

# Webinar

Discover the AI features already inside  
Dynamics 365 Finance and Operations



# Today 's Team



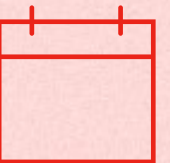
Claus Andersen  
**Sr. Enterprise Architect**



Angelo Dalle Molle  
**Global CMO**

# Agenda

- Who is AlfaPeople
- Microsoft Copilot and AI fundamentals
- Microsoft Dynamics 365 Finance and Operations (and other Microsoft Business Applications) position in the Copilot landscape
- Copilot and AI in Microsoft Dynamics 365 Finance and Operations
- Key takeaways



# Who is AlfaPeople

- Your leading Microsoft Dynamics 365 partner



**Europe:** Denmark, Germany, Spain, Switzerland

**North America:** USA, Canada

**Asia:** China, Saudi Arabia, United Arab Emirates

**Latam:** Brazil, Chile, Costa Rica, Colombia, Ecuador, Guatemala, Mexico, Paraguay, Peru, Uruguay

- Present in 18+ countries
- 650+ employees globally
- 450+ Microsoft-certified consultants
- Offshore team in India and LATAM
- 500+ active customers globally



INNER CIRCLE  
FOR MICROSOFT AI BUSINESS SOLUTIONS

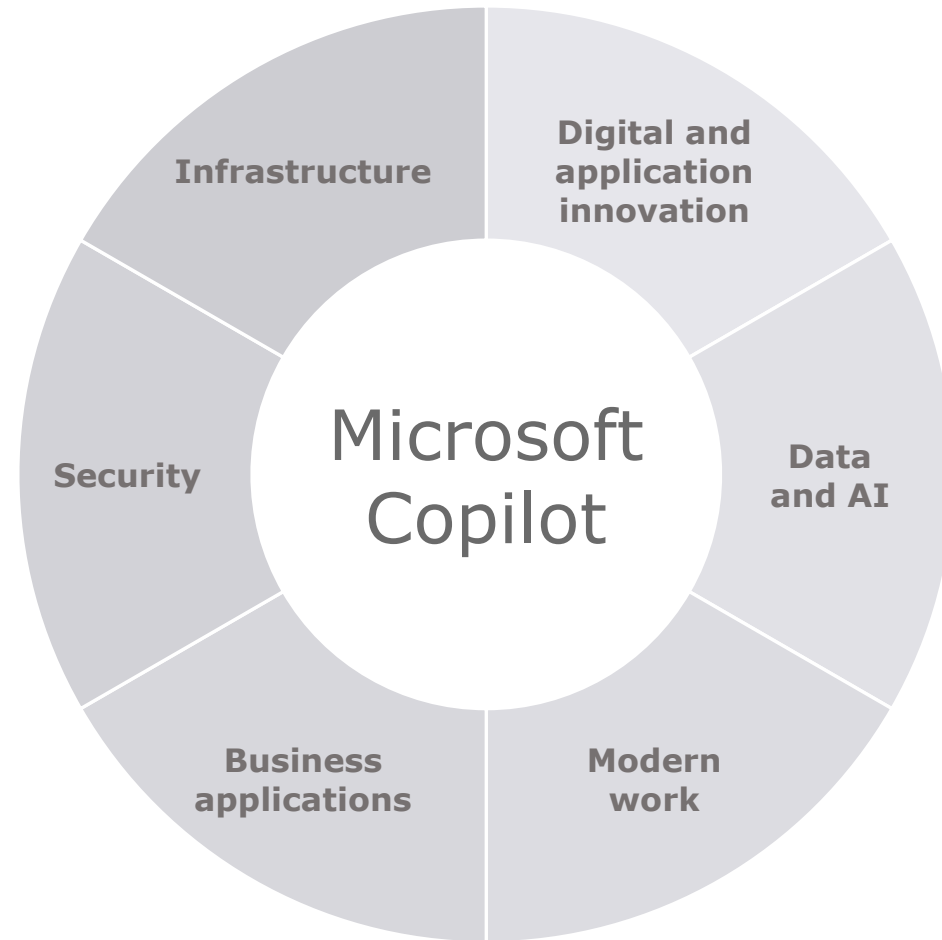
**Top 1%** of worldwide Partners.

Part of the Inner Circle for the **last 16 years** and received several awards.

# Microsoft Copilot and AI fundamentals



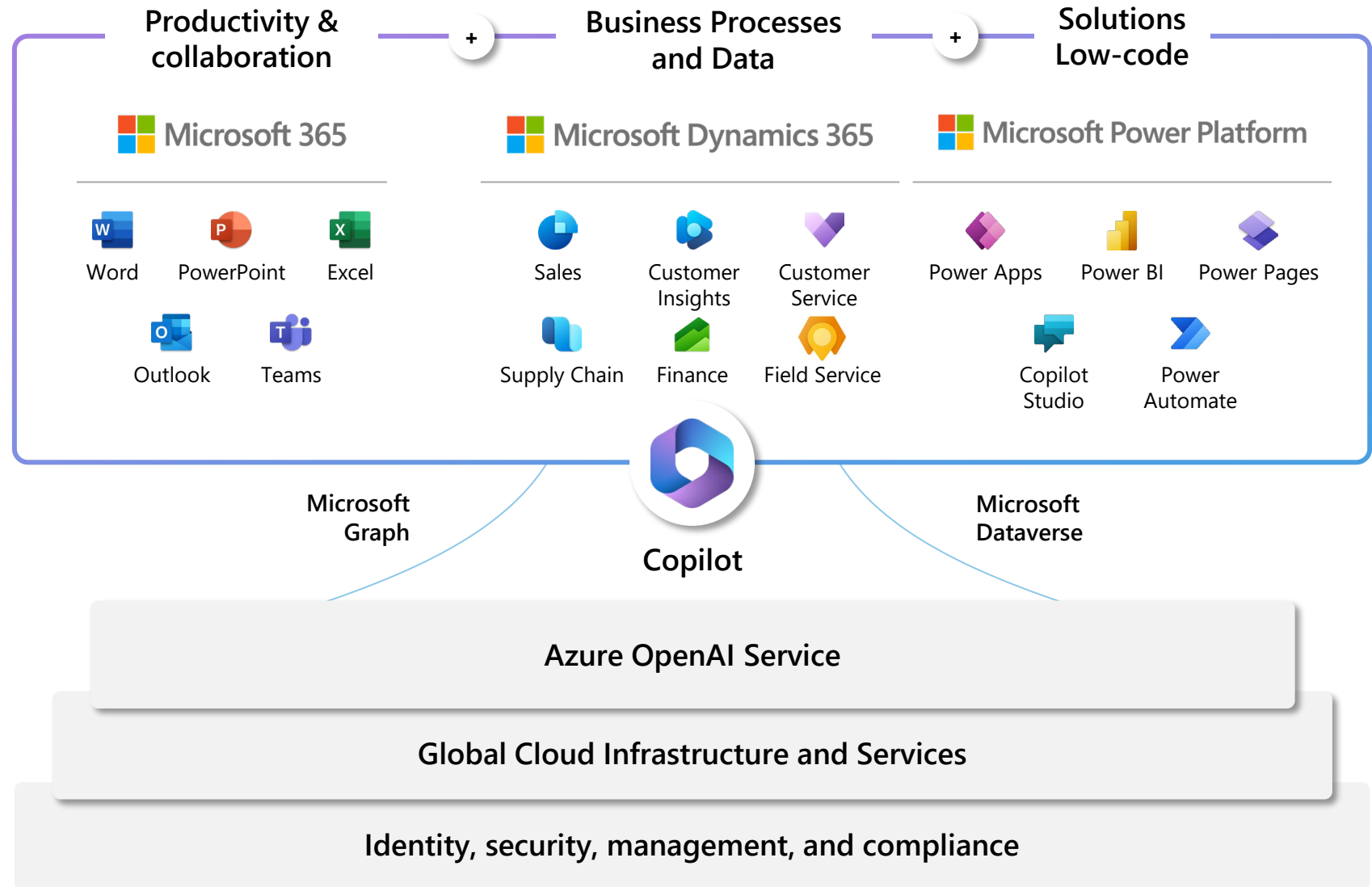
# Microsoft Copilot



# Data + Dynamics 365 Copilot + ERP

## Microsoft Copilot

The same persistent AI unifying your data, applications, and services

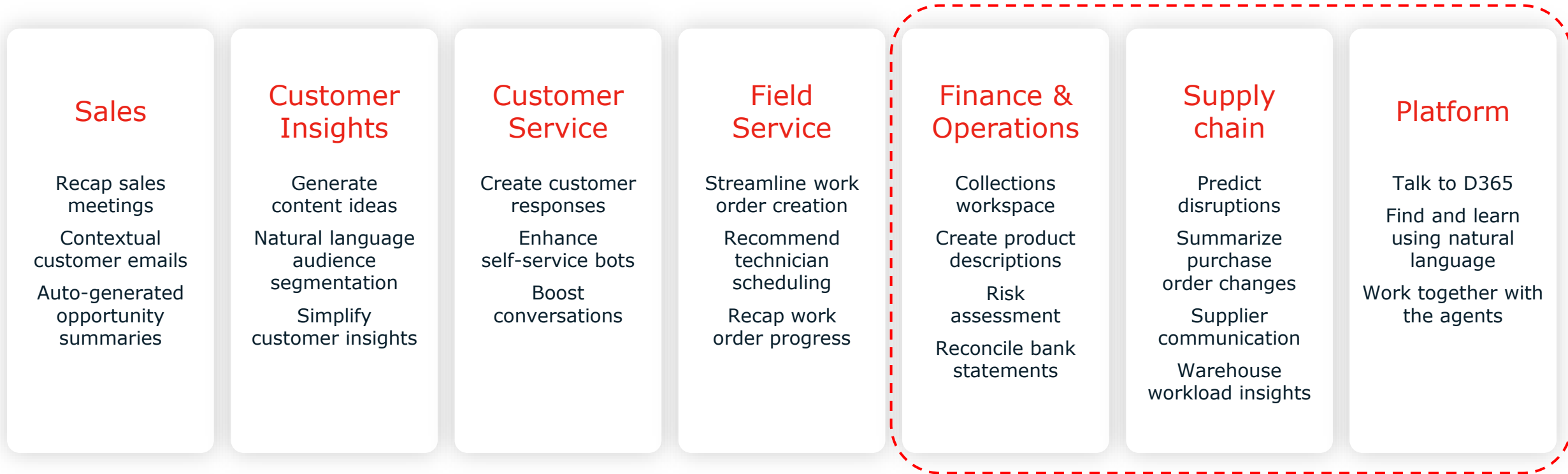


# Copilot landscape

The position of Microsoft Dynamics 365 Finance and Operations (and other Microsoft Business Applications) in the Copilot landscape.



# A Copilot for everyone across the organization



Copilot for Dynamics 365

Copilot for Dynamics 365 is **available today (in GA or preview)**. Some of the presented might require additional licensing.

# Copilot and AI

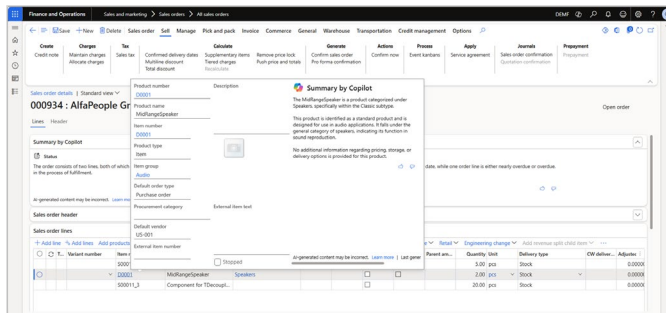
- in Microsoft Dynamics 365 Finance and Operations



# Copilot in Dynamics 365

## Supply Chain Management

### Product summary



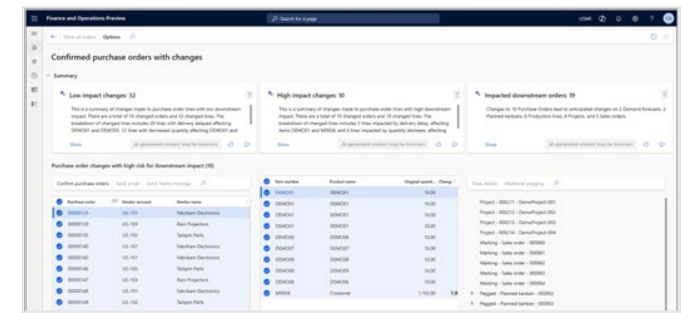
- Copilot-generated summary of the item on forms that shows the item number.
- Gives you a quick and customized overview of the most important information related to a selected product, plus information from other pages you work with the most, tailored to your job function.

### Vendor and customer summaries



- Shows status information that include the currency, accounting currency, hold status, number of orders, posted vendor invoices, payment status, and more. It can also include the number of overdue vendor invoices, purchasing agreements, and active rebates agreements.

### Changes to confirmed purchase orders\*

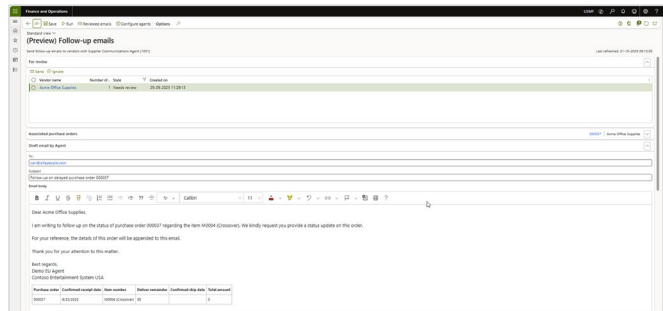


- Lists all previously confirmed supplying purchase orders that have been changed since confirmation.
- Helps during the review process by identifying potential impacts on demand such as production work, service work orders, and sales orders.

# Copilot in Dynamics 365

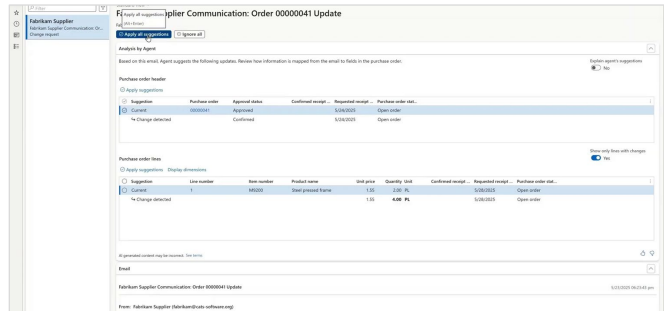
## Supply Chain Management

### Supplier Communications Agent\*



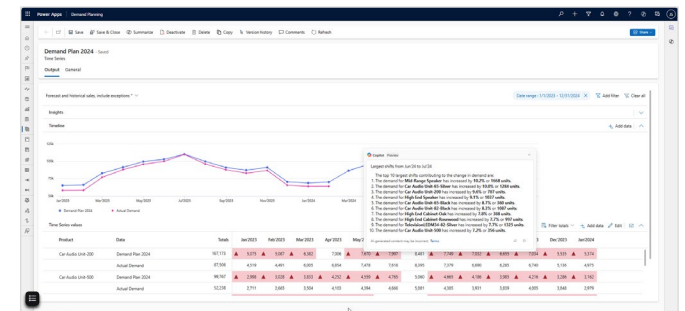
- Automatically draft ready-to-send emails that, for example, ask a vendor about the status of a delayed order or remind them to confirm a purchase order.

### Supplier Communications Agent



- Automatically reads your email inbox to analyze communications from your vendors. Finds messages related to purchase orders and analyzes them together with organizational data to identify both purchase order confirmations and change requests.

### Demand Planning Insights

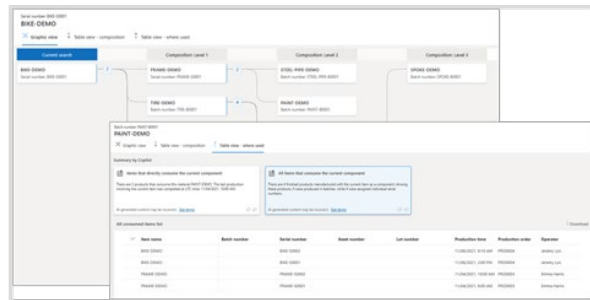


- Offers detailed insights calculated using AI models with generative insights that provides a confidence score and describes the pattern in natural language and also indicates the proportion of planning items that follow the pattern.

# Copilot in Dynamics 365

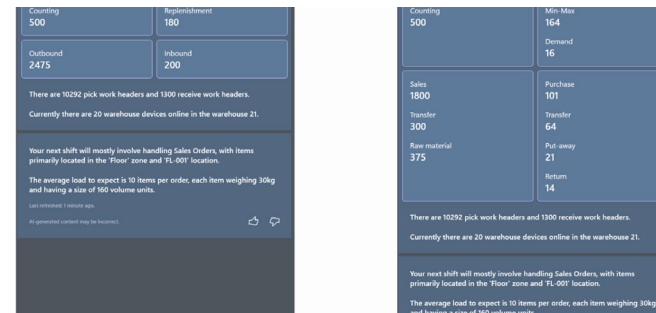
## Supply Chain Management

### Traceability overview



- Let you collect business and industry-specific data across the product value chain and use Copilot to summarize the collected data to quickly get an overview to quickly act on regulation audits and support the compliance process.

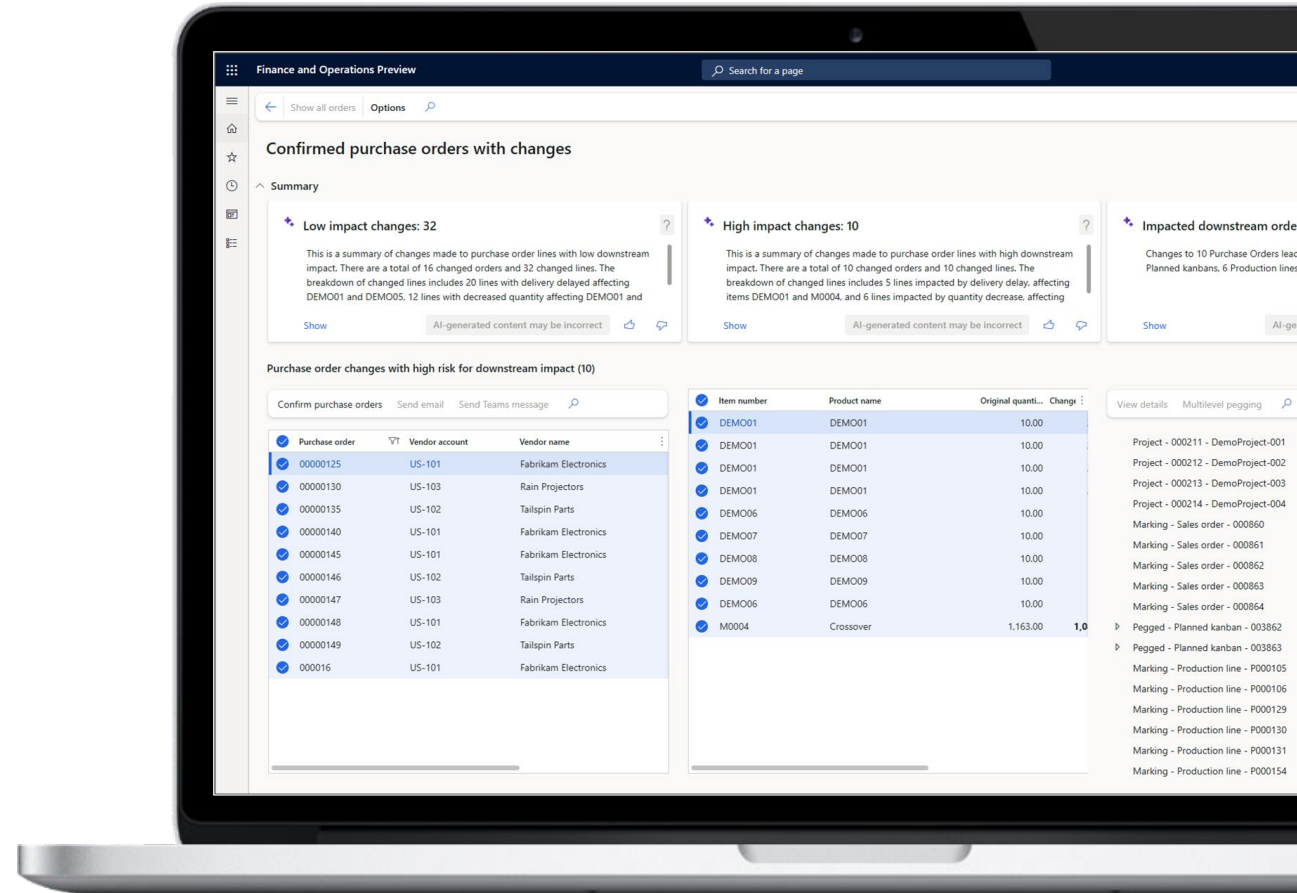
### Workload insights in the WMS app



- Workers can use the insights on the workload page to get an overview of their workday and optimize the way that they engage with their daily tasks.
- Detailed information about available tasks helps enhance operational efficiency, reduce the time that is spent on information retrieval, and optimize resource allocation across the warehouse floor.

# Demo

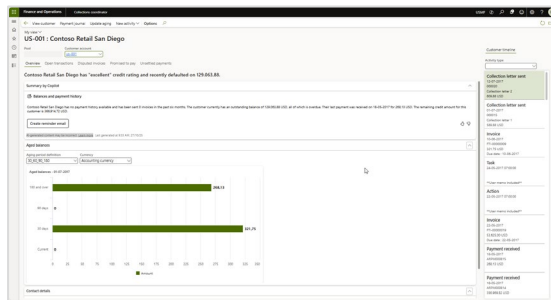
## Supply Chain Management



# Copilot in Dynamics 365

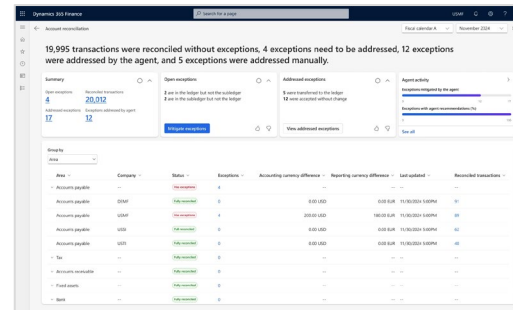
## Finance

### Collections coordinator summary\*



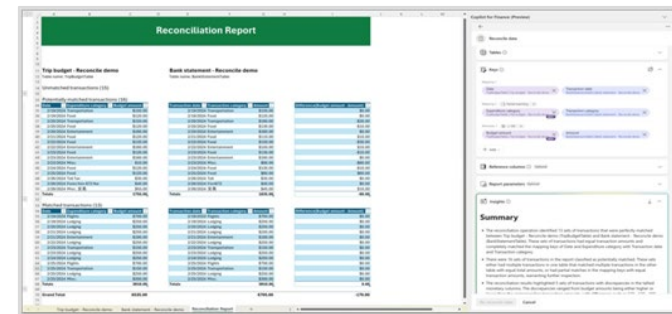
- Get an AI-generated summary of a customer's overdue invoices, payment history, and remaining credit.
- Get an AI-generated draft of a reminder email.

### Reconciliation workspace



- Reconcile your general ledger with the accounts payable, accounts receivable, tax, and bank subledgers.
- View reconciled data and automated data analysis on a defined schedule and the Copilot-powered agent suggests the most likely action to take.

### Copilot for Finance\*



- Suggests reconciliation vectors, compares financial data structures, classifies transactions, and creates reconciliation reports with generative AI supported summaries.

# Demo

## Finance

### Reconciliation Report

**Trip budget - Reconcile demo**  
Table name: TripBudgetTable

Unmatched transactions (15)

Potentially matched transactions (16)

Date	Expenditure category	Budget amount
2/19/2024	Transportation	\$150.00
2/19/2024	Food	\$120.00
2/20/2024	Transportation	\$150.00
2/20/2024	Food	\$120.00
2/20/2024	Entertainment	\$160.00
2/21/2024	Food	\$120.00
2/22/2024	Food	\$120.00
2/22/2024	Entertainment	\$160.00
2/23/2024	Food	\$120.00
2/23/2024	Entertainment	\$160.00
2/23/2024	Misc.	\$10.00
2/24/2024	Food	\$120.00
2/25/2024	Food	\$120.00
2/26/2024	Toll Tax	\$30.00
2/26/2024	Fees from 472 fee	\$40.00
2/26/2024	Misc. 交易	\$55.00
<b>Totals</b>		<b>1755.00</b>

**Bank statement - Reconcile demo**  
Table name: BankStatementTable

Transaction date	Transaction category	Amount	Difference(Budget amount - Amount)
2/19/2024	Transportation	\$150.00	\$0.00
2/19/2024	Food	\$120.00	\$0.00
2/20/2024	Transportation	\$180.00	-\$30.00
2/20/2024	Food	\$130.00	-\$10.00
2/20/2024	Entertainment	\$160.00	\$0.00
2/21/2024	Food	\$110.00	\$10.00
2/22/2024	Food	\$150.00	-\$30.00
2/22/2024	Entertainment	\$150.00	\$10.00
2/23/2024	Food	\$130.00	-\$10.00
2/23/2024	Entertainment	\$160.00	\$0.00
2/23/2024	Misc.	\$90.00	-\$60.00
2/24/2024	Food	\$130.00	-\$10.00
2/25/2024	Food	\$60.00	\$60.00
2/26/2024	Toll	\$30.00	\$0.00
2/26/2024	Fees#72	\$40.00	\$0.00
2/26/2024	交易	\$45.00	\$10.00
<b>Totals</b>		<b>1835.00</b>	<b>-80.00</b>

Date	Expenditure category	Budget amount
2/19/2024	Flights	\$700.00
2/19/2024	Lodging	\$250.00
2/20/2024	Lodging	\$250.00
2/21/2024	Lodging	\$250.00
2/21/2024	Entertainment	\$160.00
2/22/2024	Lodging	\$250.00
2/23/2024	Transportation	\$150.00
2/23/2024	Lodging	\$250.00
2/24/2024	Lodging	\$250.00
2/25/2024	Flights	\$700.00
2/25/2024	Transportation	\$150.00
2/25/2024	Lodging	\$250.00
2/25/2024	Misc.	\$300.00
<b>Totals</b>		<b>3910.00</b>

Transaction date	Transaction category	Amount	Difference(Budget amount - Amount)
2/19/2024	Flights	\$700.00	\$0.00
2/19/2024	Lodging	\$250.00	\$0.00
2/20/2024	Lodging	\$250.00	\$0.00
2/21/2024	Lodging	\$250.00	\$0.00
2/21/2024	Entertainment	\$160.00	\$0.00
2/22/2024	Lodging	\$250.00	\$0.00
2/23/2024	Transportation	\$150.00	\$0.00
2/23/2024	Lodging	\$250.00	\$0.00
2/24/2024	Lodging	\$250.00	\$0.00
2/25/2024	Flights	\$700.00	\$0.00
2/25/2024	Transportation	\$150.00	\$0.00
2/25/2024	Lodging	\$250.00	\$0.00
2/25/2024	Misc.	\$300.00	\$0.00
<b>Totals</b>		<b>3910.00</b>	<b>0.00</b>

Date	Expenditure category	Budget amount	Difference(Budget amount - Amount)
2/19/2024	Transportation	\$150.00	\$0.00
2/19/2024	Food	\$120.00	\$0.00
2/20/2024	Transportation	\$150.00	-\$30.00
2/20/2024	Food	\$120.00	-\$10.00
2/20/2024	Entertainment	\$160.00	\$0.00
2/21/2024	Food	\$120.00	\$0.00
2/22/2024	Food	\$120.00	-\$30.00
2/22/2024	Entertainment	\$160.00	\$10.00
2/23/2024	Food	\$120.00	-\$10.00
2/23/2024	Entertainment	\$160.00	\$0.00
2/23/2024	Misc.	\$10.00	-\$60.00
2/24/2024	Food	\$120.00	-\$10.00
2/25/2024	Food	\$120.00	\$60.00
2/26/2024	Toll Tax	\$30.00	\$0.00
2/26/2024	Fees from 472 fee	\$40.00	\$0.00
2/26/2024	Misc. 交易	\$55.00	\$10.00
<b>Totals</b>		<b>1755.00</b>	<b>-170.00</b>

**Grand Total**      **6535.00**      **6705.00**      **-170.00**

Trip budget - Reconcile demo    Bank statement - Reconcile demo    Reconciliation Report

Copilot for Finance (Prev)

←

Reconcile data

Tables

Keys

Missing 1

Date

Missing 2

Partial match

Expenditure category

Budget amount

+ Add

Reference column

Report parameter

Insights

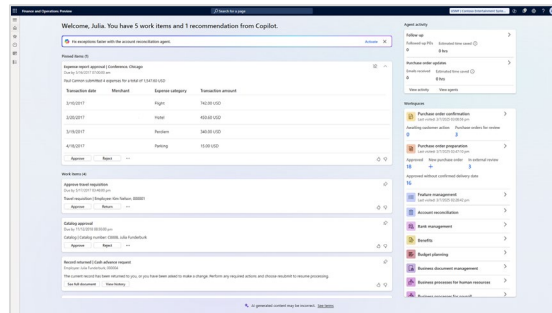
**Summary**

- The reconciliation on between Trip budget (BankStatementTable) completely matches and Transaction cat
- There were 16 sets either had multiple table with equal tot transaction amount
- The reconciliation n monetary columns.

Re-reconcile data

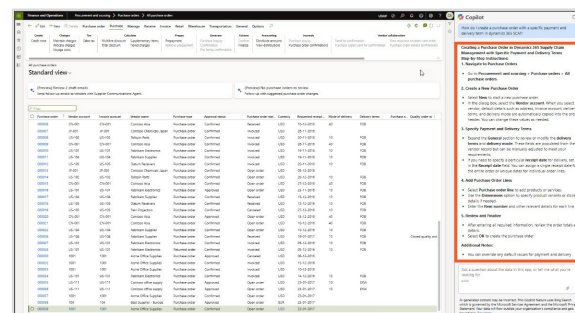
# Copilot in Dynamics 365 Platform

## Immersive Home(\*)



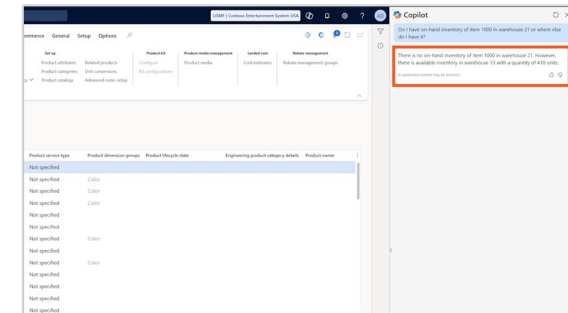
- Helps the user work hand in hand with AI agents and focus on the most important work items assigned to the specific user.

## Sidecar – Generative Help



- In-app help and guidance that uses the power of generative AI to give contextual support to users.
- Copilot accesses the full range of public documentation to offer precise assistance and streamline the navigation through the extensive capabilities of finance and operations apps.

## Sidecar (plus) – Talk and connect with FO



- AI assistant panel that uses the Model Context Protocol (MCP) to that allows users to interact with AI agents that can do things like query inventory quantities, find approved vendors, matching invoices and create transfer orders. Can be extended for specific needs.
- Use D365FO business events to trigger autonomous agents

# Key take-aways

AI & Copilot is already in Dynamics 365 Finance and Operations.

Primarily as features or as part of features.

More AI & Copilot features are being introduced by Microsoft in every release.

Possible to extend existing Copilot features and functionality and create new ones.

# Survey

Complete the survey and participate in our giveaway!



# GIVEAWAY: AI & Copilot Assessment Workshop



This workshop provides an AI integration roadmap fostering innovation, efficiency, strategic growth, operational readiness, and ethical practices, transforming challenges into competitive opportunities.

1-day workshop, On-site or Online.

The workshop is designed for managers, IT decision-makers, process owners, and data analysts.

[Read more!](https://alfapeople.com/ai-assessment-workshop-2/)

<https://alfapeople.com/ai-assessment-workshop-2/>

## Sessions in the Workshop:

- **Introduction to Microsoft technologies:**  
Exploring Microsoft AI, Copilots, and Azure services to enhance efficiency and address business challenges.
- **Use Case Exploration:**  
We will explore use cases and identify challenges and priorities for strategic impact in your organization.
- **Design Thinking:**  
Design Thinking session focuses on AI solutions, quick wins, ROI, consensus, and prioritizing value creation.
- **Organizational Readiness:**  
Discussing AI integration, emphasizing data quality, change management, training, governance, and ethical AI practices.
- **Roadmap and Next Steps:**  
Outlining a roadmap for AI adoption to accelerate your organization's journey.

# GIVEAWAY: Copilot in a Day

**Copilot in a Day is an exclusive, hands-on experience** led by AlfaPeople's expert consultants, designed to showcase the real value of Microsoft Copilot.

Discover how to configure, customize, and apply its advanced features to streamline workflows, boost productivity, and turn data into actionable insights.

More than a demo, Copilot in a Day is an inspiring journey that gives your team practical know-how, sparks new ideas, and reveals how Microsoft AI can transform the way you work—today and in the future.

## Introduction

- The current role of AI in productivity and business transformation;
- General concepts of AI, including Generative AI, and its application in the business environment;
- Overview of Copilots within Dynamics 365 and other platforms;
- Functionalities and benefits specific to <<name of specific Copilot>>.
- Copilot Studio's role in customizations, extensions and integrations;
- Overview of Azure AI Services and its fundamental architecture.

## Practical demonstration

- Demonstration of how the technologies work in practice in a demo session guided and presented by the AlfaPeople trainer. Due to configuration restrictions, participants will follow the presentation without interaction at this time.
- Presentation of exemplary use cases in productivity and processes.
- Demo with <<specific Copilot name>>: settings, features and customizations.
- Other complementary tools and integrations with other platforms

## Closing

- Q&A.
- Next steps.

[Read more!](#)

# Q&A

Feel free to ask questions by unmuting or writing in the chat



## Contact us

Phone: +45 70 20 27 40

Email: [info@alfapeople.com](mailto:info@alfapeople.com)

# Screenshot slides

Sales order details | Standard view  
**000934 : AlfaPeople Gr**

Lines Header

Summary by Copilot

Status  
 The order consists of two lines, both of which in the process of fulfillment.

AI-generated content may be incorrect. [Learn more](#)

Sales order header

Sales order lines


+ Add line + Add lines Add products

○	↻	T...	Variant number	Item r
				S0001
○			D0001	MidRangeSpeaker
			S00011_3	Component for TDecoupl...

**Product number**  
D0001

**Product name**  
MidRangeSpeaker

**Item number**  
D0001

**Product type**  
Item 

**Item group**  
Audio

**Default order type**  
Purchase order

**Procurement category**  
External item text

**Default vendor**  
US-001

**External item number**  
 Stopped

**Summary by Copilot**

The MidRangeSpeaker is a product categorized under Speakers, specifically within the Classic subtype.

This product is identified as a standard product and is designed for use in audio applications. It falls under the general category of speakers, indicating its function in sound reproduction.

No additional information regarding pricing, storage, or delivery options is provided for this product.

AI-generated content may be incorrect. [Learn more](#) | Last gener

Open order

date, while one order line is either nearly overdue or overdue.

Parent am...	Quantity	Unit	Delivery type	CW deliver...	Adjustec :
	5.00	pcs	Stock		0.00000
	2.00	pcs	Stock		0.00000
	20.00	pcs	Stock		0.00000

## DE-001 : Opal Audio

### Summary by Copilot

#### Status

The total number of posted invoices is 4, amounting to a total of 35,453.75 EUR, with an outstanding balance of 35,453.75 EUR for posted vendor invoices. There have been 0 posted vendor payments. Additionally, there is 1 purchase order with an open status, 2 that have been received, and 5 that are invoiced. There are no purchase agreements on hold or effective, and there are no active rebate agreements or active rebate deals. Both vendor and accounting currencies are EUR, with the data range covering the last one year.

#### Insights

The vendor has an overdue invoice count of 4, with a total overdue invoice amount of -35,453.75. The invoice with the maximum overdue days is 321 days, identified by invoice number 65656356. The invoice with the maximum overdue amount is 34,212.50, associated with invoice number RE\_000611. There is 1 pending vendor invoice, with no pending invoices having matching errors or waiting for approval. Additionally, there is 1 delayed product receipt recorded within the data range of the last one year.

AI-generated content may be incorrect. [Learn more](#)

General

10 Not Active

## DE-010 : A.Datum Corporation

### Summary by Copilot

#### Status

The data for the last year indicates that there were 12 posted customer invoices totaling 184,279 EUR, which matches the customer's outstanding balance. No customer payments were recorded, resulting in an unsettled payment amount of 0 EUR. Additionally, 12 sales orders were invoiced for the same amount of 184,279 EUR, while there were no delivered sales orders. Currently, there are 5 open sales orders.

#### Insights

The data for the last year indicates there are 12 overdue customer invoices totaling 184,279 EUR. The maximum overdue days recorded is 312, associated with invoice number CIV-000173. The highest overdue amount is 25,990 EUR, linked to invoice number CIV-000174. Additionally, there are 7 delayed sales order lines and 12 sales orders that have been invoiced but not confirmed.

AI-generated content may be incorrect. [Learn more](#)

General

20

Show all orders Options

## Confirmed purchase orders with changes

### Summary

#### Low impact changes: 32

This is a summary of changes made to purchase order lines with low downstream impact. There are a total of 16 changed orders and 32 changed lines. The breakdown of changed lines includes 20 lines with delivery delayed affecting DEMO01 and DEMO05, 12 lines with decreased quantity affecting DEMO01 and

Show

AI-generated content may be incorrect



#### High impact changes: 10

This is a summary of changes made to purchase order lines with high downstream impact. There are a total of 10 changed orders and 10 changed lines. The breakdown of changed lines includes 5 lines impacted by delivery delay, affecting items DEMO01 and M0004, and 6 lines impacted by quantity decrease, affecting

Show

AI-generated content may be incorrect



#### Impacted downstream orders: 19

Changes to 10 Purchase Orders lead to anticipated changes on 2 Demand forecasts, 2 Planned kanbans, 6 Production lines, 4 Projects, and 5 Sales orders.

Show

AI-generated content may be incorrect



### Purchase order changes with high risk for downstream impact (10)

Confirm purchase orders Send email Send Teams message

Purchase order	Vendor account	Vendor name
00000125	US-101	Fabrikam Electronics
00000130	US-103	Rain Projectors
00000135	US-102	Tailspin Parts
00000140	US-101	Fabrikam Electronics
00000145	US-101	Fabrikam Electronics
00000146	US-102	Tailspin Parts
00000147	US-103	Rain Projectors
00000148	US-101	Fabrikam Electronics
00000149	US-102	Tailspin Parts
000016	US-101	Fabrikam Electronics

Item number	Product name	Original quanti...	Change
DEMO01	DEMO01	10.00	
DEMO01	DEMO01	10.00	
DEMO01	DEMO01	10.00	
DEMO01	DEMO01	10.00	
DEMO06	DEMO06	10.00	
DEMO07	DEMO07	10.00	
DEMO08	DEMO08	10.00	
DEMO09	DEMO09	10.00	
DEMO06	DEMO06	10.00	
M0004	Crossover	1,163.00	1,0

View details Multilevel pegging

- Project - 000211 - DemoProject-001
- Project - 000212 - DemoProject-002
- Project - 000213 - DemoProject-003
- Project - 000214 - DemoProject-004
- Marking - Sales order - 000860
- Marking - Sales order - 000861
- Marking - Sales order - 000862
- Marking - Sales order - 000863
- Marking - Sales order - 000864
- Pegged - Planned kanban - 003862
- Pegged - Planned kanban - 003863
- Marking - Production line - P000105
- Marking - Production line - P000106
- Marking - Production line - P000129
- Marking - Production line - P000130
- Marking - Production line - P000131
- Marking - Production line - P000154

Send follow-up emails to vendors with Supplier Communications Agent (1001) Last refreshed: 21-10-2025 09:13:05

For review

Send Ignore

Vendor name	Number of...	State	Created on
Acme Office Supplies	1	Needs review	29-09-2025 11:29:13

Associated purchase orders 000037 | Acme Office Supplies

Draft email by Agent

To: can@alfapeople.com

Subject: Follow-up on delayed purchase order 000037

Email body

Rich text editor toolbar with options like Bold, Italic, Underline, Font color, Background color, Bulleted list, Numbered list, Indent, Outdent, Font size, Font family (Calibri), Paragraph style, Undo, Redo, Link, Unlink, Insert link, Insert image, Help.

Dear Acme Office Supplies,

I am writing to follow up on the status of purchase order 000037 regarding the item M0004 (Crossover). We kindly request you provide a status update on this order.

For your reference, the details of this order will be appended to this email.

Thank you for your attention to this matter.

Best regards,  
Demo EU Agent  
Contoso Entertainment System USA

Purchase order	Confirmed receipt date	Item number	Deliver remainder	Confirmed ship date	Total amount
000037	9/25/2025	M0004 (Crossover)	50		0

Filter

**Fabrikam Supplier**  
Fabrikam Supplier Communication: Or...  
Change request

Standard view Apply all suggestions (Alt+Enter)

## Fabrikam Supplier Communication: Order 00000041 Update

Apply all suggestions  Ignore all

### Analysis by Agent ^

Based on this email, Agent suggests the following updates. Review how information is mapped from the email to fields in the purchase order. Explain agent's suggestions  No

**Purchase order header**

Apply suggestions

Suggestion	Purchase order	Approval status	Confirmed receipt ...	Requested receipt ...	Purchase order stat...
<input checked="" type="radio"/> Current	00000041	Approved		5/24/2025	Open order
<input type="radio"/> Change detected		Confirmed		5/24/2025	Open order

**Purchase order lines** Show only lines with changes  Yes

Apply suggestions  Display dimensions

Suggestion	Line number	Item number	Product name	Unit price	Quantity	Unit	Confirmed receipt ...	Requested receipt ...	Purchase order stat...
<input checked="" type="radio"/> Current	1	M9200	Steel pressed frame	1.55	2.00	PL		5/28/2025	Open order
<input type="radio"/> Change detected				1.55	4.00	PL		5/28/2025	Open order

AI generated content may be incorrect. See terms 👍 👎

**Email** ^

**Fabrikam Supplier Communication: Order 00000041 Update** 5/23/2025 06:23:43 pm

**From:** Fabrikam Supplier (fabrikam@cats-software.org)  
**To:** procurement@scmcloudandedge.onmicrosoft.com;

In relation to PO 00000041  
We need to inform about a delay of item M9200 by 4 days and change in quantity for item M9201 from 2 to 4 PL

### Demand Plan 2024 - Saved

Time Series

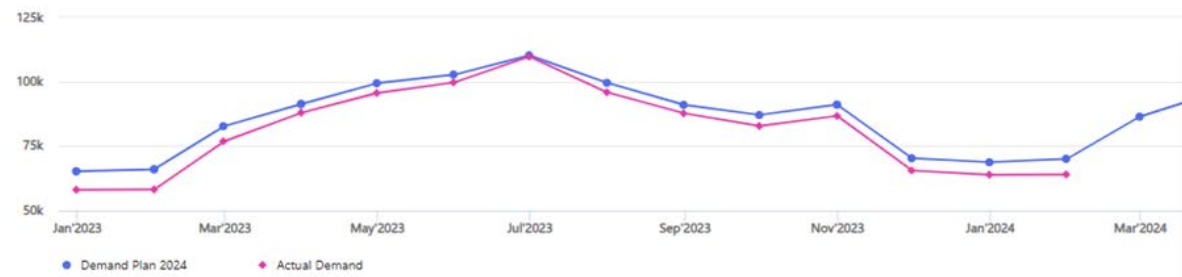
Output **General**

Forecast and historical sales, include exceptions \* ▾

Date range : 1/1/2023 - 12/31/2024 ✕ 🔍 Add filter 🗑️ Clear all

Insights ▾

Timeline + Add data ▾



**Copilot Preview** ✕

Largest shifts from Jun'24 to Jul'24

The top 10 largest shifts contributing to the change in demand are:

1. The demand for **Mid-Range Speaker** has increased by **10.2%** or **1668 units**.
2. The demand for **Car Audio Unit-65-Silver** has increased by **10.0%** or **1284 units**.
3. The demand for **Car Audio Unit-200** has increased by **9.6%** or **787 units**.
4. The demand for **High End Speaker** has increased by **9.1%** or **1037 units**.
5. The demand for **Car Audio Unit-65-Black** has increased by **8.7%** or **360 units**.
6. The demand for **Car Audio Unit-82-Black** has increased by **8.3%** or **1087 units**.
7. The demand for **High End Cabinet-Oak** has increased by **7.8%** or **388 units**.
8. The demand for **High End Cabinet-Rosewood** has increased by **7.7%** or **997 units**.
9. The demand for **TelevisionLEDM34-82-Silver** has increased by **7.7%** or **1325 units**.
10. The demand for **Car Audio Unit-500** has increased by **7.2%** or **356 units**.

AI-generated content may be incorrect. [Terms](#)

Time Series values

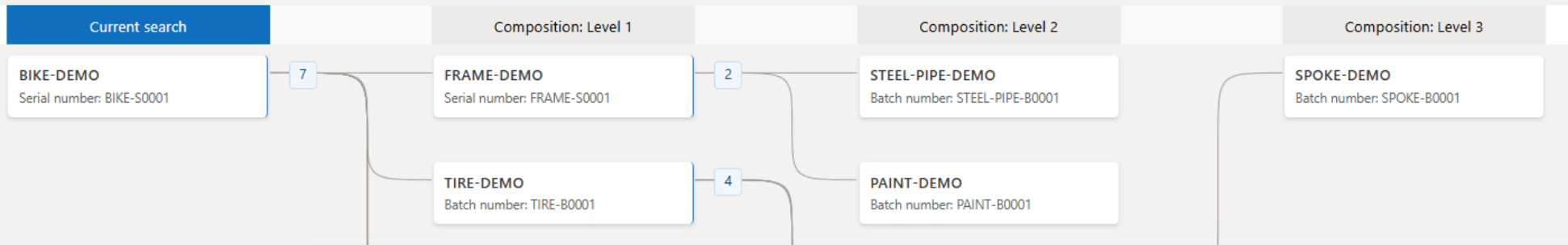
Product	Data	Totals	Time Series values												
			Jan'2023	Feb'2023	Mar'2023	Apr'2023	May'2023	Jun'2023	Jul'2023	Aug'2023	Sep'2023	Oct'2023	Nov'2023	Dec'2023	Jan'2024
Car Audio Unit-200	Demand Plan 2024	167,173	▲ 5,075	▲ 5,087	▲ 6,382	7,006	▲ 7,670	▲ 7,997	8,481	▲ 7,749	▲ 7,032	▲ 6,655	▲ 7,034	▲ 5,535	▲ 5,374
	Actual Demand	87,506	4,519	4,491	6,005	6,854	7,478	7,618	8,395	7,379	6,690	6,285	6,740	5,136	4,975
Car Audio Unit-500	Demand Plan 2024	99,767	▲ 2,998	▲ 3,028	▲ 3,833	▲ 4,252	▲ 4,559	▲ 4,765	5,060	▲ 4,665	▲ 4,186	▲ 3,985	▲ 4,216	▲ 3,286	▲ 3,162
	Actual Demand	52,238	2,711	2,665	3,504	4,103	4,394	4,666	5,081	4,385	3,931	3,839	4,005	3,048	2,979

Filter totals ▾ + Add data ✎ Edit 🗑️ ▾

Serial number: BIKE-S0001

## BIKE-DEMO

[Graphic view](#) [Table view - composition](#) [Table view - where used](#)



Batch number: PAINT-B0001

## PAINT-DEMO

[Graphic view](#) [Table view - composition](#) [Table view - where used](#)

### Summary by Copilot

#### Items that directly consume the current component

There are 2 products that consume this material PAINT-DEMO. The last production involving the current item was completed at UTC time: 11/04/2021, 10:00 AM.

AI-generated content may be incorrect. [See terms](#)



#### All items that consume the current component

There are 4 finished products manufactured with the current item as a component. Among these products, 0 were produced in batches, while 4 were assigned individual serial numbers.

AI-generated content may be incorrect. [See terms](#)



### All consumed items list

[Download](#)

Item name	Batch number	Serial number	Asset number	Lot number	Production time	Production order	Operator
BIKE-DEMO		BIKE-S0002			11/08/2021, 9:10 AM	PRO0004	Jeremy Los
BIKE-DEMO		BIKE-S0001			11/06/2021, 2:00 PM	PRO0004	Jeremy Los
FRAME-DEMO		FRAME-S0002			11/04/2021, 10:00 AM	PRO0003	Emma Harris
FRAME-DEMO		FRAME-S0001			11/04/2021, 9:00 AM	PRO0003	Emma Harris

Warehouse 21: Overview of work lines

Counting  
500

Replenishment  
180

Outbound  
2475

Inbound  
200

There are 10292 pick work headers and 1300 receive work headers.

Currently there are 20 warehouse devices online in the warehouse 21.

Your next shift will mostly involve handling Sales Orders, with items primarily located in the 'Floor' zone and 'FL-001' location.

The average load to expect is 10 items per order, each item weighing 30kg and having a size of 160 volume units.

Last refreshed: 1 minute ago.

AI-generated content may be incorrect.



Warehouse 21: Overview of work lines

Counting  
500

Min-Max  
164

Demand  
16

Sales  
1800

Purchase  
101

Transfer  
300

Transfer  
64

Raw material  
375

Put-away  
21

Return  
14

There are 10292 pick work headers and 1300 receive work headers.

Currently there are 20 warehouse devices online in the warehouse 21.

Your next shift will mostly involve handling Sales Orders, with items primarily located in the 'Floor' zone and 'FL-001' location.

The average load to expect is 10 items per order, each item weighing 30kg and having a size of 160 volume units.



My view **US-001 : Contoso Retail San Diego**

Pool Customer account

Overview Open transactions Disputed invoices Promised to pay Unsettled payments

Contoso Retail San Diego has "excellent" credit rating and recently defaulted on 129.063,88.

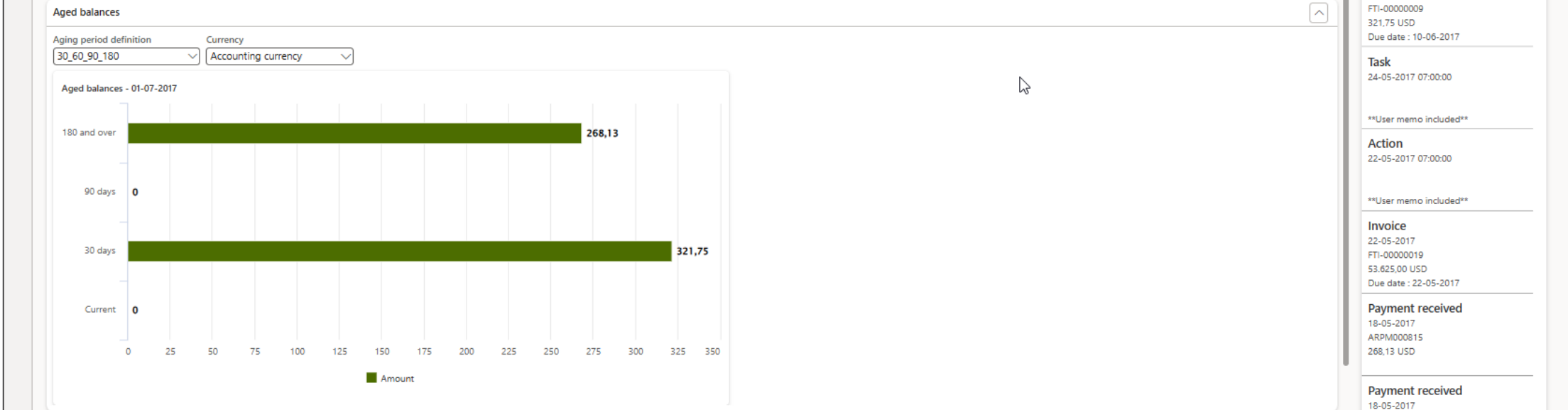
**Summary by Copilot**

**Balances and payment history**

Contoso Retail San Diego has no payment history available and has been sent 0 invoices in the past six months. The customer currently has an outstanding balance of 129.063,88 USD, all of which is overdue. Their last payment was received on 18-05-2017 for 268,13 USD. The remaining credit amount for this customer is 366.914,72 USD.

[Create reminder email](#)

All-generated content may be incorrect. [Learn more](#) Last generated at: 9:33 AM, 27/10/25



Contact details

**Customer timeline**

Activity type

**Collection letter sent**  
 12-07-2017  
 000020  
 Collection letter 2  
 609,88 USD

**Collection letter sent**  
 01-07-2017  
 000015  
 Collection letter 1  
 589,88 USD

**Invoice**  
 10-06-2017  
 FTI-00000009  
 321,75 USD  
 Due date : 10-06-2017

**Task**  
 24-05-2017 07:00:00

**\*\*User memo included\*\***

**Action**  
 22-05-2017 07:00:00

**\*\*User memo included\*\***

**Invoice**  
 22-05-2017  
 FTI-00000019  
 53.625,00 USD  
 Due date : 22-05-2017

**Payment received**  
 18-05-2017  
 ARPM000815  
 268,13 USD

**Payment received**  
 18-05-2017  
 ARPM000814  
 356.969,82 USD

19,995 transactions were reconciled without exceptions, 4 exceptions need to be addressed, 12 exceptions were addressed by the agent, and 5 exceptions were addressed manually.

**Summary**

Open exceptions	Reconciled transactions
<b>4</b>	<b>20,012</b>
Addressed exceptions	Exceptions addressed by agent
<b>17</b>	<b>12</b>

**Open exceptions**

2 are in the ledger but not the subledger  
2 are in the subledger but not the ledger

[Mitigate exceptions](#)

**Addressed exceptions**

5 were transferred to the ledger  
12 were accepted without change

[View addressed exceptions](#)

**Agent activity**

Exceptions mitigated by the agent



Exceptions with agent recommendations (%)



[See all](#)

Group by

Area ▼

Area	Company	Status	Exceptions	Accounting currency difference	Reporting currency difference	Last updated	Reconciled transactions
Accounts payable	--	Has exceptions	4	--	--	--	--
Accounts payable	DEMF	Fully reconciled	0	0.00 USD	0.00 EUR	11/30/2024 5:00PM	91
Accounts payable	USMF	Has exceptions	4	200.00 USD	180.00 EUR	11/30/2024 5:00PM	89
Accounts payable	USSI	Fully reconciled	0	0.00 USD	0.00 EUR	11/30/2024 5:00PM	62
Accounts payable	USTI	Fully reconciled	0	0.00 USD	0.00 EUR	11/30/2024 5:00PM	40
Tax	--	Fully reconciled	0	--	--	--	--
Accounts receivable	--	Fully reconciled	0	--	--	--	--
Fixed assets	--	Fully reconciled	0	--	--	--	--
Bank	--	Fully reconciled	0	--	--	--	--

# Reconciliation Report

## Trip budget - Reconcile demo

Table name: TripBudgetTable

### Unmatched transactions (15)

### Potentially matched transactions (16)

Date	Expenditure category	Budget amount
2/19/2024	Transportation	\$150.00
2/19/2024	Food	\$120.00
2/20/2024	Transportation	\$150.00
2/20/2024	Food	\$120.00
2/20/2024	Entertainment	\$160.00
2/21/2024	Food	\$120.00
2/22/2024	Food	\$120.00
2/22/2024	Entertainment	\$160.00
2/23/2024	Food	\$120.00
2/23/2024	Entertainment	\$160.00
2/23/2024	Misc.	\$10.00
2/24/2024	Food	\$120.00
2/25/2024	Food	\$120.00
2/26/2024	Toll Tax	\$30.00
2/26/2024	Forex forx-672 fee	\$40.00
2/26/2024	Misc. 交易	\$55.00
<b>Totals</b>		<b>1755.00</b>

### Matched transactions (13)

Date	Expenditure category	Budget amount
2/19/2024	Flights	\$700.00
2/19/2024	Lodging	\$250.00
2/20/2024	Lodging	\$250.00
2/21/2024	Lodging	\$250.00
2/21/2024	Entertainment	\$160.00
2/22/2024	Lodging	\$250.00
2/23/2024	Transportation	\$150.00
2/23/2024	Lodging	\$250.00
2/24/2024	Lodging	\$250.00
2/25/2024	Flights	\$700.00
2/25/2024	Transportation	\$150.00
2/25/2024	Lodging	\$250.00
2/25/2024	Misc.	\$300.00
<b>Totals</b>		<b>3910.00</b>

## Bank statement - Reconcile demo

Table name: BankStatementTable

Transaction date	Transaction category	Amount
2/19/2024	Transportation	\$150.00
2/19/2024	Food	\$120.00
2/20/2024	Transportation	\$180.00
2/20/2024	Food	\$130.00
2/20/2024	Entertainment	\$160.00
2/21/2024	Food	\$110.00
2/22/2024	Food	\$150.00
2/22/2024	Entertainment	\$150.00
2/23/2024	Food	\$130.00
2/23/2024	Entertainment	\$160.00
2/23/2024	Misc.	\$90.00
2/24/2024	Food	\$130.00
2/25/2024	Food	\$60.00
2/26/2024	Toll	\$30.00
2/26/2024	Forex672	\$40.00
2/26/2024	交易	\$45.00
<b>Totals</b>		<b>1835.00</b>

Transaction date	Transaction category	Amount
2/19/2024	Flights	\$700.00
2/19/2024	Lodging	\$250.00
2/20/2024	Lodging	\$250.00
2/21/2024	Lodging	\$250.00
2/21/2024	Entertainment	\$160.00
2/22/2024	Lodging	\$250.00
2/23/2024	Transportation	\$150.00
2/23/2024	Lodging	\$250.00
2/24/2024	Lodging	\$250.00
2/25/2024	Flights	\$700.00
2/25/2024	Transportation	\$150.00
2/25/2024	Lodging	\$250.00
2/25/2024	Misc.	\$300.00
<b>Totals</b>		<b>3910.00</b>

Difference(Budget amount - Amount)
\$0.00
\$0.00
-\$30.00
-\$10.00
\$0.00
\$10.00
-\$30.00
\$10.00
-\$10.00
\$0.00
-\$80.00
-\$10.00
\$60.00
\$0.00
\$0.00
\$10.00
<b>-80.00</b>

Difference(Budget amount - Amount)
\$0.00
\$0.00
\$0.00
\$0.00
\$0.00
\$0.00
\$0.00
\$0.00
\$0.00
\$0.00
\$0.00
\$0.00
\$0.00
<b>0.00</b>

**Grand Total**      **6535.00**      **6705.00**      **-170.00**

### Copilot for Finance (Preview)

#### Reconcile data

#### Tables

#### Keys

Mapping 1

Date [TripBudgetTable | Trip budget - Reconcile demo] X      Transaction date [BankStatementTable | Bank statement - Reconcile demo] X

Mapping 2 [Partial matching] X

Expenditure category [TripBudgetTable | Trip budget - Reconcile demo] X      Transaction category [BankStatementTable | Bank statement - Reconcile demo] X

Monetary 1 [USD] X

Budget amount [TripBudgetTable | Trip budget - Reconcile demo] X      Amount [BankStatementTable | Bank statement - Reconcile demo] X

+ Add

#### Reference columns

#### Report parameters

#### Insights

### Summary

- The reconciliation operation identified 13 sets of transactions that were perfectly matched between Trip budget - Reconcile demo (TripBudgetTable) and Bank statement - Reconcile demo (BankStatementTable). These sets of transactions had equal transaction amounts and completely matched the mapping keys of Date and Expenditure category with Transaction date and Transaction category.
- There were 16 sets of transactions in the report classified as potentially matched. These sets either had multiple transactions in one table that matched multiple transactions in the other table with equal total amounts, or had partial matches in the mapping keys with equal transaction amounts, warranting further inspection.
- The reconciliation results highlighted 5 sets of transactions with discrepancies in the tallied monetary columns. The discrepancies ranged from budget amounts being either higher or lower than the corresponding transaction amounts with differences such as \$30, \$10, \$80.

Re-reconcile data      Cancel

Welcome, Julia. You have 5 work items and 1 recommendation from Copilot.

Fix exceptions faster with the account reconciliation agent.

Activate

Pinned items (1)

Expense report approval | Conference, Chicago

Due by 5/16/2017 07:00:00 am

Paul Cannon submitted 4 expenses for a total of 1,547.60 USD

Transaction date	Merchant	Expense category	Transaction amount
3/10/2017		Flight	742.00 USD
3/20/2017		Hotel	450.60 USD
3/19/2017		Perdiem	340.00 USD
4/18/2017		Parking	15.00 USD

Approve Reject ...

Work items (4)

Approve travel requisition

Due by 5/17/2017 03:48:00 pm

Travel requisition | Employee: Kim Nelson, 000001

Approve Return ...

Catalog approval

Due by 11/12/2018 08:50:00 pm

Catalog | Catalog number: C0008, Julia Funderburk

Approve Reject ...

Record returned | Cash advance request

Employee: Julia Funderburk, 000004

The current record has been returned to you, or you have been asked to make a change. Perform any required actions and choose resubmit to resume processing.

See full document View history

Agent activity

Follow-up

Followed-up POs Estimated time saved

0 0 hrs

Purchase order updates

Emails received Estimated time saved

0 0 hrs

View activity View agents

Workspaces

Purchase order confirmation

Last visited: 3/7/2025 03:08:56 pm

Awaiting customer action Purchase orders for review

0 3

Purchase order preparation

Last visited: 3/7/2025 02:47:10 pm

Approved New purchase order In external review

18 + 3

Approved without confirmed delivery date

16

Feature management

Last visited: 3/7/2025 02:28:42 pm

Account reconciliation

Bank management

Benefits

Budget planning

Business document management

Business processes for human resources

Business processes for payroll

Finance and Operations | Procurement and sourcing > Purchase orders > All purchase orders

USMF

← Edit + New Delete Purchase order Purchase Manage Receive Invoice Retail Warehouse Transportation General Options

Create	Charges	Tax	Calculate	Prepay	Generate	Actions	Accounting	Journals	Vendor collaboration
Credit note	Maintain charges Allocate charges Voyage costs	Sales tax	Multiline discount Total discount	Supplementary items Tiered charges	Prepayment Remove prepayment	Confirm Finalize	Distribute amounts View distributions	Purchase inquiry Purchase order confirmations	Send for confirmation Purchase orders sent for confirmation View response on latest sent order Purchase order vendor confirmation

All purchase orders

Standard view

(Preview) Review 2 draft emails  
Send follow-up emails to vendors with Supplier Communications Agent.

(Preview) No purchase orders to review  
Follow-up with suggested purchase order changes.

Filter

Purchase order	Vendor account	Invoice account	Vendor name	Purchase type	Approval status	Purchase order stat...	Currency	Requested receipt ...	Mode of delivery	Delivery terms	Purchase a...	Quality order st: :
000006	CN-001	CN-001	Contoso Asia	Purchase order	Confirmed	Received	USD	10-12-2016	40	FOB		
000007	JP-001	JP-001	Contoso Chemicals Japan	Purchase order	Confirmed	Invoiced	USD	26-11-2016				
000008	US-102	US-102	Tailspin Parts	Purchase order	Confirmed	Invoiced	USD	20-11-2016	10	FOB		
000009	CN-001	CN-001	Contoso Asia	Purchase order	Confirmed	Invoiced	USD	26-11-2016	40	FOB		
000010	US-101	US-101	Fabrikam Electronics	Purchase order	Confirmed	Invoiced	USD	19-11-2016	10	FOB		
000011	US-104	US-104	Fabrikam Supplier	Purchase order	Confirmed	Invoiced	USD	19-11-2016	10	FOB		
000012	US-105	US-105	Datum Receivers	Purchase order	Confirmed	Invoiced	USD	20-11-2016	10	FOB		
000013	JP-001	JP-001	Contoso Chemicals Japan	Purchase order	Confirmed	Open order	USD	03-12-2016				
000014	US-102	US-102	Tailspin Parts	Purchase order	Confirmed	Open order	USD	28-12-2016	10	FOB		
000015	CN-001	CN-001	Contoso Asia	Purchase order	Confirmed	Open order	USD	27-12-2016	40	FOB		
000016	US-101	US-101	Fabrikam Electronics	Purchase order	Approved	Open order	USD	23-11-2016	10	FOB		
000017	US-104	US-104	Fabrikam Supplier	Purchase order	Confirmed	Received	USD	13-12-2016	10	FOB		
000018	US-105	US-105	Datum Receivers	Purchase order	Confirmed	Received	USD	13-12-2016	10	FOB		
000019	US-103	US-103	Rain Projectors	Purchase order	Confirmed	Canceled	USD	27-12-2016	10	FOB		
000020	CN-001	CN-001	Contoso Asia	Purchase order	Approved	Open order	USD	18-12-2016	40	FOB		
000021	CN-001	CN-001	Contoso Asia	Purchase order	Confirmed	Open order	USD	18-12-2016	40	FOB		
000023	US-104	US-104	Fabrikam Supplier	Purchase order	Confirmed	Open order	USD	10-12-2016	10	FOB		
000026	US-104	US-104	Fabrikam Supplier	Purchase order	Confirmed	Received	USD	19-01-2017	10	FOB		Closed quality ord
000027	US-101	US-101	Fabrikam Electronics	Purchase order	Confirmed	Invoiced	USD	05-12-2016	10	FOB		
000028	US-101	US-101	Fabrikam Electronics	Returned order	Confirmed	Invoiced	USD	05-12-2016	10	FOB		
000030	1001	1001	Acme Office Supplies	Purchase order	Approved	Canceled	USD	08-12-2016				
000032	1001	1001	Acme Office Supplies	Purchase order	Confirmed	Invoiced	USD	15-12-2016				
000033	1001	1001	Acme Office Supplies	Purchase order	Confirmed	Invoiced	USD	10-12-2016				
000034	US-101	US-101	Fabrikam Electronics	Purchase order	Confirmed	Invoiced	USD	14-12-2016	10	FOB		
000035	US-111	US-111	Contoso office supply	Purchase order	Approved	Open order	USD	23-01-2017	10	EXW		
000036	US-111	US-111	Contoso office supply	Purchase order	Approved	Open order	USD	23-01-2017	10	EXW		
000037	1001	1001	Acme Office Supplies	Purchase order	Confirmed	Open order	USD	23-01-2017				
000038	104	104	Best Supplier - Europe	Purchase order	Approved	Open order	EUR	23-01-2017				
000039	1001	1001	Acme Office Supplies	Purchase order	Confirmed	Open order	USD	23-01-2017				

Copilot

How do I create a purchase order with a specific payment and delivery term in dynamics 365 SCM?

**Creating a Purchase Order in Dynamics 365 Supply Chain Management with Specific Payment and Delivery Terms**  
Step-by-Step Instructions:

- Navigate to Purchase Orders**
  - Go to **Procurement and sourcing > Purchase orders > All purchase orders**.
- Create a New Purchase Order**
  - Select **New** to start a new purchase order.
  - In the dialog box, select the **Vendor account**. When you select a vendor, default details such as address, invoice account, delivery terms, and delivery mode are automatically copied into the order header. You can change these values as needed.
- Specify Payment and Delivery Terms**
  - Expand the **General** section to review or modify the **delivery terms** and **delivery mode**. These fields are populated from the vendor record but can be manually adjusted to meet your requirements.
  - If you need to specify a particular **receipt date** for delivery, set it in the **Receipt date** field. You can assign a single receipt date for the entire order or unique dates for individual order lines.
- Add Purchase Order Lines**
  - Select **Purchase order line** to add products or services.
  - Use the **Dimensions** option to specify product variants or storage details if needed.
  - Enter the **Item number** and other relevant details for each line.
- Review and Finalize**
  - After entering all required information, review the order totals and details.
  - Select **OK** to create the purchase order.

**Additional Notes:**

- You can override any default values for payment and delivery

Ask a question about the data in this app, or tell me what you're looking for

0/500

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Set up	Product kit	Product media management	Landed cost	Rebate management
Product attributes	Configure	Product media	Cost estimates	Rebate management groups
Product categories	Kit configurations			
Product catalogs	Advanced notes setup			

Product service type	Product dimension groups	Product lifecycle state	Engineering product category details	Product owner
Not specified				
Not specified	Color			
Not specified	Color			
Not specified	Color			
Not specified				
Not specified	Color			
Not specified				
Not specified	Color			
Not specified				
Not specified				
Not specified				
Not specified				
Not specified				
Not specified				

Do I have on-hand inventory of item 1000 in warehouse 21 or where else do I have it?

There is no on-hand inventory of item 1000 in warehouse 21. However, there is available inventory in warehouse 13 with a quantity of 410 units.

AI-generated content may be incorrect