



Microsoft Dynamics 365
and Power Platform Community Conference
MAY 25 – 27, 2026
Portorož, Slovenia, Europe



D365FO becomes a real **AI ERP** with **Immersive home** and **Autonomous Agents**





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and Power Platform Community Conference**
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André Arnaud de Calavon
Managing Partner | CTO

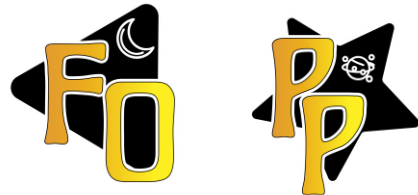
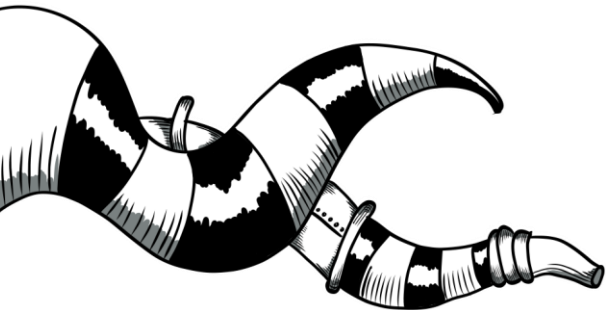


D365FO becomes a real AI ERP with Immersive home and Autonomous Agents



Laze Janev

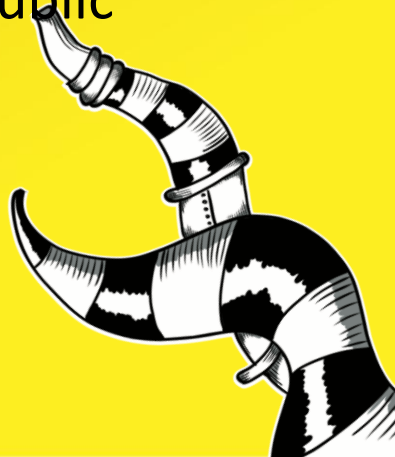
Dynamics 365 Solution Architect
MVP Business Applications AI ERP





The ERA of generative AI - How did we come here?

- 1950: Neural networks – Turing test
- 1986: Algorithm for training multi-layer networks crucial for learning in deep networks
- 1997: Formalise Long Short-Term Memory, solving many sequence-learning problems
- 2014: Introduction to Generative Adversarial Networks, a new, powerful class of generative models
- 2017: The Transformer architecture is introduced in “Attention Is All You Need”
- 2022 (Nov): ChatGPT launches and rapidly popularizes generative AI for the public
- Microsoft > Copilot





Automation then and now

- **1980s–1990s – Digital Automation & Early AI Control**

- Widespread adoption of CNC machines, SCADA systems, and robotics in manufacturing.
- Automation expands to office work: ERP, databases, workflow software.

- **2000s – Internet & Software Automation**

- Web-based e-commerce, APIs, and cloud computing enable large-scale automated business processes.
- RPA (Robotic Process Automation) begins automating repetitive back-office tasks.

- **2010s – AI-Enhanced Automation**

- Machine learning models optimize logistics, predictive maintenance, fraud detection.
- Autonomous vehicles, drones, and IoT devices begin real-world deployment.
- Intelligent assistants (Siri, Alexa) bring automation to daily life.

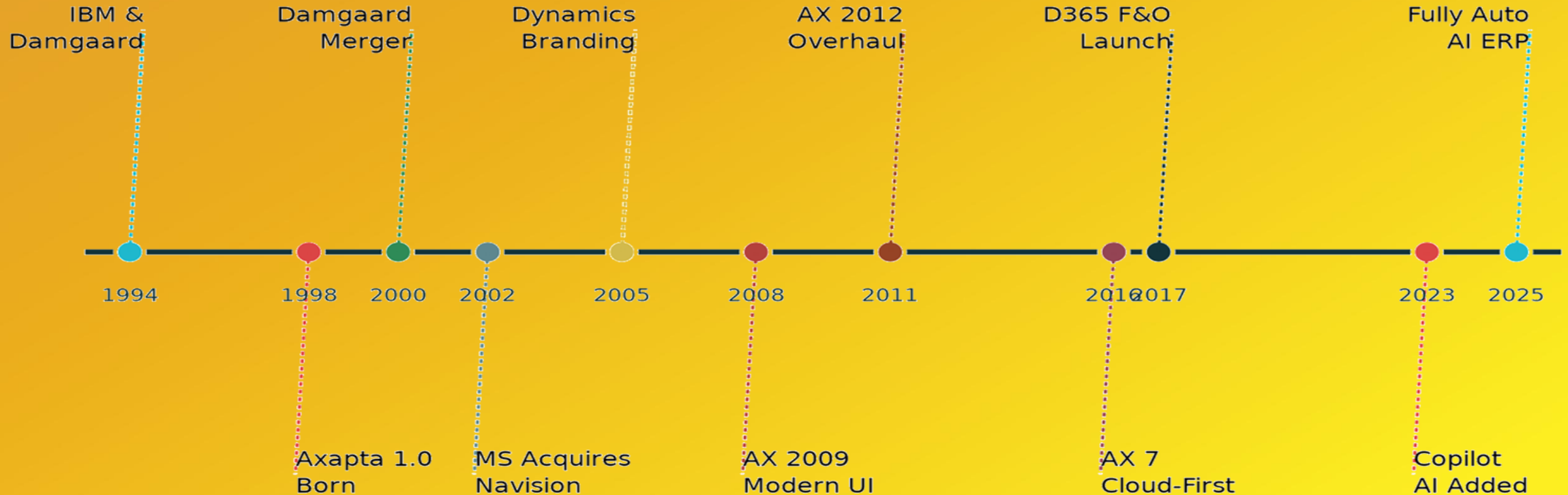
- **2020s – Generative & Cognitive Automation**

- Large language models and GenAI drive **knowledge work automation** (document drafting, coding, analysis).
- Autonomous agents perform multi-step tasks (e.g., ordering supplies, summarizing data, generating reports).





Dynamics 365 F&O Evolution Timeline





The architecture of the future Autonomous ERP

Enterprise Agent Platform(s)



Headless Business Services



Application Business Logic



From legacy UI (tiled)



The screenshot displays the Microsoft Dynamics 365 Finance and Operations user interface. The top header bar is dark with the text "Finance and Operations" on the left and user information (USMF, search, notifications, settings, and user profile) on the right. The left-hand navigation pane is light blue and contains a list of menu items: Home, Favourites, Recent, Workspaces, and a list of specific business processes like "Account reconciliation", "Archive with Dataverse long term retention", "Bank management", "Benefits", "Budget planning", "Business document management", "Business processes for human resources", "Business processes for payroll", "CAPA management", "Cash overview - all companies", "Cash overview - current company", "Catalogue management", "Category and product management", "Channel deployment", "Channel merchandising configuration validator", "Collections coordinator", and "Commerce pricing and...". The main content area has a header image with the text "Contoso Entertainment System USA". Below this is a search bar and a calendar for September 2025. The calendar shows the 14th as the current date. To the right of the calendar is a grid of application tiles under the heading "APPS". These tiles include "Business performance analytics", "Copilot for Finance (Preview)", "Human Resources", "Recruiting add-on (Preview)", "Traceability", "Business performance planning", "Demand planning", "Invoice capture", and "Stock Visibility". Below the apps grid is another grid of workspace tiles under the heading "WORKSPACES". These tiles include "Account reconciliation", "Compensation management", "Financial analysis - all companies", "Payment workspace", "Revenue management", "Archive with Dataverse long term retention", "Confirmed purchase orders with changes", "Financial analysis - current company", "Payroll management", "Sales order processing and enquiry", "Bank management", "Cost accounting ledger administration", "Financial period close", "People", "Sales return processing", "Benefits", "Cost administration", "Fixed asset management", "Personnel management", "Store financials", "Budget planning", "Cost analysis", "General journal processing", "Product readiness for discrete manufacturing", and "Store management".



To AI generated UI - Immersive home

Finance and Operations

Home

Favourites

Recent

Workspaces

Account reconciliation

Archive with Dataverse long term retention

Bank management

Benefits

Budget planning

Business document management

Business processes for human resources

Business processes for payroll

CAPA management

Cash overview - all companies

Cash overview - current company

Catalogue management

Category and product management

Channel deployment

Channel merchandising configuration validator

Collections coordinator

Commerce pricing and

Welcome, Julia. You have 5 work items assigned to you.

Work items (5)

Approve travel requisition

Due by 17/05/2017 15:48:00

Travel requisition | Employee: Kim Nelson, 000001

ApproveReturn...

Catalog approval

Due by 12/11/2018 20:50:00

Catalog | Catalog number: C0008, Julia Funderburk

ApproveReject...

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 documentView history

Resubmit expense report

Expense report 000034 has been returned to you

See full expense reportView history

Expense report approval | Conference, Chicago

Due by 16/05/2017 07:00:00

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

ApproveReject...

Agent activity

Purchase order follow-ups

In the last 7 days

POs with follow-upsEmails sent

00

Time saved 0 hrs

Purchase order updates from suppliers

In the last 7 days

POs with updatesEmails received

00

Time saved 0 hrs

View activity

View agents

Workspaces

Data management

Last visited: 06/05/2025 16:51:18

Feature management

Last visited: 29/07/2025 13:35:56

Financial period close

Last visited: 29/07/2025 13:35:49

Archive with Dataverse long term retention

Last visited: 21/05/2025 21:11:37

Account reconciliation

Last visited: 06/05/2025 16:17:04

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



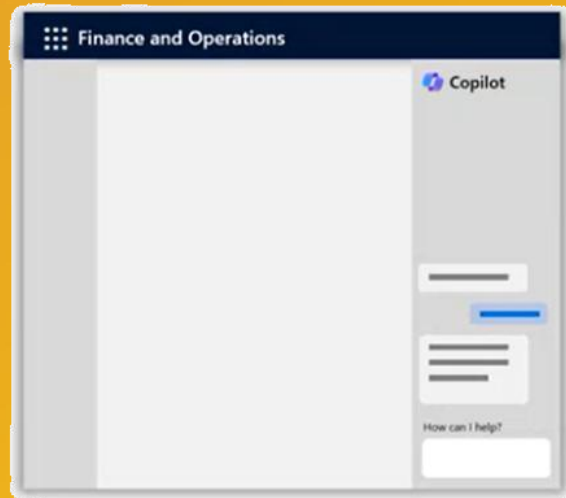
Immersive home





Copilot for Finance and Operations

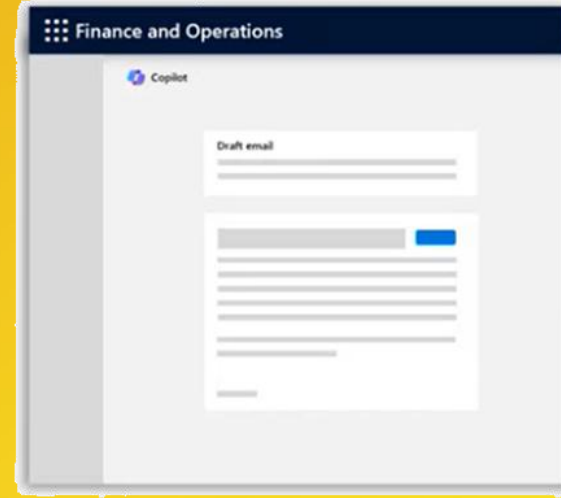
App sidebar chat



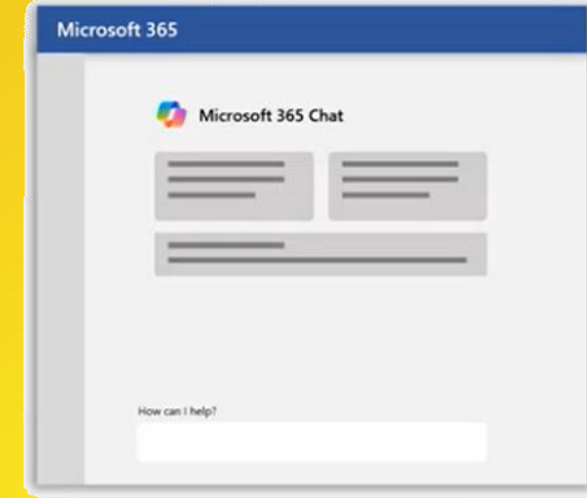
Embedded AI



Agents



M365 Chat/custom agents





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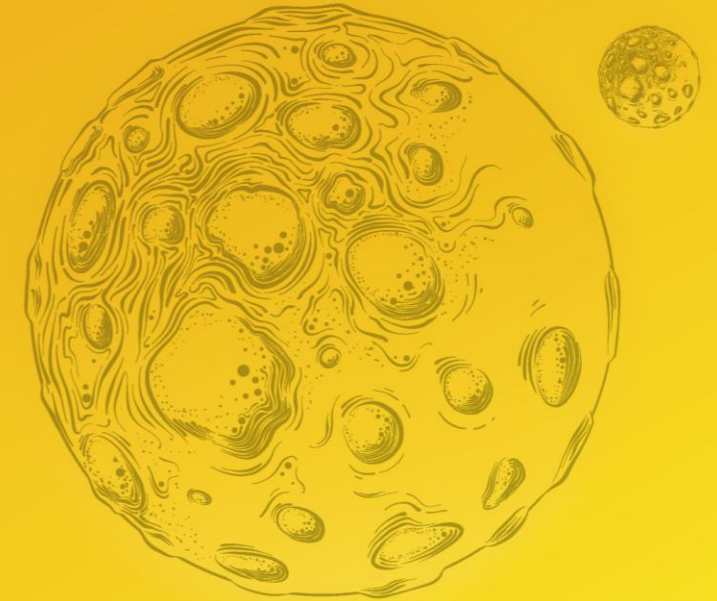
Portorož, Slovenia, Europe

Copilot Cowork

Architecture F&O MCP plugin

Pre reqs

Prompt demo





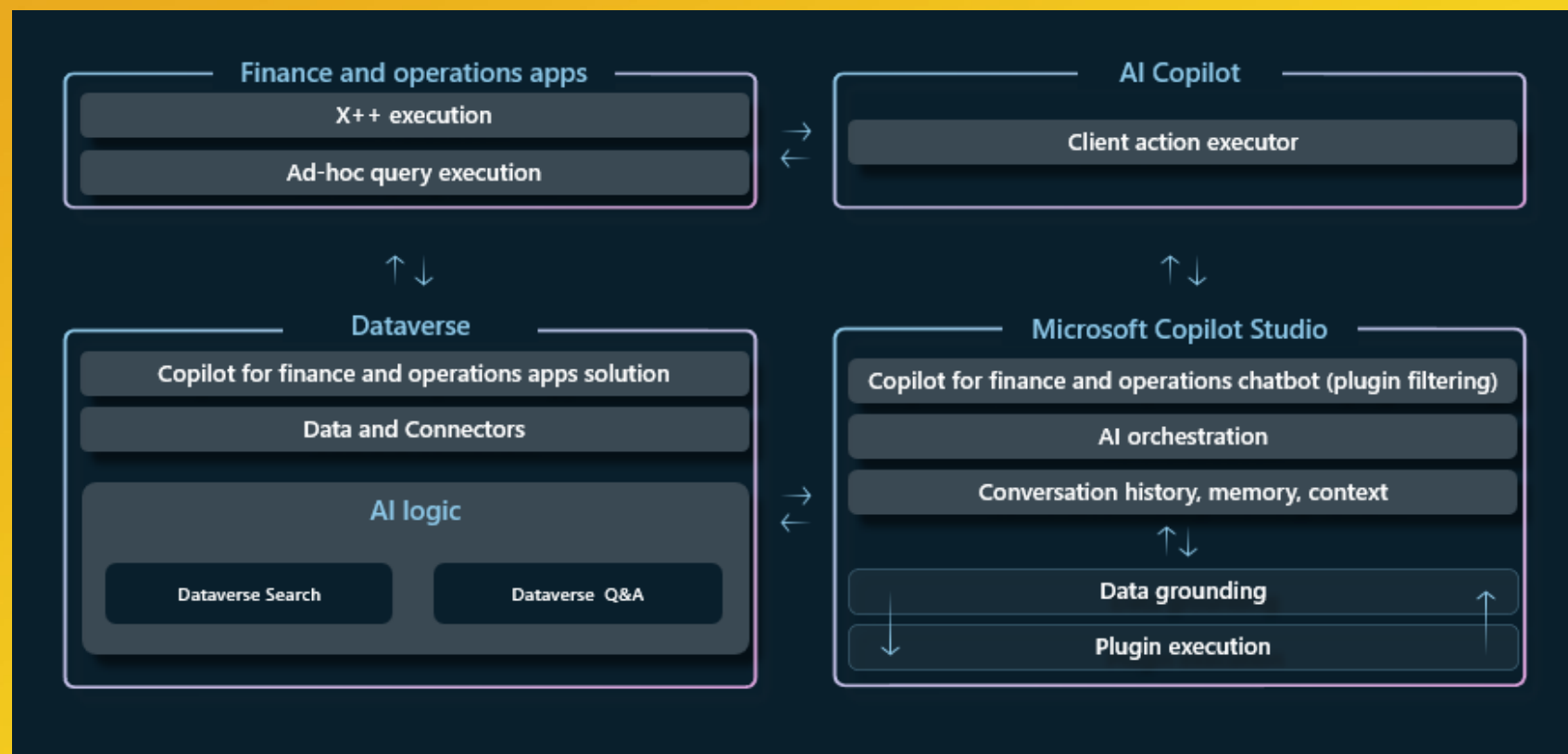
Cowork





Extend Sidecar with Copilot Studio

- Add knowledge
- Add topics
 - Static
 - Low code
 - X++
- Plugin context
 - Headless
 - Client



- <https://aka.ms/dynamicsfnocopilot>
- https://aka.ms/dynamicsfnocopilot_extend



Add knowledge – public source (setup)

Home

Create

Copilots

Library

...

Copilots

▼ Custom copilots

Copilot for finance and opera

Sales Copilot Power Virtual A

Customer Service Copilot Bot

▼ Microsoft

Copilot for Microsoft 365

Copilot for Sales

Copilot in Dynamics 365 Cust

► Coming soon

Copilot Studio

Environment dynamicspedia

André Arnaud de ...

Copilot for finance and ope...

Overview Knowledge Topics Actions Analytics Channels

Published 6/17/2024

Publish

Settings

...

Test

Test your copilot

...

↺

↻

✕

🌐

Add public websites

✕

How to choose websites:

- If your site is external, make sure it's indexed or found by Bing.
- Don't use sites with forums or comments from end users; this can reduce the relevancy of answers.
- Don't include query strings, more than two levels of depth, or the character " in your URL.

Public website link

https://dynamicspedia.com

Add

This generative AI feature uses Bing Search. Your data will flow outside your organization's compliance and geo boundaries. Customer's use of Bing search is governed by the [Microsoft Services Agreement](#) and the [Microsoft Privacy Statement](#)

Back

Add

Cancel

Advanced security help

AppCopilot.CopilotFeaturesSend

AppCopilot.DescribeCapabilities

See all

Ask a question or describe what you need

0/2000

➤

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)



Add knowledge – public source (result)

 Copilot

How can I move all users and security from one environment to another?

To transfer all users and security settings from one environment to another in Dynamics 365 Finance and Operations, you can follow these steps:

1. Ensure that the environments match in terms of users and security settings.
2. If they don't match, update one or both of them to the most recent version as described in the documentation.
3. Open the installation management area and navigate to Environments to find your Customer Insights - Journeys version number.
4. If you have multiple Dynamics 365 environments, each of them will be listed in this section [1](#).

AI-generated content may be incorrect



<https://learn.microsoft.com/...>

 Copilot

How can I move all users and security from one environment to another?

To transfer all users and security settings from one environment to another in Dynamics 365 Finance and Operations, you can use data entities. There are several ways to achieve this, but one method involves utilizing data management features to move the users and security settings. This process allows you to effectively migrate the necessary configurations between environments [1](#).

AI-generated content may be incorrect



<https://dynamicspedia.com/...>



Add knowledge – static text

Trigger

Phrases

Edit

Phrases

Where can I get more information about secu
Advanced security in Dynamics 365 F&O
Wish Andre can help me with security.
How to manage security for a lot of users and

+

Message

Text

+ Add B I :≡ ≡≡ {x} fx

It looks like you are asking about managing security in Microsoft Dynamics 365 F&O. There is information about how to configure or customize security available on [Microsoft Learn](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/security-architecture). You can find more detailed learnings about security for Dynamics 365 F&O on [Dynamicspedia.com](https://dynamicspedia.com/security). This is a blog site authored by André Arnaud de Calavon.

Copilot

Can you provide some advanced help with configuring security?

It looks like you are asking about managing security in Microsoft Dynamics 365 F&O. There is information about how to configure or customize security available on [Microsoft Learn](#). You can find more detailed learnings about security for Dynamics 365 F&O on [Dynamicspedia.com](#). This is a blog site authored by André Arnaud de Calavon.

AI-generated content may be incorrect



Add knowledge – low code

Finance and Operations Preview

Search for a page

USMF

7

?

AA

←

≡

Edit

+ New

Delete

Status ▾

Course

Options

Related information

Setup

Reports

Course participants

Agenda

Course confirmation report

Questionnaire schedules

Track

List of participants

Sessions

Waiting list

Courses | Standard view ▾

00003 : Health and Safety

General

Course ID

00003

Status

Open

Workflow

End date and time

12/19/2017 07:00:00 PM

Template

Safety

Scheduling

LOCATION

Registration deadline

3/14/2017

Course title

Health and Safety

Setup

Standard

Classroom

RedRm1

Organizer

Allow self registration

☒ Yes

TIME

Start date and time

12/19/2017 05:00:00 PM

PARTICIPANTS

Minimum

5

Maximum

60

Course description

This course introduces you to the health and safety role at Contoso. The course focuses on the hazards associated with different types of machinery and the control of any hazardous materials.

Copilot

I need a translation to Dutch for a course

What is the course ID for the course description you want to translate?

AI-generated content may be incorrect

00003

Here is the translated description for course 00003:

In deze cursus maakt u kennis met de gezondheids- en veiligheidsrol bij Contoso. De cursus richt zich op de gevaren die gepaard gaan met verschillende soorten machines en de beheersing van eventuele gevaarlijke stoffen.

AI-generated content may be incorrect

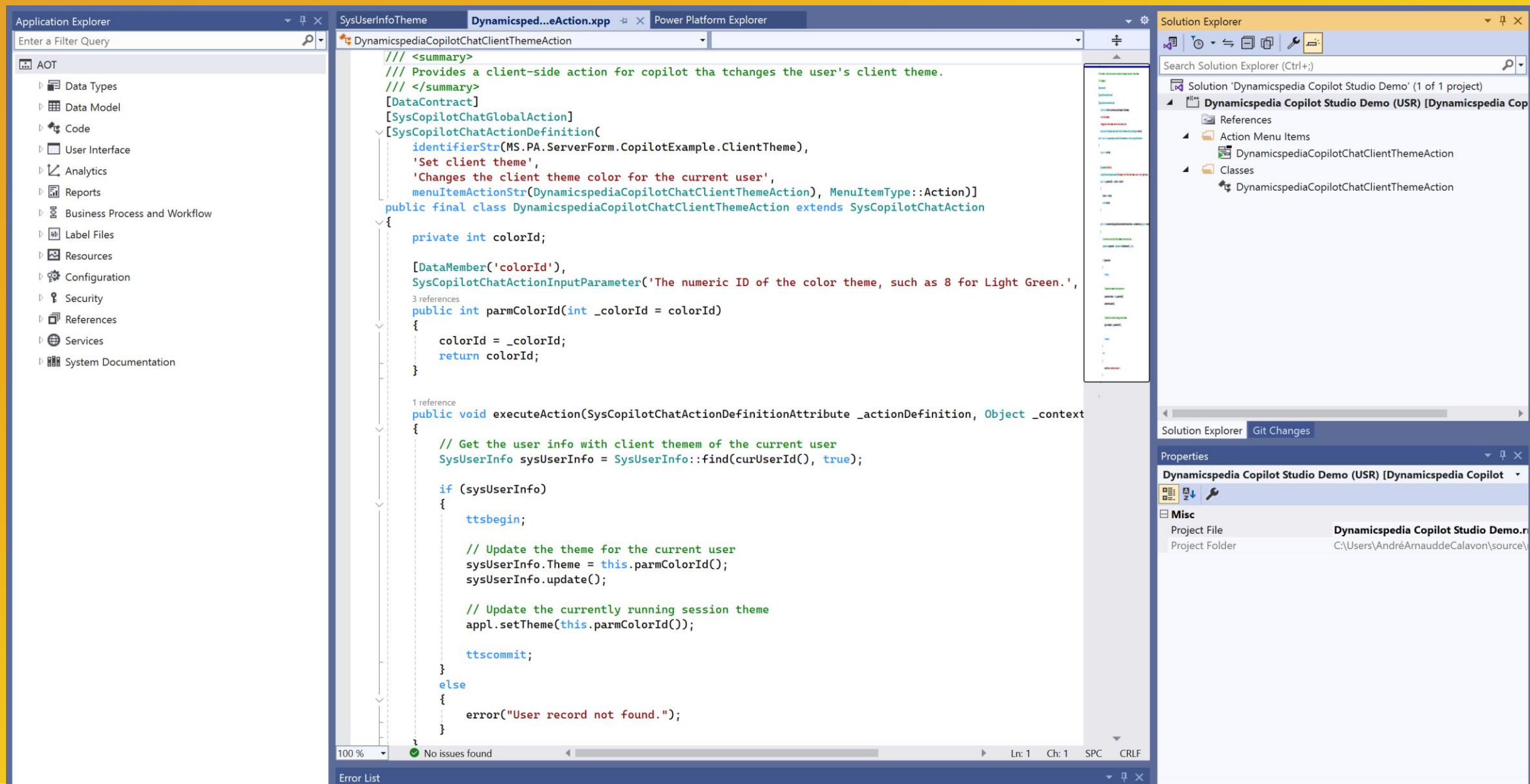
Ask a question about the data in this app, or tell me what you're looking for

0/500

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)



Add knowledge – client plugin



The screenshot displays the Microsoft Dynamics 365 development environment with the following components:

- Application Explorer:** Shows the project structure with folders for AOT, Data Types, Data Model, Code, User Interface, Analytics, Reports, Business Process and Workflow, Label Files, Resources, Configuration, Security, References, Services, and System Documentation.
- Code Editor:** Displays the code for the `DynamicspediaCopilotChatClientThemeAction` class. The code includes a summary, data contract, and a public method `executeAction` that updates the user's theme.
- Solution Explorer:** Shows the project structure for the 'Dynamicspedia Copilot Studio Demo (USR)' solution, including references, action menu items, and classes.
- Properties Window:** Shows the properties for the 'Dynamicspedia Copilot Studio Demo (USR)' project, including the project file and folder.

Code Snippet:

```
/// <summary>
/// Provides a client-side action for copilot that changes the user's client theme.
/// </summary>
[DataContract]
[SysCopilotChatGlobalAction]
[SysCopilotChatActionDefinition(
    identifierStr(MS.PA.ServerForm.CopilotExample.ClientTheme),
    'Set client theme',
    'Changes the client theme color for the current user',
    menuItemActionStr(DynamicspediaCopilotChatClientThemeAction, MenuItemType::Action))]
public final class DynamicspediaCopilotChatClientThemeAction extends SysCopilotChatAction
{
    private int colorId;

    [DataMember('colorId'),
    SysCopilotChatActionInputParameter('The numeric ID of the color theme, such as 8 for Light Green.')]
    public int parmColorId(int _colorId = colorId)
    {
        colorId = _colorId;
        return colorId;
    }

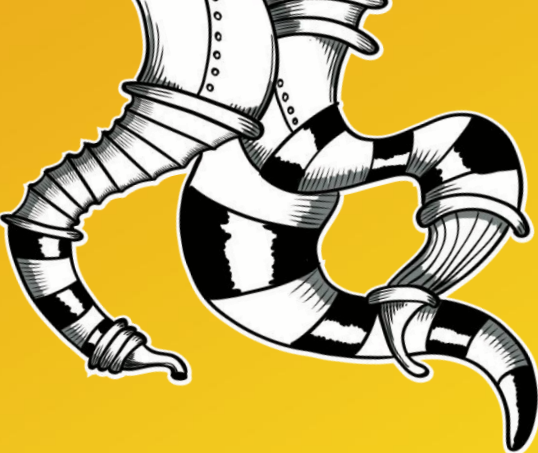
    1 reference
    public void executeAction(SysCopilotChatActionDefinitionAttribute _actionDefinition, Object _context)
    {
        // Get the user info with client theme of the current user
        SysUserInfo sysUserInfo = SysUserInfo::find(curUserId(), true);

        if (sysUserInfo)
        {
            ttsbegin;

            // Update the theme for the current user
            sysUserInfo.Theme = this.parmColorId();
            sysUserInfo.update();

            // Update the currently running session theme
            appl.setTheme(this.parmColorId());

            ttscommit;
        }
        else
        {
            error("User record not found.");
        }
    }
}
```



Sidecar





Agents available now OOTB



**Dynamics 365
Human Resources**

- Agent enabled Recruitment Onboarding Agent (Preview)



**Dynamics 365
Supply Chain**

- Supplier Communications Agent (Preview)



**Dynamics 365
Finance**

- Account Reconciliation Agent (Preview)
- Financial Reconciliation Agent





**Dynamics 365
Project Operations**

- Time Agent (Preview)
- Expense Agent (Preview)
- Approvals Agent (Preview)



**Dynamics 365
Field Service**

- Scheduling Operations Agent (Preview)



Agentic Investments



Copilot Studio

ERP Agent Foundation
(MCP, Model benchmark, Evals)



* With customers in production public preview

Microsoft NDA Confidential
Roadmap is subject to change



Dynamics 365 ERP MCP



Form tools

Enable agents to perform operations, including actions and business logic, that are available on application forms



Data tools

Enable agents to perform standard create, read, update, and delete operations with application data



Action tools

Enable the agent to find and directly invoke classes in application code, allowing developers to create custom actions that can be called through the MCP server



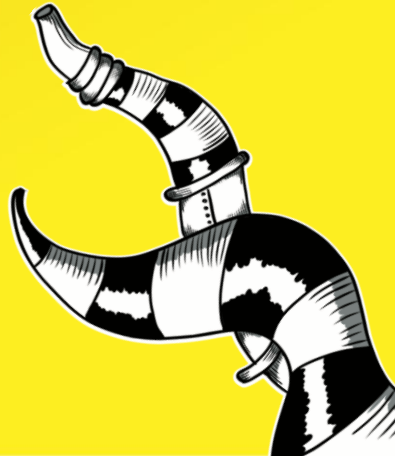
Dynamics 365 ERP MCP

Dynamics 365 ERP

Analytics MCP



Questions





THANK YOU!