armanino

Dynamics 365 FSC + AI: From Possibility to Impact

NOVEMBER 6, 2026

MEET YOUR

Presenters



JAMES COX

Director, Technology



GEOFFREY BAZINETT

Solution Architect



MICHAEL PACIFICO

Director, AI & Automation

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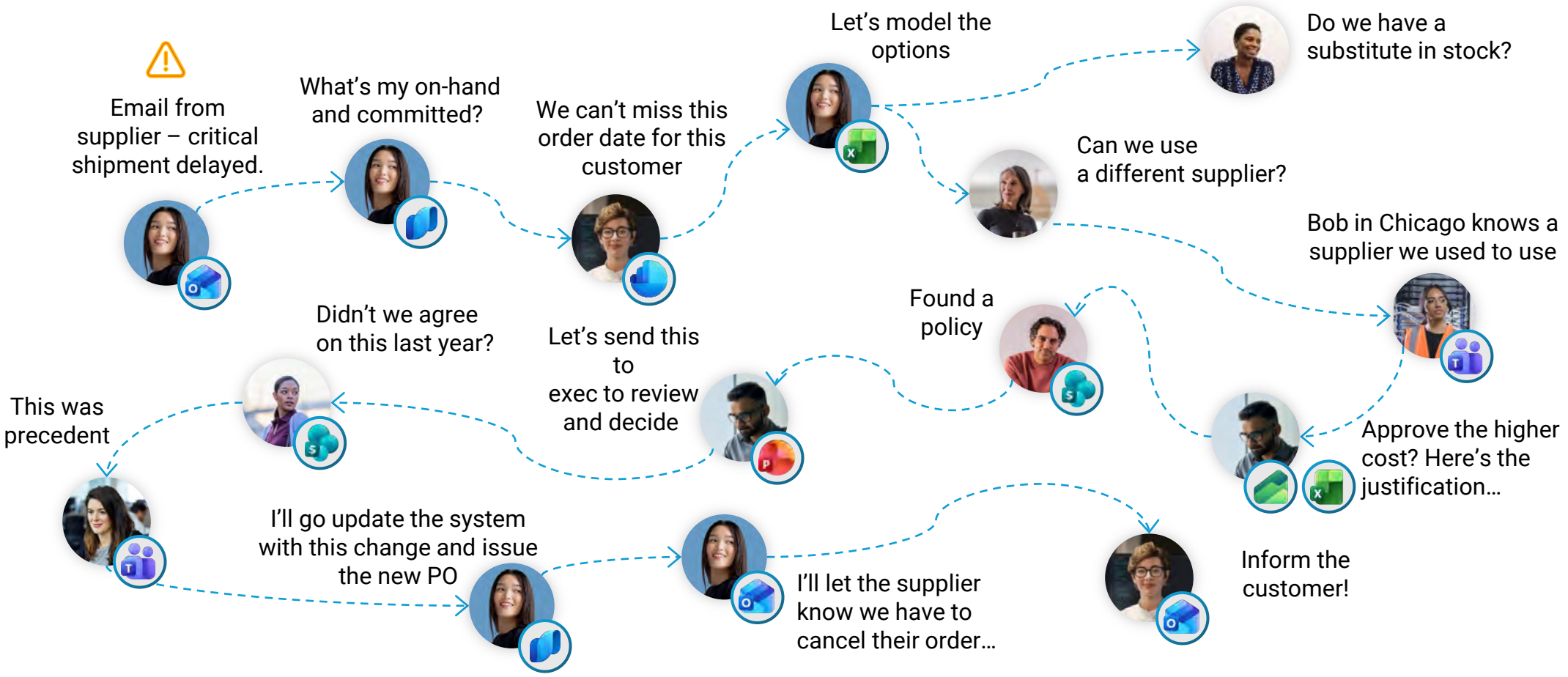
Agenda

- Business Changes with AI
- Implementing Cowork with FSC
- D365 FSC with Cowork
- Real World AI Agent Use Cases with FSC
- D365 FSC Custom Agents in Copilot Studio
- How can Armanino Help?

D365 FSC COPILOT AND COWORK

Business Changes with AI

Today's ERP Experience



Today's Reality



Frontier Reality

Today's Reality



Frontier Reality



Copilot

Agents

Copilot Studio

Dynamics 365 Agents
1P | 3P | Custom

Agent 365

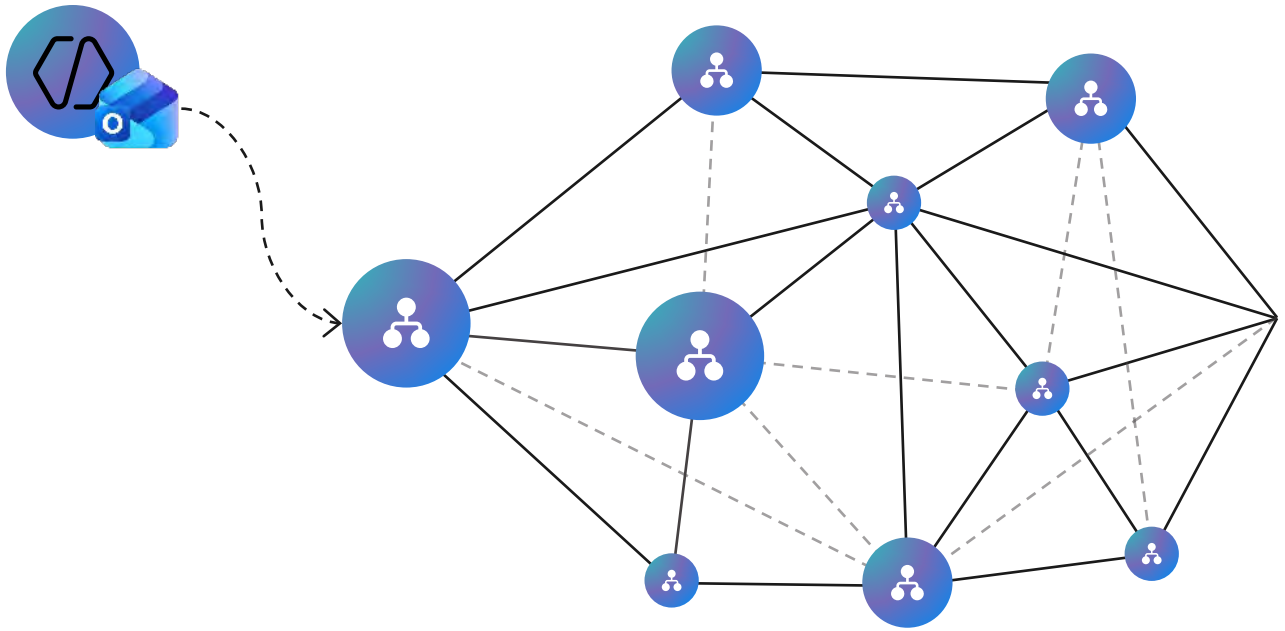
Work IQ

Microsoft Dynamics 365
Headless System of Record

Microsoft 365
Productivity Applications

We can reshape business processes & enrich employee experiences

Email from supplier – critical shipment will be delayed.

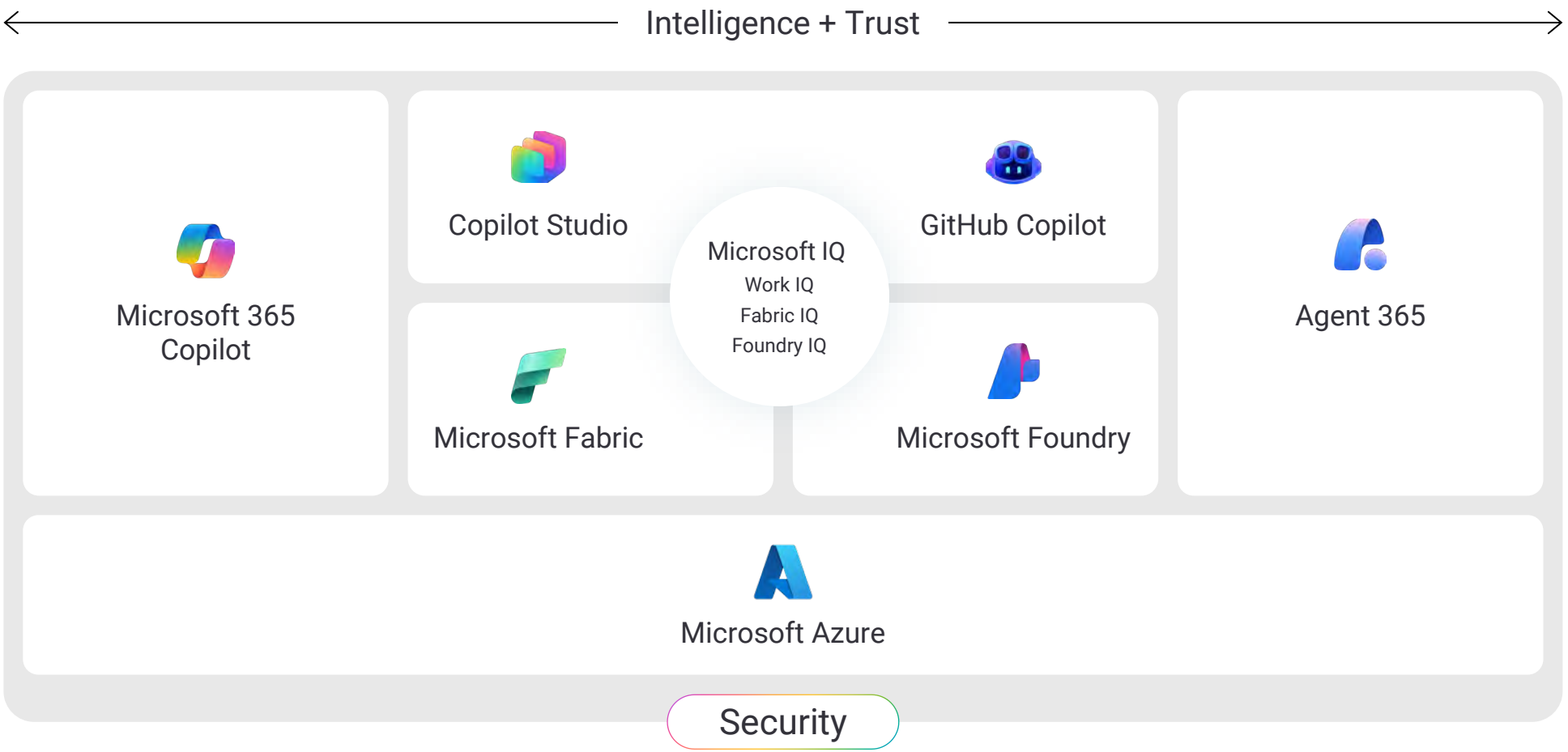


I approve the plan...

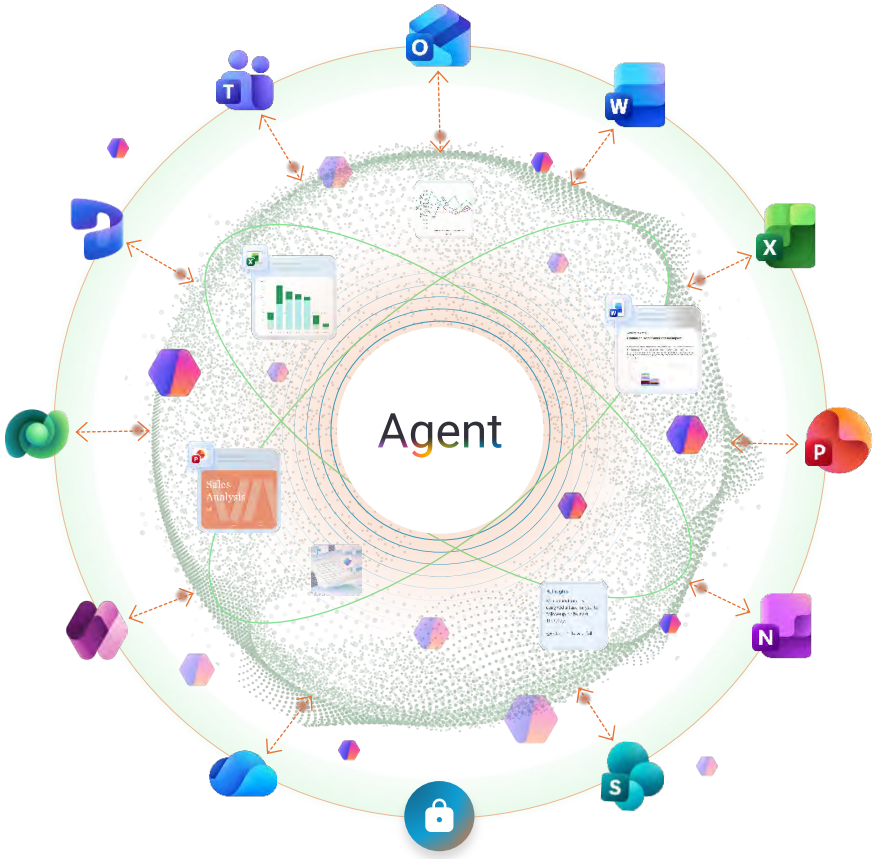


...and have some ideas

One platform brings intelligence and trust together



Work IQ: Workplace intelligence for agents



Intelligence

Continuously builds and structures high-quality context across your entire data estate

Speed

Agent-optimized retrieval that enables fewer round trips to the service and lower latency access to rich context

Efficiency

Handles retrieval, context assembly, and reasoning in a unified runtime rather than with iterative, token-intensive reassembly

Scale

Designed to support the scale of agentic workloads, including high-volume reasoning and tool-calling

Security

Operates directly on enterprise data in place, preserving existing security and governance policies

New AI Capabilities Rapidly Evolving

Assistants

Copilot

Speed	Instant
Human effort	High

Delegates

Cowork

Speed	Minutes
Human effort	Medium

Autopilots

Scout

Speed	Continuous
Human effort	Low

Human-driven → AI-driven

D365 FSC COPILOT AND COWORK

Implementing Cowork with FSC

D365 FSC COPILOT AND COWORK

From governed inputs to configured D365 FSC

Two demonstrations show how Cowork can combine Microsoft 365 content with MCP-enabled ERP actions while keeping the user in control of review and execution.

01 Create a legal entity

INPUT A governed Word template plus a detailed prompt containing approved fictional company, address, localization and setup values.

COWORK EXECUTION

- Read and validate the template fields
- Propose a step-by-step FSC execution plan
- Create the legal entity and core organization data through MCP tools
- Run the number sequence wizard and establish base number sequences
- Pause for review or approval before sensitive commits

Outcome: a repeatable, document-driven company setup with visible checkpoints.

02 Configure warehouse management

INPUT A discovery meeting transcript describing receiving, storage, picking, replenishment, mobile-device and exception-management requirements.

COWORK EXECUTION

- Extract WMS decisions, assumptions and unresolved questions
- Translate requirements into proposed FSC configuration
- Create or update configuration records through MCP-enabled tools
- Validate dependencies and summarize what was configured
- Produce an exception list for items requiring consultant judgment

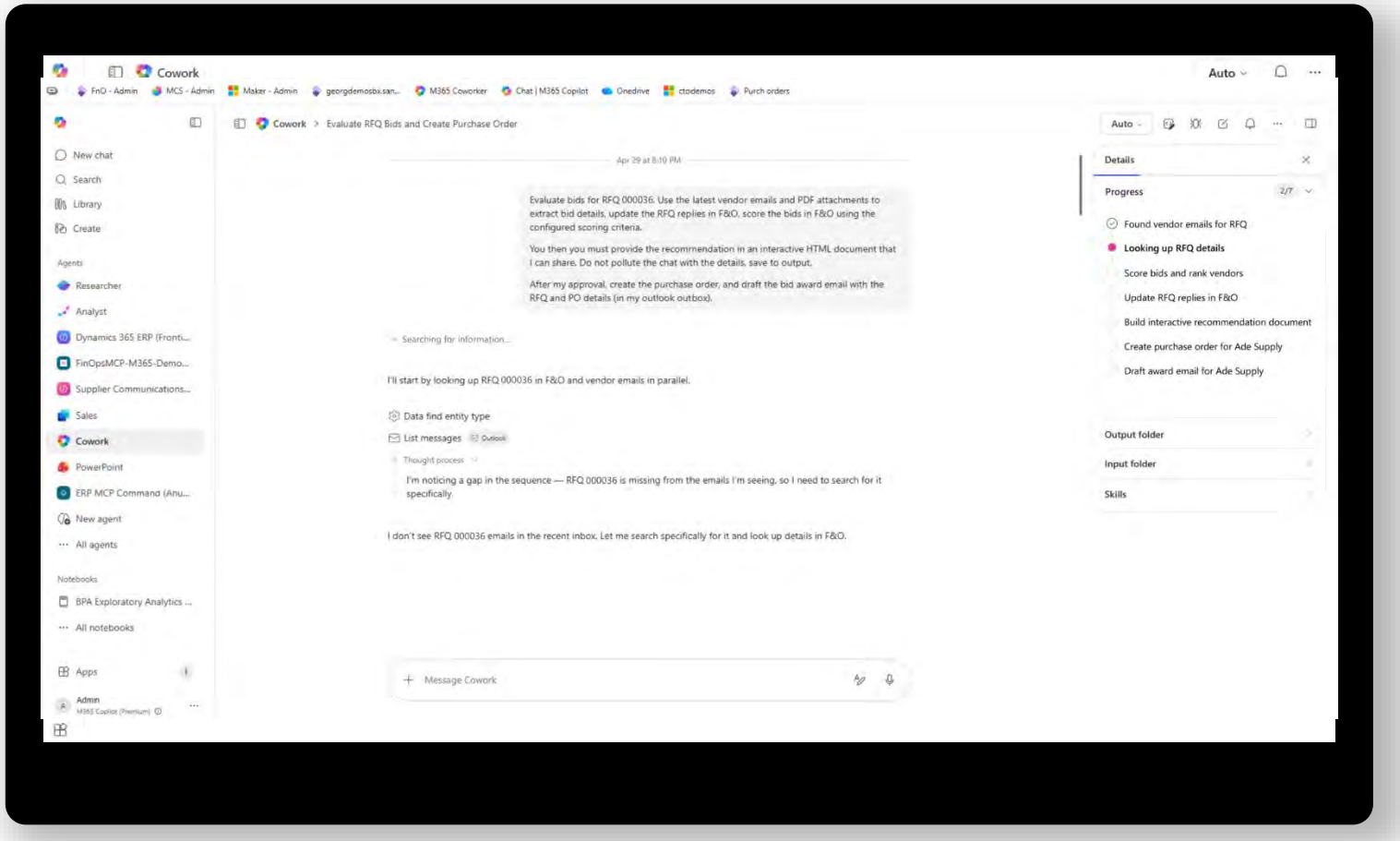
Outcome: discovery knowledge is converted into auditable WMS configuration faster.

D365 FSC COPILOT AND COWORK

D365 FSC with Cowork

Dynamics 365 ERP apps plugin for Copilot Cowork

Let Cowork pull the right records, understand business data, and trigger next steps to support end-to-end workflows for finance, HR and operations.



1. **Agent-driven productivity**
   Delegate work to Copilot Cowork to investigate issues, coordinate actions, and run business workflows on your behalf.

2. **One unified workspace**
   It brings data and actions into a single surface, to coordinate work across multiple applications and help reduce app-switching, when combined with Microsoft 365, Work IQ and third-party or custom plugins.

3. **Connected work. Controlled Outcomes.**
   Microsoft governance models help ensure every action runs with the right permissions, business rules, and full accountability.

D365 FSC COPILOT AND COWORK

Enable & connect the Dynamics 365 ERP plugin

Stand up ERP-aware AI in three steps — governed by design, live in minutes.

1

STEP 1

Enable in your tenant

Enroll in the Frontier preview and switch on Copilot Cowork, then turn on the Dataverse setting in the Microsoft 365 admin center.

2

STEP 2

Open access to FSC

Enable the Dynamics 365 ERP MCP server in your Finance & Operations environment and add the Cowork client to your allowed MCP clients.

3

STEP 3

Add the plugin & go

In Cowork, add the Dynamics 365 ERP Apps plugin, select your environment, and consent once — the ERP tools go live in your chats.

SECURE BY DEFAULT

Cowork honors every Finance & Operations security role — users only see and do what they already can in the app. Connect once, and Cowork remembers.

D365 FSC COPILOT AND COWORK

Work your FSC data in plain language

Ask. Act. Orchestrate — across ERP, email and documents in one conversation.

1

ASK YOUR DATA

Data tools

Read, create, and update records across Finance & Operations entities — returned in a clear, structured view.

"What's the credit limit for customer US-001 in USMF?"

2

ACT IN THE APP

Form tools

Navigate pages, set field values, and run operations exactly as a user would in the application.

"Create a vendor invoice journal for 500 USD."

3

AUTOMATE

Action tools

Invoke the custom business logic your developers expose through the Dynamics 365 ERP MCP server.

Extend Cowork with your own ERP actions.

ONE PROMPT, END-TO-END

One prompt — "Evaluate bids for RFQ 000012" — and Cowork pulls the RFQ from Finance & Operations, reads vendor emails and PDF attachments in Outlook, scores them against your criteria, drafts a recommendation, then creates the purchase order and award email on your approval.

Work IQ + your ERP — one conversation, no app-switching, full accountability.

Copilot Chat & Copilot Cowork: When to use each

	Copilot Chat (Basic) *free*	M365 Copilot (Premium) *paid*	Copilot Cowork *requires M365 Copilot license*
What it is	Your easy way to get started with AI. It combines web information with business data in your everyday apps to deliver relevant results.	Your secure AI for work — fast, intuitive, secure, and grounded in your data. Get answers, draft content, dig deeper and spark ideas.	Your AI that gets the work done — a multi-step agentic solution that takes actions across your Microsoft 365 apps.
Best for	Quick help, ideas, and research.	Fast, focused tasks in one conversation: draft, summarize, brainstorm, Q&A, and discrete research.	Complex, multi-step work spanning multiple apps — end-to-end deliverables.
Speed	Variable — may be limited during high demand with standard access.	Fast — response in seconds to minutes.	Thorough — works autonomously through the full task for minutes to hours.
Task complexity	Single-step or short interactions - supports basic, chat-driven tasks.	Single-step or single-session grounded in your work data.	Multi-step workflows across tasks, applications, and sources.
Use when	You need quick assistance — draft content, get an answer, brainstorm ideas, or summarize information you provide.	You need AI to work with your context - drafting an email from a thread, summarizing meetings, or creating content using your business data.	You need Copilot to go do the work — multi-deliverable, end-to-end requests that need actions across apps, files and systems.
Scenarios	• Quick catch-up on a topic • Draft or refine content from a prompt • Summarize a document you upload	• Draft and iterate on content • On-demand daily briefing • Summary of a project status	• Clean up your entire inbox and calendar • Multi-step project launches • Cross-app workflows like preparing for meetings or business reviews

D365 FSC COPILOT AND COWORK

Real World AI Agent Use Cases with FSC

D365 FSC COPILOT AND COWORK

AI Agent for Proactive Inbound Voyage Tracking

TURN UNSTRUCTURED LOGISTICS UPDATES INTO ACTIONABLE DELIVERY DATES

1
MONITOR

Read inbound emails from freight forwarders, carriers, customs brokers, and 3PL providers.

2
INTERPRET

Extract container references, voyage milestones, estimated dates, actual dates, and delay notices.

3
MATCH

Correlate each update to the appropriate voyage, shipping container, journey activity, PO, or transfer order.

4
UPDATE

Propose or apply approved date changes to voyage and inbound-tracking records with an audit trail.

5
PROPAGATE

Refresh downstream PO and transfer-order delivery dates so planning uses the latest expected supply.

ACCURATE VISIBILITY

Tracking control center reflects current voyage progress.

BETTER PLANNING

Updated expected delivery dates improve supply planning inputs.

EXCEPTION CONTROL

Users focus on conflicting, incomplete, or high-impact updates.

LESS REKEYING

Reduce manual review and repeated date maintenance across records.

D365 FSC COPILOT AND COWORK

AI Agent for Cross-Docking Opportunity Orchestration

AUTONOMOUSLY ALIGN MAKE-TO-ORDER AND JIT PRODUCTION WITH OUTBOUND DEMAND

1
IDENTIFY
Evaluate eligible sales demand and production orders for the same item, site, and warehouse.

2
PRIORITIZE
Apply an agent priority matrix, such as sales pool first and expected delivery date second.

3
MARK
Mark the selected production quantity to the highest-priority sales order and log the rationale.

4
TRIGGER AT RAF
Reporting as finished releases the linked demand and creates the shipment and cross-dock work.

5
STAGE & SHIP
Move the finished goods directly from production output to staging and load for shipment.

MTO / JIT FIT
Match near-term production output to committed demand.

CONFIGURABLE PRIORITY
Filter by sales pool, delivery date, customer, or service level.

LOWER HANDLING
Bypass finished-goods storage for eligible demand.

FASTER FULFILLMENT
Convert RAF output into staged, shipment-ready inventory.

Recommended guardrails: Cap marked quantities, exclude blocked orders, log priority decisions and route incomplete or conflicting matches for review.

D365 FSC COPILOT AND COWORK

AI Agent for Pre-Arrival Batch Attribute Capture

TURN VENDOR DOCUMENTS INTO RECEIPT-READY BATCH MASTER DATA

1
MONITOR
Read vendor emails and attached packing slips or quality documents before the shipment arrives.

2
EXTRACT
Identify the purchase order, item, vendor batch or lot, and configured attribute values.

3
VALIDATE
Compare extracted values with the product's assigned batch attributes, data types, and permitted ranges.

4
CREATE
Create or prepare the batch record and populate validated attribute values in D365 FSC.

5
READY RECEIVING
Present matched batch data to receiving so the dock team verifies rather than rekeys information.

EARLIER VISIBILITY
Quality and receiving can review vendor data before arrival.

DATA ACCURACY
Reduce manual transcription from supplier documents.

FASTER RECEIVING
Avoid entering batch attributes while goods wait at the dock.

CONTROLLED EXCEPTIONS
Route missing, conflicting, or out-of-range values for review.

Recommended control: auto-create only high-confidence matches; require review when the PO, item, batch identifier, or attribute value is ambiguous.

D365 FSC COPILOT AND COWORK

AI Agent for Batch Quarantine and Recall Readiness

CONNECT INVENTORY HOLDS TO DOWNSTREAM CUSTOMER IMPACT

1
DETECT
Monitor inventory-status or quarantine changes for batch-controlled inventory.

2
NOTIFY QUALITY
Alert the quality team and summarize the held batch, item, quantity, site, and triggering event.

3
TRACE IMPACT
Identify sales transactions and customers associated with inventory issued from the affected batch.

4
CONFIRM ACTION
Present the affected-customer list and ask quality to confirm whether recall communication and returns are required.

5
PREPARE RETURNS
After approval, create expected RMA records or drafts for affected goods and provide a trackable response list.

FASTER RESPONSE
Move from quarantine detection to a structured quality review.

TARGETED SCOPE
Focus investigation on transactions tied to the affected batch.

HUMAN CONTROL
Quality approves recall and return actions before execution.

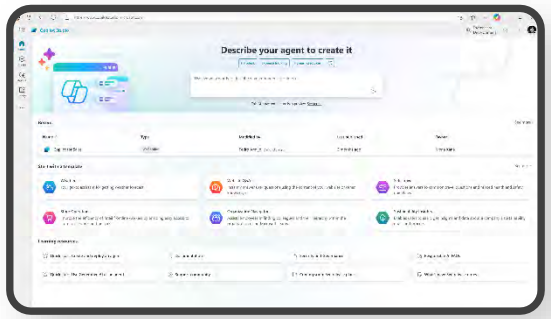
AUDITABLE FOLLOW-UP
Maintain a clear list of customers, decisions, and expected returns.

Recommended control: the agent should not initiate customer notification or create final RMAs until quality approves the affected scope and disposition.

D365 FSC COPILOT AND COWORK

D365 FSC Custom Agents in Copilot Studio

What's in Copilot Studio?



Agent Building Studio

Makers of all skill levels can use low code and AI to create their own agents and extend Microsoft 365 Copilot

Workspaces



Create

Quickly get started using natural language or an agent pre-built for you



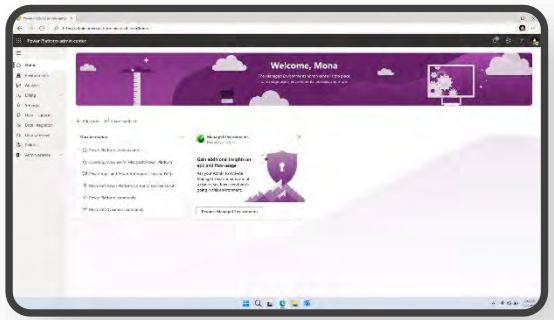
Tools

View your full list of custom agent components that enable knowledge and actions



Agents

Connect to your org's knowledge, create topics, add actions, view analytics, choose which channels to deploy to and more



Admin Studio

Deploy agents securely using central administration, built-in security roles, and simple management across environments to maintain compliance and governance.

Copilot Studio - Core Capabilities

Intuitive UX	Visual canvas	Low code design	Pro code views	Real-time testing	Easy collaboration	Natural language to build
Conversation Design	Build + publish custom actions	Tailor specific topics	Create rich + dynamic responses	Multi-language	Multi-channel	Templates
Conversation Orchestration	Multi-turn conversations	Logic / variable management	Escalate to live agent	Multi-LLM routing	Dynamic content based on user	
Data Connectivity	Deep reasoning	1,400 pre-built data connectors	Custom data connectors	Agent flows	Generative actions	Generative answers
Pro-Dev Extensibility	DIY gen AI	Bring your own Model (BYOM)*	Custom Azure Bot Framework Skills	Knowledge base extension	Custom analytics	Azure app insights telemetry
Streamlined Management	Responsible AI checks	Trusted platform	Admin center	Compliance standards	Analytics	ALM automation / Custom authentication

End-to-end conversational AI platform

Copilot Studio: From Context to Action

Transform business processes with Copilot and agents, on a trusted platform

Context

People
Processes
Knowledge
Data

Decisions

Reason
Analyze
Recommend

Actions

Execute
Automate
Orchestrate

Intelligence Layer

Agents that can drive real business outcomes

Intelligence in the flow of work

Copilot + agents operate where work happens

Shared business context

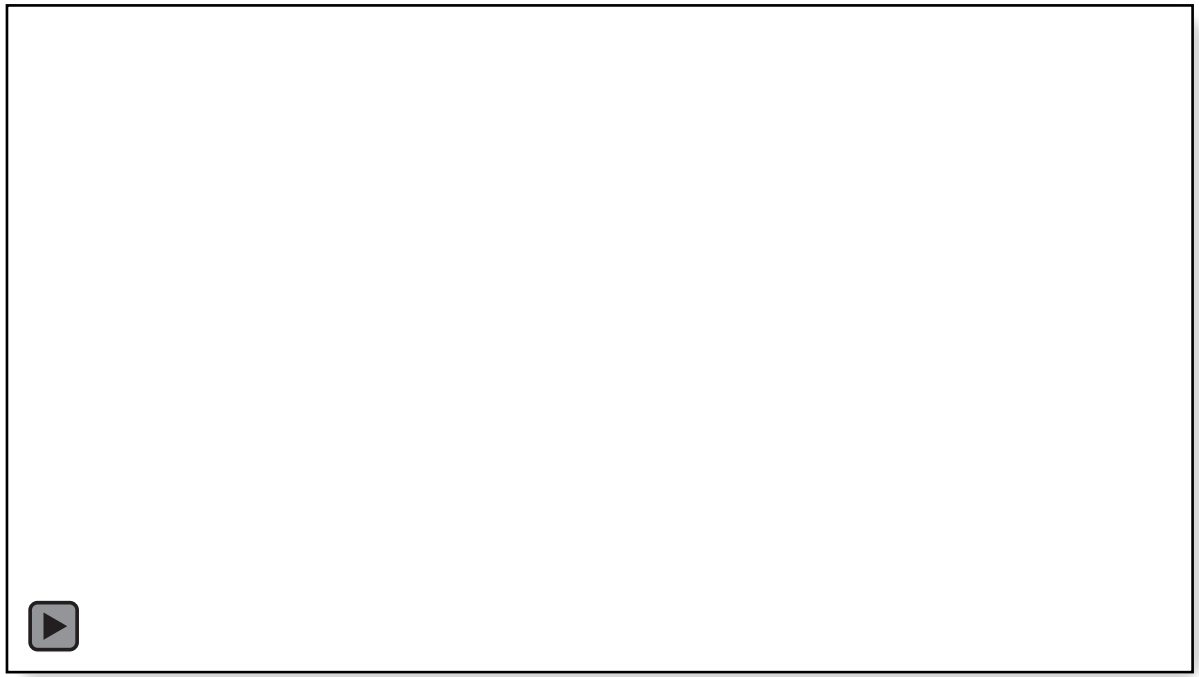
People, processes, knowledge, and data come together

One trusted platform

Security, governance, and observability are built in

Microsoft Copilot Studio

- Build agents and workflows without code using intuitive natural-language or simple configuration experiences
- Managed SaaS service comes with agent lifecycle, security, and governance built-in
- Fast, secure way to automate and scale agents with 1,400+ pre-built connectors, shared models in Microsoft Foundry, and ability to publish agents to 20+ channels



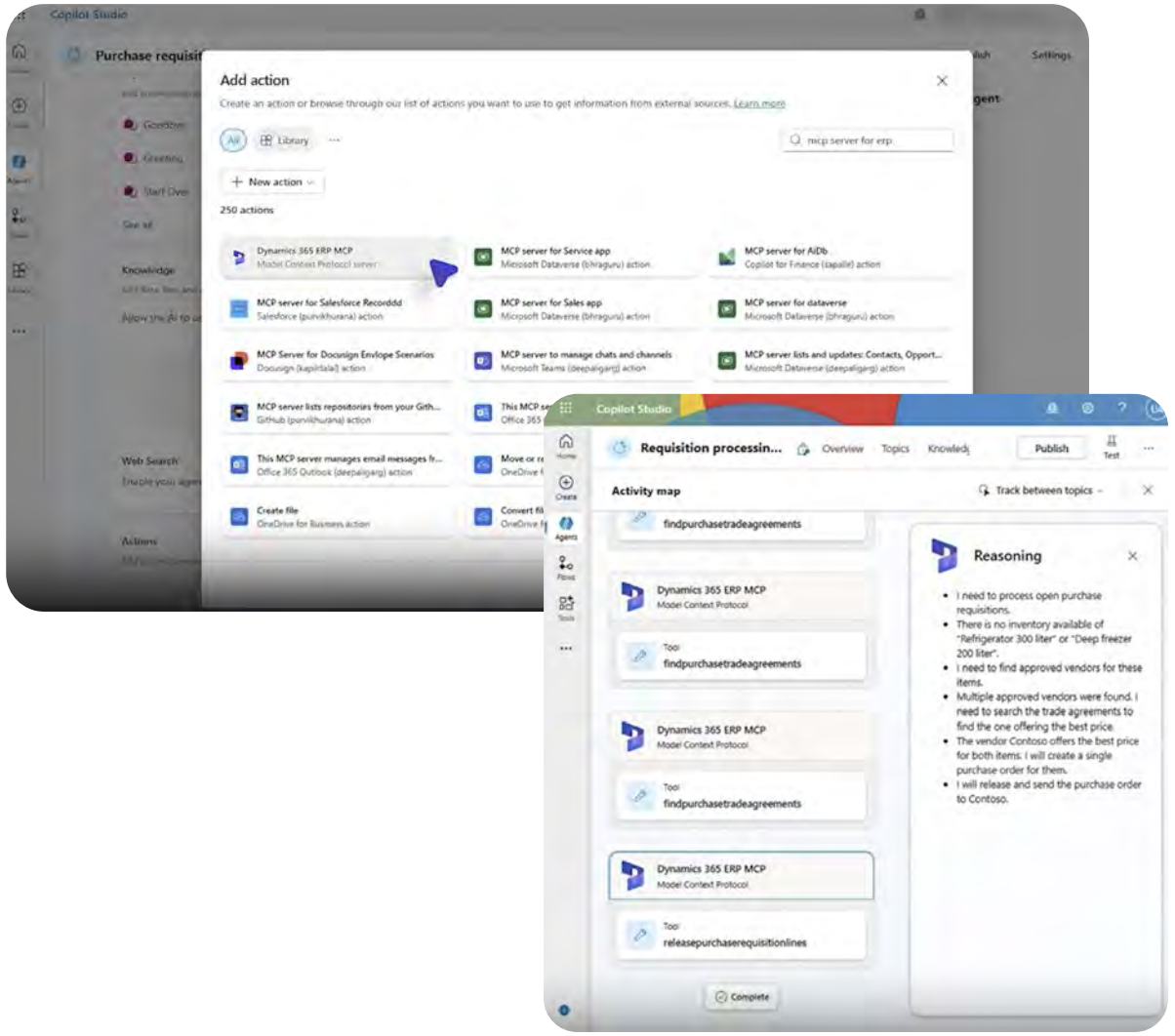
Generally available

MCP for Dynamics 365

Enhance agent intelligence: Make agents more context aware with access to knowledge, actions and tools from Dynamics 365 (ERP, Sales and Customer Service).

Faster time to value: Rapidly build MCP compliant agents to execute processes autonomously with minimal API and integration efforts

Secure, consistent and reliable: Enterprise security and governance controls while accessing Dynamics 365 apps



Flexibility to choose the best model for the job

OpenAI

Latest OpenAI models available across Microsoft 365 Copilot.

Anthropic

Anthropic Claude models available in Researcher, Copilot Chat, and expanding across Microsoft 365 apps.

Within Microsoft 365 Copilot

Copilot Studio

Over 11,000 models in the Microsoft Foundry for custom-built agents in Copilot Studio.

For custom-built agents

D365 FSC COPILOT AND COWORK

How can Armanino Help?

AI Automation Assessment + ARMANINO

Assessment Scope by Business Process Flow

Clients can start with one process flow and add others later without rescoping the completed work.

ORDER TO CASH

Quote, order entry, credit hold, invoicing, collections.

PROCURE TO PAY

Requisition, PO, receipt, invoice match, payment.

RECORD TO REPORT

Period close, reconciliations, journals, reporting.

PLAN TO PRODUCE

Demand plan, MRP, production orders, shop floor.

INVENTORY TO DELIVERY

Warehouse work, picking, shipping, freight, returns.

DESIGN TO PRODUCT

Item Setup and Creation, Engineering Change Control, Item Classifications.

Each flow is priced, scoped and delivered independently. Pricing is shown in the investment options.

AI Automation Assessment + ARMANINO

Microsoft Provided Tools

Cowork supports people in the flow of work. Copilot Studio agents automate repeatable steps with governance and lifecycle controls.

MICROSOFT COWORK

Assisted work in the flow of Microsoft 365.
Summarize, draft, analyze, prepare.
No build effort: enablement and prompt design.
Best for judgment-heavy, low-volume steps.

COPILOT STUDIO AGENTS

Autonomous agents wired into D365 FSC data.
Triggered by events and run without a person.
Build effort, testing and lifecycle required.
Best for high-volume, rule-based steps.

Most process flows need both: Cowork for the exceptions, an agent for the volume.

AI Automation Assessment + ARMANINO

Assessment Deliverables

Every flow returns five artifacts that can be reused by the steering committee, delivery team and future build SOWs.

1 **CURRENT-STATE PROCESS MAP**
Swimlane of system steps, manual steps and hand-offs

2 **AI OPPORTUNITY REGISTER**
Every candidate scored on value, feasibility and risk

3 **EFFORT ESTIMATE**
Small, medium or large sizing per agent, with hours and assumptions

4 **Prototype Agent Design Document**
Agent requirements and solution design document

Optional

5 **RUN-COST MODEL**
Licensing and Copilot Credit consumption over twelve months

6 **ROADMAP AND BUSINESS CASE**
Sequenced waves, payback and the executive readout

Delivered as Visio, Excel and PowerPoint files your team owns and can maintain.

AI Automation Assessment + ARMANINO

Investment Options by Process Flow

TASK-LEVEL CLIENT FEE BREAKDOWN

TASK	CATEGORY	FEE
Process walkthrough workshops with process owners	Per flow	$3,625
Current-state process map documentation and validation	Per flow	$3,530
AI opportunity identification and scoring	Per flow	$4,335
Agent effort sizing (small / medium / large)	Per flow	$2,940
Run-cost model: licensing and Copilot Credit consumption	Per flow	$2,980
Roadmap, sequencing and business case	Per flow	$3,620
Copilot Studio and Cowork education session	Per engagement	$2,940
Executive readout preparation and delivery	Per engagement	$2,940
Kickoff, mobilization and stakeholder alignment	Per engagement	$2,190
Agent prototype add-on (Optional)	Per agent	$8,300

*Agent prototype add-on: Customer will select from small agents in the AI Opportunity Register.

SELECTED FLOW WORK

$21,030

Six tasks priced per process flow

ENGAGEMENT WORK

$8,070

Three tasks priced per engagement

TOTAL INVESTMENT FOR ONE PROCESS FLOW

$29,100

All process flow task and engagement

AGENT ADD-ONS

$8,300

Prototype build, priced per agent

GRAND TOTAL INVESTMENT

$37,400

All process flow tasks, engagement fee and agent scope

You Can’t Spell Armanino Without “AI”

Connect with us:

Experts@armanino.com

Armanino Operates in an Alternative Practice Structure:

Armanino’s accounting, consulting and technology experts combine technical know-how with firsthand industry knowledge.
We’ve built AI into everything we do, so you have the power to innovate on your own terms. Build anything. Learn more at armanino.com.

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