nordic.
summit

Bulding Modern F&O solutions
- With Virtual Entities

nordic summit

Ted Ohlsson

FTRSA – CE,
CTO Dynamics 365 Nordics - Capgemini

Bulding Modern F&O solutions

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DYNAMICS MINDS powered by DOCENTRIC

Agenda

- 08:30 Virtual entities 101
- 9:30 Fika
- 10:00 Copilot Studio
- 10:30 Copilot Studio – Exercise
- 11:30 Model driven Apps
- 12:00 Lunch
- 13:00 Model driven Apps – Exercise
- 13:45 Power Automate
- 14:15 Power Automate – Exercise
- 14:30 Fika
- 14:45 Power Automate – Exercise
- 15:30 Canvas Apps & Power Pages
- 15:50 Wrap-up

Todays landscape

Dynamics 365 ready business apps

Sales
Customer Insights
Sustainability
Customer Service
Field Service
Project Operations
Supply Chain Management
Finance
Human Resources
Commerce

App interfaces & editors

Power Pages
Power Apps Model driven
Power Apps Canvas
F&O Interphase

Automation Tools

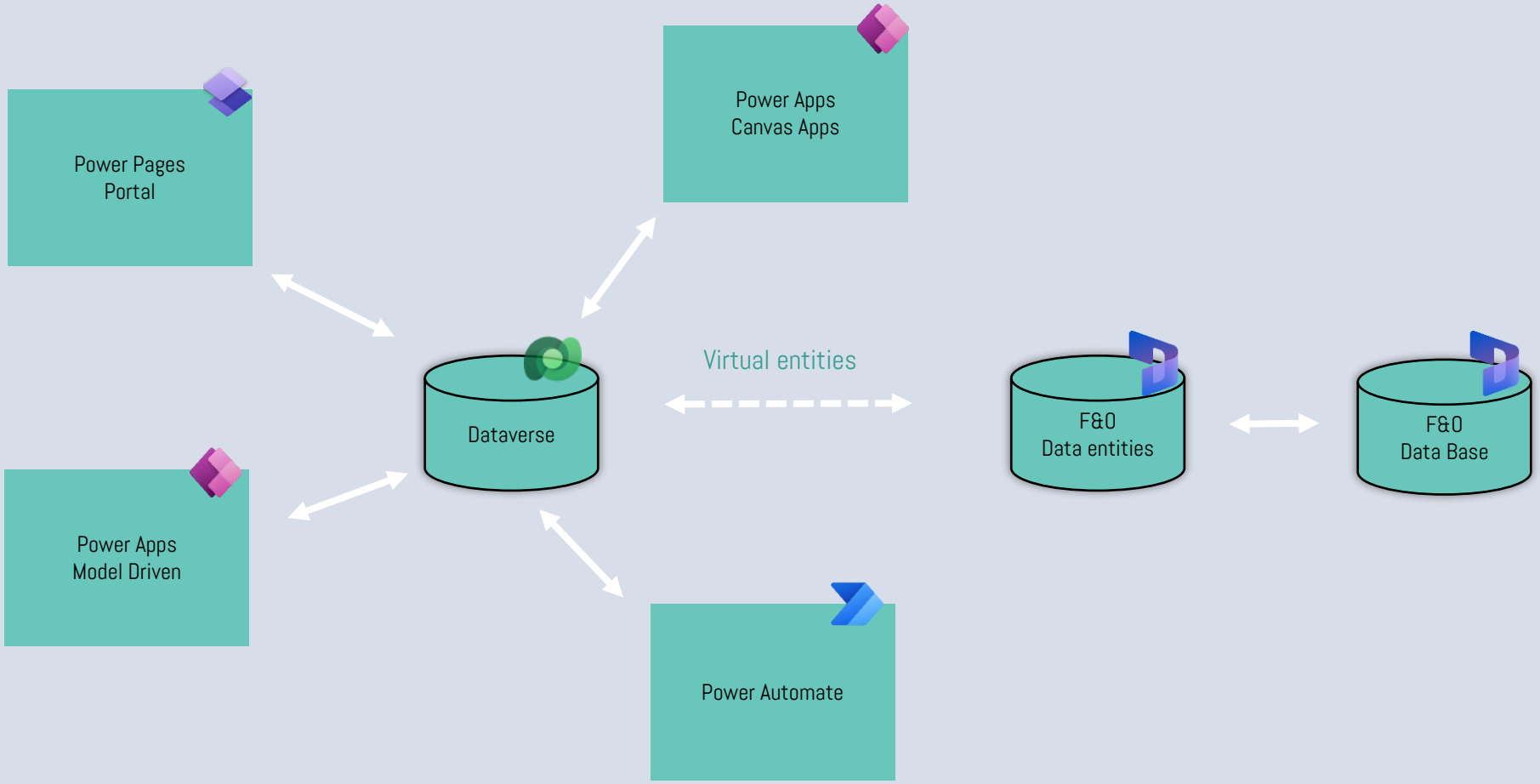
Power Virtual Agents
Power Automate
AI builder

Platforms & Databases

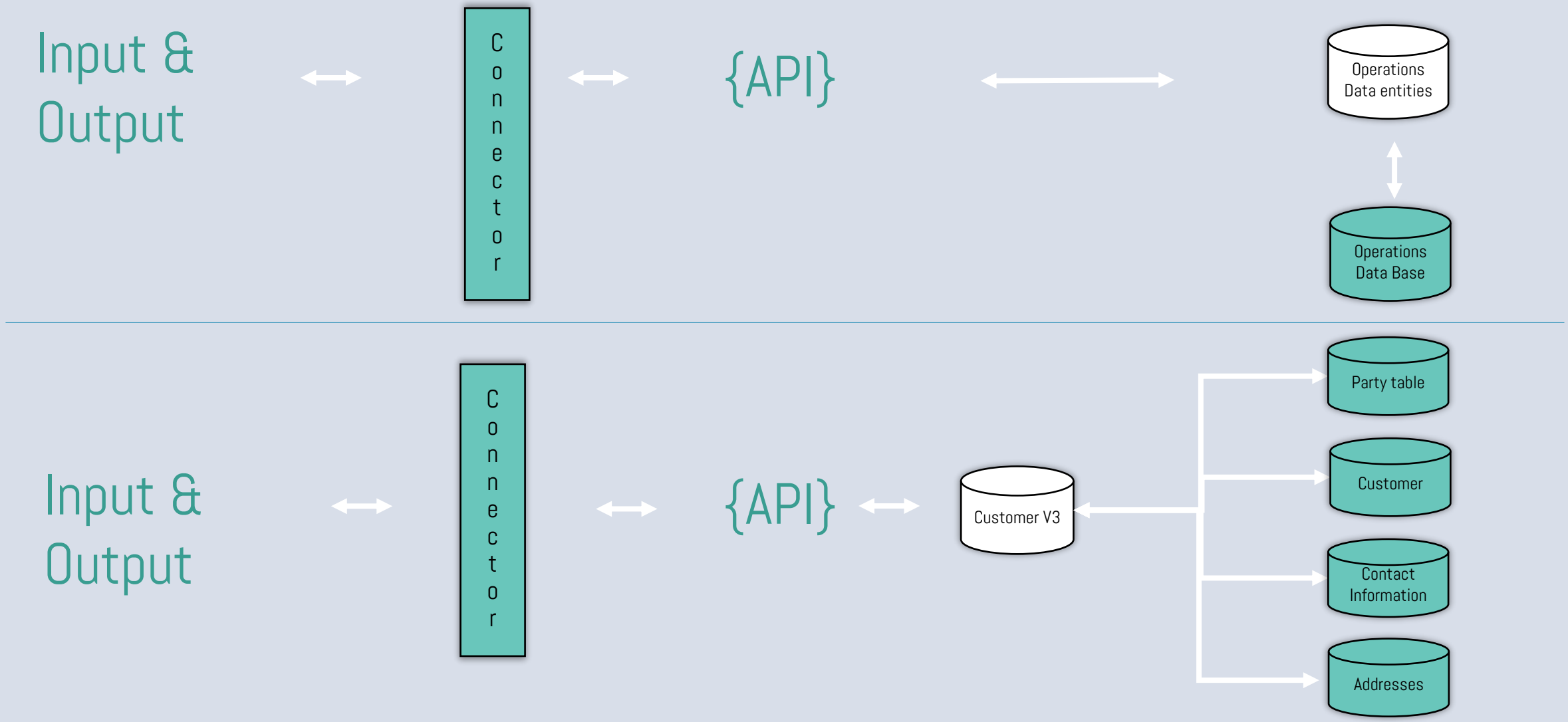
Dataverse
Virtual entities for F&O
Dual-Write
F&O Platform

Power Platform

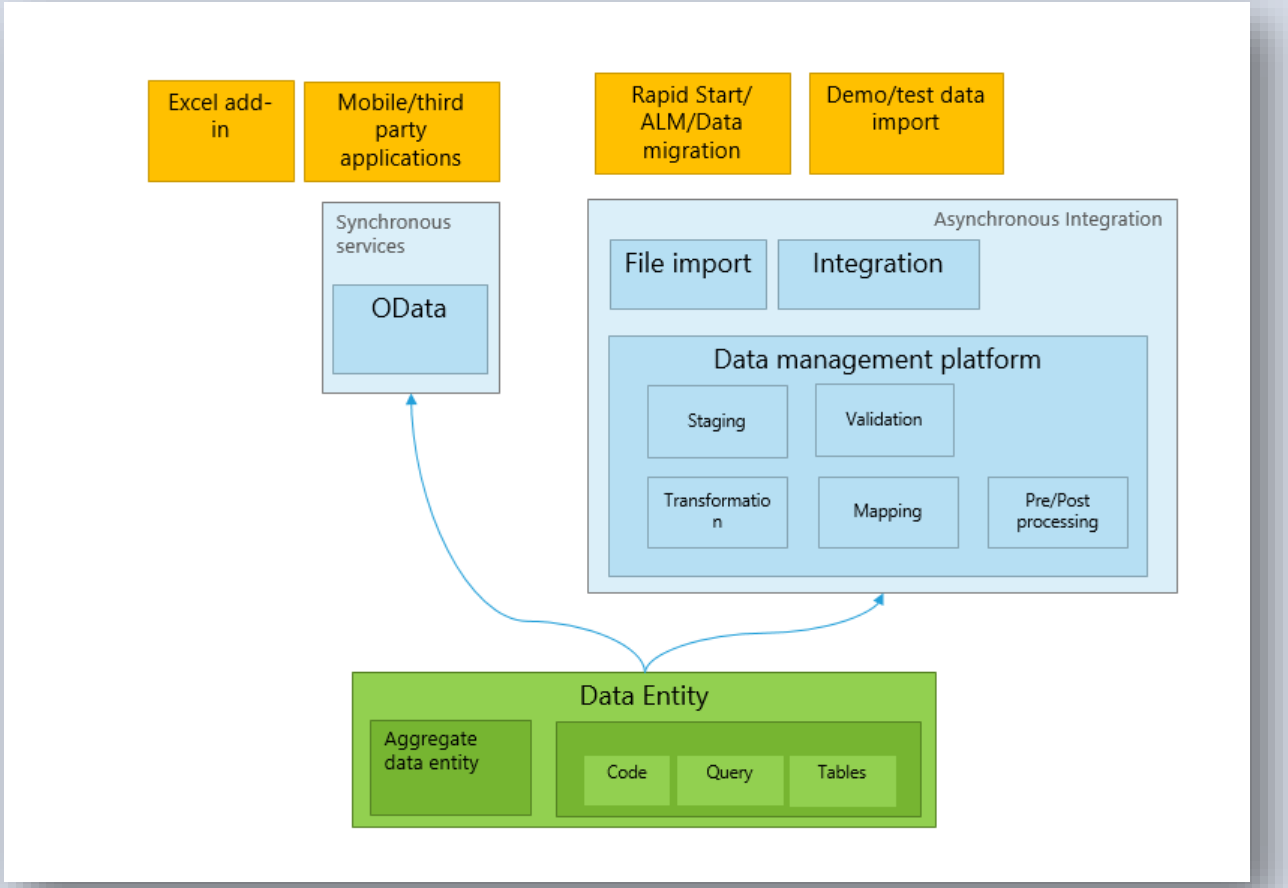
Power Apps with F&O – Virtual Entities



F&O Data Entities



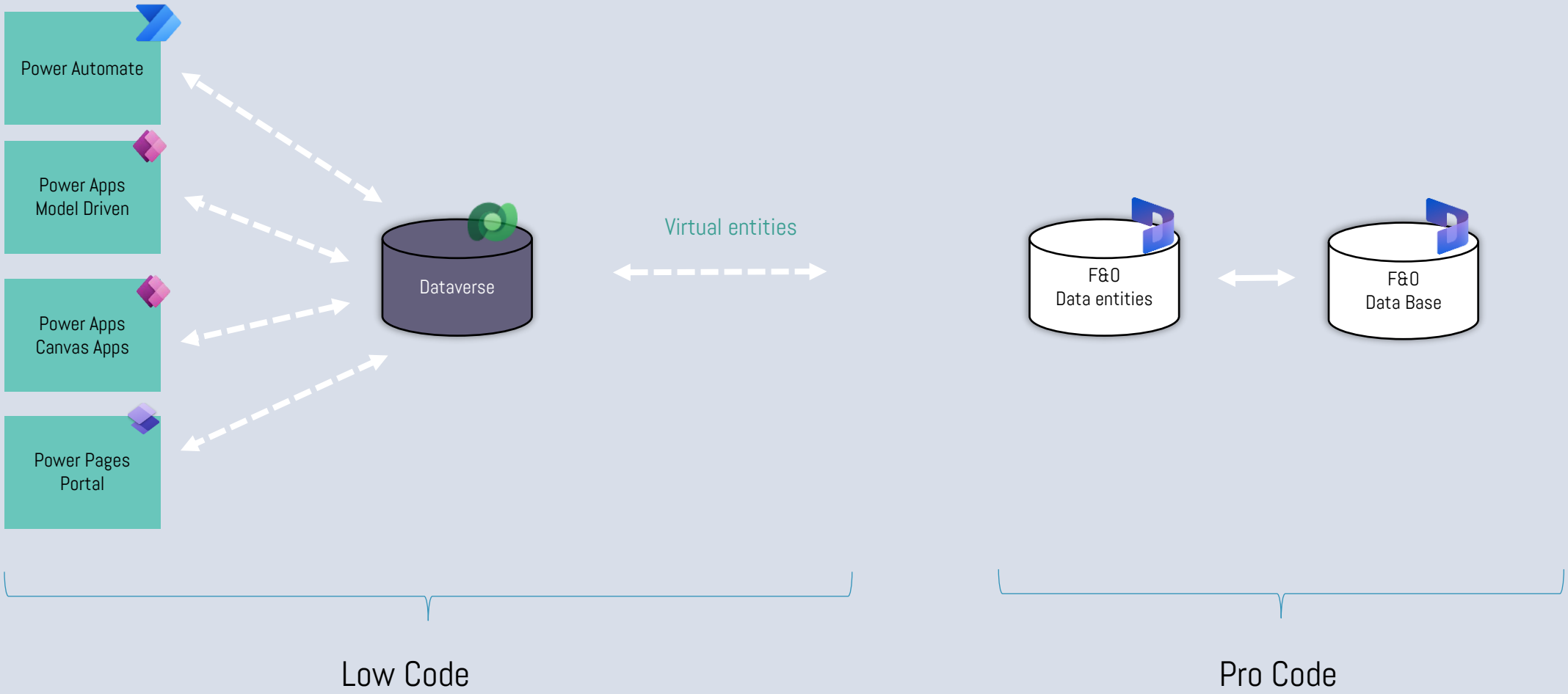
Public vs Private Data entities



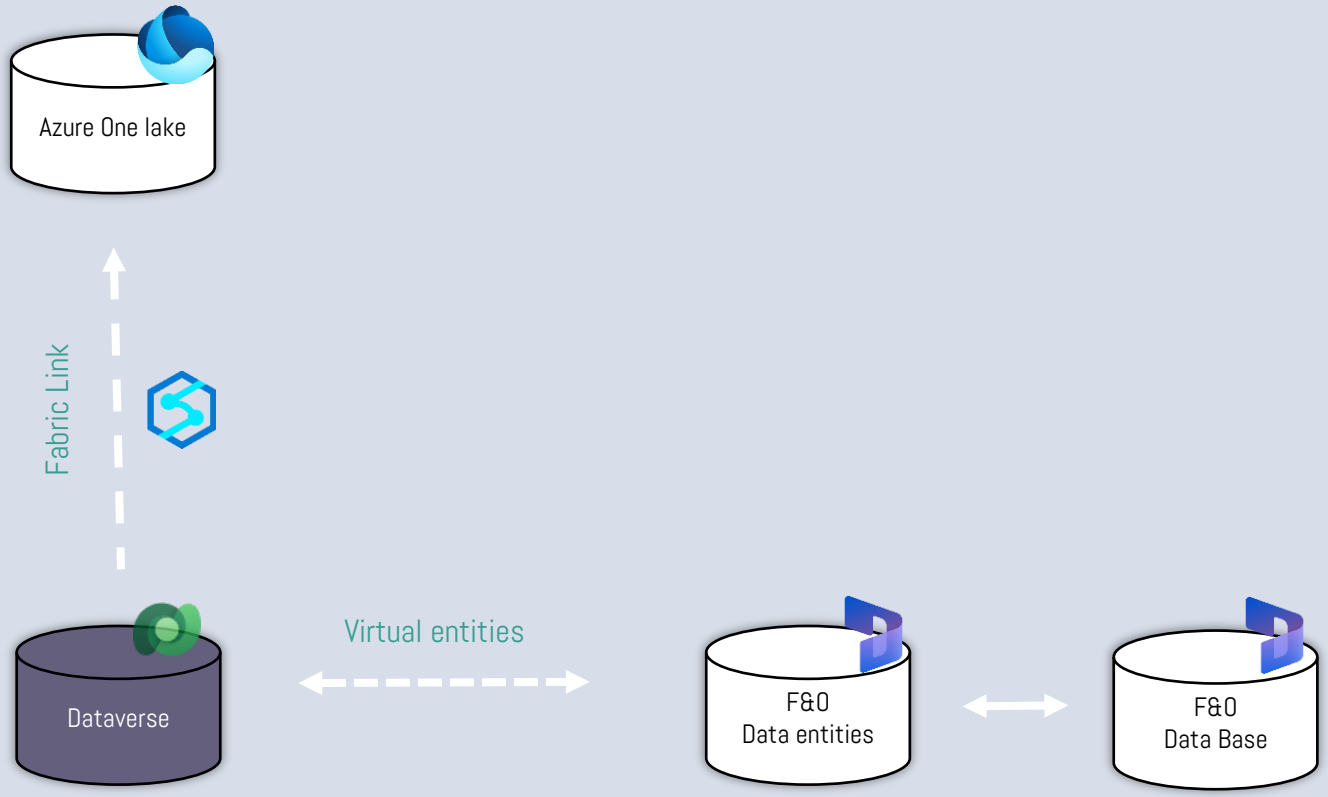
https:// *YourFOEnviorment*.operations.eu.dynamics.com/**Data**

https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities

Low Code vs Pro Code



Fabric Link


Azure One lake
Fabric Link
Dataverse
Virtual entities
F&O
Data entities
F&O
Data Base

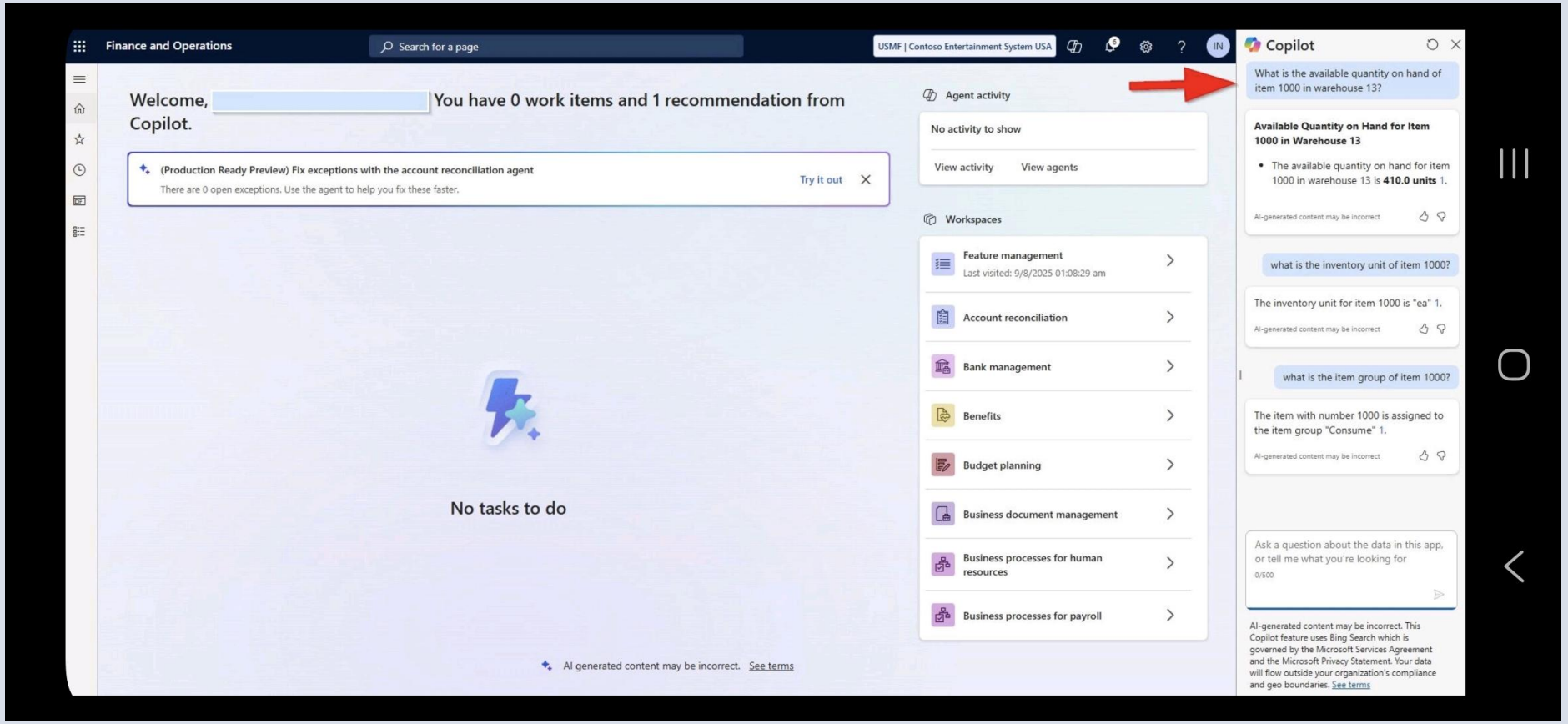
Training Material

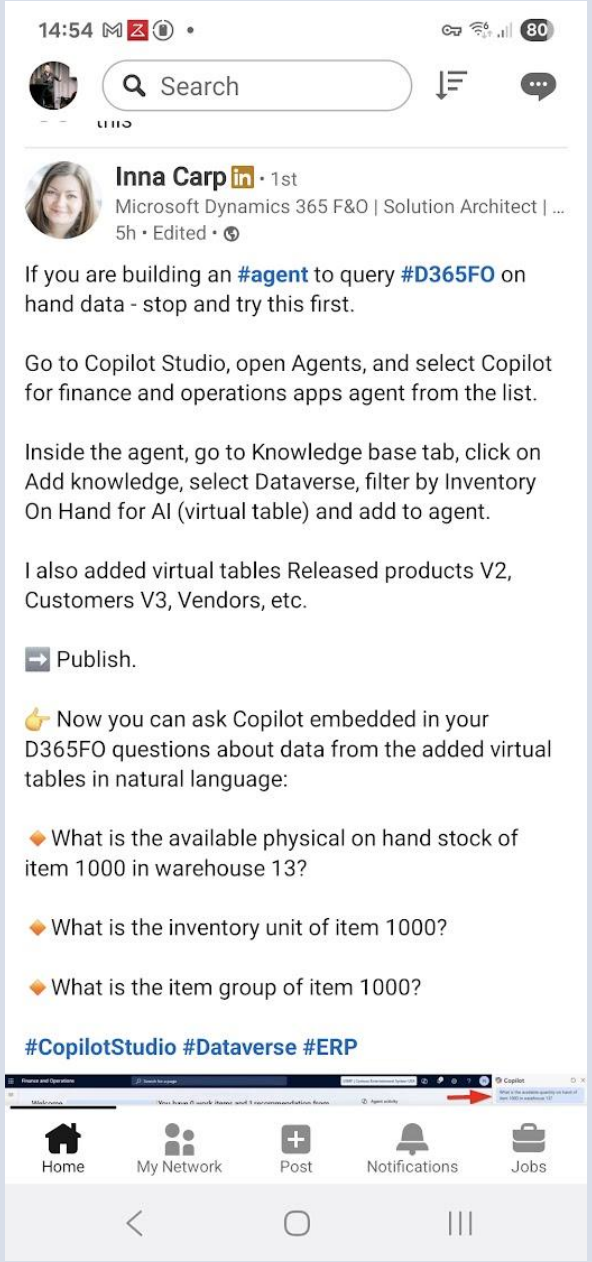
- https://github.com/Teeeeeeeeeeeed/TrainingMaterial

(11 “e”s in Ted)

COPILOT STUDIO

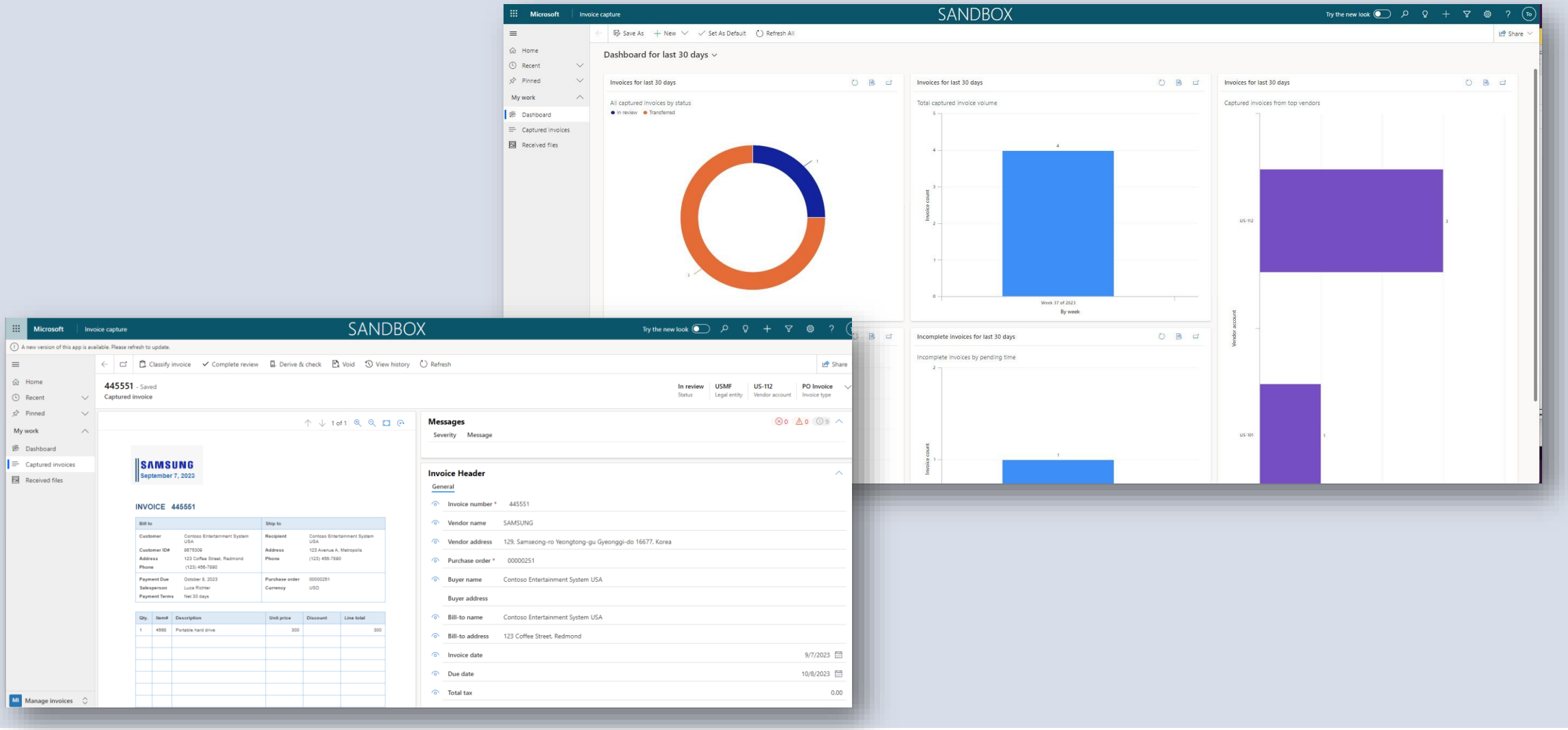
Extra task


Finance and Operations
Search for a page
USMF | Contoso Entertainment System USA
Welcome,
You have 0 work items and 1 recommendation from Copilot.
(Production Ready Preview) Fix exceptions with the account reconciliation agent
There are 0 open exceptions. Use the agent to help you fix these faster.
Try it out
No tasks to do
AI generated content may be incorrect. See terms
Agent activity
No activity to show
View activity
View agents
Workspaces
Feature management
Last visited: 9/8/2025 01:08:29 am
Account reconciliation
Bank management
Benefits
Budget planning
Business document management
Business processes for human resources
Business processes for payroll
Copilot
What is the available quantity on hand of item 1000 in warehouse 13?
Available Quantity on Hand for Item 1000 in Warehouse 13
The available quantity on hand for item 1000 in warehouse 13 is 410.0 units 1.
AI-generated content may be incorrect
what is the inventory unit of item 1000?
The inventory unit for item 1000 is "ea" 1.
AI-generated content may be incorrect
what is the item group of item 1000?
The item with number 1000 is assigned to the item group "Consume" 1.
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
AI-generated content may be incorrect. This Copilot feature uses Bing Search which is governed by the Microsoft Services Agreement and the Microsoft Privacy Statement. Your data will flow outside your organization's compliance and geo boundaries. See terms

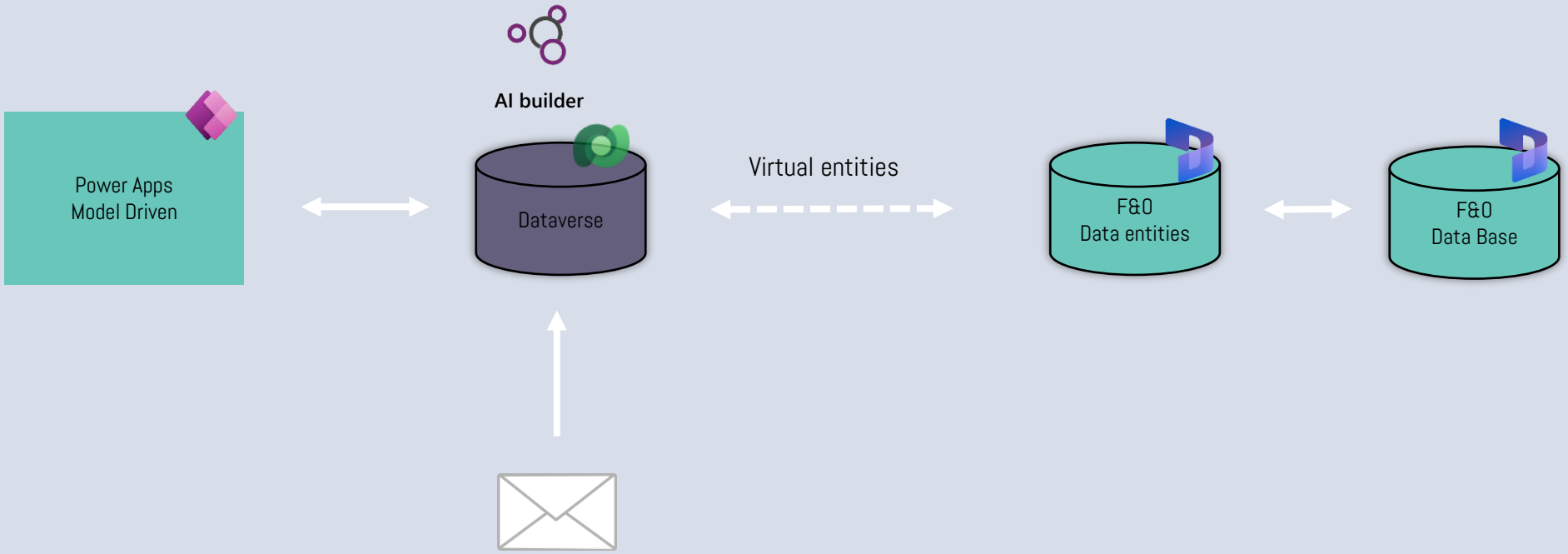

14:54
Search
Inna Carp · 1st
Microsoft Dynamics 365 F&O | Solution Architect | ...
5h • Edited •
If you are building an #agent to query #D365FO on hand data - stop and try this first.
Go to Copilot Studio, open Agents, and select Copilot for finance and operations apps agent from the list.
Inside the agent, go to Knowledge base tab, click on Add knowledge, select Dataverse, filter by Inventory On Hand for AI (virtual table) and add to agent.
I also added virtual tables Released products V2, Customers V3, Vendors, etc.
➡️ Publish.
👉 Now you can ask Copilot embedded in your D365FO questions about data from the added virtual tables in natural language:
🔸What is the available physical on hand stock of item 1000 in warehouse 13?
🔸What is the inventory unit of item 1000?
🔸What is the item group of item 1000?
#CopilotStudio #Dataverse #ERP
Home
My Network
Post
Notifications
Jobs

MODEL-DRIVEN APPS

Demo – Invocie Captrue App



Invoice Capture Infrastructure



Todays landscape

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Customer Insights
Sustainability
Customer Service
Field Service
Project Operations
Supply Chain Management
Finance
Human Resources
Commerce

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AI builder

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Power Platform

Tomorrows landscape

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Human Resources
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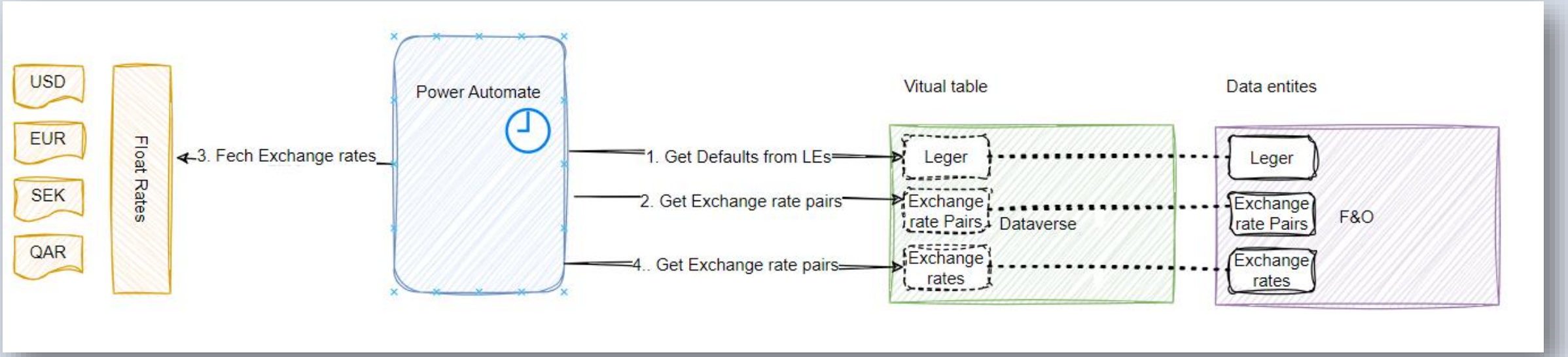
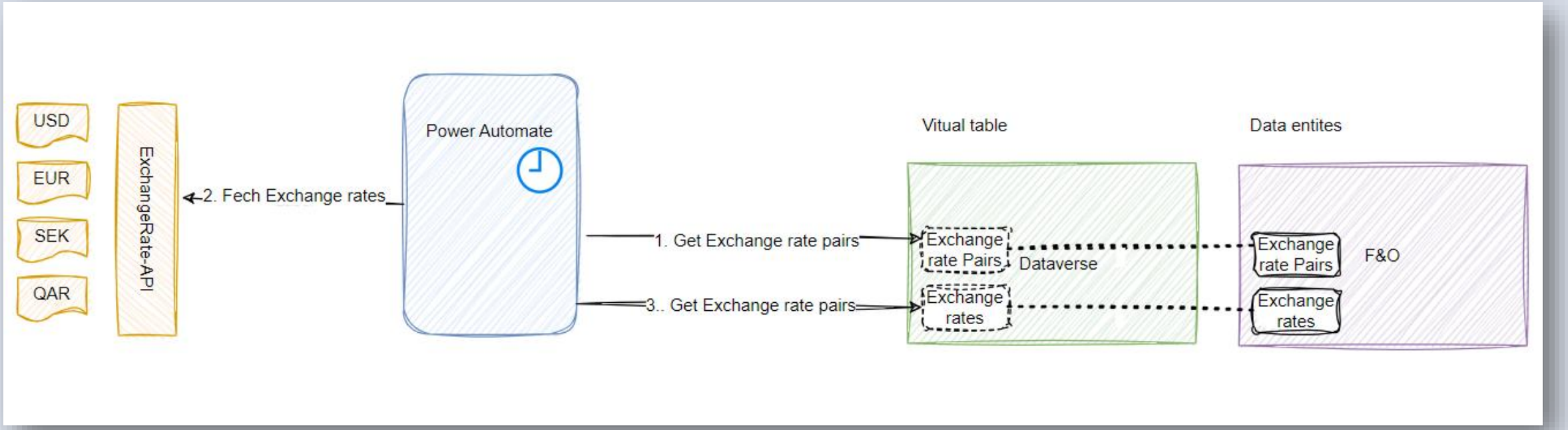
POWER AUTOMATE

Power Automate

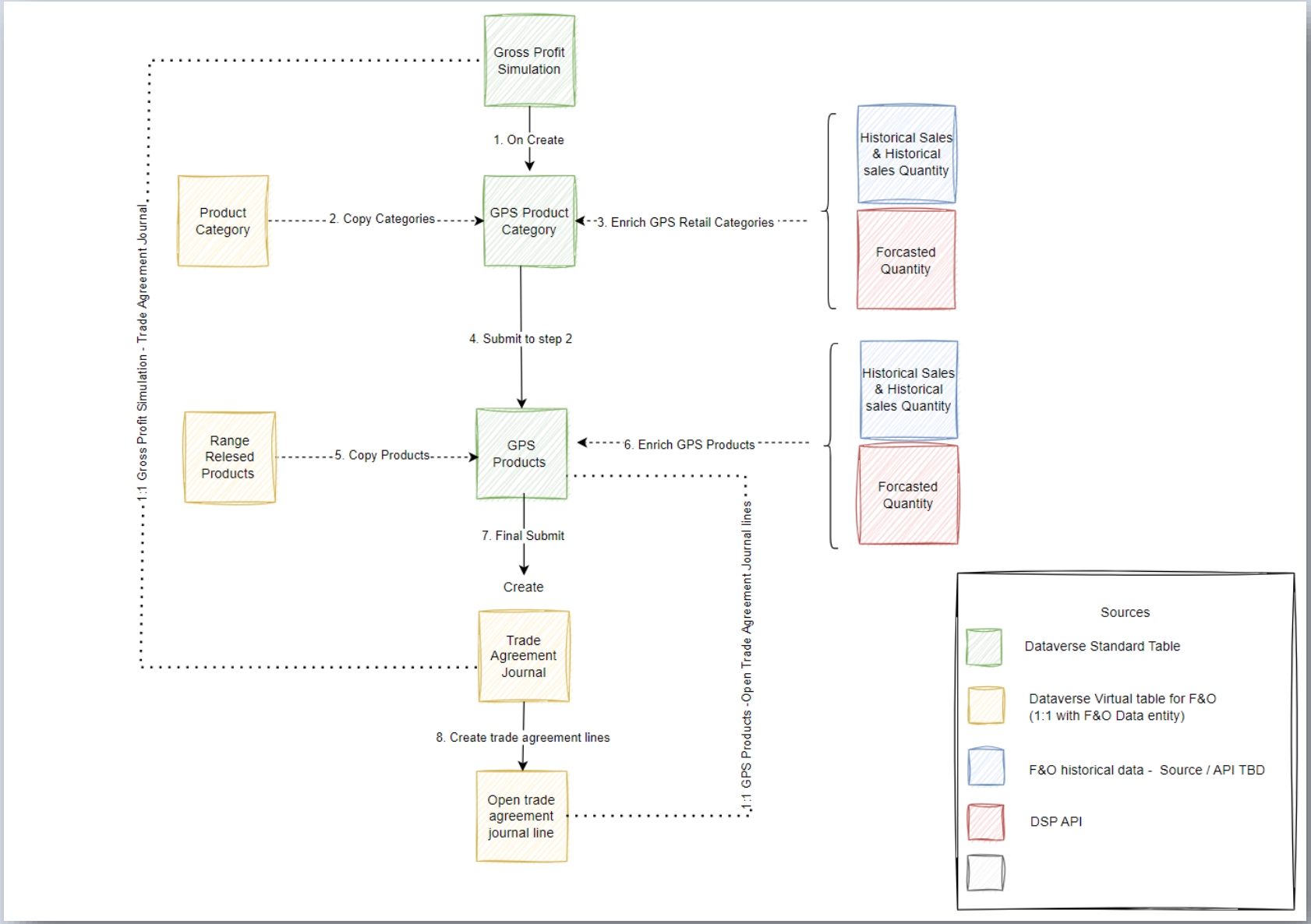


Power Automate



CANVAS APPS

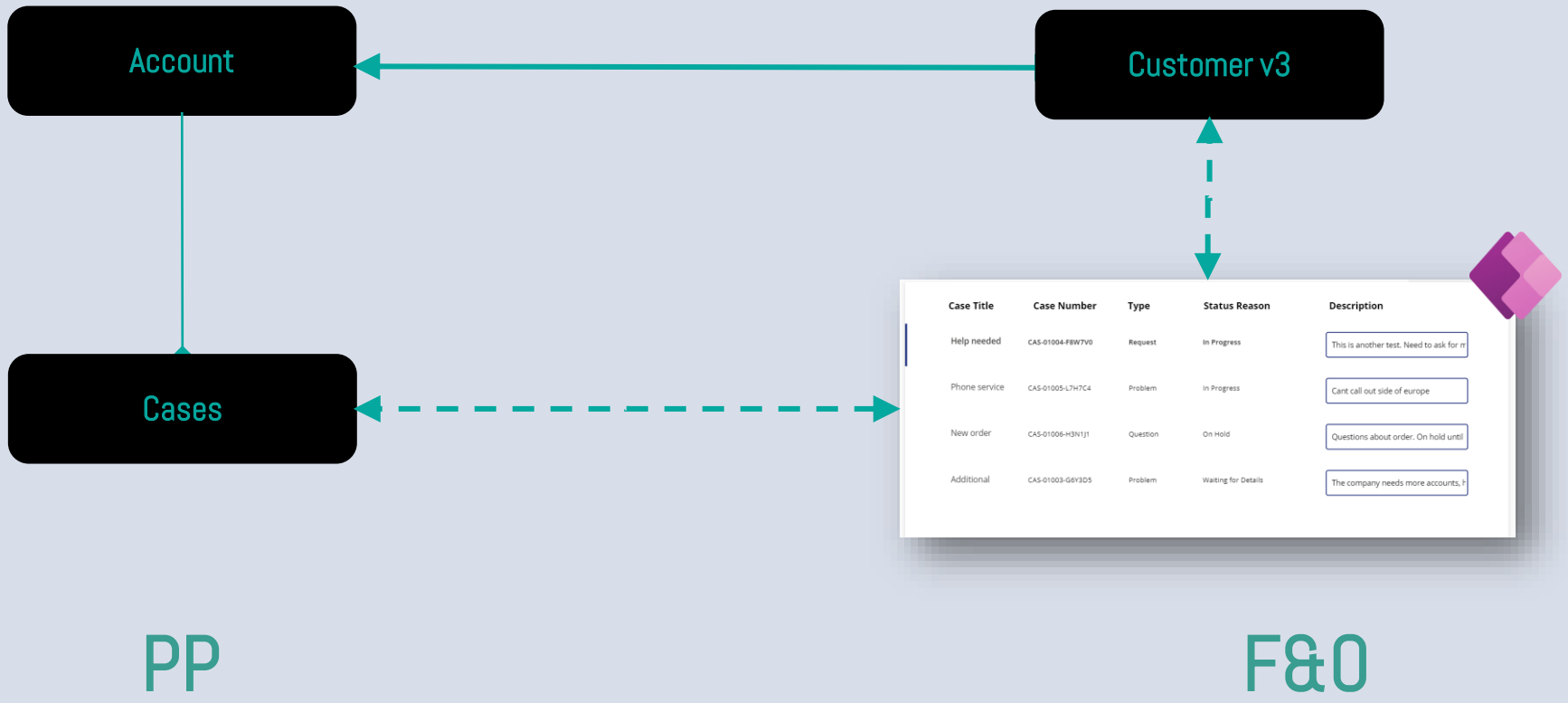
Canvas Apps


Gross Profit Simulation
1. On Create
Product Category
2. Copy Categories
GPS Product Category
3. Enrich GPS Retail Categories
Historical Sales & Historical sales Quantity
Forcasted Quantity
4. Submit to step 2
Range Relesed Products
5. Copy Products
GPS Products
6. Enrich GPS Products
Historical Sales & Historical sales Quantity
Forcasted Quantity
7. Final Submit
Create
Trade Agreement Journal
8. Create trade agreement lines
Open trade agreement journal line
1:1 Gross Profit Simulation - Trade Agreement Journal
1:1 GPS Products -Open Trade Agreement Journal lines
Sources
Dataverse Standard Table
Dataverse Virtual table for F&O (1:1 with F&O Data entity)
F&O historical data - Source / API TBD
DSP API

CANVAS APPS
- EMBEDDED IN F&O

Flow to build

Dual-Write



Updating

Default/Text

```
ThisItem.Description
```

OnChange

```
Patch(Cases, ThisItem, {Description: Description.Text })
```

Filter by Parent

Direct filter (if possible recommended)

```
Filter(Cases, Contact.'First Name' = "Calle")
```

Lookup filtering

```
Filter(Cases, Customer = LookUp(Accounts, 'Account Number' = "SC0001"))
```

```
Filter(Cases, Customer = LookUp(Accounts, 'Account Number' = FinOpsInput))
```

Adding Context inputs

Any field Input:

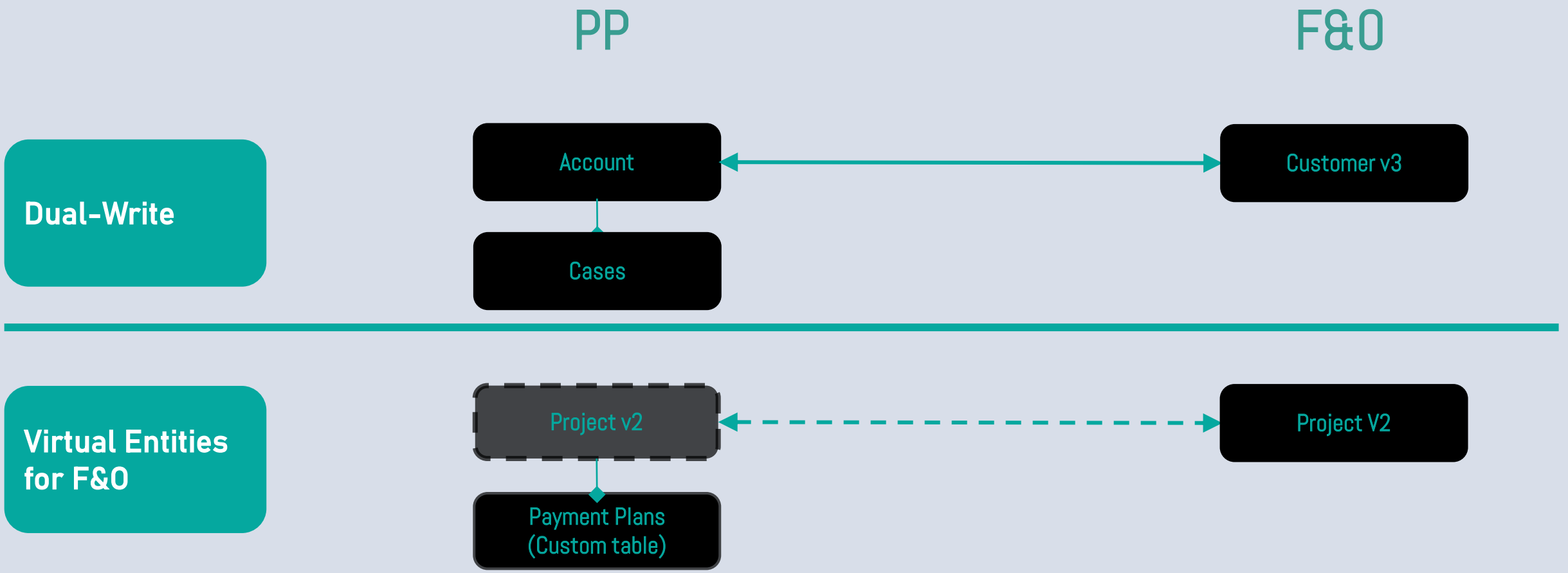
```
If(!IsBlank(Param("EntityId")), Set(FinOpsInput, Param("EntityId")), Set(FinOpsInput, ""));
```

Legal Entity:

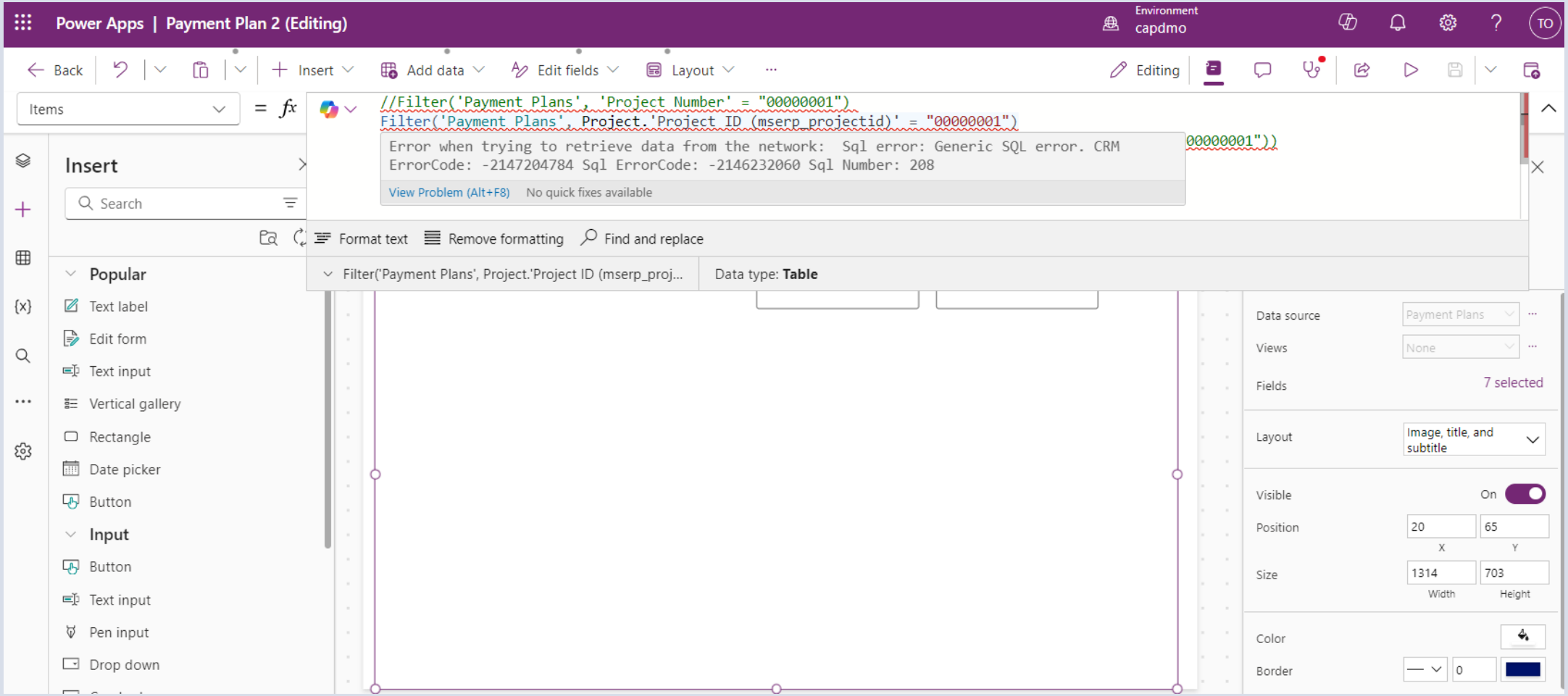
```
If(!IsBlank(Param("cmp")), Set(FinOpsLegalEntity, Param("cmp")), Set(FinOpsLegalEntity, ""));
```

https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/get-started/embed-power-apps

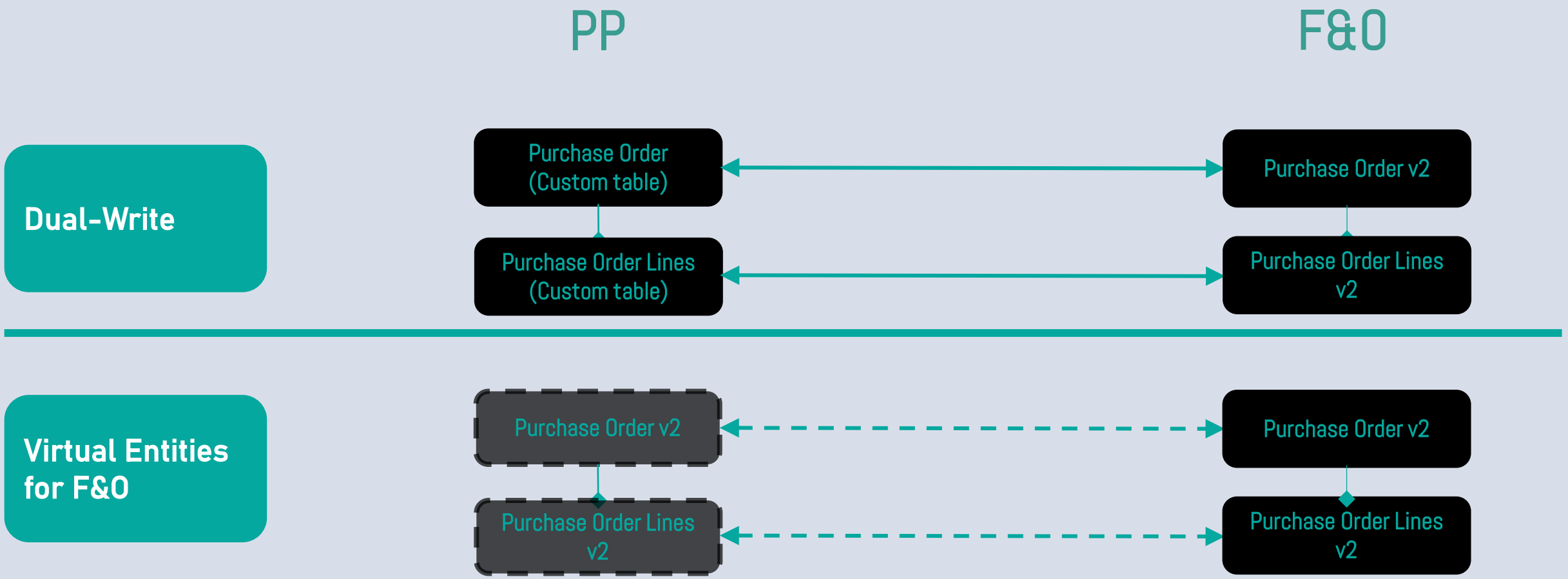
Parant F&O Data - Child Dataverse Data



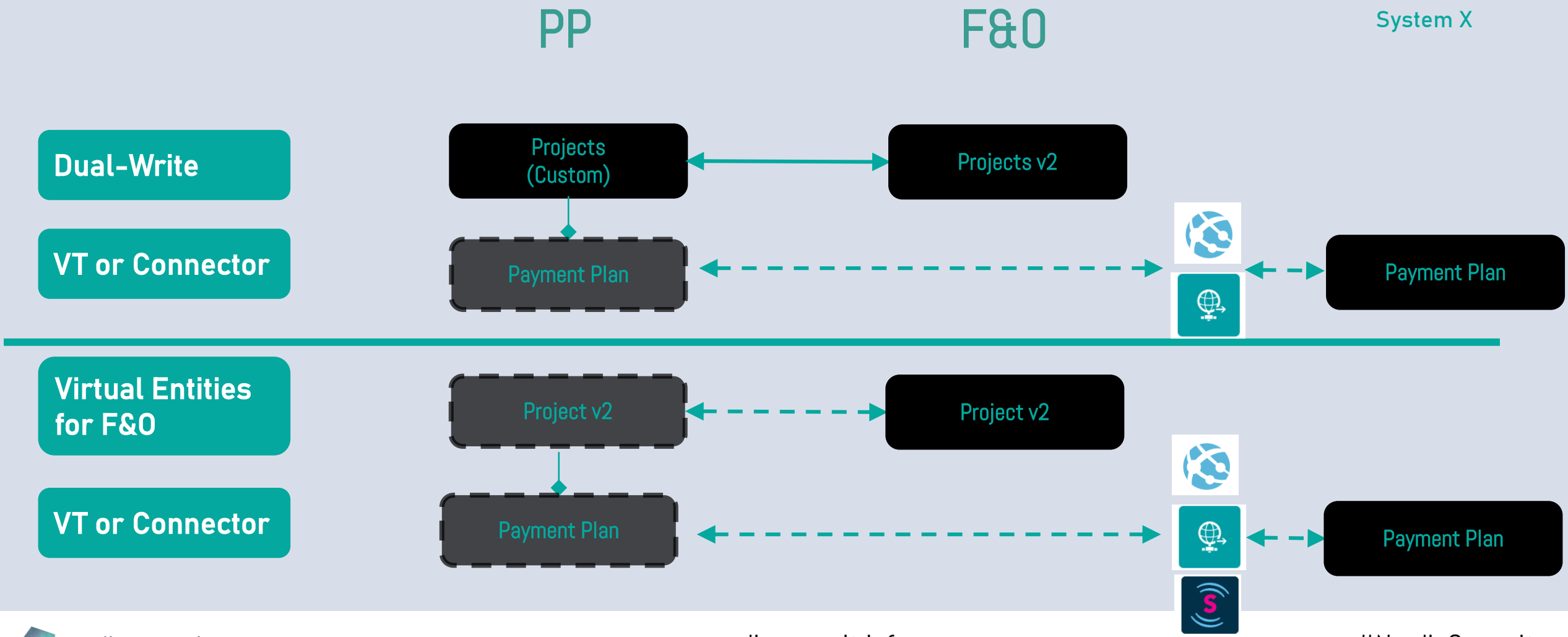
Virtual table filter Issue



Parant and Child F&O Data

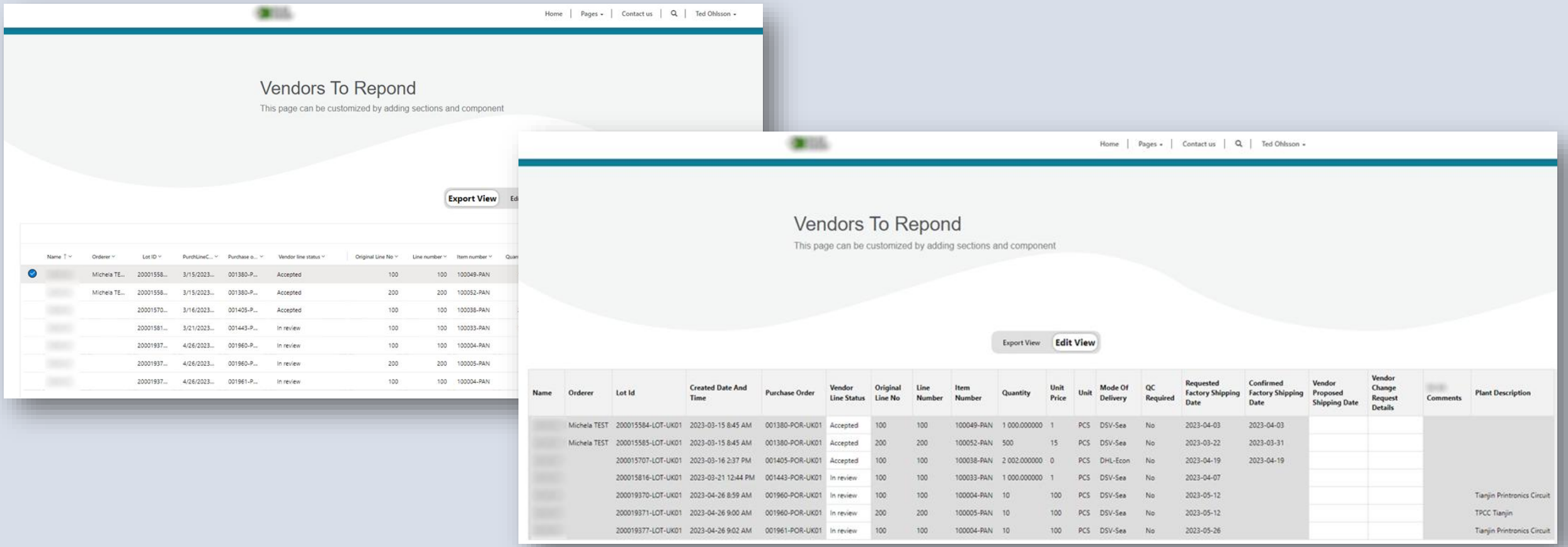


Parant F&O Data - Child any source



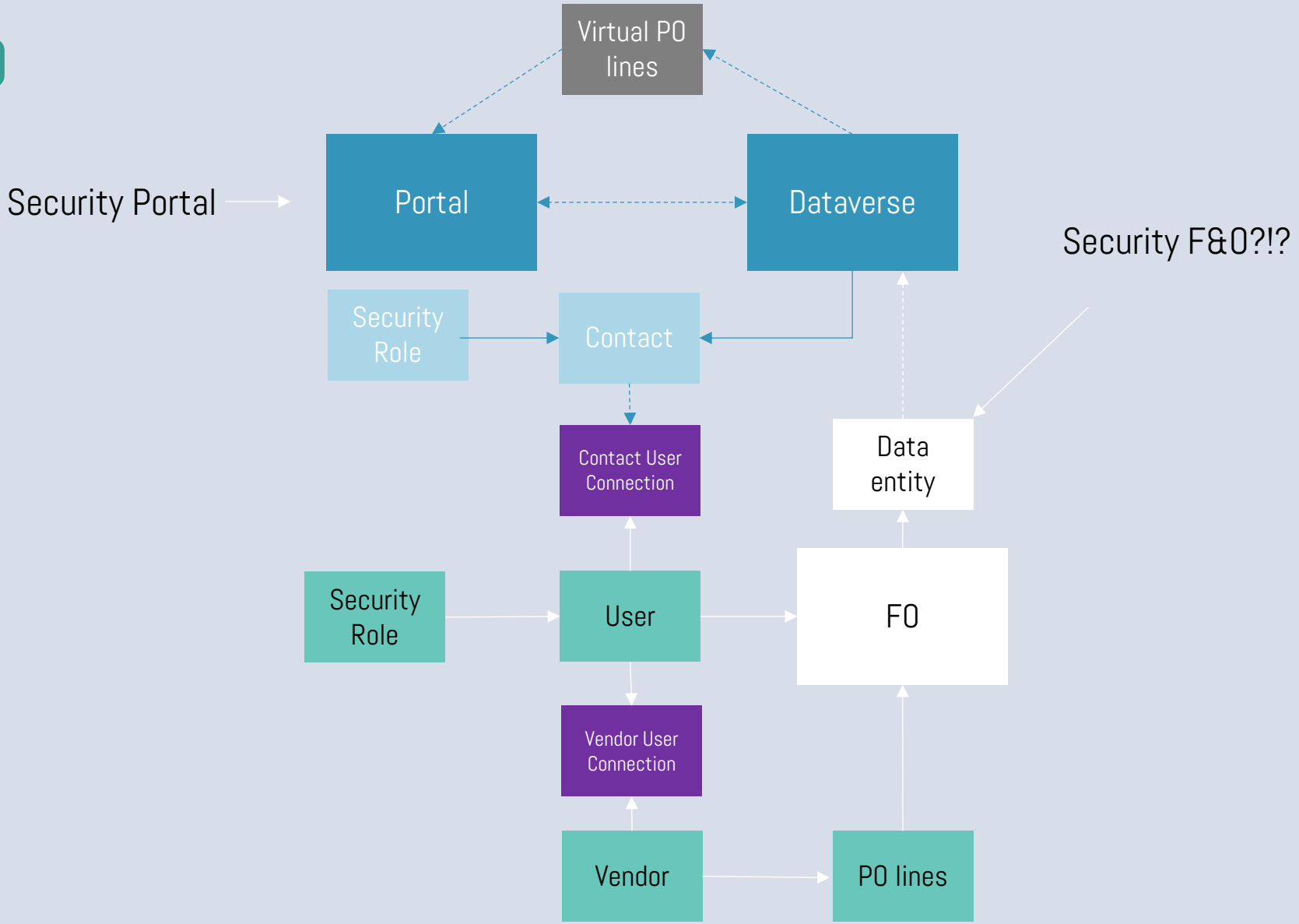
POWER PAGES

Power Pages



https://learn.microsoft.com/en-us/dynamics365/guidance/reference-architectures/finance-operations-dataverse-power-pages

Power Pages with F&O – Virtual Entities



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Do you have any questions?

Feedback

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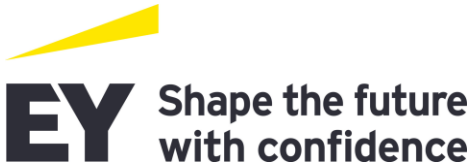
ARROW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THANK YOU!