DYNAMICS BUSINESS EXCELLENCE

Intelligent operations

The CFO’s guide to agentic ERP



Microsoft Dynamics 365

Table of contents

01 / Why AI in ERP can't wait

02 / Reimagining ERP for modern business

03 / A foundation for intelligent operations

04 / Transform your operations with Dynamics 365

05 / How AI agents transform workflows

06 / The AI possibility spectrum

07 / Build your own AI agents for Dynamics 365

08 / Prebuilt agents: ready for work

09 / What's next?

Why AI in ERP can’t wait

Today’s businesses face a perfect storm. Customer expectations continue to rise. Competition comes from unexpected directions. And the pace of business requires real-time insights and rapid innovation. Welcome to the new enterprise reality, where legacy approaches to running operations can’t keep pace with your business needs.

Against this backdrop, AI has become a strategic imperative. But for many organizations, their existing enterprise resource planning (ERP) systems stand in the way. Built for a different era, these rigid systems are unable to adapt to rapidly changing business needs and can’t tap into the full potential of AI.

It’s time to reimagine how enterprise systems work to prioritize agility and put intelligence at the core of operations. Ready to get started?.

More than 80% of workers say AI helps them focus on important work.[1]

This e-book is your guide to transforming your ERP with agentic solutions. It shows you how to reinvent operations, enhance productivity, and gain a competitive edge through the power of a modern ERP.



[1] 2024 Work Trend Index Annual Report, Microsoft.

93%

of business leaders see the benefits of flexible, integrated ERP systems[2]

but only

39%

of intelligent operations trust their current ERP to support business transformation[2]

Reimagining ERP for modern business

Modern ERPs are like building blocks, letting you adapt and reconfigure as your business evolves. It's an essential shift that helps organizations improve existing businesses functions, optimizing with data-driven insights.

With a composable agentic system, each piece can work independently while fitting perfectly together. This lets you:

- Add new capabilities without disrupting existing operations.
- Connect to thousands of third-party systems.
- Scale up to support global expansion.
- Gain access to always-on, real-time insights.
- Adapt quickly to changing business requirements.
- Automate processes and drive intelligent decision-making with AI.

Organizations need a new approach to enterprise systems—one not bound by rigid structures. Today's ERP should do more than just record transactions; it must drive insights and enable quick action.

2 Microsoft. *Embrace Cloud Migration with Microsoft Dynamics 365*. January 23, 2024.

A foundation for intelligent operations

Dynamics 365 delivers a modern, composable platform designed to help your organization operate profitably, enhance performance, and create a resilient and connected organization ready for whatever comes next. As a cloud-based system, it offers greater flexibility and convenience than legacy on-premises systems. Backed by Microsoft enterprise-grade security and compliance, it provides the protection organizations need to operate with confidence.

Frontier Firms: The future of finance

AI agents that can help you plan, detect, reason, and recommend, powering processes from end-to-end

- Record
- Reconcile
- Analyze
- Plan and forecast
- Post



Transform your operations with Dynamics 365

Turn efficiency into profitability

Enhance productivity and improve operations to meet your customers' needs.

- Speed up operations by automating processes like record to report and order to cash.
- Adapt quickly to changing market conditions with smart recommendations.
- Predict/meet market demands by optimizing resources through AI insights.
- Simplify partner collaboration with streamlined onboarding and unified planning tools.

Drive better business outcomes

Accelerate your path to growth with real-time insights.

- Close financial periods faster with automated reconciliation and reporting.
- Accurately plan across your business by connecting the tools you already use.
- Make confident decisions with real-time insights and predictive analytics.
- Explore new revenue streams while managing everything on a single platform.

Build connections, safely

Enable security and innovation to work hand in hand.

- Adopt new technology smoothly without immediately replacing existing systems.
- Connect your business tools with standardized processes and built-in integrations.
- Operate globally with confidence through enterprise-grade security.
- Count on a 99.9% uptime service-level agreement (SLA).

How AI agents transform workflows

Microsoft offers a suite of powerful AI agents that seamlessly connect with Dynamics 365, bringing new intelligence to your everyday workflows.

With Microsoft Copilot Studio, you can create your own custom agents that match your unique vision, whether you want to enhance existing ERP processes or establish new ways of working.

Agents let you tailor Dynamics 365 to match your exact needs in days or weeks, not months or years. They work like digital colleagues alongside you, helping improve your business processes and amplify human intelligence. AI makes the future of work more efficient, intuitive, and aligned to the unique rhythm of your business.

Unlike traditional automation, agents can identify failures and process gaps so you can improve them over time. This makes Dynamics 365 more effective the more you use it.

That's the true AI advantage: not just faster processes, but smarter ones. Not just automation, but augmentation. Not just efficiency, but transformation.

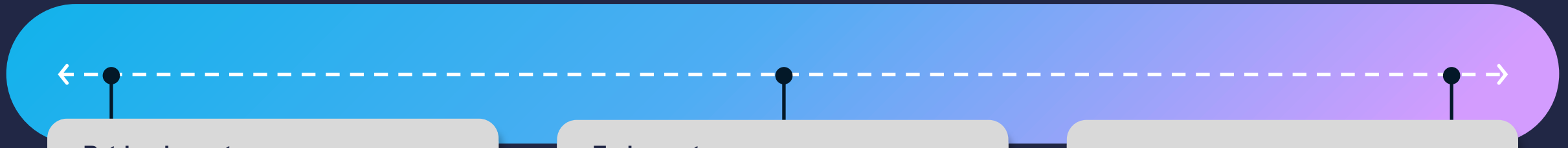


66% of companies adopting AI agents report increased productivity[3]

3. PwC Agent Survey, May 2025

The AI possibility spectrum

Within Dynamics 365, agents help businesses tailor their operations, boost productivity, and get ahead of competitors by building a truly customizable ERP system. Customization operates across three levels of sophistication. Each brings unique value across this spectrum of capability.



Retrieval agents

Your knowledge partners

Connect with data, drawing from your business's collective knowledge. They can answer questions about things like policies, procedures, or past decisions, making your entire organization's expertise readily accessible.

"How do I connect to the corporate network?"

"What's the remaining budget for x project?"

Task agents

Your process accelerators

Execute specific actions and workflows like processing invoices, updating records, or coordinating approvals. By handling routine tasks your teams can get more done while ensuring core operations run smoothly.

"Request an email account for my new hire"

"Review outstanding and open POs and begin financial planning"

Autonomous agents

Your proactive allies

Offer the most advanced agents that can work independently, monitoring systems and taking action as needed. For example, spotting/addressing supply chain disruptions before they affect your business or automatically reconciling financial discrepancies as they arise.

"The agent has identified and researched 15 new leads for you to review"

"Emerging support issues have been identified and routed by the agent to the appropriate teams"

Build your own AI agents for Dynamics 365

Copilot Studio is the low-code platform for building, testing, and deploying custom agents for use in Dynamics 365 and other systems. Workers of all skill levels can deliver true customization to your business—from people with no coding experience to professional developers. Agents built with Copilot Studio are designed with security at their core. Robust data protection safeguards your sensitive information, while agent guardrails and controls ensure compliance and reliability.

Three paths to agent creation:



Talk

Start a conversation with your agent. Describe what you want to accomplish in everyday language. Connect it to relevant systems. Copilot Studio works with you to shape the agent to meet your needs.



Design

For a more hands-on approach, use a visual canvas in Copilot Studio that lets you drag and drop components to design your agent's capabilities. This gives your agent shape and purpose without coding.



Code

Use Agent SDK for total control and flexibility to create sophisticated solutions. The Microsoft Agent Framework gives full access to agent capabilities, backed by enterprise-grade reliability.

Prebuilt agents: ready for work

Unsure of where to start? Microsoft has built a suite of autonomous agents powered by Copilot Studio ready for you to deploy to Dynamics 365. Here are two examples that show how Copilot Studio makes your ERP smarter, faster, and more effective.

When deployed to Dynamics 365, these agents represent the next evolution of intelligent automation. They work alongside your team as trusted partners, tailored to the unique needs of your organization, reinventing operations, enhancing productivity, and creating competitive advantage.

Supplier communications agent

To maintain pace with supply changes, this agent in Dynamics 365 automatically fields emails, assesses supply disruptions, and updates purchase orders in real-time to keep operations flowing under any circumstance.

If a supply delay affects a critical order, the agent will evaluate inventory and offer the best mitigation plan, ensuring customers receive their orders on time. With the ability to review and determine whether to adopt its suggestions and logic, you have full oversight into everything the agent does.

Account reconciliation agent

Closing the books at quarter-end can be a daunting task. This agent automates the heavy lifting. It reviews and reconciles data, flags discrepancies, and suggests corrective actions, all based on your previous decisions.

You remain in control, deciding which tasks the agent handles, monitoring its progress to ensure transparency and trust. As it learns from your actions, it becomes more efficient, helping you close your books faster.



What’s next?

The journey to AI-enhanced ERP is about building on your strengths to create something better. The opportunity is clear. The future of your business operations is ready to be built with Dynamics 365.

As your trusted partner, DBE helps you unlock the full value of these capabilities at the scale your business requires. We bring proven expertise in ERP implementation, seamless integration, and the optimisation of Microsoft solutions such as Dynamics 365.

Start today

The Added Value of DBE

DBE – Dynamics Business Excellence offers end-to-end support to help your business manage security, costs, and IT needs. From tailored technology roadmaps to expert consulting, migration, and implementation, we can help maximize the value of your cloud transformation.



DBE has the expertise to help you migrate and modernize your estate with Dynamics 365