$ 297,413,790		
Actual loan proceeds	\$ 4,742,563	\$ 7,513,302	\$ 2,698,274	\$ 2,044,802	\$ 1,935,842	\$ 7,248,951	\$ 1,170,729	\$ 1,283,643	\$ 2,394,287	\$ 2,678,370	\$ 5,528,318	\$ 39,239,081		
Incoming customer payments	\$ 4,026,395	\$ 3,162,797	\$ 6,843,719	\$ 6,857,213	\$ 7,619,934	\$ 6,745,103	\$ 6,929,477	\$ 1,418,492	\$ 1,985,337	\$ 4,377,912	\$ 2,950,909	\$ 52,917,288		
Interest, other income	\$ 8,102,267	\$ 2,287,059	\$ 7,811,033	\$ 5,043,858	\$ 4,849,863	\$ 8,163,324	\$ 2,283,242	\$ 4,443,671	\$ 3,835,523	\$ 7,295,447	\$ 1,352,365	\$ 55,467,652		
Local cash sales	\$ 1,468,420	\$ 6,228,510	\$ 2,300,202	\$ 6,297,544	\$ 7,053,249	\$ 2,211,727	\$ 3,351,033	\$ 2,374,627	\$ 5,863,876	\$ 2,077,950	\$ 3,658,728	\$ 42,885,866		
Other receipts	\$ 8,157,609	\$ 5,812,170	\$ 7,834,662	\$ 5,812,568	\$ 5,589,008	\$ 4,728,041	\$ 3,953,341	\$ 2,573,561	\$ 886,624	\$ 3,027,798	\$ 6,779,679	\$ 55,155,061		
Returns and allowances	\$ 4,443,188	\$ 5,604,188	\$ 7,726,359	\$ 2,511,073	\$ 2,414,493	\$ 973,242	\$ 7,246,682	\$ 5,293,139	\$ 5,507,876	\$ 3,328,226	\$ 6,700,376	\$ 51,748,842		
Outflow	\$ 21,353,294	\$ 26,399,174	\$ 22,499,150	\$ 25,164,531	\$ 24,741,141	\$ 20,239,536	\$ 20,753,235	\$ 25,414,047	\$ 28,106,576	\$ 24,981,684	\$ 19,802,836	\$ 259,455,204		
Advertising	\$ 1,571,927	\$ 729,393	\$ 1,767,547	\$ 988,806	\$ 950,775	\$ 393,665	\$ 1,301,347	\$ 785,597	\$ 193,435	\$ 1,687,427	\$ 1,714,425	\$ 12,084,344		
Commissions and fees	\$ 1,616,199	\$ 1,931,286	\$ 585,231	\$ 1,054,967	\$ 1,107,715	\$ 1,339,487	\$ 925,661	\$ 1,881,836	\$ 1,846,583	\$ 1,637,307	\$ 1,725,637	\$ 15,651,909		
Contract labor	\$ 1,224,329	\$ 274,757	\$ 598,882	\$ 907,969	\$ 873,047	\$ 1,286,271	\$ 1,226,480	\$ 1,573,157	\$ 820,761	\$ 1,101,962	\$ 341,725	\$ 10,229,340		
Employee benefit programs	\$ 552,463	\$ 937,842	\$ 1,403,186	\$ 511,754	\$ 492,071	\$ 325,931	\$ 1,151,418	\$ 393,953	\$ 293,706	\$ 1,847,965	\$ 1,268,742	\$ 9,179,031		
Insurance (other than health)	\$ 381,560	\$ 622,243	\$ 801,886	\$ 1,458,221	\$ 1,402,136	\$ 43,536	\$ 172,190	\$ 1,492,913	\$ 1,290,111	\$ 715,761	\$ 74,704	\$ 8,455,261		
Interest expense	\$ 1,854,117	\$ 664,358	\$ 980,614	\$ 1,210,106	\$ 1,163,563	\$ 1,499,784	\$ 1,629,730	\$ 1,721,656	\$ 990,142	\$ 931,590	\$ 1,867,258	\$ 14,512,918		
Materials and supplies (in COGS)	\$ 488,578	\$ 1,331,378	\$ 1,437,766	\$ 1,629,287	\$ 1,710,751	\$ 1,203,142	\$ 1,436,881	\$ 500,920	\$ 1,472,554	\$ 1,786,291	\$ 964,884	\$ 13,962,432		

Search (Alt + Q) Copilot for Finance

	A	B	C	D	E	F	G	H	I	J
1	Customer account	Transaction description	Date	Base amount	Tax amount	Total amount	Currency			
2	IC0000233	ICT-0434545446	45443	1200	120	1320	USD			
3	IC0000233	ICT-0434545445	45444	-1200	-120	-1320	USD			
4	IC0000233	ICT-0434545444	45444	1400	140	1540	USD			
5	IC0000234	ICT-0434545475	45442	22566	2256.6	24822.6	USD			
6	IC0000235	ICT-0434545474	45442	1267	126.7	1393.7	USD			
7	IC0000236	ICT-0434545473	45442	18007	1800.7	19807.7	USD			
8	IC0000237	ICT-0434545472	45441	1267	126.7	1393.7	USD			
9	IC0000238	ICT-0434545471	45441	2500	250	2750	USD			
10	IC0000239	ICT-0434545470	45441	1200	120	1320	USD			
11	IC0000240	ICT-0434545469	45438	12459	1245.9	13704.9	USD			
12	IC0000241	ICT-0434545468	45438	1200	120	1320	USD			
13	IC0000242	ICT-0434545467	45438	22566	2256.6	24822.6	USD			
14	IC0000243	ICT-0434545466	45438	1267	126.7	1393.7	USD			
15	IC0000244	ICT-0434545465	45430	1500	150	1650	USD			
16	IC0000245	ICT-0434545464	45430	350000	63000	413000	USD			
17	IC0000246	ICT-0434545463	45424	1400	140	1540	USD			
18	IC0000247	ICT-0434545462	45421	2500	250	2750	USD			
19	IC0000248	ICT-0434545461	45415	1200	120	1320	USD			
20	IC0000249	ICT-0434545460	45406	35777	3577.7	39354.7	USD			
21	IC0000250	ICT-0434545459	45406	1267	126.7	1393.7	USD			
22	IC0000251	ICT-0434545458	45406	3345	334.5	3679.5	USD			
23	IC0000252	ICT-0434545457	45402	11567	1156.7	12723.7	USD			
24	IC0000253	ICT-0434545455	45400	1565	156.5	1721.5	USD			
25	IC0000254	ICT-0434545454	45396	1500	150	1650	USD			
26	IC0000255	ICT-0434545453	45394	12459	1245.9	13704.9	USD			
27	IC0000256	ICT-0434545452	45392	1200	120	1320	USD			
28	IC0000257	ICT-0434545451	45389	22566	2256.6	24822.6	USD			

Coffee Networking





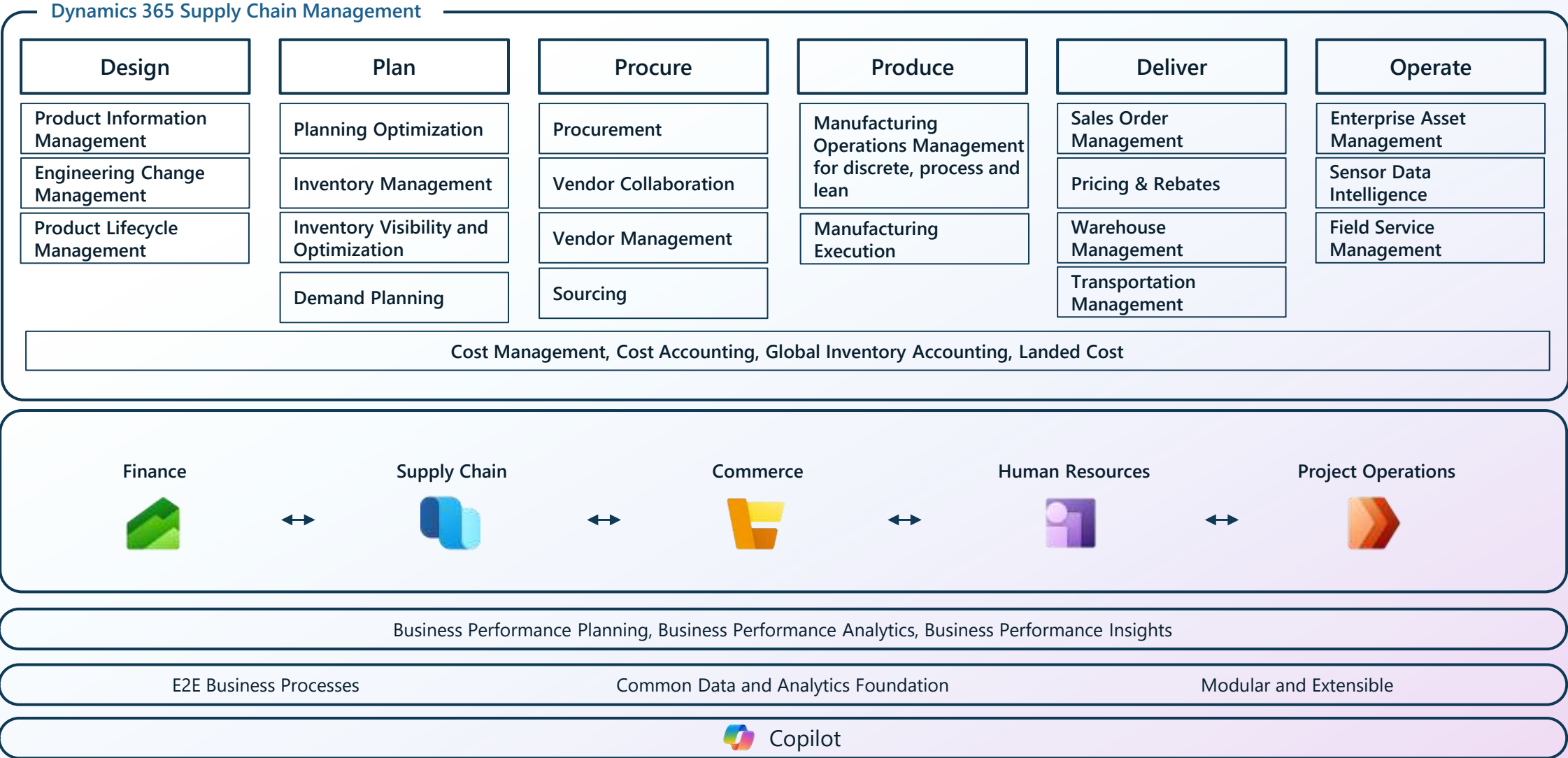
Optimización de la cadena de suministros con IA



Ana Cantero
Technology Specialist Dynamics 365
Microsoft España

Supply Chain Management portfolio

Leading the way to autonomous ERP



Copilot in Dynamics 365 Supply Chain Management

Demand planning

Adapt quickly to demand shifts

Intelligent: Improve forecast accuracy with AI powered models and data from external sources

Flexible: Build your own no-code forecast model or bring your own pre-trained forecast models.

Reassuring: Assess impact of manual forecast changes at an aggregated & disaggregated level with What-if analysis

Collaborative: Build consensus with stakeholders across sales, finance, marketing and operations in the flow of work.



“The demand planning app will help the business make right decisions that will lower wastage, avoid unnecessary deliveries, reduce the carbon footprint, and is cyber safe.”

AI-powered forecast model selected by best fit



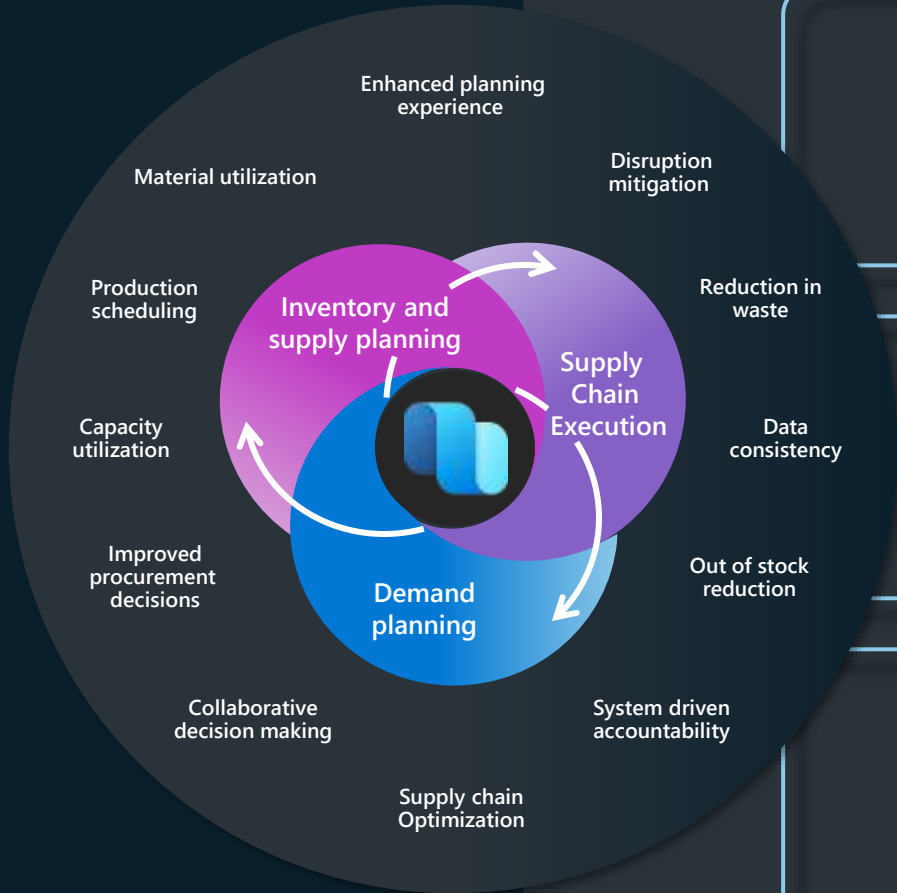
Collaborate with Teams

Manually update forecast at any level

Copilot in Dynamics 365 Supply Chain Management

Demand planning

Full Planning and execution cycle with Dynamics 365



Demand planning

- Visual forecast designer
- Autonomous forecast
- External signals support
- Flexible planning modeling
- AI based algorithms
- Product phase in/out
- Collaborative planning
- Seamless integration
- E2E process management

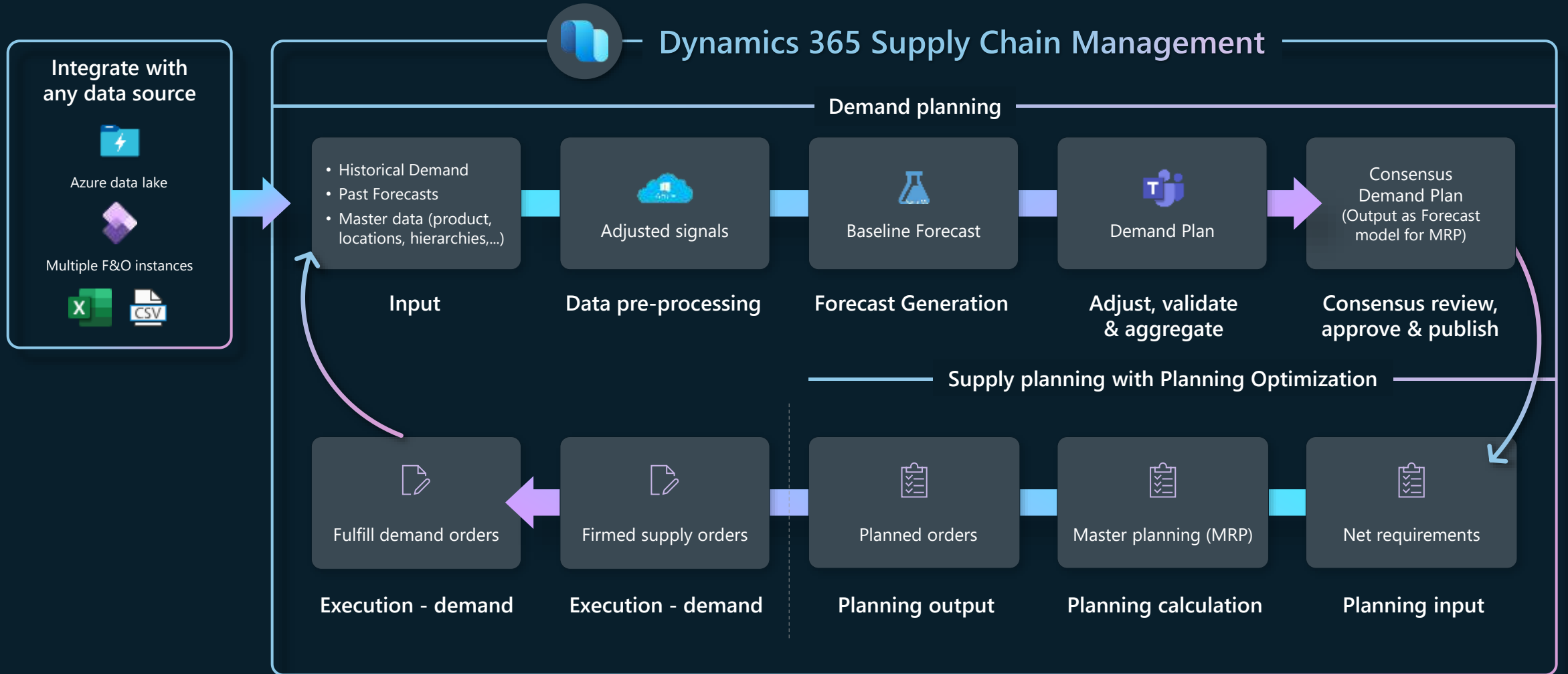
Supply planning

- MRP
- DDMRP
- Production scheduling
- Safety stock calculation
- Multi sourcing
- Finite capacity/material
- Intercompany planning
- Priority based planning
- Order promising

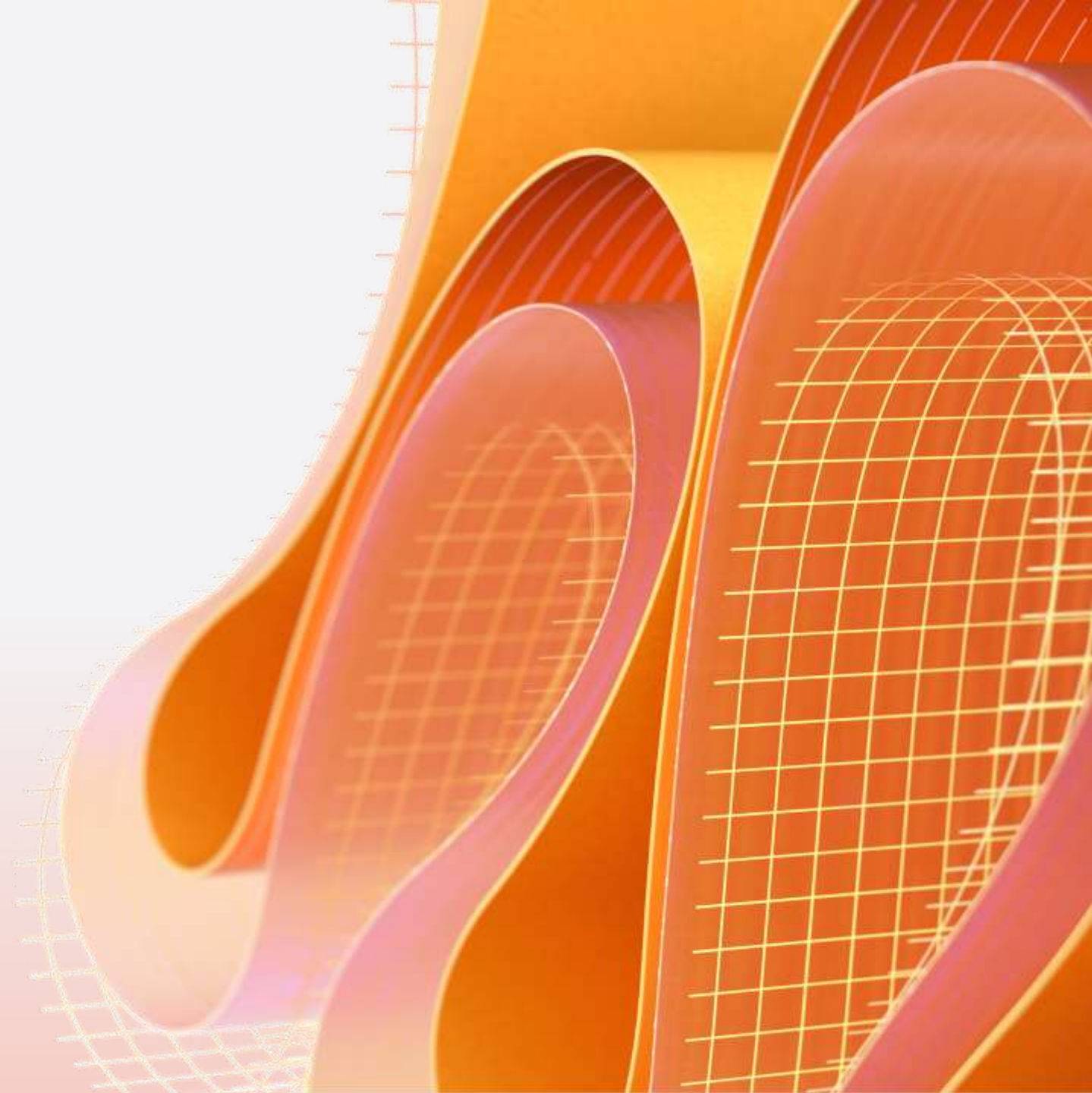
Supply chain execution

- Warehouse management
- Transportation management
- Operations management
- Inventory visibility
- Pricing
- Sales and procurement
- Asset management
- Production control
- Product lifecycle management

Full Planning cycle with demand planning

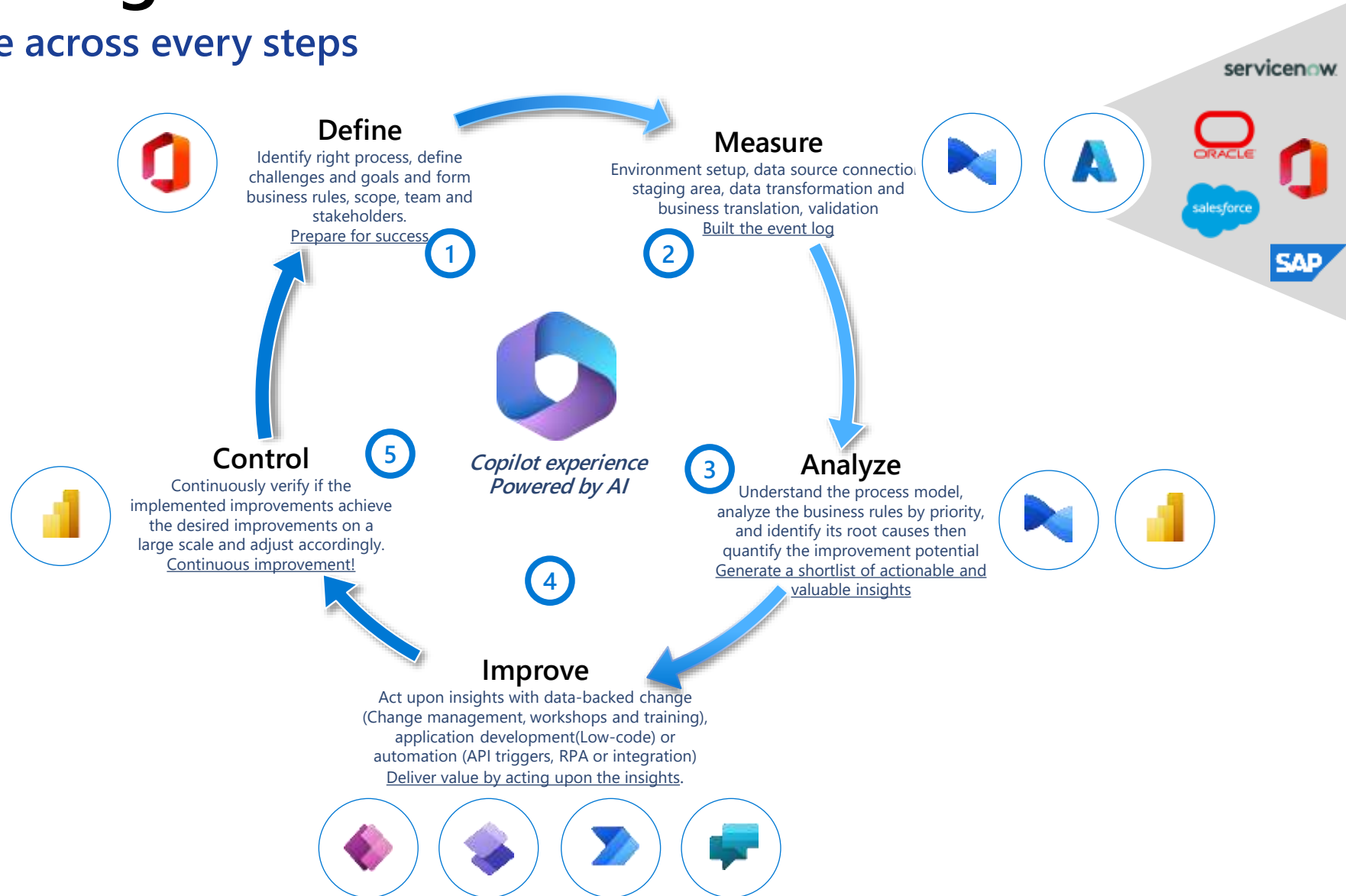


DEMO

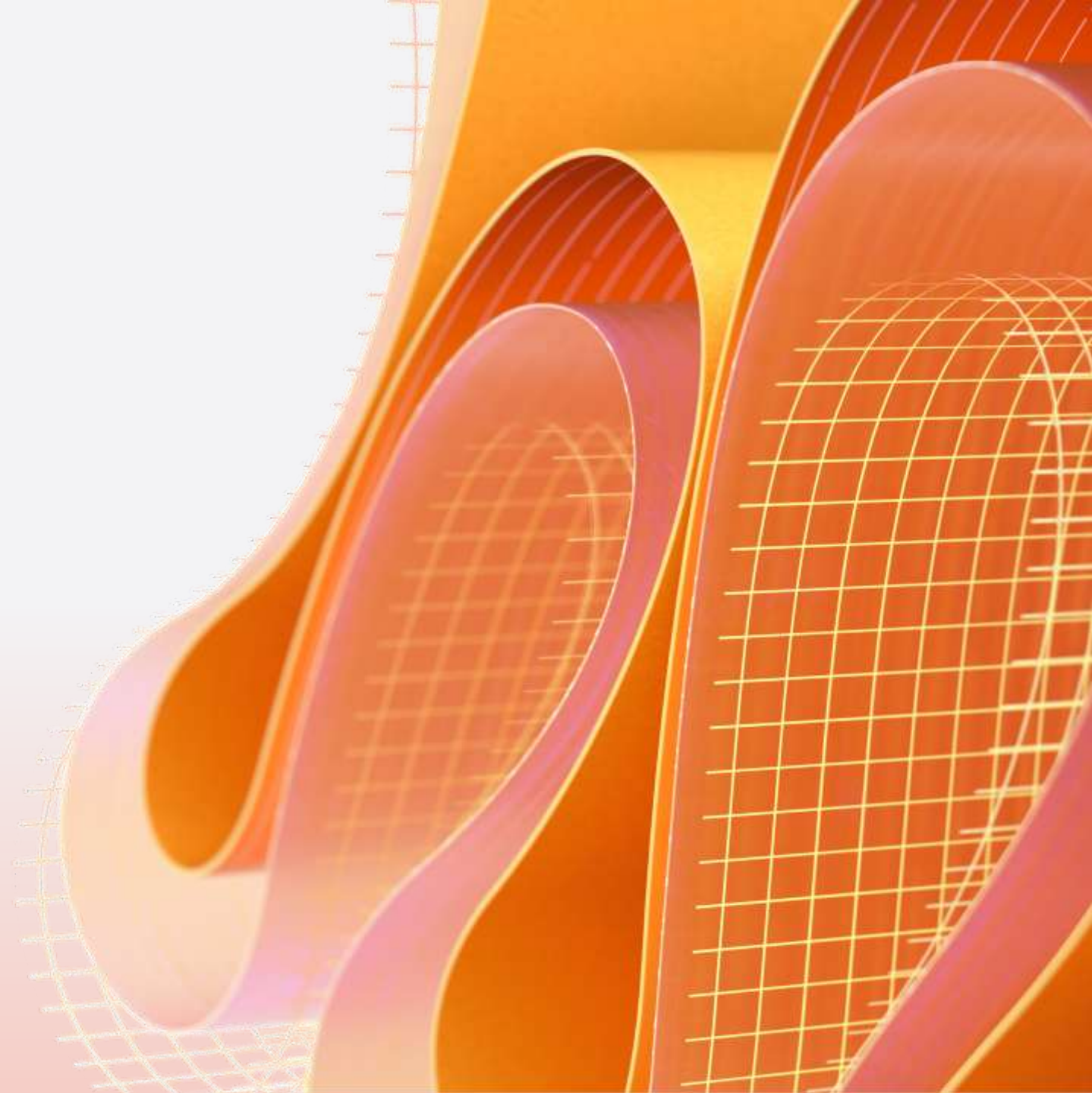


Process Mining with Microsoft

Unified experience across every steps



DEMO



Sensor Data Intelligence

On-prem sensors



Sensor data

Sensor Data Intelligence



Data ingestion

Dynamics 365 Supply Chain Management



Seamless integration

Get started with these out-of-the-box scenarios



Machine status



Product quality



Asset maintenance

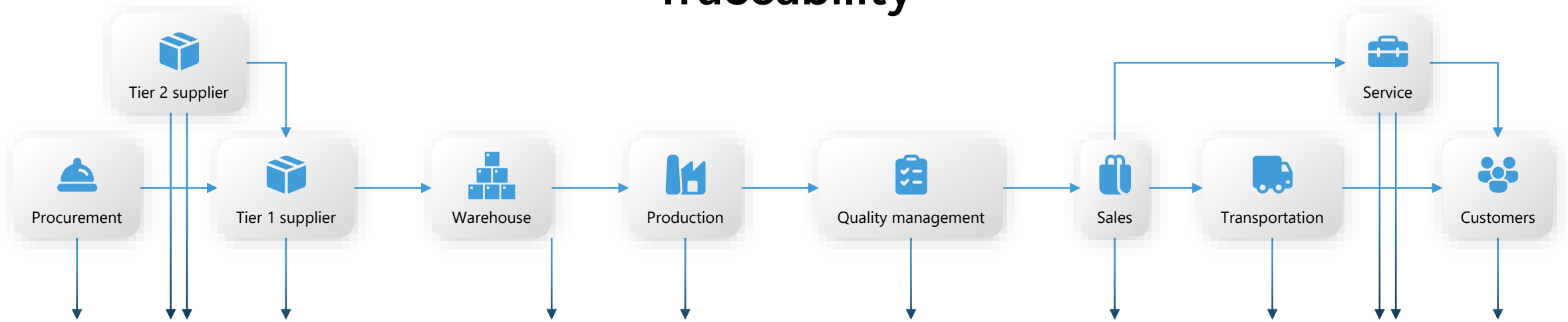


Production delays

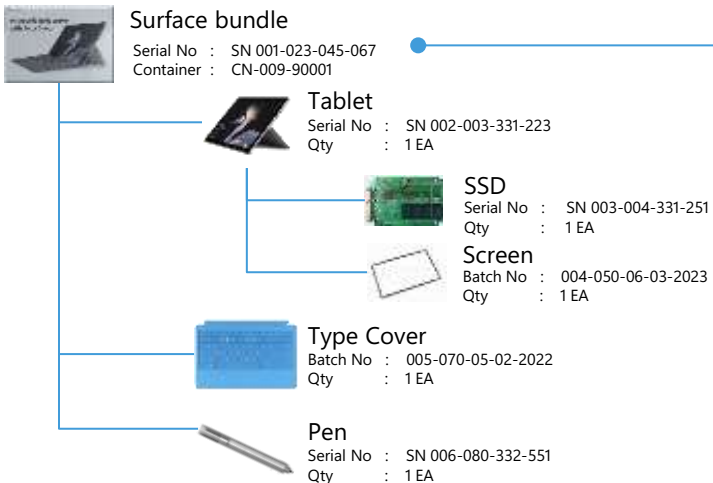


Asset downtime

Traceability



Genealogy tree



Activity events

Date: 2023-02-06 Time: 14:42:00 Operator: JL001
Create, Sales Order - SO0001

Date: 2023-02-16 Time: 14:43:00 Operator: MY001
Release, Production Order - PO0001

Date: 2023-02-17 Time: 15:42:00 Operator: CK002
Start, Operation -OP1, Resource - RSC001

Date: 2023-02-17 Time: 14:50:00 Operator: CK002
Consume, Type Cover, Batch No: 005-070-05-02-2022, Qty: 1 EA

Data collection

Test item: Outfit	Result: PASS
Test item: Size	Result: PASS
Test item: Color	Result: PASS

Traceability add-in

Procurement with Copilot

Enhancing Procurement Efficiency with Dynamics 365

Enhanced Decision-Making in Procurement: Dynamics365 Copilot introduces advanced tools for managing purchase order changes, enabling informed decision making

Streamlined Purchase Order Management: The tool simplified tracking and confirming purchase order alteration, significantly improving process efficiency

Already available! [Read the blog](#)

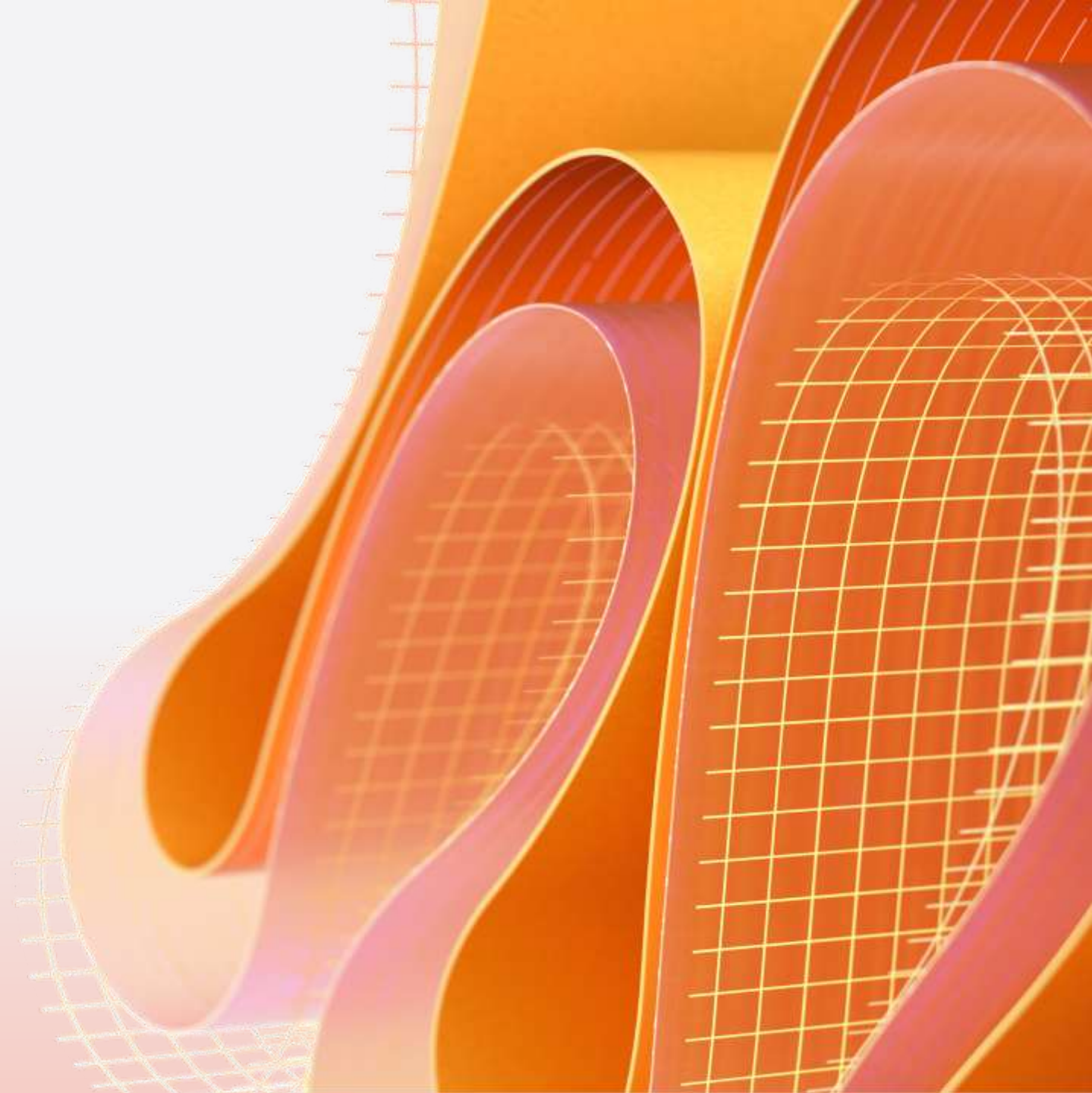
Assess downstream impact of order changes and disposition them

The screenshot displays the 'Confirmed purchase order changes' section in Dynamics 365. It features a summary area with three key metrics: 'Low impact changes: 0', 'High impact changes: 5', and 'Impacted downstream orders: 39'. Below this, a table lists 'Purchase order changes with risk for downstream impact (5)'. The table includes columns for 'Purchase order', 'Vendor account', 'Vendor name', 'Requested', 'Item number', 'Product name', 'Status', 'Original quantity', and 'Changed quantity'. A table with 8 columns and 6 rows is shown. The first row is highlighted in blue. To the right of the table, a list of impacted downstream orders is visible, including 'Planned keyboard - High-end speakers - Standard crossover, 240 pieces' and 'Planned keyboard - Mid-range speakers - Standard crossover, 280 pieces'.

Purchase order	Vendor account	Vendor name	Requested	Item number	Product name	Status	Original quantity	Changed quantity
0007911	US-103	Datum receivers	6/11/2022	143004	Standard crossover		1,563,000	1,007,000
0007422	US-102	Teklyn Parts	6/13/2022					
0007704	US-102	Teklyn Parts	6/16/2022					
0007821	US-102	Teklyn Parts	6/18/2022					
01W001	US-101	Petroleum Electronics	6/16/2022					

Enhanced Vendor Communication

DEMO



Challenges

Procurement specialists

What current state looks like



Time consuming to manually address PO changes



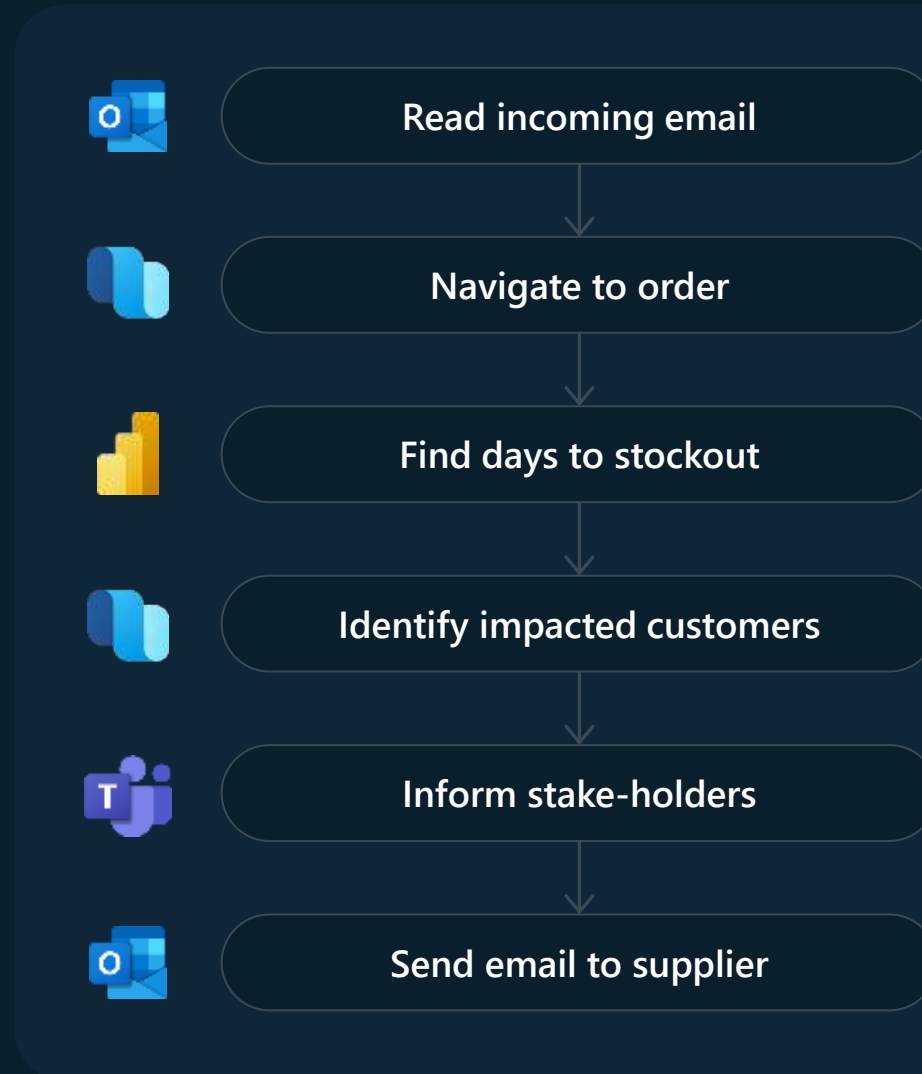
Reactive to supply chain disruptions



Limited strategic focus

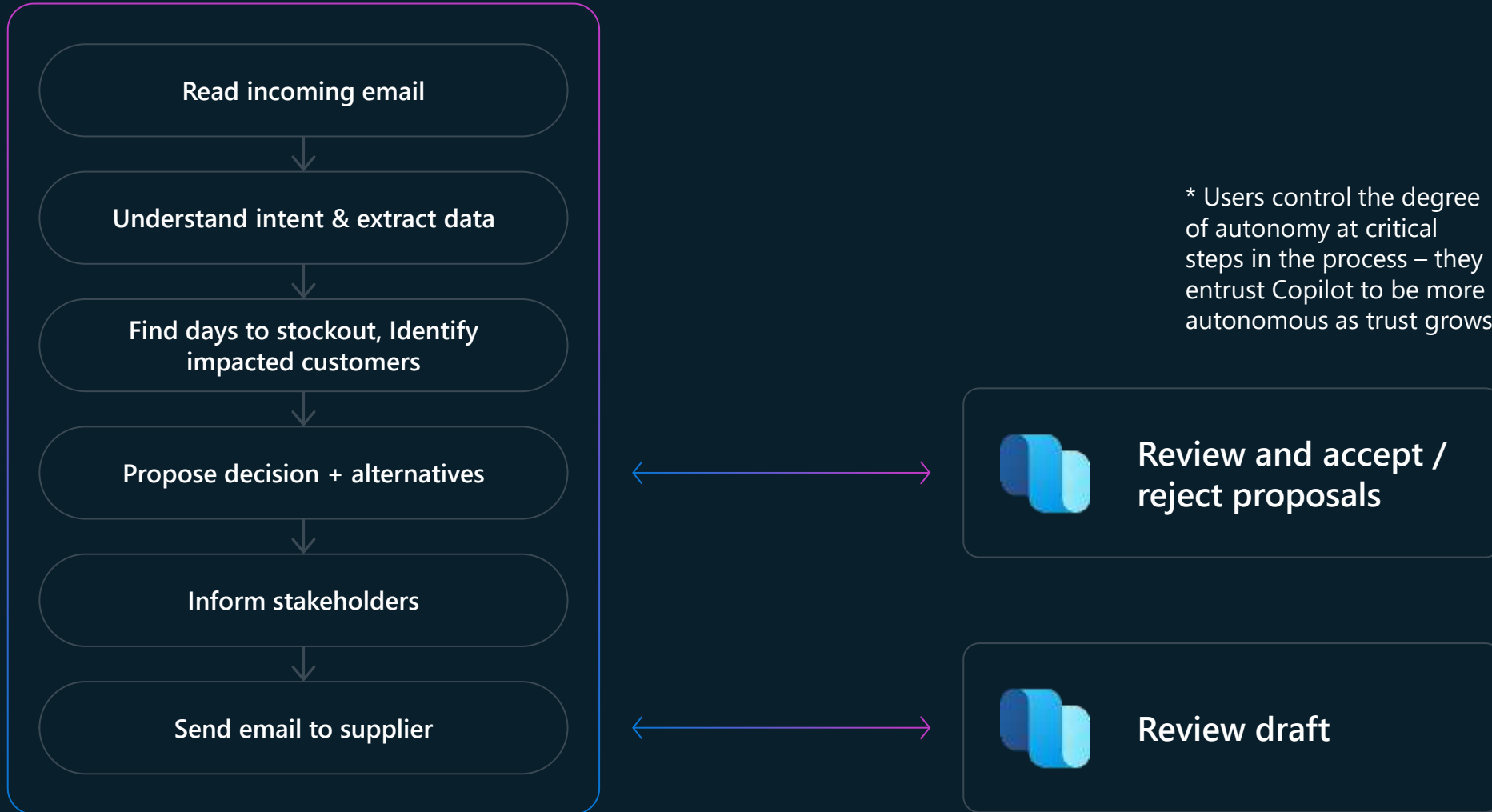
Current workflow

Procurement specialists



Future workflow

Procurement specialists with Supplier Communications Agent





Good morning, Inga. You have 1 recommendation.

Speed up your purchase order updates

Your team have manually confirmed 155 purchase orders in the last week. If most of these confirmations came from emails, we can help your team speed up the process and keep your purchase orders correctly updated.

Manually confirmed purchase orders

5% ↑

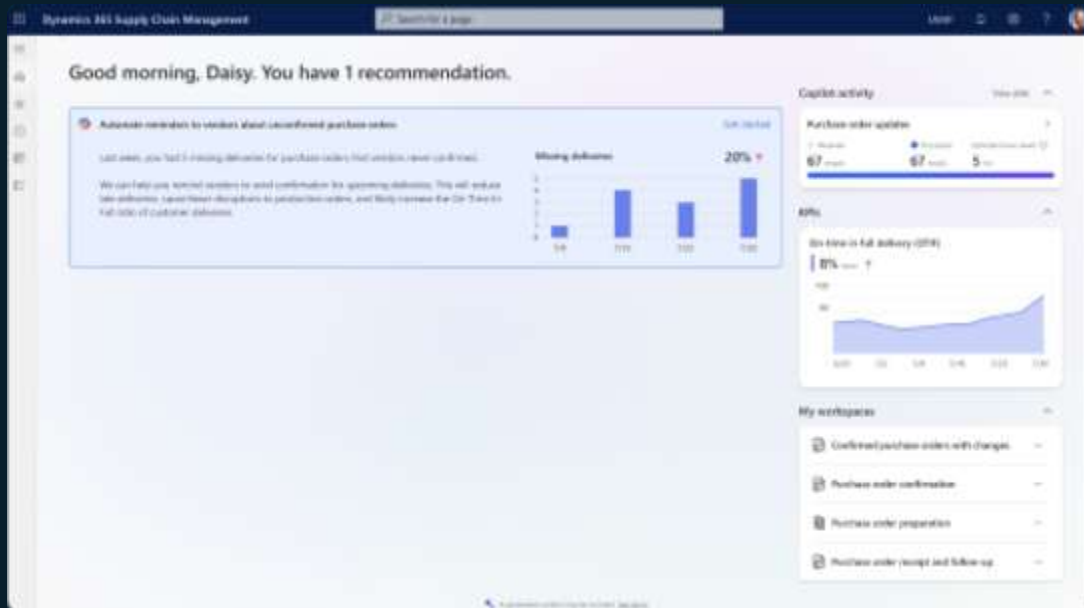
Potential time savings



Supplier communications agent

Adaptive Experience

Agents are continuously learning



Modern UI that only shows what the user needs at that moment instead of forms over tables

You are in control of the agent, and it learns alongside you to manage exceptions and improve its performance

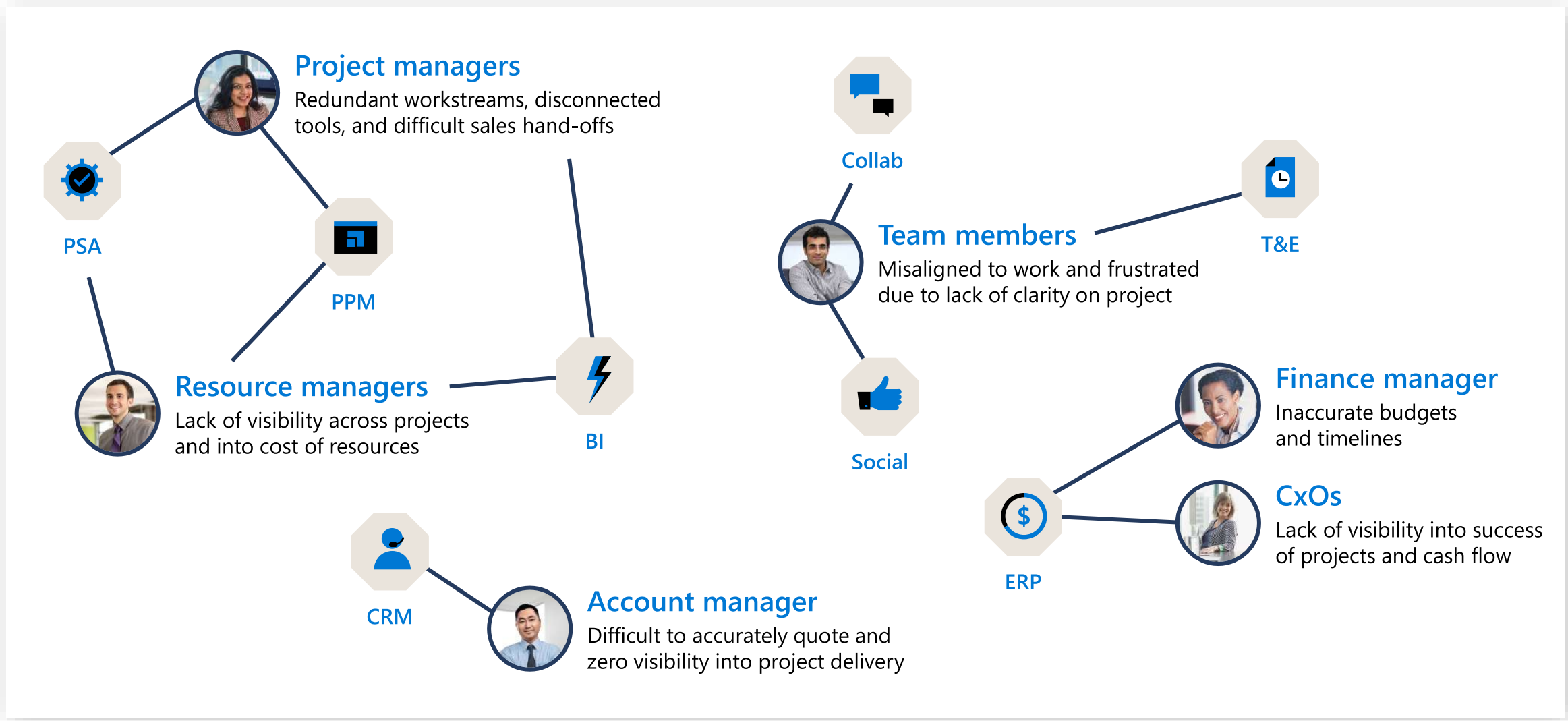


Gestión eficiente de proyectos: Mejorando la productividad



Aida Antón
Digital Technical Specialist
Microsoft España

Disparate systems and data silos are impacting success



Unify your project-centric business in a single app





Dynamics 365 Project Operations in shared ecosystem

Business Performance Planning, Business Performance Analytics, Business Performance Insights

Dynamics 365 Project Operations

Deal management	Work planning	Resourcing	Time and Expenses	Procurement	Billing & Finance
Multiple Contract Types	Project scheduling	Skills management	Mobile experience	Strategic sourcing	Subscription billing and revenue recognition
Lead to Project Contracts	Gantt, Kanban boards	Resource requests	Approval time edits	Supplier onboarding & vendor management	Electronic invoicing
CPQ for Services	Estimates	Booking reconciliations	Enterprise policies & rules	Deliveries and service tracking	Credit and collections
Advanced contract limits	Project Templates	Workforce planning and management	Receipt capture (OCR)	Invoice three-way match and payments	Project costing and accounting

Core Financials, Operational HR, and Globalization Studio (Tax, localization, compliance)



Copilot in Dynamics 365

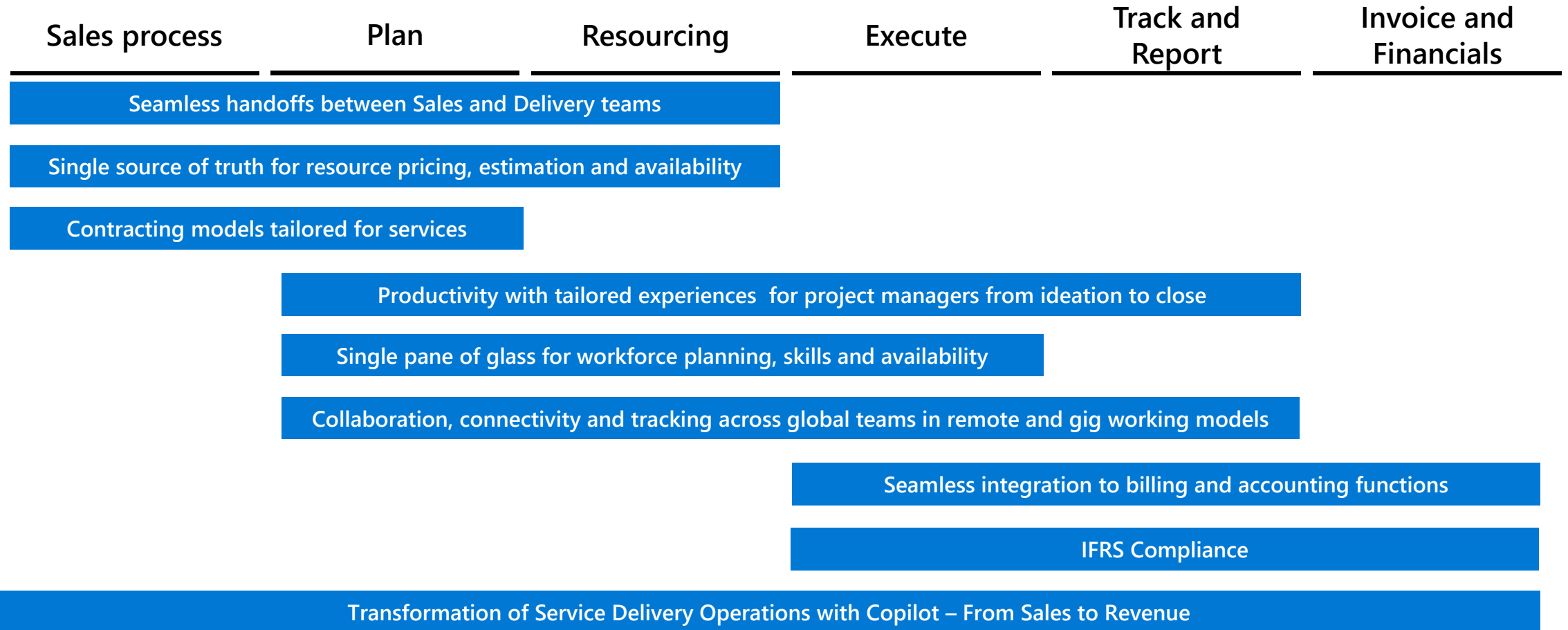


Copilot Studio

Extend

MICROSOFT CLOUD	Connectors & Common Data Framework	Copilot	Collaboration	Security	AI & Analytics	Low-Code Agility	Sustainability
	Dataaverse, Azure Synapse, Azure	Data & AI	Microsoft 365 & Teams	Microsoft	Power BI	Power Apps, Power Automate & Power Pages	Cloud for Sustainability

Investment themes - Project Operations





Copilot for Project Operations



- Home
- Recent
- Pinned
- My Work**
- Dashboards
- Time Entries
- Expenses
- Approvals
- Material Usage
- Projects**
- Projects
- Schedule Board
- Resource Utilization
- Resources
- Roles
- Contract Workers
- Project Reports
- Purchasing**
- Vendors
- Purchase Price Lists
- Subcontracts
- Contracted Resou
- P Projects**

←
📄 Focused view
📊 Show Chart
➕ New Project
🗑️ Delete
↻ Refresh
👤 Collaborate
📊 Visualize this view
✉️ Email a Link
🔗 Share

Bean Fix San Diego Projects 📄 Edit columns 🔍 Edit filters 🔍 Filter by keyword

<input type="checkbox"/>	Project ID	Name	Customer	Start Date	Finish Date	Actual Start	Effort (Ho...	Effort Co...	% Compl..
<input type="checkbox"/>	P-001060-Y	Additional training for Bean Fix employees	Bean Fix San Diego	7/12/2021	11/22/2024...		9,665.05	9.00	
<input type="checkbox"/>	P-001011-Z	Bean Fix E-Commerce	Bean Fix San Diego	9/10/2024	9/19/2024 ...	9/5/2024	576.00	167.50	2
<input type="checkbox"/>	P-001126-W	Bean Fix Franchisee (7 stores)	Bean Fix San Diego	5/3/2021	8/16/2022 ...	5/3/2021	3,206.00	266.00	
<input type="checkbox"/>	P-001121-K	Custom Cafe A-100s for Bean Fix stores	Bean Fix San Diego	7/16/2021	12/8/2022 ...		3,230.00	161.50	
<input type="checkbox"/>	P-001004-M	Store Rebrand and Refurbish	Bean Fix San Diego	6/10/2020	11/17/2021...	6/10/2020	2,850.38	1,021.00	3
<input type="checkbox"/>	P-001013-C	Sustainable Shops	Bean Fix San Diego	10/2/2024	10/5/2024 ...		0.00	0.00	

Rows: 6

Proposal Generation



← 📄 ↶ 💾 Save 💾 Save & close 🔍 Activate ➕ New 🗑️ Delete 📄 Update totals 📊 What-if 📄 Copy 🔍 Check access 📄 Export to PDF ⌵ 📄 Process ⌵ 👤 Assign 🔗 Flow ⌵ ⋮ 📄 Share

Redesign service ticket system - Saved

\$70,250.00 \$9,625.00 24.68 Draft
Total cost Total revenue Gross margin Status

Quote • Project quote information

[Summary](#) [Details](#) [Projects](#) [Products](#) [Analytics](#) [Proposal](#)

Proposal configuration

[+ Add section](#) [📄 Create proposal](#)

<input type="checkbox"/> Section title ↑ ↓	<input type="checkbox"/> Section type ↑ ↓	<input type="checkbox"/> Section content ↑ ↓	<input type="checkbox"/> Availability ↑ ↓
<input type="checkbox"/> Company profile	Standard text	Adatum Corporation is a technology firm specializing in developing and implementing IT solutions for various industries. Known for its innovative...	📄
<input type="checkbox"/> Need of the solution	Standard text	The customer's journey towards migrating their on-premise software to the cloud necessitates a comprehensive team and resources. They envision a ...	📄 📄
<input type="checkbox"/> Implementation details	Structured information		📄 📄
<input type="checkbox"/> Costs	Structured information		📄 📄
<input type="checkbox"/> Project schedule	Structured information		
<input type="checkbox"/> Payment terms	Standard text	Payment Schedule, Payment Method, Late Payment Penaltie, Cancellations and Refund, Changes and Modification, Acceptance of Terms	📄
<input type="checkbox"/> Next steps	Structured information	The next steps for a sales proposal involve the client reviewing the proposal, providing feedback for revisions if needed, obtaining internal approvals...	📄

- Home
- Recent
- Pinned
- Customers
 - Customers
 - Contacts
 - Products
 - Price lists
- Sales
 - Leads
 - Opportunities
 - Quotes**
 - Project contracts
- Transactions
 - Approved time
 - Approved expenses
 - Journals
 - Actuals
- Billing
 - Billing hub
 - Retainers and Advan...
 - Available retainers an...
- Sales

Microsoft Powerpoint Online

Search or enter web address

Redesign service ticket system - PPT - Saved

File Home Insert Draw Design Transitions Animations Slide Show Review View Help

Comments Record Present in teams Editing Share

Aptos (Body) 11

Copilot

1 Sales Proposal for Adventure Works

2 What we do

3 Initiatives


4 Detailed description of each slide

5 Specifics

6 Pricing strategy

7 Project plan

June 15th, 2024
Quote ID: 1000024



Redesigning Service Ticket System for Adatum

Empower your productivity through AI based services

Click to add notes

Copilot

Done! I've created a draft sales proposal for you from the quote "Redesigning Service Ticket System"

View quote

AI-generated content may be incorrect

Ask a question or tell me what you want to do. For ideas on how I can help, select the prompt guide below

Slide 1 of 7 English (U.S.)

Notes

100%

Creating a summary...

Stop generating

AI-generated content may be incorrect

Like Comment



June 15th, 2024

Adatum US
3575 157th Ave NE
Redmond 98052

Contoso
1423 NW Market St
Redmond 98107

Redesign service ticket system proposal

Quote ID: 10000025

Dear Adventure Works,

Thank you for considering our services for your Redesign service ticket system project. We are excited about the opportunity to assist you in transitioning to the cloud and maximizing the benefits of Azure for your business.

After carefully reviewing your requirements and objectives, we have developed a tailored proposal outlining our approach and deliverables for the migration project. Below is an overview of our proposal.

Needs analysis

Currently, Contoso relies on on-premise software to power their operations. However, they recognize the potential benefits of migrating to the cloud, including scalability, flexibility, and cost-efficiency. To facilitate this transition, they are seeking a retainer opportunity. Contoso journey towards migrating their on-premise software to the cloud necessitates a comprehensive team and resources. They envision a seamless transition facilitated by...

Copilot

Done! I've created a draft sales proposal for you from the quote "Redesigning Service Ticket System"

View quote

AI-generated content may be incorrect

Ask a question or tell me what you want to do. For ideas on how I can help, select the prompt guide below

What – If Analysis



← 📄 🔄 💾 Save 🗑️ Save & close 📄 Activate ➕ New 🗑️ Delete 📄 Update totals 📄 Copy 🔍 Check access 📄 Export to PDF ⌵ 🔄 Process 👤 Assign 🔗 Flow ⋮ 📄 Share

Redesign service ticket system - Saved

\$70,250.00 **\$9,625.00** **24.68** **Draft**
Total cost Total revenue Gross margin Status

Quote • Project quote information

Hide cards

Summary

The project is quoted at \$70,250.00, below the industry benchmark of \$85,000.00, including \$50,000 for hardware and \$20,250 for consulting. A 15% contingency is added to manage the typical 10% cost overrun. Although competitively priced, the projected 18% gross margin falls short of our 25% goal. We plan to improve profitability by optimizing procurement and leveraging the latest cost-effective technologies, ensuring the project's completion within 12 months with our team of 50 specialists.

Summary Details Projects Products What-if analysis Analytics Proposal

Quote insights

Customer budget

(\$63,030.00)

Over customer budget

Profitability

83.66

Gross margin

Scheduled to deliver

16

Days past the requested date

Estimates

Cost Sales

Expense estimates
\$3,000.00

Material estimates
\$5,900.00

Labor estimates
\$9,608.00

Discount
\$5.00%

Fee
\$2,000.00

Your infrastructure quote line has budget variance of **15%**. Consider reducing the expense cost to meet the budget target.

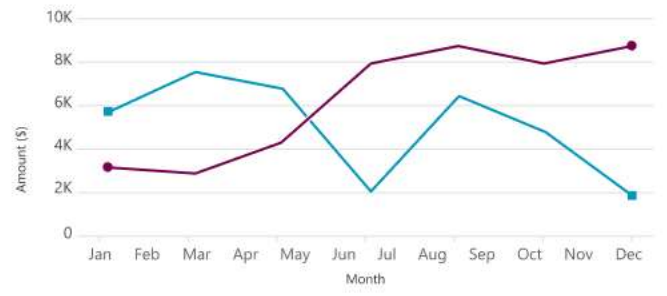
View expenses

Similar successful quotes in the past have given **12%** discount. Consider increasing your discount %

View discount

Distribution of cost and revenue

Over time



Catch up

You have sales proposal ready to review and share with customer

You have **6** Copilot suggestions in your what-if analysis project

- Home
- Recent
- Pinned
- Customers
 - Customers
 - Contacts
 - Products
 - Price lists
- Sales
 - Leads
 - Opportunities
 - Quotes
 - Project contracts
- Transactions
 - Approved time
 - Approved expenses
 - Journals
 - Actuals
- Billing
 - Billing hub
 - Retainers and Advan...
 - Available retainers an...
- Sales

What-if



- Select goal
- Revise price
- Resourcing unit
- Role
- Resource level
- Work hours
- Copilot recommendations
- Review

Goals

Increase gross margin



Current	Target
24.68 %	65.00 %

Minimize cost



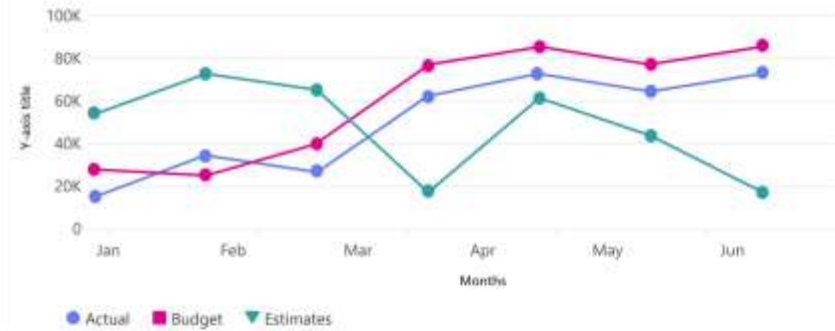
Current	Target
\$70,250.00	---

Increase revenue



Current	Target
\$300,000.00	---

Gross margin over time



Next

Save and close

Cancel

- Home
- Recent
- Pinned
- Customers
 - Customers
 - Contacts
 - Products
 - Price lists
- Sales
 - Leads
 - Opportunities
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 - Project contracts
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← 📄 🔄 💾 Save 🗑️ Save & close 📄 Activate ➕ New 🗑️ Delete 📄 Update totals 📄 Apply what if 📄 Copy 🔍 Check access 📄 Export to PDF ⌵ 🔄 Process ⌵ 👤 Assign 🔄 Flow ⌵ ⋮ Share

Redesign service ticket system - Saved \$70,250.00 Total cost \$9,625.00 Total revenue 24.68 Gross margin Draft Status

Quote • Project quote information

Summary Details Projects Products **What-if analysis** Analytics Proposal

Select goal ⌵ Select target % ⌵ Current margin ⌵

Resourcing unit (5)

Fabrikam India 75

Fabrikam UK

Fabrikam US

Resourcing role (3)

Architect

Consulting Lead

Senior Consulting Lead

Resourcing level (3)

Associate

Senior

Principal

Updated line details + Apply ↶ ⋮

Line	Line detail description	Transaction	Role	Resourcing unit	Quantity	Unit	Unit price	Amount
Cloud consulting	Build a sales order...	Time	Consultant	Fabrikam US	100	Hour	450	45,000
Cloud consulting	Data collection	Time	Consultant	Fabrikam UK	150	Hour	150	22,500
Cloud consulting	Regulatory rules mappin	Time	Engineer	Fabrikam India	120	Hour	120	14,400
Cloud consulting	Data field mapping	Time	Technician	Fabrikam Neth...	230	Hour	230	52,900
Cloud consulting	Validate mapping	Time	Sr. Consultant	Fabrikam US	110	Hour	110	12,000
Cloud consulting	Design report templates	Time	Consulting Lead	Fabrikam UK	220	Hour	220	48,400
Infrastructure update	Generate draft reports	Time	Consulting Lead	Fabrikam India	300	Hour	300	90,000
Infrastructure update	Build a sales order...	Time	Consulting Lead	Fabrikam Neth...	450	Hour	450	202,500
Infrastructure update	Build a sales order...	Time	Consulting Lead	Fabrikam US	600	Hour	600	36,000
Infrastructure update	Build a sales order...	Time	Consulting Lead	Fabrikam UK	200	Hour	300	60,000
Infrastructure update	Build a sales order...	Time	Consulting Lead	Fabrikam UK	600	Hour	600	36,000

Recommendation:
 Missing role or unit price. A role price of \$300.00 has been suggested based on market price.



Time and Approvals Agent





Time Entry powered by Copilot



- Activity
- Chat
- Teams
- Calendar
- Calls
- OneDrive
- ...
- Apps

Chat

Copilot

- Pinned
 - Oscar Krogh** 8:29 AM
Louisa will send the initial list of...
 - Beth Davies** Yesterday
Thanks, that would be nice.
 - Kayo Miwa** Yesterday
I reviewed with the client on...
 - Strategy planning potential...** 8:20 AM
Sarah: It would be great to sync...
 - August Bergman** 7:18 AM
I haven't checked available time...
- Recent
 - Charlotte and Babak** 8:58 AM
Babak: I asked the client to send...
 - Emiliano Ceballos** 7:55 AM
👍👍
 - Marie Beaudouin** 7:30 AM
Sounds good
 - Daichi Fukuda** 7:02 AM
You: Thanks! Have a nice day, I...
 - Marketing team sync** 10:43
I think Babak might know more...
 - Kian Lambert** Yesterday
Have you run this by Beth? Mak...
 - Team Design Template** Yesterday
Reta: Let's set up a brainstormi...
 - Marie's B-day gift** Yesterday
I was thinking of a gift card for...
 - Wanda Howard** Yesterday
Yah, that sounds great

Copilot

Time entries from 2/11

February 23, 2024, 8:00 AM

Hi Babak, I've created your time entries for this week based on your assignments, and I've added comments to the same. Here's a summary:

- Monday, 21 Feb** submitted entries of 8/8 hours for Fabrikam housing ✓
- Tuesday, 22 Feb** draft entries of 8 hours (Geneva project, Fabrikam housing)
- Wednesday, 23 Feb** draft entries of 6 hours (Geneva project), and submitted entries of 2 hours (Fabrikam housing)

Shall I go ahead and submit these 4 entries (14 hours) to Robin for approval?

AI-generated content may be incorrect

-
-
-

Ask a work question or use / to reference people, files and more

84/2000

- Activity
- Chat
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- Calendar
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- OneDrive
- ...
- Apps

Chat

Copilot

• Pinned

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Copilot

Time entries from 2/11

New chat ...

Tuesday, 22 Feb

Here are the details of the entries for Tuesday

Summary for Tuesday 2/22 10/40 hours submitted

Project	Task	Hours	Creator	Source
Geneva project	Accounts review	4.00	Copilot	Bookings
Met with accounting head to gain access to relevant details to move forward with the case.				
Fabrikam housing	Ecological survey	4.00	Copilot	Assignments
Discussed legalities that may arise with regard to environmental impact of the housing project				
Total			8 hours	

Show entries for: Mon 2/21 Wed 2/23

Shall I go ahead and submit these 2 entries (8 hours) to Robin for approval?

- Submit entries
- Save changes
- Open in Time

AI-generated content may be incorrect

- Is there anything else I need to submit?
- Who else needs to know?
- Can I recall the expense report?

Ask a work question or use / to reference people, files and more

84/2000

← Export ▾ ⋮

My weekly time entries ▾

Edit columns Search project 🔍

Edit entry ▾ ✓ Submit 🗑 Delete ↶ Recall 📄 Copy ▾ 📁 Import ▾

< > 📅 Apr 9 - Apr 15, 2023

	Status ▾	Type ▾	Project ▾	Task ▾	Role ▾	Sun 9 ▾	Mon 10 ▾	Tue 11 ▾	Wed 12 ▾	Thu 13 ▾	Fri 14 ▾	Sat 15 ▾	Total ▾
--	----------	--------	-----------	--------	--------	---------	----------	----------	----------	----------	----------	----------	---------

	Draft	Work	Geneva project	Literature review	Legal consultant				4.00				4.00
	Draft	Work	Geneva project	Accounts review	Legal consultant				2.00				2.00
	Draft	Work	Geneva project	Accounts survey	Legal consultant			4.00					4.00
	Draft	Work	Fabrikam housing	Ecological survey	Legal consultant			4.00					4.00
	Submitted	Work	Geneva project	Case strategy meet	Legal consultant				2.00				2.00
	Submitted	Work	Fabrikam housing	Ecological survey	Legal consultant		4.00						4.00
	Submitted	Work	Fabrikam housing	Location survey	Legal consultant		4.00						4.00
						0.00	8.00	8.00	8.00	0.00	0.00	0.00	24.00

5 rows (0 selected)

- Activity
- Chat
- Teams
- Calendar
- Calls
- OneDrive
- ...
- Apps

Chat

Copilot

- Pinned
- OK Oscar Krogh 8:29 AM
Louisa will send the initial list of...
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- Wanda Howard Yesterday
Yah, that sounds great
- WSL Little Yesterday

Copilot

Time entries from 2/11

Shall I go ahead and submit these 2 entries (8 hours) to Robin for approval?

Submit entries Save changes Open in Time

AI-generated content may be incorrect

Submit entries

Time Entries Submitted



Your time entries for Tuesday have been submitted to Robin for approval.

Review and submit entries for the rest of your week:

- Monday, 21 Feb - submitted entries of 8/8 hours for Fabrikam housing
- Tuesday, 22 Feb - submitted entries of 8/8 hours for Geneva project and Fabrikam housing
- Wednesday, 23 Feb - draft entries of 6 hours (Geneva project), and submitted entries of 2 hours (Fabrikam housing)

Submit all Open in Time

AI-generated content may be incorrect

is there anything else I need to submit? Who else needs to know? Can I recall the expense report?

Ask a work question or use / to reference people, files and more

SA/2000





Expense Entry powered by Copilot



- Activity
- Chat 3
- Teams
- Calendar
- Calls
- OneDrive
- ...
- Apps

Chat

Copilot

• Pinned

- Oscar Krogh** 8:29 AM
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I was thinking of a gift card for...
- Wanda Howard** Yesterday
Yah, that sounds great
- Will Little** Yesterday

Copilot

Time entries from 2/11

February 23, 2024, 8:00 AM

Hi Babak, I've identified some expenses pertaining to the Geneva project from last week's trip to Amsterdam for which I've generated an expense report with the following summary:

#11023345 Amsterdam trip for Geneva project 🟢 All expenses are in compliance

Travelled to Amsterdam to meet with clients at Contoso's head office. Stayed for 3 days at Amsterdam Marriott Hotel.

Total amount	USD 710.00
Attached expenses	12

Expense categories Click on a category to view all expenses from it

Flight (2) Meal (5) Itemization (1) Car rental (4)

Should I submit it for approval?

Submit all **Show details** **Open Expense Management**

AI-generated content may be incorrect

- Is there anything else I need to submit?
- Who else needs to know?
- Can I recall the expense report?

Ask a work question or use / to reference people, files and more

84/2000

- Activity
- Chat 3
- Teams
- Calendar
- Calls
- OneDrive
- ...
- Apps

Chat

Copilot

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- Wanda Howard** Yesterday
Yah, that sounds great
- Will Little** Yesterday

Copilot

Time entries from 2/11

week's trip to Amsterdam for which I've generated the following report. Should I submit it for approval?

#11023345 Amsterdam trip for Geneva project ✔ All expenses are in compliance

Date	Merchant	Category	Currency	Tax	Amount
2/5/2024	Salt Co	Meal	USD	5.00	20.00
2/6/2024	Spice W...	Meal	USD	20.00	80.00
2/6/2024	Sweet C...	Meal	USD	10.00	40.00
2/7/2024	Sour Res...	Meal	USD	6.25	25.00
2/7/2024	Bitter Bis...	Meal	USD	8.75	35.00
Total				USD 200.00 of 710.00	

Save Changes made to the report will not be saved unless you do so manually.

Expense categories Click on a category to view all expenses from it

Flight (2) Itemization (1) Car rental (4)

Submit report Detach expenses Open in Expense to edit

AI-generated content may be incorrect

Is there anything else I need to submit? Who else needs to know? Can I recall the expense report?

Ask a work question or use / to reference people, files and more

84/2000

Amsterdam trip

2/5/2024-2/7/2024

Travelled to Amsterdam to meet with clients at Contoso's head office. Stayed for 3 days at Amsterdam Marriott Hotel.

To be paid
400.00

Receipts
4

Status
Draft

Submit

Save and close



Expenses Receipts

+ New + Attach existing Remove Bulk edit Copy

Date	Expense category	Amount	Merchant	Purpose	Payment method	Receipts	Additional Information
⊕ 2/5/2024	Meal	40.00	Salt Co	Client engagement	Credit card	Yes	--
⊕ 2/5/2024	Flight	80.00	Lufthansa	Client engagement	Credit card	Yes	--
⊕ 2/6/2024	Car rental	40.00	Uber	Client engagement	Credit card	Yes	--
⊕ 2/7/2024	Hotel (Itemization)	240.00	Marriott Hotel	Client engagement	Credit card	Yes	Itemized expense



40.00
2/5/24 | Meal
Credit card

Edit

Details

Category: Location:

Amount: Tax:

Receipt

Image_123454.jpg

Actions

Save and continue



Approvals



- Home
- Recent
- Pinned
- My work
 - Dashboards
 - Time entries
 - Expenses
 - Material usage
 - Approvals
 - Intelligent approvals
- Projects
 - Projects
 - Schedule board
 - Resource utilization
 - Resources
 - Contract workers
 - Roles
 - Project reports
- Purchasing
 - Vendors
 - Purchase price lists
 - Subcontracts
 - Contracted resource...
 - Materials on order
 - Subcontract milestones
 - Vendor invoices
- Projects

Show Chart

Approvals reviewed by Copilot - Saved

<input type="checkbox"/>	Project	Task	Transaction class	Transaction category	Date	Resource	Product	Submitted quantity	Billable quantity	Total amount
<input type="checkbox"/>	Installation at Adatum	Installation	Time	Default	3/25/2024	David So		8.0	8.0	\$0.00
<input type="checkbox"/>	Needs review: 0\$ sales price Overtime submission Adatum	Documentation	Time	Default	3/25/2024	Jenny Wilson		8.0	8.0	\$0.00
<input type="checkbox"/>	Installation at Adatum	Hardware installation	Time	Default	3/25/2024	Timothy Estrada		8.0	8.0	\$400.00
<input type="checkbox"/>	Installation at Adatum	Network installation	Time	Default	3/25/2024	Jolene Richard		8.0	8.0	\$400.00
<input type="checkbox"/>	Installation at Adatum	Grounding	Time	Default	3/25/2024	Melva Bowers		8.0	8.0	\$400.00
<input type="checkbox"/>	Installation at Adatum	Telemetry	Time	Default	3/25/2024	Juliet Finch		8.0	8.0	\$400.00
<input type="checkbox"/>	Installation at Adatum	Software installation	Time	Default	3/25/2024	Edward Rutledge		8.0	8.0	\$400.00
<input type="checkbox"/>	Installation at Adatum	Software installation	Expense	Airfare	3/25/2024	Georgette Bray		8.0	8.0	\$400.00
<input type="checkbox"/>	Installation at Adatum	Software installation	Expense	Airfare	3/25/2024	Delores Ortega		8.0	8.0	\$400.00
<input type="checkbox"/>	Installation at Adatum	Software installation	Expense	Hotel	3/25/2024	Anastasia Love		8.0	8.0	\$400.00
<input type="checkbox"/>	Installation at Adatum	Software installation	Expense	Hotel	3/25/2024	Victoria Williams		8.0	8.0	\$400.00
<input type="checkbox"/>	Installation at Adatum	Software installation	Expense	Meal	3/25/2024	Graham Strong		8.0	8.0	\$400.00
<input type="checkbox"/>	Installation at Adatum	Software installation	Material	Material	3/25/2024	Cameron Williamsor	Armband	8.0	8.0	\$400.00
<input type="checkbox"/>	Installation at Adatum	Software installation	Material	Material	3/25/2024	Cody Fisher	Armband	8.0	8.0	\$400.00
<input type="checkbox"/>	Installation at Adatum	Software installation	Material	Material	3/25/2024	Guy Hawkins	Armband	8.0	8.0	\$400.00
<input type="checkbox"/>	Installation at Adatum	Software installation	Material	Material	3/25/2024	Jacob Jones	Armband	8.0	8.0	\$400.00
<input type="checkbox"/>	Installation at Adatum	Software installation	Material	Material	3/25/2024	Savannah Nguyen	Armband	8.0	8.0	\$400.00

Rows: 120

- Home
- Recent
- Pinned
- My work
 - Dashboards
 - Time entries
 - Expenses
 - Material usage
 - Approvals
 - Approvals agent
- Projects
 - Projects
 - Schedule board
 - Resource utilization
 - Resources
 - Contract workers
 - Roles
 - Project reports
- Purchasing
 - Vendors
 - Purchase price lists
 - Subcontracts
 - Contracted resource...
 - Materials on order
 - Subcontract milestones
 - Vendor invoices
 - Projects

Save Save & close Approve Reject Assign to Copilot Refresh Check access Flow

Share

Resource - Saved
 Project approval
 Submitted Status Robin Counts Approver Robin Counts Owner

Billing type	Chargeable
Billable quantity	1.00
Submitted quantity	1.00
Sales price	\$0.00
External comments	---
Material usage ID	(No name)
Submitted by	David So
Approval set	---

Transaction date	5/21/2024
Select product	Existing
Product	Armband
Write-in product	
Material usage purpose	
External comments	
Unit group	Device and warranty packages
Unit	Basic package
Subcontract	
Subcontract line	
Quantity	1.00
Unit cost	\$1,000.00
Currency	US Dollar
Subtotal	\$1,000.00
Sales tax amount	
Total amount	\$1,000.00
Project	Installation at Adatum
Project task	

Timeline

Enter a note...

- Needs manual review 5/23/2024 3:50 PM
 - 2 reasons flagged
 - 0\$ sales price
 - Overtime submission
- Needs manual review 5/22/2024 3:48 PM
 - 2 reasons flagged
 - Budget violation
 - NTE violation

- Home
- Recent
- Pinned
- My work
 - Dashboards
 - Time entries
 - Expenses
 - Material usage
 - Approvals
 - Approvals agent
- Projects
 - Projects
 - Schedule board
 - Resource utilization
 - Resources
 - Contract workers
 - Roles
 - Project reports
- Purchasing
 - Vendors
 - Purchase price lists
 - Subcontracts
 - Contracted resource...
 - Materials on order
 - Subcontract milestones
 - Vendor invoices
 - Projects

Save Save & close Approve Reject Assign to Copilot Refresh Check access Flow

Share

Resource - Saved
 Project approval
 Submitted Status Robin Counts Approver Robin Counts Owner

Billing type	Chargeable
Billable quantity	1.00
Submitted quantity	1.00
Sales price	\$0.00
External comments	---
Material usage ID	(No name)
Submitted by	David So
Approval set	---

Transaction date	5/21/2024
Select product	Existing
Product	Armband
Write-in product	
Material usage purpose	
External comments	
Unit group	Device and warranty packages
Unit	Basic package
Subcontract	
Subcontract line	
Quantity	1.00
Unit cost	\$1,000.00
Currency	US Dollar
Subtotal	\$1,000.00
Sales tax amount	
Total amount	\$1,000.00
Project	Installation at Adatum
Project task	

Timeline

Enter a note...

- Needs manual review 5/23/2024 3:50 PM
 - 2 reasons flagged
 - \$ sales price - Add a price in the role price list for this contract for the role of "Engineer"
 - Overtime submission - Review that overtime is warranted.
- Needs manual review 5/22/2024 3:48 PM
 - 2 reasons flagged
 - Budget violation - Increasing the budget by 20% for this task will help you finish without violation
 - NTE violation - Initiate a conversation with the customer to increase the NTE limit for this contract

- Home
- Recent
- Pinned
- General
 - Parameters
 - Organizational units
 - Transactional categories
 - Expense categories
 - Recurring invoice sets
 - Calendar templates
- Settings

Save Save & close Delete Feature control Refresh Check access Word templates Flow Share

Parameter - Saved Submitted Status Robin Counts Approver Robin Counts Owner

Project parameter

Summary **Copilot agent metrics** Pricelist Amount based pricing dimensions Markup based pricing dimensions Related

Approval policy rules

File

Agent assisted metrics

Time entry creation		Expense creation		Approvals	
This week	50	This week	34	This week	120
This month	400	This month	345	This month	5,100
This quarter	1123	This quarter	1234	This quarter	12,480
To date	3023	To date	2345	To date	14,600

Factors affecting Days Sales Outstanding

Factor	Before enabling agent	After enabling agent	Change
Missing time entries per invoice cycle	54	4	92.5%
Average actuals corrected per month	23,450	234	99%
Average number of invoices corrected per quarter	123	10	91%
Rejected or returned time entries per invoice cycle	256	0	100%
Rejected or returned expense reports per invoice cycle	214	14	93%



Invoice redesign



Active contracts Search for records

	Pinned	Contract	Customer	Contract value	Previously invoiced	Ready to be invoiced	Available advances	Products				
<input checked="" type="checkbox"/>		Adatum Fabrication contract	Adatum Fabrication	\$100,000.00	\$50,000.00	\$20,000.00	\$1,000.00					
	<input type="checkbox"/>	Line	Project	Next invoice date	Billing method	Milestones	Time	Material	Expense	Fee	Invoiceable backlog	Previously invoiced
	<input type="checkbox"/>	Diagnostics	Diagnostics	12/15/23	Time and material		\$12,500.00	\$12,500.00	\$12,500.00	\$12,500.00	\$50,000.00	\$25,000.00
		Installation	Installation	12/31/23	Fixed price	\$50,000.00					\$50,000.00	\$25,000.00
>		Adventure works contract	Adventure works	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	2				
>		City Power & Light contract	City Power & Light	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00					
>		City Power & Light contract	City Power & Light Engineering	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	4				
>		City Power & Light Instr contract	City Power & Light Instrumentation	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00					
>		City Power & Light Int contract	City Power & Light Integration	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00					
>		Trey Research contract	Trey Research	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	4				
>		Trey Research Assembly contract	Trey Research Assembly	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00					
>		Trey Research Electronics contract	Trey Research Electronics	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00					
>		Trey Research Fabrication contract	Trey Research Fabrication	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00					
>		Trey Research Instr contract	Trey Research Instrumentation	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00					
>		Trev Research Fab contract	Trev Research Fabrication	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00					

Time transactions for Diagnostics

[Create invoice](#)
[Add to invoice](#)
[Ready to invoice](#)
[Not ready to invoice](#)
[Re-evaluate Not-To-Ex...](#)
[Reset Not-To-Exceed s...](#)
[Export to Excel](#)

Not-To-Exceed status	Transaction class	Billing type	Billing status	Document date	Bookable resource	Resource role	Resourcing unit	Quantity	Price	Amount	Tax
Not applicable	Time	Chargeable	Ready to invoice	1/1/2023	Savannah Nguy	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Not applicable	Time	Chargeable	Ready to invoice	1/2/2023	Ronald Richard	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Not applicable	Time	Chargeable	Ready to invoice	1/3/2023	Jane Cooper	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Not applicable	Time	Non chargeable	Not ready to invoice	1/4/2023	Annette Black	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Not applicable	Time	Non chargeable	Not ready to invoice	1/5/2023	Robert Fox	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Not applicable	Time	Non chargeable	Not ready to invoice	1/6/2023	Floyd Miles	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Committed	Time	Non chargeable	Not ready to invoice	1/7/2023	Ralph Edwards	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Committed	Time	Non chargeable	Not ready to invoice	1/8/2023	Leslie Alexande	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Failed	Time	Non chargeable	Not ready to invoice	1/9/2023	Bessie Cooper	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Failed	Time	Non chargeable	Not ready to invoice	1/10/2023	Cameron Willia	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Failed	Time	Non chargeable	Not ready to invoice	1/11/2023	Dianne Russell	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Failed	Time	Non chargeable	Not ready to invoice	1/12/2023	Devon Lane	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Failed	Time	Non chargeable	Not ready to invoice	1/13/2023	Brooklyn Simm	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Failed	Time	Non chargeable	Not ready to invoice	1/14/2023	Esther Howard	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Failed	Time	Non chargeable	Not ready to invoice	1/15/2023	Guy Hawkins	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Failed	Time	Non chargeable	Not ready to invoice	1/16/2023	Albert Flores	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	
Failed	Time	Non chargeable	Not ready to invoice	1/17/2023	Jerome Bell	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	

32 rows (0 selected)

Previously invoiced transactions for Diagnostics



Create corrective i... Add to invoice Pin for correction Export to Excel

<input type="checkbox"/>	Pinned	Grouping	Invoice	Transaction class	Document date	Bookable resource	Resource role	Resourcing unit	Quantity	Price	Amount	Tax
<div style="margin-left: 20px;">> Savannah Nguyen (2) [Bookable resource]</div>												
			Adatum diagno...	Time	1/1/2023	Savannah Ngu	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	\$0.00
			Adatum diagno...	Time	1/1/2023	Savannah Ngu	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	\$0.00
<div style="margin-left: 20px;">> Jane Cooper (2) [Bookable resource]</div>												
<input checked="" type="checkbox"/>			Adatum diagno...	Expense	1/1/2023	Jane Cooper	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	\$0.00
<input checked="" type="checkbox"/>			Adatum diagno...	Expense	1/1/2023	Jane Cooper	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	\$0.00
<div style="margin-left: 20px;">> Annette Black (2) [Bookable resource]</div>												
			Adatum install...	Material	1/2/2023	Annette Black	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	\$0.00
			Adatum diagno...	Material	1/2/2023	Annette Black	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	\$0.00
<div style="margin-left: 20px;">> Robert Fox (2) [Bookable resource]</div>												
			Adatum telem...	Time	1/3/2023	Robert Fox	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	\$0.00
			Adatum diagno...	Time	1/3/2023	Robert Fox	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	\$0.00
<div style="margin-left: 20px;">> Floyd Miles (2) [Bookable resource]</div>												
			Adatum diagno...	Time	1/4/2023	Floyd Miles	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	\$0.00
			Adatum diagno...	Time	1/4/2023	Floyd Miles	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	\$0.00
<div style="margin-left: 20px;">> Ralph Edwards (2) [Bookable resource]</div>												
			Adatum diaono...	Time	1/4/2023	Ralph Edwards	Network Technician	Fabrikam	1.00	\$1,000.00	\$1,000.00	\$0.00

32 rows (0 selected)



Suggest a resource

Using Key phrase extraction model in AI Builder

- Home
- Recent
- Pinned
- My work
 - Dashboards
 - Time entries
 - Expenses
 - Material usage
 - Approvals
- Projects
 - Projects
 - Schedule board
 - Resource utilization
 - Resources
 - Roles
- Purchasing
 - Vendors
 - Purchase price lists
 - Subcontracts
 - Contracted resource...
 - Materials on order
 - Subcontract milestones
 - Vendor invoices

Save Save & close New project Copy project Deactivate Book Delete Refresh project totals Refresh

Azure on-prem migration 12/31/2022 12:00 AM \$200,000.00 --- 0.00

Project Due date Estimated labor cost Cost consumption % Progress %



Summary Tasks **Team** Resource reconciliation Estimates Tracking Sales Task billing setup Expense estimates Related

All team members Suggest resources

Worker type	Resource	Role	Resourcing unit	Position name	Start	End	Required hours	Hard booked hour	Total effort
Full time	David So	Migration Spec	Fabrikam US	Migration Spec	11/1/2022	12/31/2022	400.00	---	400.00
Full time	Generic resource	Network Engine	Fabrikam US	Network Eng	11/1/2022	12/31/2022	400.00	---	400.00
Contractor	Generic resource	Service Engine	Fabrikam US	Service Eng	11/1/2022	12/31/2022	400.00	---	400.00
Contractor	Generic resource	Software Engine	Fabrikam US	Software Eng	11/1/2022	12/31/2022	400.00	---	400.00

Resources for Network Engineer

Suggestions and scores seen below are based only on past experience.

View details Book Compare

Do not show contractors

Full time

Score	Resource	Worker type
10	Dawn Carlson	Full time
10	Jolene Richard	Full time
10	Melva Bowers	Full time
10	Juliet Finch	Full time
10	Edward Rutledge	Full time
10	Georgette Bray	Full time

View more suggestions

- Home
- Recent
- Pinned
- My work
 - Dashboards
 - Time entries
 - Expenses
 - Material usage
 - Approvals
- Projects
 - Projects
 - Schedule board
 - Resource utilization
 - Resources
 - Roles
- Purchasing
 - Vendors
 - Purchase price lists
 - Subcontracts
 - Contracted resource...
 - Materials on order
 - Subcontract milestones
 - Vendor invoices

Save Save & close New project Copy project Deactivate Book Delete Refresh project totals Refresh

Azure on-prem migration

Project

12/31/2022 12:00 AM Due date \$200,000.00 Estimated labor cost --- Cost consumption % 0.00 Progress %

Opportunity sales process Active for 4 days

New Quote Plan Deliver Complete Close (4 D)

Summary Tasks **Team** Resource reconciliation Estimates Tracking Sales Task billing setup Expense estimates Related

All team members

Worker type	Resource	Role	Resourcing unit	Position name	Start	End	Required hours	Hard booked hour	Total effort
Full time	Generic resource	Migration Spec	Fabrikam US	Migration Spec	11/1/2022	12/31/2022	400.00	---	400.00
Full time	Generic resource	Network Engine	Fabrikam US	Network Eng	11/1/2022	12/31/2022	400.00	---	400.00
Contractor	Generic resource	Service Engine	Fabrikam US	Service Eng	11/1/2022	12/31/2022	400.00	---	400.00
Contractor	Generic resource	Software Engin	Fabrikam US	Software Eng	11/1/2022	12/31/2022	400.00	---	400.00

David So

Book

Score 10

Total relevant experience 200 hours

Project similarity 4

Domain experience

- Robotics arms installation
- Network installation
- Telemetry

Task experience

- Install robotic arm 10
- Order tools 10
- Planning 10



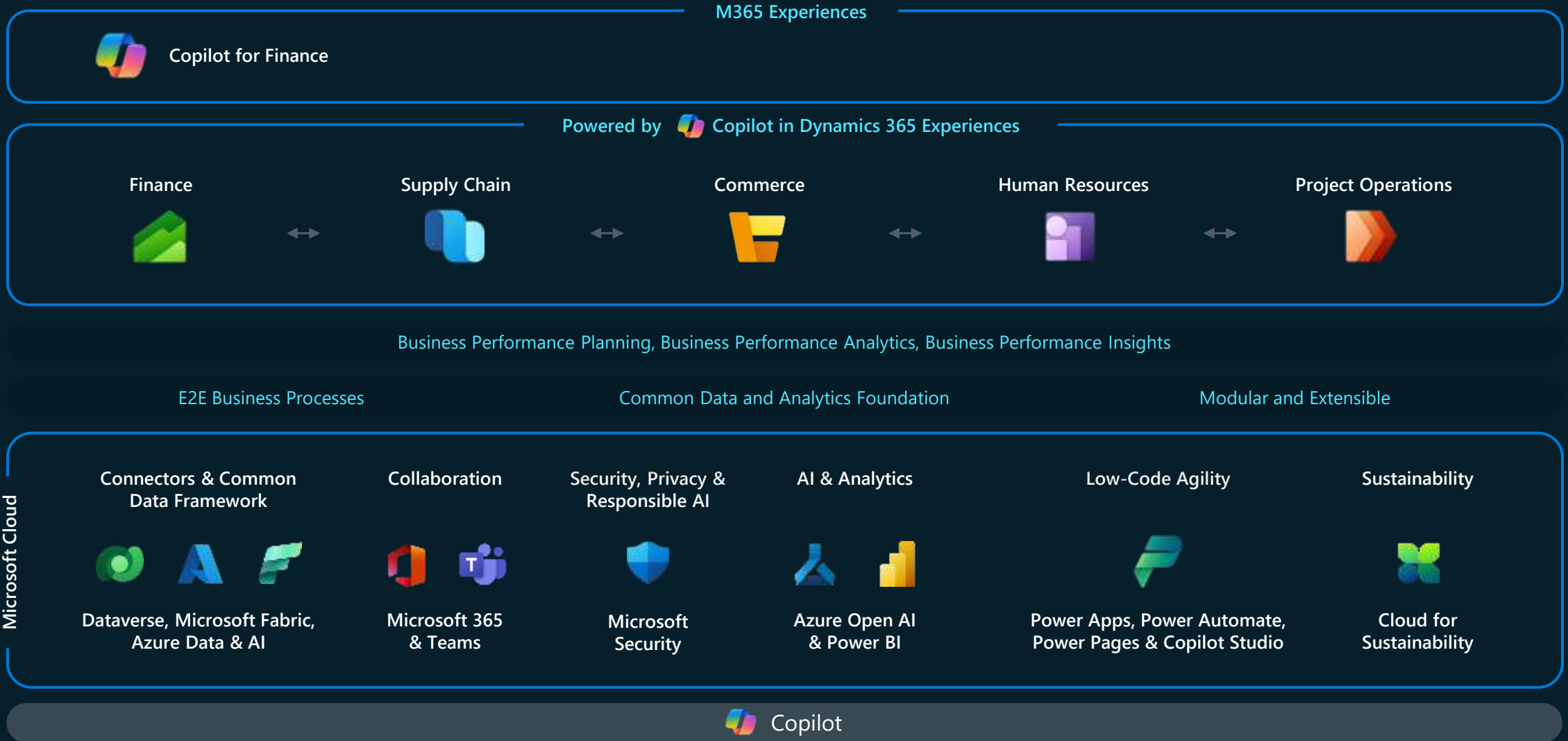
Commerce: La revolución digital en el comercio



Aida Antón
Digital Technical Specialist
Microsoft España

Our Vision for AI-Led ERP

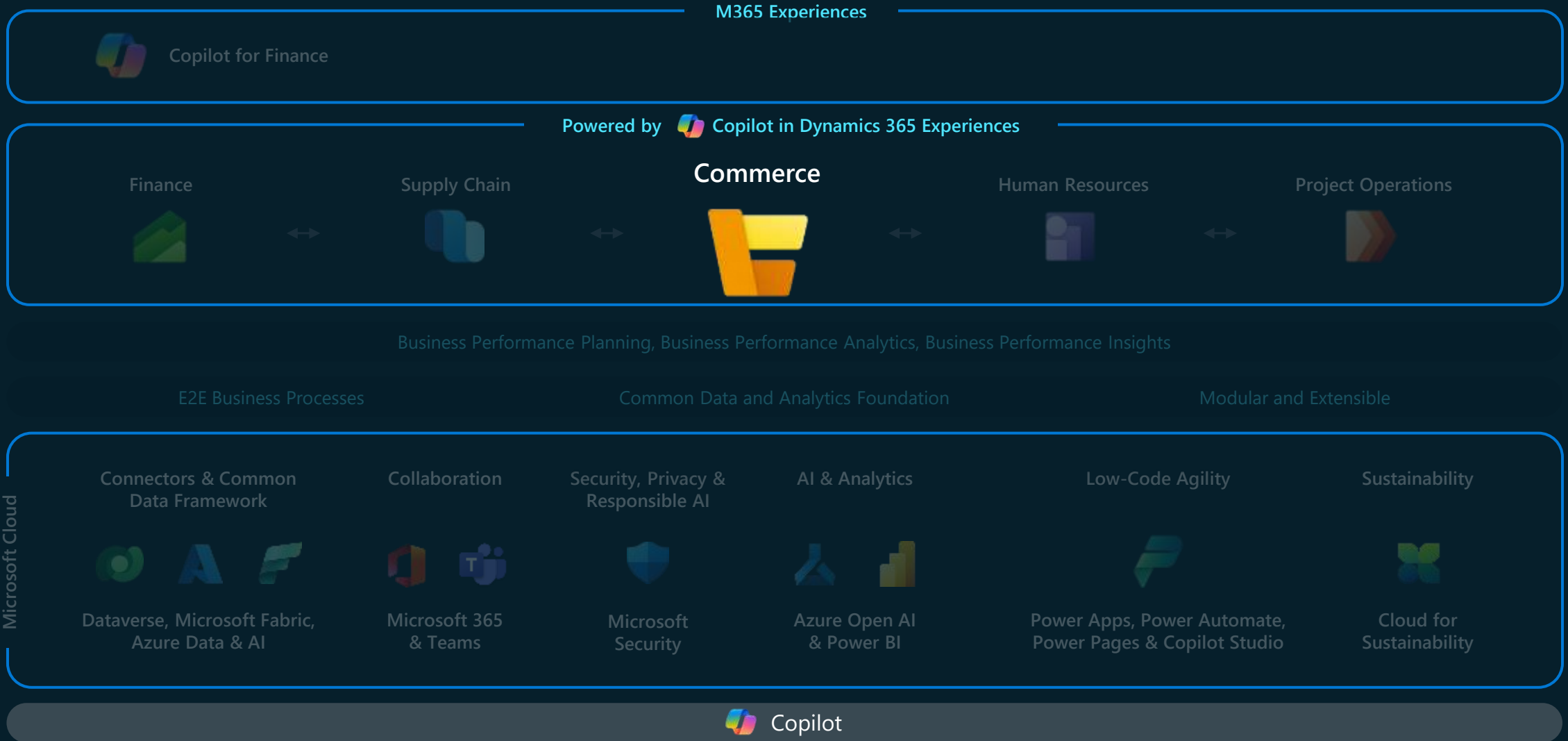
The next generation of ERP is intelligent and autonomous



Extensibility | Industry solutions

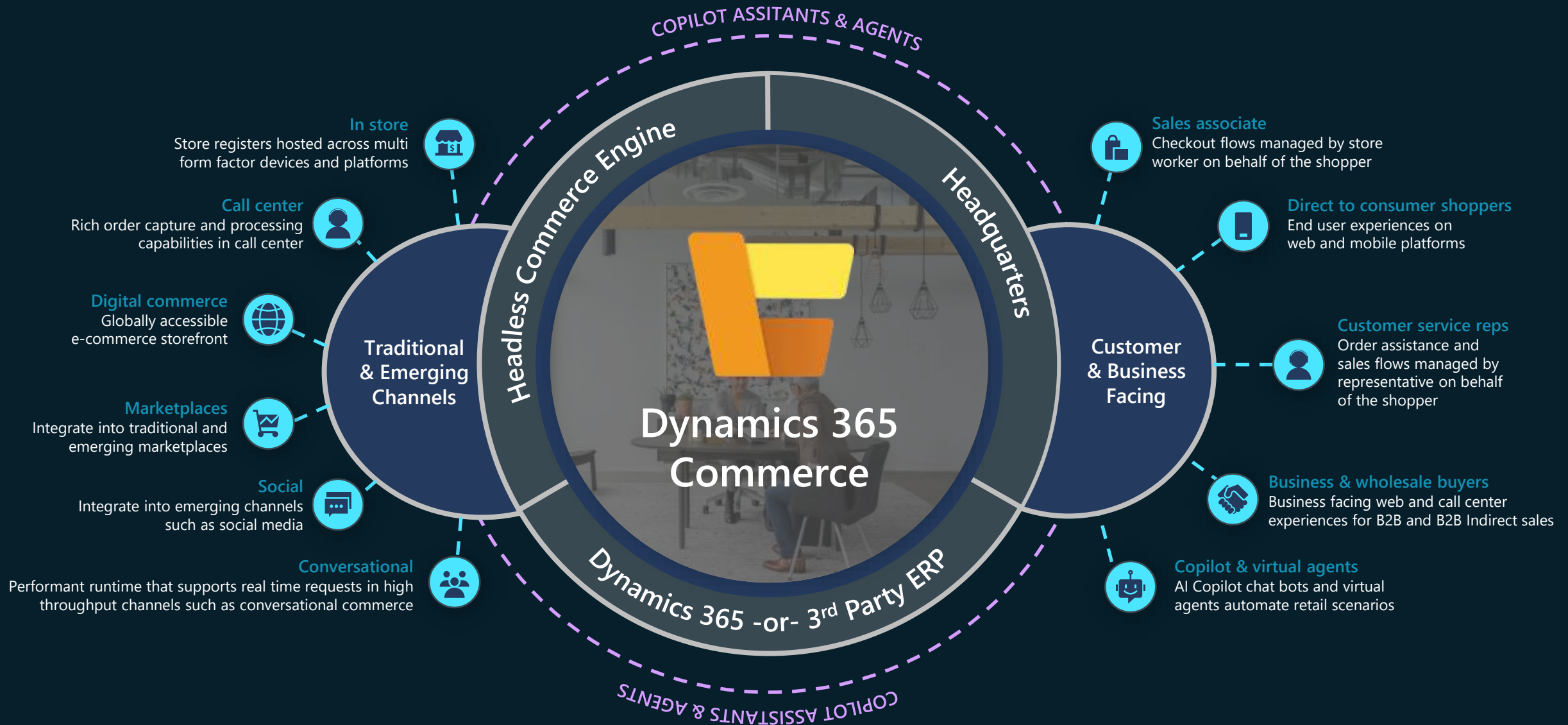
Our Vision for AI-Led ERP

The next generation of ERP is intelligent and autonomous



Dynamics 365 Commerce

Unified Omnichannel Commerce



Example Customer Verticals

Fashion
& Accessories



Convenience, QSR
& Restaurants



Electronics
& Telecoms



Drug, Pharma
& Beauty/Health



Grocery
& Specialty Foods



Venues, Events, Museums
& Travel/Transit



Department
& General Merch



Pet, Outdoor
& Sports



Miscellaneous
& Other Specialty



Jewelry
& Luxury Watches



Furniture
& Fixtures





Personalized experiences

Customer expectations are rising and over 80% of retail shoppers say they want personalized experiences in retail stores that rival the ones they get online.

Omni-channel, Customer Insights, Loyalty, Copilot template for personalized shopping



In-store experience

Faster checkout and a smooth in-store experience are critical for a buyer.

Scan-and-go, autonomous stores, AI powered smart carts, Smart store analytics



Operational resiliency

Retailers need to ensure they can operate, regardless of external factors that may be preventing them from doing so like lost network connectivity or power outages.

iOS Offline, Android Offline, Windows Offline, RCSU



Streamlining operations

Retailers are looking for ways to leverage AI to predict and automate their daily workflows

Store analytics, Demand Planning, Customer Insights, Replenishment, Shift reconciliation, Copilot template for store operations



Omni-channel retail operations

Retail are starting to blend their online and in-store experiences, using what's often referred to as seamless omnichannel experiences.

Online shopping, Mobile apps, Pickup options, Delivery services



Sustainability

A 2024 survey of US consumers by NielsenIQ shows that 95% want to make sustainable living a greater part of their lives.

Sustainability, Traceability, Brand reputation

Investment Themes

Deliver Efficiency with
Copilot



Deliver Modern Store
Experiences



Deliver Customer
Success



Investments by Theme



Deliver Efficiency with Copilot

- Easily Enrich Products with Copilot in Site Builder
- Improve Merchandiser Efficiency with Copilot
- Copilot Generated Product Insights
- Proactive Customer Summaries
- Channel & Store Report Summaries
- Summarized Insights Based on Statements



Deliver Modern Store Experiences

- Fast & Frictionless Self Checkout to Improve Efficiency
- Check Out Faster with Optimized Payment Flows
- Boost Cashier Efficiency with UX Improvements
- Reduce Checkout Times with Streamlined Receipt Workflows
- Enable Barcode Scanning on iOS Devices
- Tap to Pay On iPhone with Adyen
- Payment Modernization
- Offline on iOS and Android Devices



Deliver Customer Success

- Inventory Accuracy with Real-Time Inventory
- Multifaceted Pricing Strategies with Unified Pricing
- Data Archival

Investment Themes

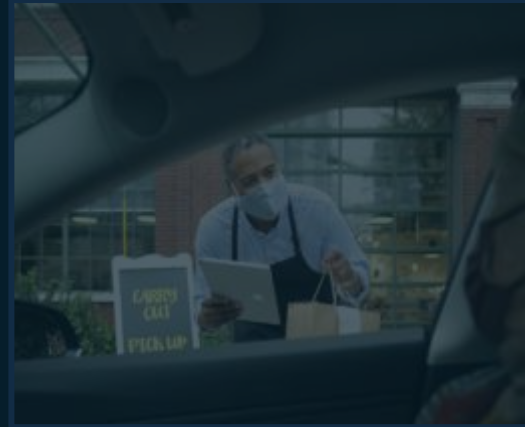
Deliver Efficiency with Copilot



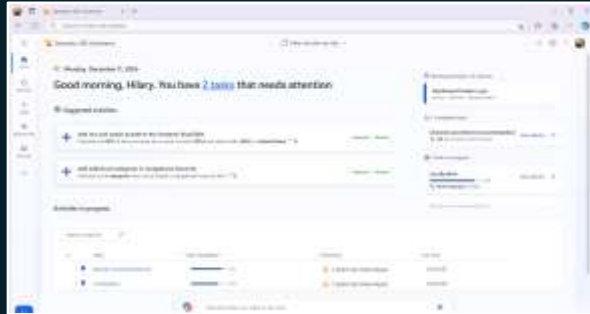
Deliver Modern Store Experiences



Deliver Customer Success

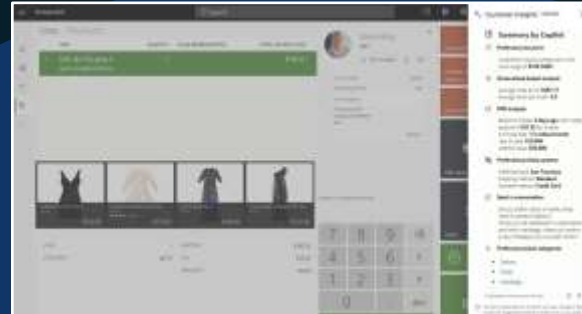


Copilot for Everyone in Dynamics 365 Commerce



Merchandizing Efficiency

- One-stop merchandising dashboard providing status and verifications



Customer Summarization

- Quickly understand the customer to create personalized sales experiences



Product Summarization

- Quickly understand the product, its availability and how best to sell it



Channel & Report Summaries

- Quickly generate summaries at the channel, store and associate level



Statement Insights

- Provide business insights based on the posted statements and find errors

Merchandising Insights

Improve merchandiser efficiency with Copilot

One-stop merchandising dashboard providing status of multiple automated verifications across a variety of merchandising assets in Headquarters.

Ability to schedule validations during off-business hours.

Validate product-related configurations, such as variants, attributes, assortments, translations across multiple channels .

Provide AI-driven insights into the quality of merchandising assets such as product descriptions.

Suggest solutions to issues found, so that the user's role then becomes to review, make necessary edits, and approve these suggestions.

Easily understand if you have issues that need to be addressed



Quickly get to the root of the issue with quick links

Customer Insights

Improve sales with proactive customer summaries

Store associates can leverage Copilot to enhance customer interactions and create personalized shopping experiences. By connecting relevant data points, Copilot empowers associates to better understand individual customers and offer tailored recommendations.

Copilot provides purchase history, discount, wish list insights about the customer "E.g. This customer has not made any recent purchases in the last six months" making it efficient for a store employee in an assisted selling experience

Customer summary is also available in the POS transaction page while a customer is transacting to make it easier for a store employee to take the next best action without navigating away

Summarized buying behaviors and risks and a detailed purchase timeline



Quick conversation starters personalized for the individual customer

Product Insights

Improve sales with intelligent product summaries

Provides generated insights that highlight key product information and insights that will enable store associates to quickly communicate the most relevant information about the product.

Information can include product key attributes, availability, and discounts to be summarized.

Product demand rating will be provided based on seasonal trends, date, and location.

Top related products will help quickly search for and cross-sell additional products.

Additional insights such as discount frequency and product sale velocity will also be provided in future phases.

Product insights will be surfaced on multiple screens including the product details screen, search results screen, and transaction screen in Store Commerce.

Summarized product details that allow you to quickly convey key sales attributes



Quickly navigate to related categories to find products that increase upsell opportunities

Store & Channel Summaries

Enhance efficiency, accuracy, and real-time analysis to aid store and channel performance

Channel managers can tailor the type of summary displayed for each channel report, whether it's a default out-of-box report or a custom-authored one.

Summaries seamlessly integrate with existing high-charts based reports.

Summaries will automatically adapt to the locale that has been configured for the the POS app.

Summaries are governed by data access control settings. For example, a store cashier can analyze, or view reports related to their own POS activity, while a store manager has broader permissions to access reports for the entire store's POS activity.

Quickly understand key store performance information

2024 Wave 2 - Copilot Features



Better understand what is impacting your bottom line

Statement Insights

Improve employee efficiency and proactively avoid statement posting headaches

Provide business insights based on the posted statements e.g., sales by store, popular items, most returned items etc.

Provide insights based on failed statements and transactions failing to pass validation e.g., number of transactions in the failed statements, number of transactions that failed validation, total sales per failed statement etc.

Provide a summary for each failed statement along with the recommended solutions. The summary could be used to open support tickets with Microsoft.

Proactively address issues and retry posting failed statements.

Statement summaries provide key business insights



Identify risks that may prevent statement posting and address them quickly

Investment Themes

Deliver Efficiency with
Copilot



Deliver Modern Store
Experiences



Deliver Customer
Success



Self-Checkout

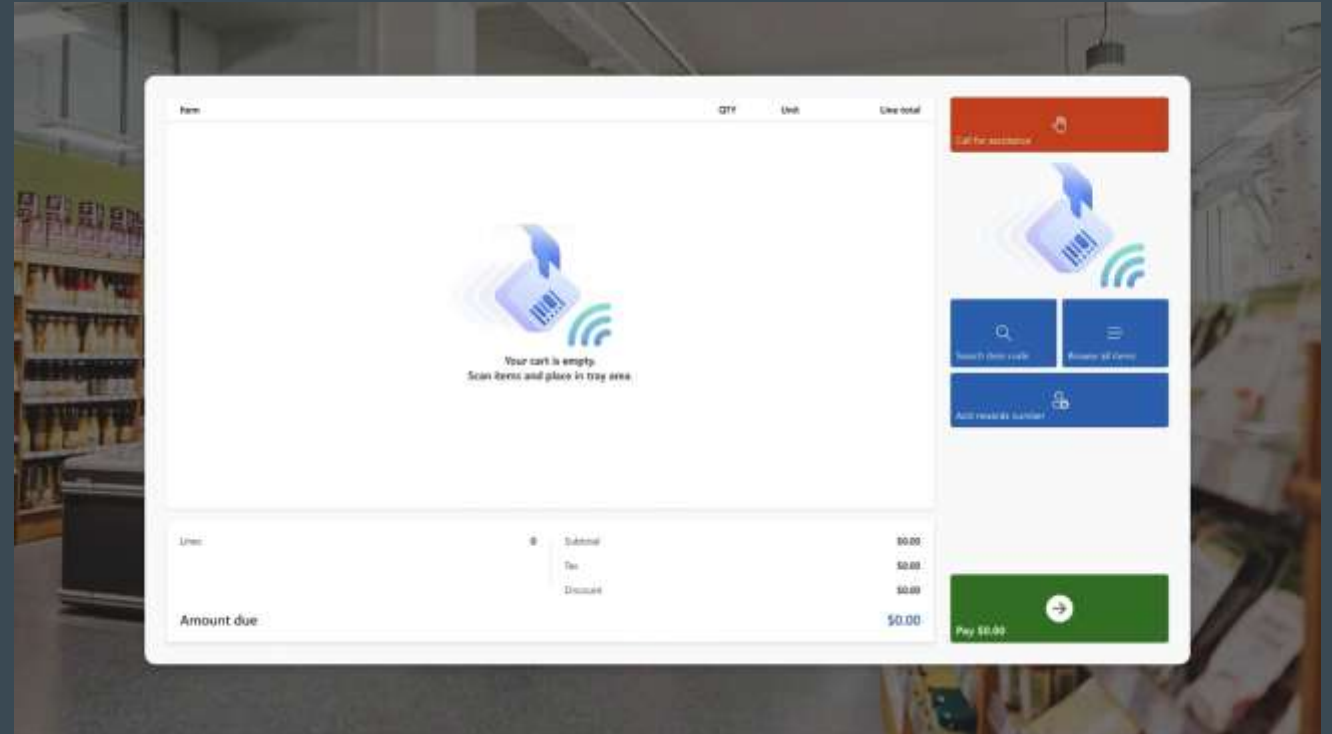
Reduce operational costs and simplify customer checkouts

Retailers are looking for opportunities to reduce operational costs. Customers see checkout lines as a waste of time. Forty-four percent of customers would abandon a transaction if the checkout process took too long.

Modern and improved checkout flow in the POS app to streamline payment capture .

Self checkout kiosks avoid long lines and enable customers to complete their transaction by themselves.

Same POS application, with a simplified interface for self-checkout



Customer can call for assistance and easily pay for their scanned purchases

Tap to Pay on iOS with Adyen

Out of the box support for Apple Tap to Pay with Adyen

Tap to Pay on iPhone will enable stores to accept contactless payments using mobile Store Commerce on iPhone devices.

Mobile Store Commerce will reduce a store's hardware footprint, allowing for more mobile interactions and checkouts between cashiers and shoppers.

Modernizes the POS device footprint for stores.

Easy customer payments using phone-to-phone tap interactions.

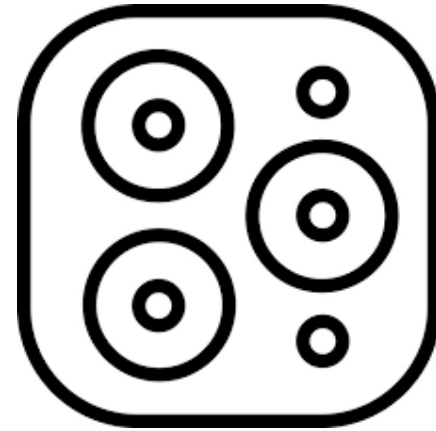


Effortless Integrations

Out of the box integrations for common retail tasks

Native integration of barcode scanning libraries for camera-based scanning on Android and iOS devices.

Support autonomous stores with AiFi technology to capture customer's cart and process payment.



Payment Modernization

Deliver out-of-the-box payment method parity with the Adyen payment gateway's offerings

Collaborating closely with Adyen to modernize our native payment connector to deliver parity with their offerings.

Enable highly desirable payment methods on POS through the existing code base, by testing, documenting and enabling Alipay, Klarna, Affirm, WeChat Pay and Pay by Link.

Invest in enabling asynchronous calling patterns to deliver ACH for POS and other highly desirable payment methods in the digital commerce and call center channels.

Payment Method	POS	Call Center	E-Commerce
Card Present	✓	👁️	
Card Not Present		✓	✓
Gift Cards	✓	✓	✓
Loyalty Points	✓	✓	✓
Pay On-Account	✓	✓	✓
Digital Wallets	✓		✓
Tap to Pay	✓		
Cash	✓		
Alipay	👁️	☁️	☁️
Klarna	👁️	☁️	☁️
Affirm	👁️	☁️	☁️
WeChat Pay	👁️	☁️	☁️
Pay by Link	👁️	☁️	☁️
ACH – Banking	☁️	☁️	☁️

Supported	Under Investigation
Requires Async	Not Applicable

Offline on iOS and Android

Providing core retail workflows in offline mode for business continuity and disaster recovery

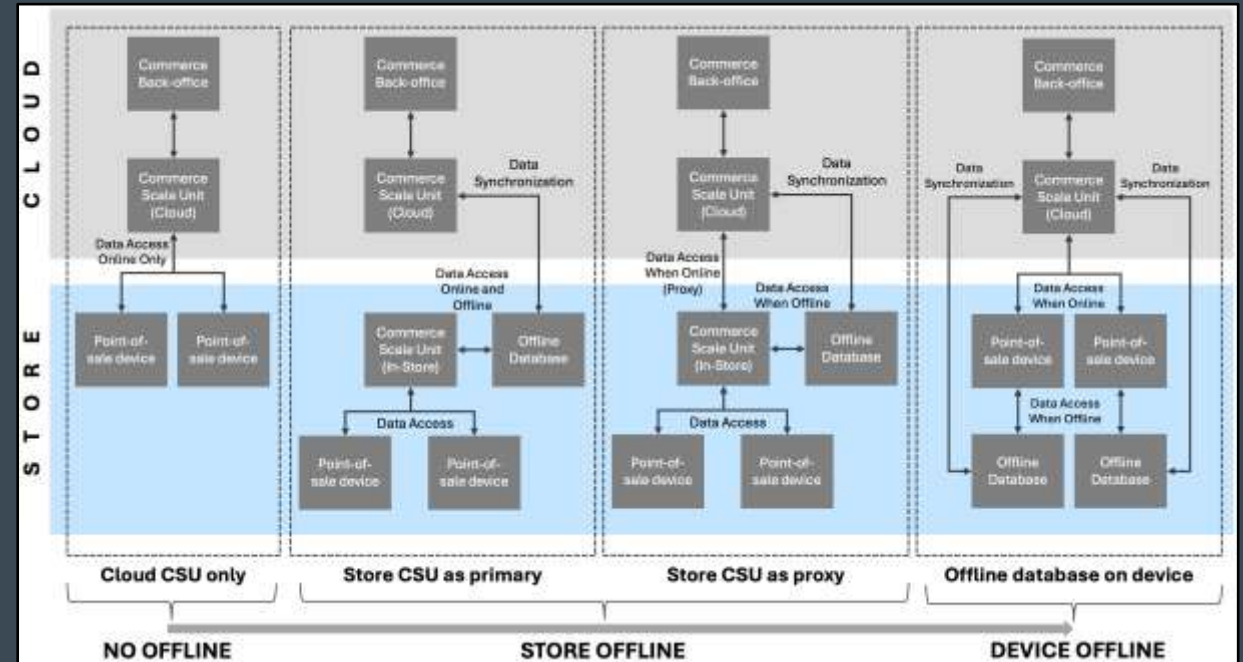
Store Commerce app will support offline mode on both iOS and Android devices.

Orders and transactions will be captured and stored locally on the device to be synchronized when reconnected.

Automatic synchronization of data when connectivity is available or restored.

Ensures uninterrupted business operations when network or service outages occur.

Also allows employees to utilize the Store Commerce app in the field with intermittent or no network.



Investment Themes

Deliver Efficiency with
Copilot



Deliver Modern Store
Experiences



Deliver Customer
Success



Multifaceted Pricing Strategy

Unifies pricing management across SCM and Commerce

Leverage attribute-based pricing model to set up pricing rules based on product, customer, channel, or attributes.

Enable sophisticated pricing by market or segment.

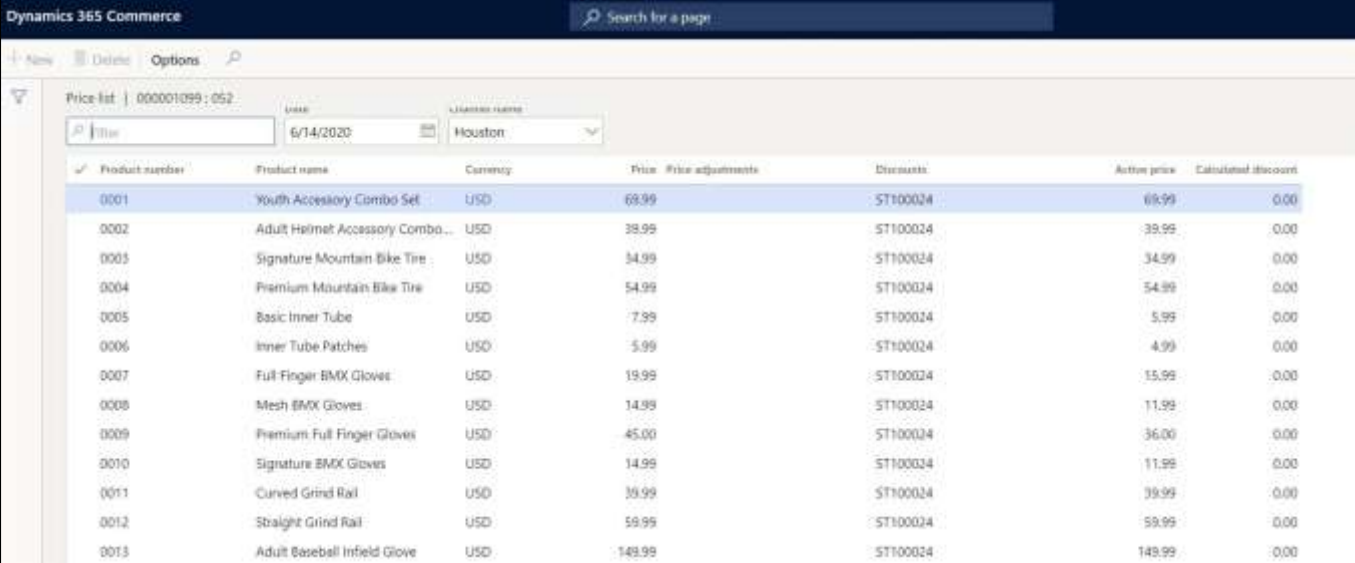
Define and manage complex pricing structures with comprehensive price component breakdown.

Utilize rich set of pricing techniques including long-term trade agreements, short-term price adjustments, promotional discounts, auto-charges, etc.

Run pricing simulations to validate pricing setup .

Integrate with headless pricing APIs.

Configure and customize pricing engine behavior.



The screenshot displays the Dynamics 365 Commerce interface for a Price list. The title bar shows 'Dynamics 365 Commerce' and a search bar. Below the title bar, there are navigation options: 'New', 'Delete', and 'Options'. The main content area shows a 'Price list' for '000001099: 052'. The 'Unit' is set to '6/14/2020' and the 'Location name' is 'Houston'. The table below lists various products with their respective prices and discounts.

Product number	Product name	Currency	Price	Price adjustments	Discounts	Active price	Calculated discount
0001	Youth Accessory Combo Set	USD	69.99		ST100024	69.99	0.00
0002	Adult Helmet Accessory Combo...	USD	39.99		ST100024	39.99	0.00
0003	Signature Mountain Bike Tire	USD	34.99		ST100024	34.99	0.00
0004	Premium Mountain Bike Tire	USD	54.99		ST100024	54.99	0.00
0005	Basic Inner Tube	USD	7.99		ST100024	5.99	0.00
0006	Inner Tube Patches	USD	5.99		ST100024	4.99	0.00
0007	Full Finger BMX Gloves	USD	19.99		ST100024	15.99	0.00
0008	Mesh BMX Gloves	USD	14.99		ST100024	11.99	0.00
0009	Premium Full Finger Gloves	USD	45.00		ST100024	36.00	0.00
0010	Signature BMX Gloves	USD	14.99		ST100024	11.99	0.00
0011	Curved Grind Rail	USD	39.99		ST100024	39.99	0.00
0012	Straight Grind Rail	USD	59.99		ST100024	59.99	0.00
0013	Adult Baseball Infield Glove	USD	149.99		ST100024	149.99	0.00

Inventory Visibility Service

Inventory accuracy is directly related to customer satisfaction by avoiding lost sales, backorders, delays etc.

Enables better demand forecasting, production planning, and order fulfillment. This improves productivity and overall operational efficiency.

66.3% of customers have left a store without making a purchase at least on one occasion since the store didn't have the items they wanted.

Improving inventory accuracy lifted sales by 4-8% according to an extensive study by the ECR Retail Loss Group.

Integrated with Commerce to provide real-time inventory data for commerce scenarios.

Inventory can be queried and posted in real-time when a customer order is created, edited, or cancelled on any channel without performance implications.

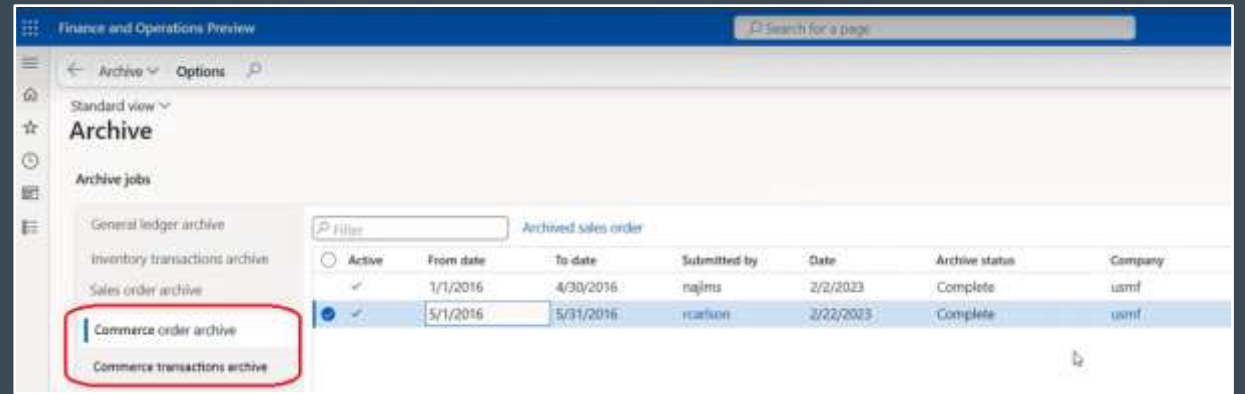


Data Archival

Keeping a large volume of historical commerce transactions results in increased storage costs, and impacts system performance

Enable the customers to choose the customer transactions they want to archive.

The archived data is still available for auditing purposes, but the customers can restore the data back, if needed.

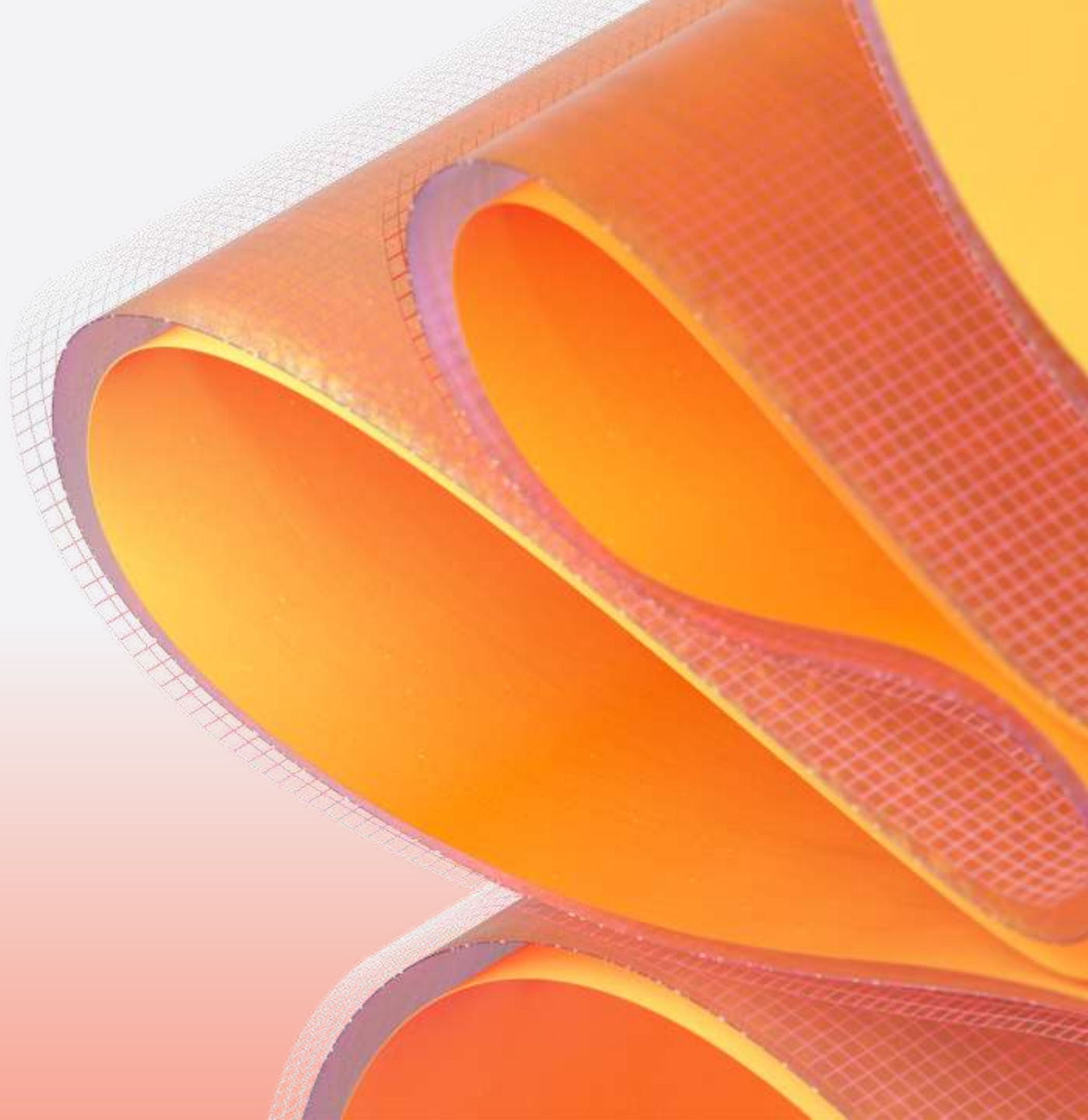


The screenshot shows the 'Archive' page in Dynamics 365. The left sidebar lists archive jobs: General ledger archive, Inventory transactions archive, Sales order archive, **Commerce order archive** (highlighted with a red box), and Commerce transactions archive. The main area displays a table of 'Archived sales order' jobs.

Active	From date	To date	Submitted by	Date	Archive status	Company
<input checked="" type="checkbox"/>	1/1/2016	4/30/2016	najms	2/2/2023	Complete	usmf
<input checked="" type="checkbox"/>	5/1/2016	5/31/2016	rcarlson	2/22/2023	Complete	usmf



Q&A



AYÚDANOS A CALCULAR NUESTRA HUELLA DE CARBONO



Tiempo medio de respuesta: 1 minuto!!!



Business Applications Day: La era de la IA y Copilot en ERP



Consulta el contenido del
evento y accede a
información adicional

Gracias

En breve empezamos con el Bonus Track



Extra Bonus – Voluntario

Migración de On premise al Cloud: Cómo dar el salto a la nube



Ana Cantero
Technology Specialist Dynamics 365
Microsoft España

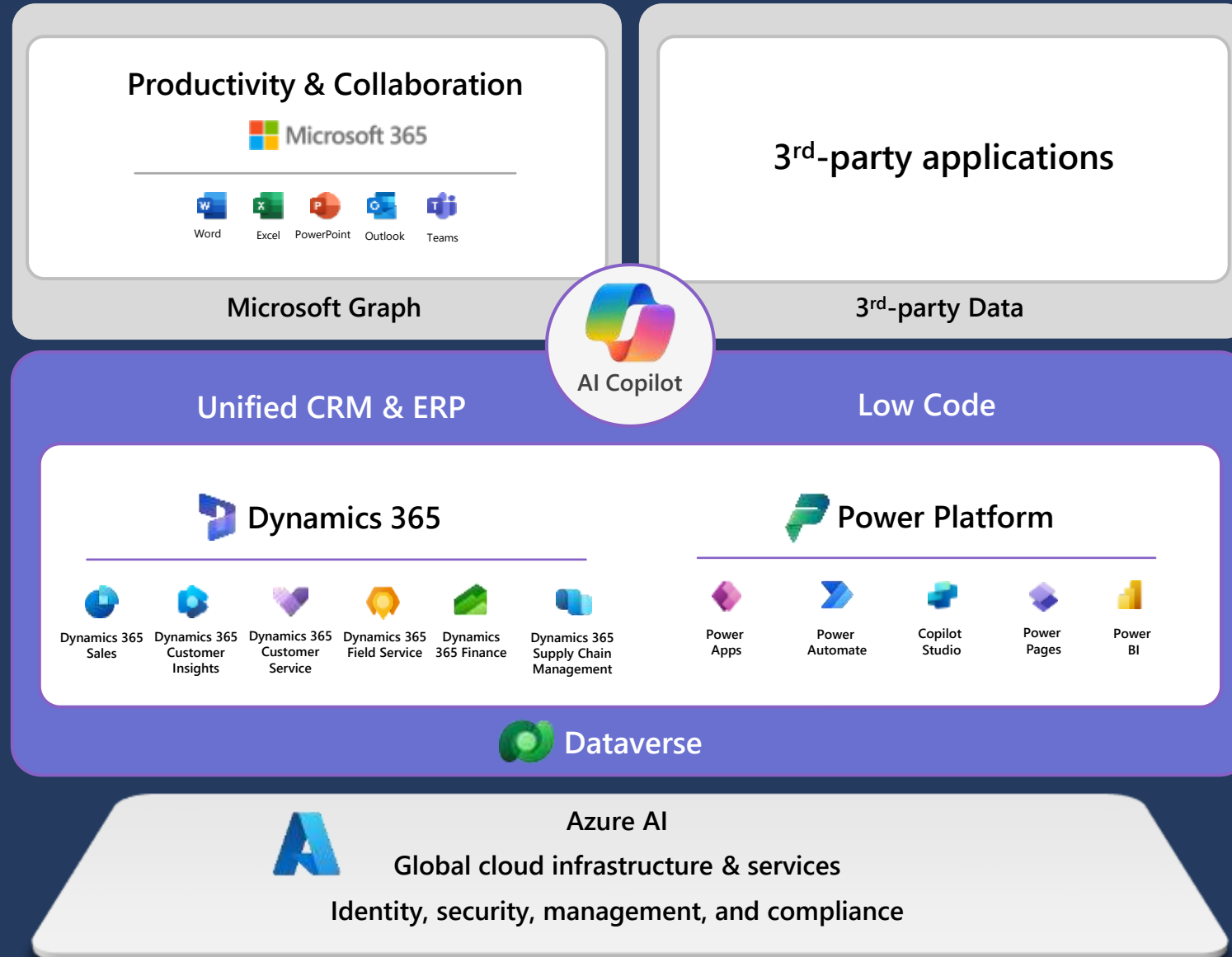


Aida Antón
Digital Technical Specialist
Microsoft España



Juan Miguel Hernández Arquero
Cloud Solution Architect
Microsoft España

Future-proof your business with Microsoft Business Applications



Migrating to the cloud offers a competitive edge



Real-time visibility into your business



Auto backup and restore



Enable flexibility and scalability



24/7/365 SLA



Access to other Microsoft solutions such as Azure IoT, Power Platform and AI-Copilot



Improve security, privacy and reliability with Azure Cloud



Constant updates



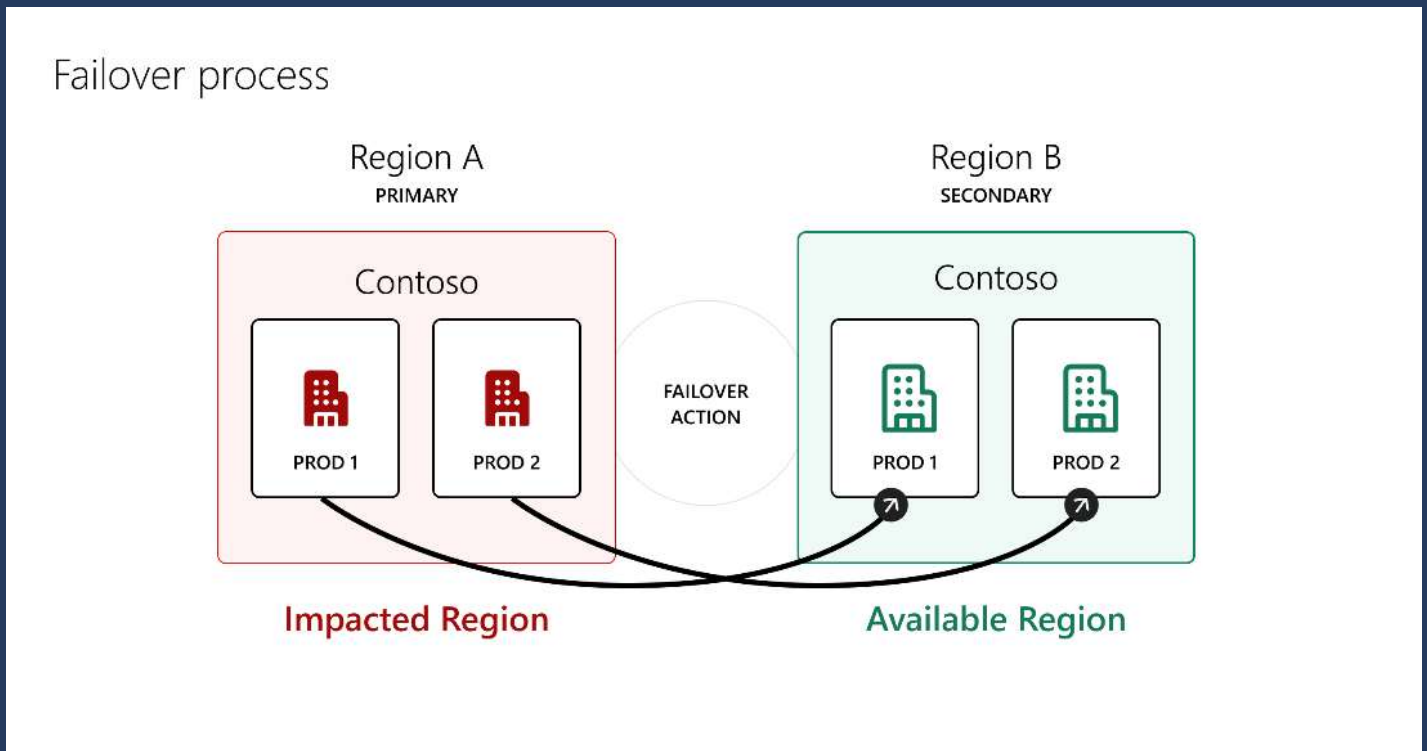
Increased productivity, speed and innovation



Disaster Recovery

Microsoft is dedicated to ensuring the **highest service availability** levels for your critical applications and data. Microsoft ensures that the baseline infrastructure and platform services are available through its business continuity and disaster recovery architecture by:

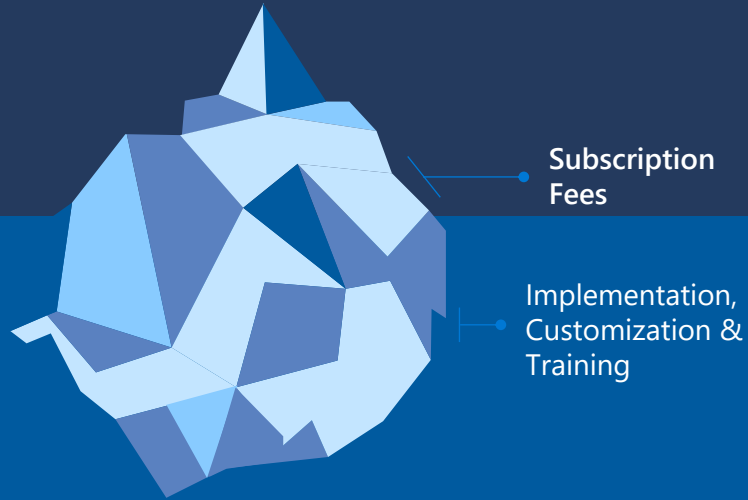
- **Enabling geo redundancy** - all data from production environments is backed up to the paired/secondary region.
- Geo-secondary replicas are kept **synchronized with the primary** environment through continuous data replication.
- No action is taken on other types of environments such as trial, sandbox, or developer.



Cloud vs. On Premises

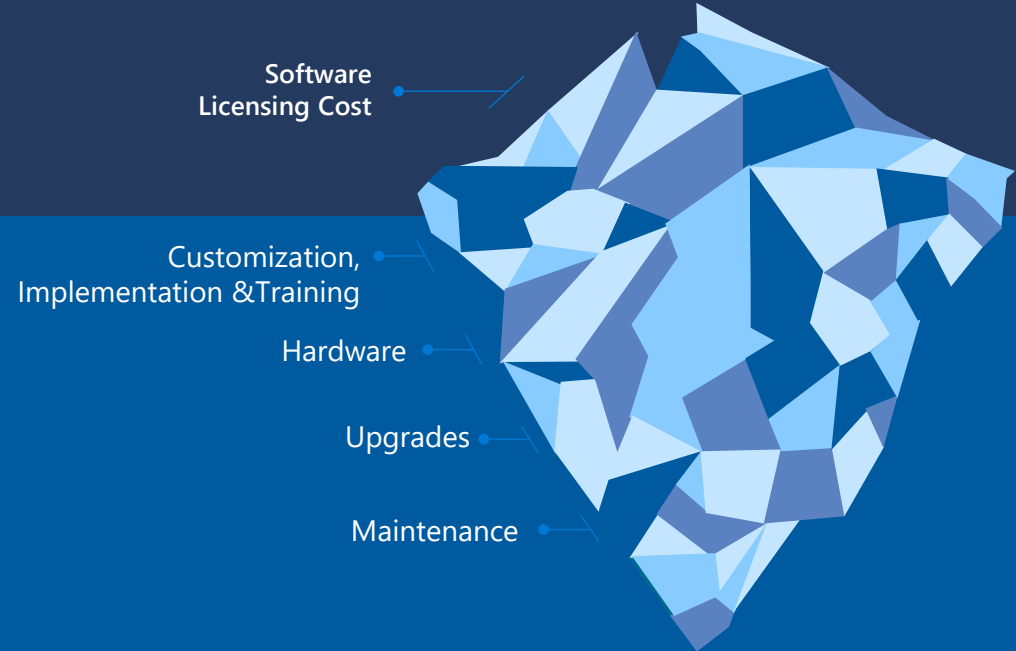
Lower total cost of ownership

Cloud



- Subscription fees
- Training
- Configuration
- System Administration

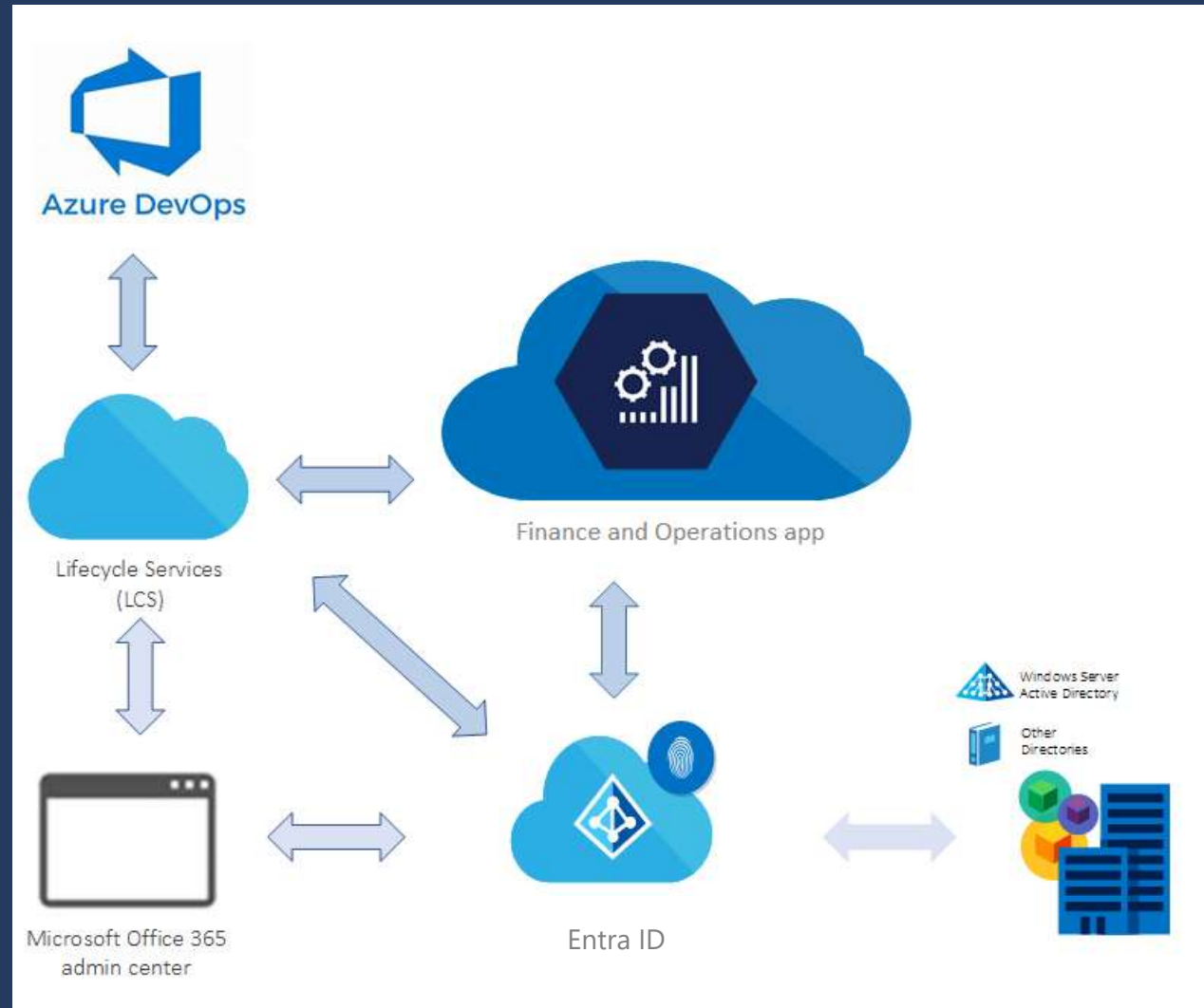
On-Premises



Ongoing Costs

- Apply patches, upgrades
- Downtime
- Performance tuning
- Rewrite customizations
- Rewrite integrations
- Upgrade dependent applications
- Ongoing burden on IT (hardware)
- Maintain/upgrade network
- Maintain/upgrade security
- Maintain/upgrade database

Dynamics 365 F&O Cloud Architecture



Service Update

Starting from April 2024, Microsoft is introducing more flexibility in scheduling updates.



Service update cadence

Four service updates annually, in February, April, July, and October. Because release durations are being extended, the same minimum of two service updates per year is maintained.

Self-update and auto-update

Service updates are made generally available for self-deployment before Microsoft automatically applies them.

Auto-update windows

Organization can select one of the two auto-update windows that are four weeks apart for each service update.

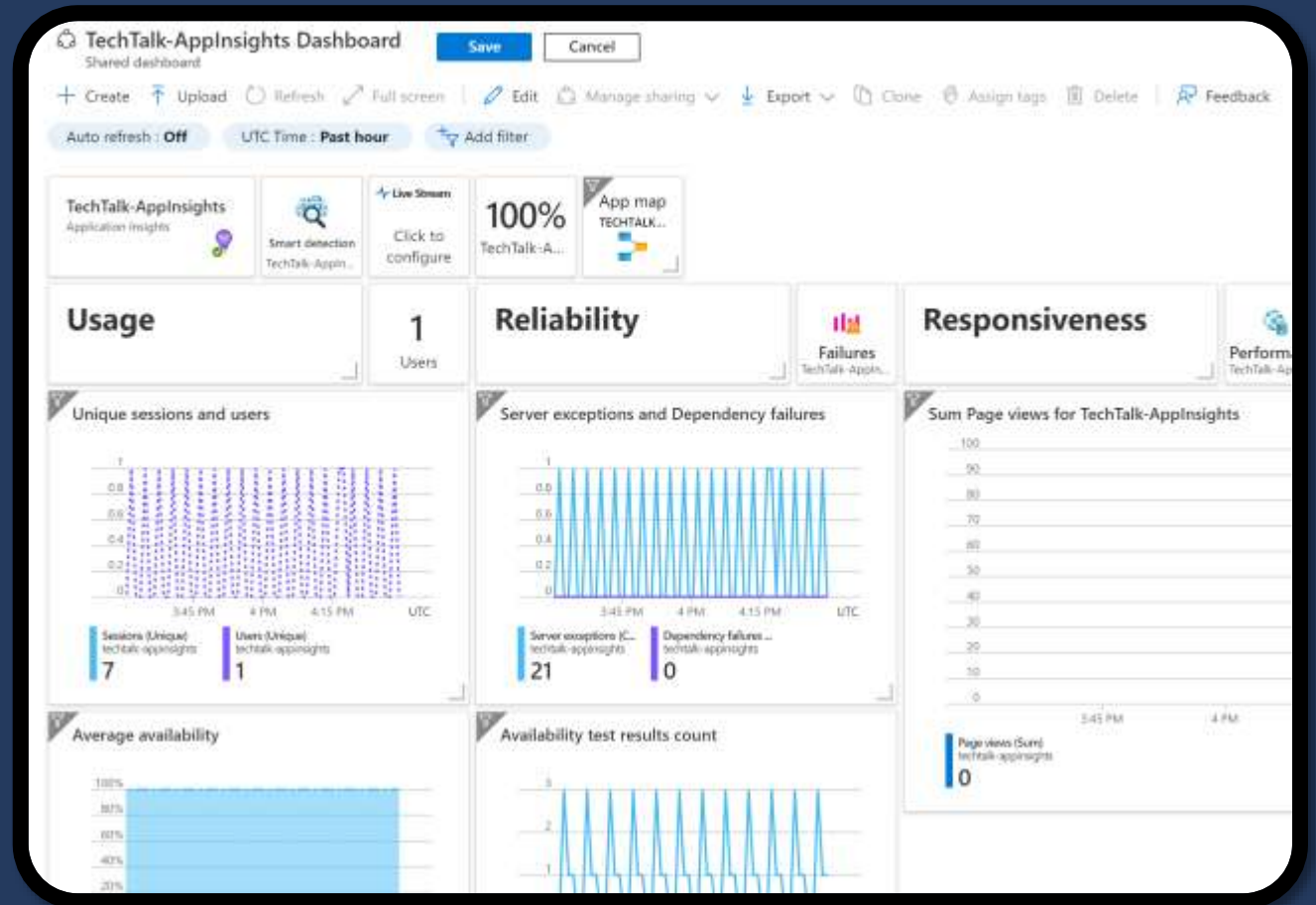
Service Update pause

The max number of consecutive updates that can be paused is being reduced from three to one. After the pause window ends, if the customer hasn't self-updated, Microsoft automatically applies the latest update

Environment Performance Monitoring

Application Insights is an extension to Azure Monitor providing web application monitoring, and provides features such as:

- Logging of telemetry (Metrics, Events, Page views, Exceptions)
- Availability testing
- Smart detection & alerting
- Integration with GitHub and Azure DevOps
- Application usage
- Creation of telemetry dashboards



Cumple con los estándares industria



Adherirse a prácticas estrictas de privacidad y seguridad al crear características y operar el servicio



Pasar auditorías internas y externas

Responder a requisitos que incluyen::

- Certificaciones prioritarias(ISO 27001, 27017, 27018, SOC 1 [SSAE 18] Type 2, SOC 2 Type 2, PA-DSS)
- Health – HIPAA BAA
- Government-EU-US Privacy Shield, EU Model Clauses, UK Official, Spain ENS, Spain LOPD, FINMA (Swiss, FSI), FERPA, New Zealand Gov CIO Fx, Australian CCSL (IRAP), Singapore MTCS



Global



- ISO 27001
- ISO 27017
- ISO 27018
- SOC 1 Type 1
- SOC 1 (SSAE 18) Type 2
- SOC 2 Type 2
- PA-DSS
- CSA STAR Self-assessment

Government



- FedRAMP High
- FedRAMP Moderate
- ITAR
- DoD DISA SRG level 2
- CJIS (State criminal justice)
- NIST SP 800-171
- Section 508 VPATs
- FIPS 140-2
- CJIS
- IRS 1075

Regional



- Australia CCSL (IRAP)
- China GB GB18030
- China GBT 24589
- EU Model Clauses
- EU—US Privacy Shield
- GDPR
- New Zealand Gov CIO framework
- Singapore MTCS
- Spain ENS High
- Spain LOPD
- UK G- Cloud Framework

Industry



- HIPAA BAA (US)
- FDA CFR title 21 part 11
- FERPA
- FINMA (Switzerland, FSI)

Cumplimiento de GDPR



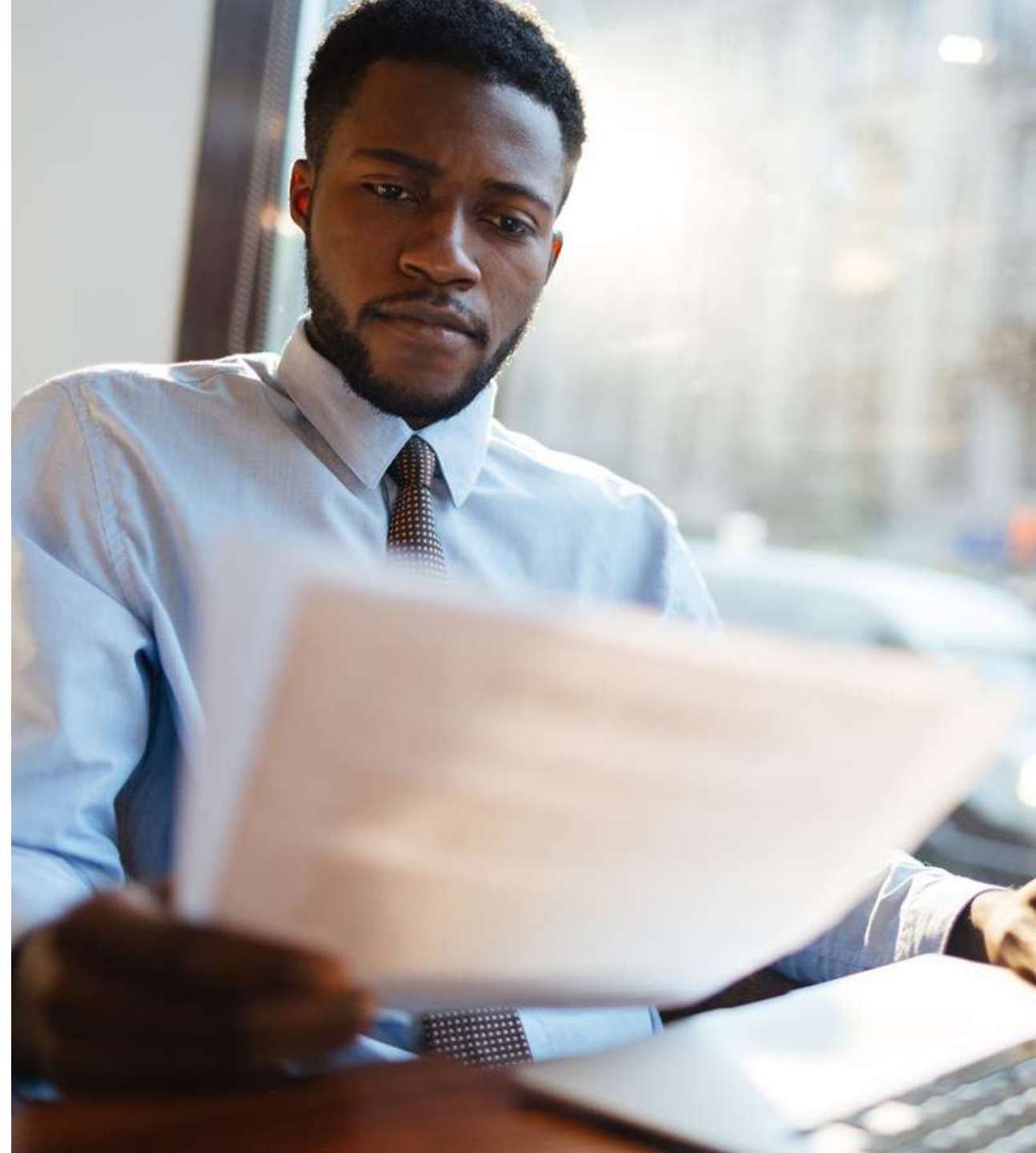
En Microsoft, creemos que la privacidad es un derecho fundamental y creemos que el Reglamento general de protección de datos (GDPR) es un paso importante para aclarar y habilitar los derechos de privacidad individuales.

Elementos clave de GDPR:

- Derechos de privacidad personal mejorados
- Aumento del deber de protección de los datos personales
- Informe obligatorio de violación de datos personales
- Sanciones significativas por incumplimiento



Microsoft Dynamics 365 se compromete a ayudar a nuestros clientes a cumplir con los requisitos del GDPR





Migration Programs

Upgrade from AX 2012 to F&O

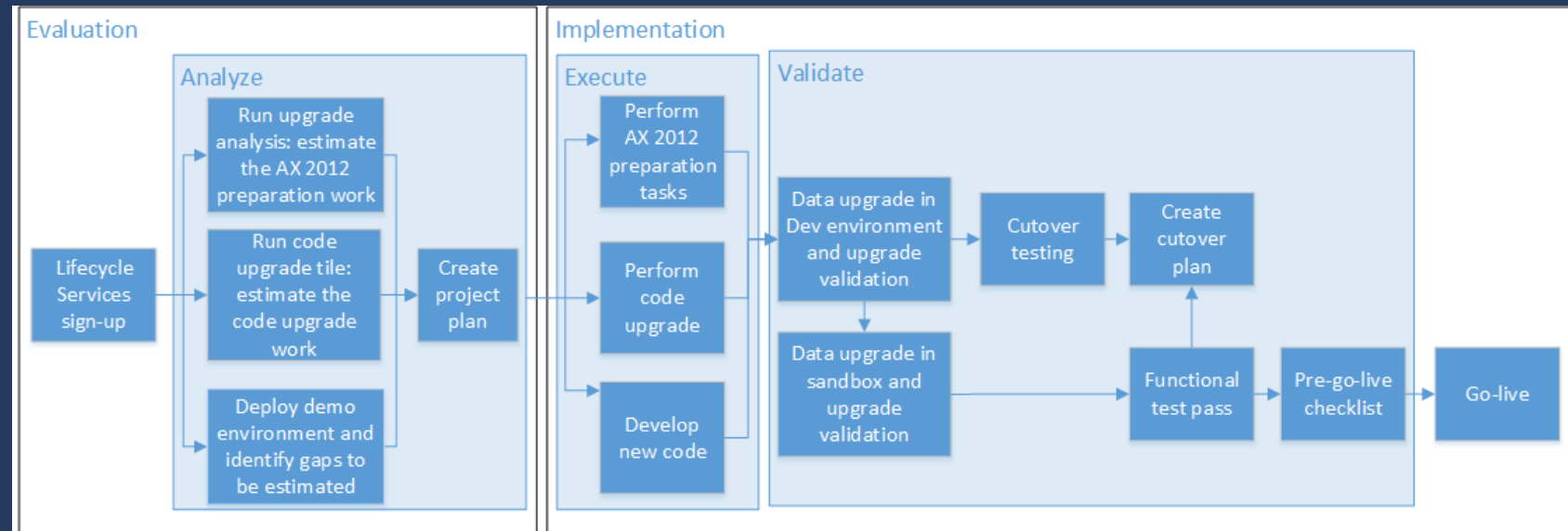
Finance and operations apps provide **an upgrade path that customers who currently run Microsoft Dynamics AX 2012** can use to move their data and code to finance and operations apps. Currently, upgrades from Dynamics AX 2012 R3 and AX 2012 R2 are supported. The upgrade process is built on the following elements:

- Tools to help you **bring forward existing custom application code** from AX 2012.
- A data upgrade process that you can use to **bring your database forward**. Therefore, you can **upgrade your full transactional history**.

The overall upgrade process can be visualized as three overarching phases:

Analyze, Execute, and Validate.

The following diagram shows the end-to-end upgrade process, and the activities that we consider part of each phase.



Move to the cloud with AIM to unlock AI-guided productivity

AIM (Accelerate, Innovate, Move) offers organizations a tailored path to move critical processes to the cloud from on-premises solutions. AIM reflects Microsoft's commitment to guiding on-premises business applications customers into the era of AI-guided productivity, which is a cloud-based venture.



Accelerate

Accelerate now to adopt AI powered technologies

Start with an AIM Assessment



Innovate

Innovate faster to stay ahead of the competition

Get access to expert implementation guidance and services



Move

Move with agility and scale as business grows

Benefit from the right investment offers

Learn more about AIM at aka.ms/D365AIM

Implementation Guide

Success by Design



Success by Design is Microsoft's guide to implementation of Dynamics 365.

Success by Design contains recommended practices across the complete implementation and application lifecycles based on our experience from thousands of successful implementations.

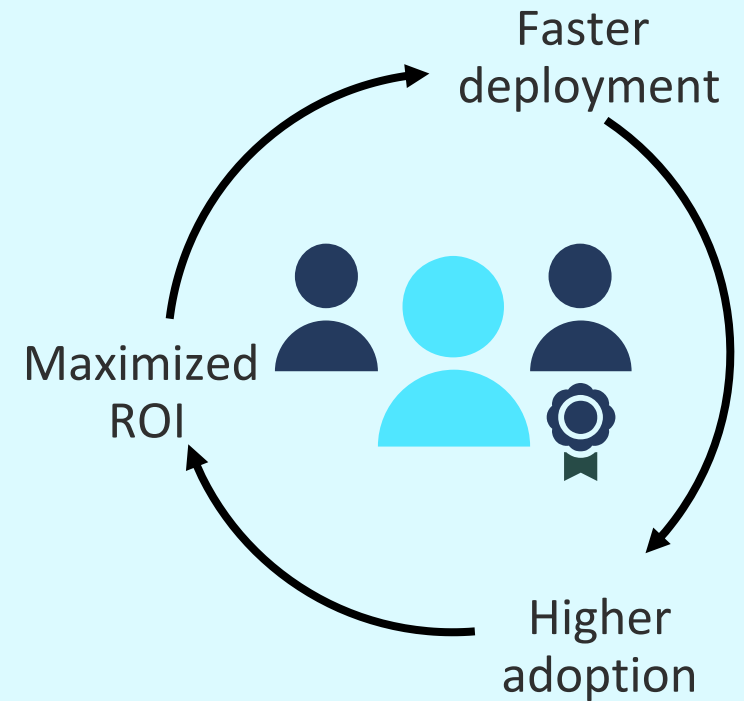
Success by Design is complemented by a number of resources such as learning paths, technical documentation and process maps to help your organisation succeed with the implementation.

Microsoft FastTrack for Dynamics 365

FastTrack for Dynamics 365 is a customer success program powered by the Microsoft engineering team to enable organizations to accelerate implementation.

The FastTrack team offers the learnings, best practices, and experience from thousands of cloud deployments through Success by Design.

FastTrack services are available at no additional cost to customers who meet certain license requirements.





Unified support / PQA

We understand your priorities

No matter where you are in your technology journey, support can help you mitigate risk, improve operational processes, and scale your business

We can help so you can...



Migrate existing applications to the cloud and optimize

Innovate with new apps and modernize existing apps

Rapidly adapt and automate business processes

Improve operational processes to help reduce your costs

Build a governance, security, and compliance strategy

Enable secure remote work for your employees

Support to drive your solution success

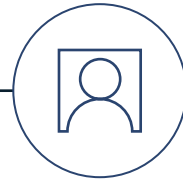
Accelerate time to value by putting your business-critical solutions at the center of our experience



Maximize my uptime

Maintain continuity, prevent issues, and respond to incidents quickly

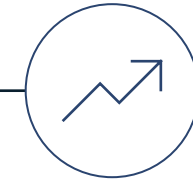
“
Keep my business running smoothly



Know and guide me

Partner with a team who knows your business and can get you results

“
Understand my goals and technology



Enable me to do more

Transform your organization for success in a cloud-first world

“
Activate my business and my people

Accelerate outcomes

Designed with flexibility to meet your needs

Receive foundational support across your Microsoft portfolio and tailor your experience through services that drive the outcomes you need most




Meet your foundational needs

Comprehensive, organization-wide support



Tailor your solution for success

Receive an allowance towards services or purchase more as add-ons

-  **Maximize my uptime**
24x7 problem resolution support and risk assessment capabilities to proactively manage IT health
-  **Know and guide me**
A designated Customer Success Account Manager focused on maximizing your business outcomes
-  **Enable me to do more**
As-needed advisory support from experts and an online hub of on-demand learning content



Proactive Services

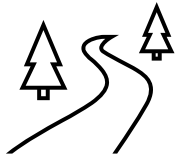
Expert-led, solution-specific engagements across Well-Architected, Server Migration, Security, Microsoft Teams, Power Apps, Analytics, and more



Enhanced Solutions

20+ in-depth, relationship-based solutions designed to ensure maximum uptime, solve complex IT challenges, and help you get the most out of your technology investment

Customer Success Unit Support



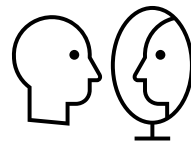
Microsoft as your travel companion from start to finish, as long as you need us



Best in field expertise where, when and as much as you need it



Microsoft on your side to derisk any ROI challenge



Helping you to see vulnerabilities and injecting ideas you didn't see



Remediation and readiness support to accelerate adoption and scale out

Project Quality Advisory



DE Project Quality Advisory for Dynamics 365 is a customer success offering to advise customers with prescriptive guidance and recommended practices for Dynamics 365 implementations

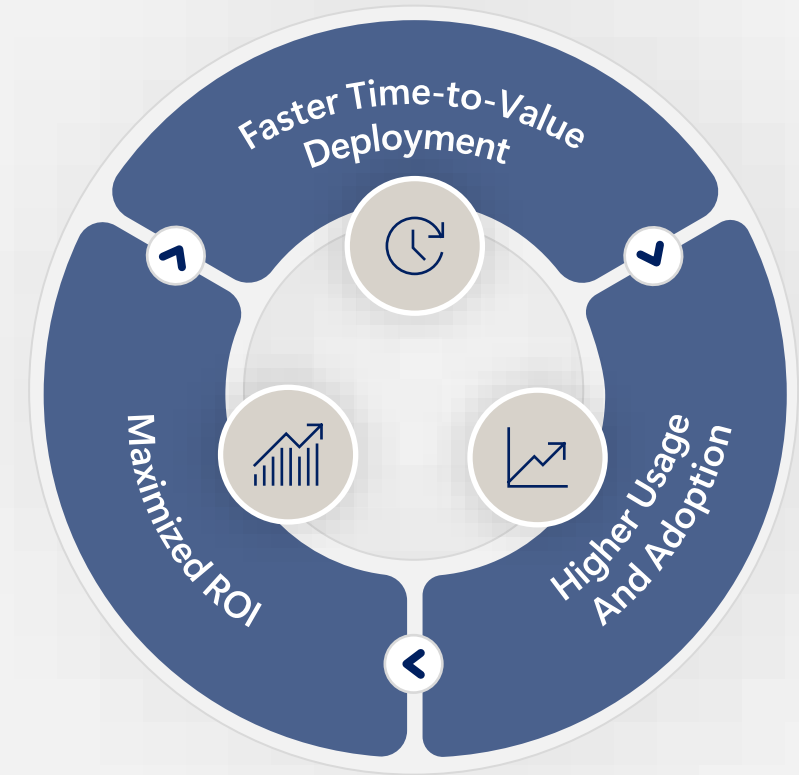


Customers benefit from qualified guidance:

- Program advisory
- Functional and technical alignment
- Success assessment
- Code and performance health checks
- Improved build and deployment quality
- Administrative educational workshops
- Steering committee participation



PQA is delivered by best-in-class trusted, solution advisors with deep, real-world enterprise implementation experience using the Success By Design framework to provide functional, technical, and business process advisory



PQA at a glance



Experienced advisors

- Accelerate your deployment with a team of subject matter experts to empower your teams with skills and knowledge
- Learn through our experience
- Influence product direction with your feedback



Milestone reviews

- Help increase the likelihood of project success with solution architecture design validation and development processes where we cover both functional and technical elements of your implementation
- Avoid common pitfalls
- Mitigate risk and overcome deployment blockers



Microsoft in your corner

- Help increase adoption success through guidance
- Lay a solid foundation to support future deployments
- Ease the transition to post go-live success programs

Roles and responsibilities

Stage	Examples of customer and partner activities. Specific division of responsibilities depends on the partner proposal.		PQA provides implementation advisory and best practice guidance.
	Customer	Partner <i>Implementation partner is required for PQA</i>	Microsoft Architects
Governance	<ul style="list-style-type: none"> • Program and project management • End-user communications • Accountable for end user adoption • Change management 	<ul style="list-style-type: none"> • Governance and program management • Change management (depends on partner proposal) 	<ul style="list-style-type: none"> • Steering committee and technical review board participation
Initiate	<ul style="list-style-type: none"> • Project kick-off • Communicate requirements 	<ul style="list-style-type: none"> • Project kick-off • Elicit and document requirements 	<ul style="list-style-type: none"> • Project kick-off • Success planning workshop
Implement	<ul style="list-style-type: none"> • Manage project in Lifecycle Services (LCS) • To-be business process design • Develop requirements • Review and sign off solution design • Support solution development • Support data migration and testing • Training users 	<ul style="list-style-type: none"> • Requirements analysis • Solution design and documentation • Modifications to Dynamics 365 • ALM and build management • Configuration and setup • Support customer with <ul style="list-style-type: none"> – Data migration – Security roles – User training 	<ul style="list-style-type: none"> • Solution blueprint review • Assessments and advisory services • Gap solution reviews • Code and performance health checks • Implementation monitoring • Education workshops
Prepare	<ul style="list-style-type: none"> • Help-desk documentation and training • Organizational go-live readiness • Go-live 	<ul style="list-style-type: none"> • Solution go-live readiness • Go-live 	<ul style="list-style-type: none"> • Cutover strategy • Go-live readiness assessment • Go-live assistance¹
Operate	<ul style="list-style-type: none"> • Realize business value 	<ul style="list-style-type: none"> • First-level support (depends on partner proposal) 	<ul style="list-style-type: none"> • Post-go live review • Transition to long-term CSU engagement

Despedida y Cierre

