



nordic.
summit

Bulding Modern F&O solutions
- With Virtual Entities



Ted Ohlsson

FTRSA – CE,
CTO Dynamics 365 Nordics - Capgemini

Bulding Modern F&O solutions



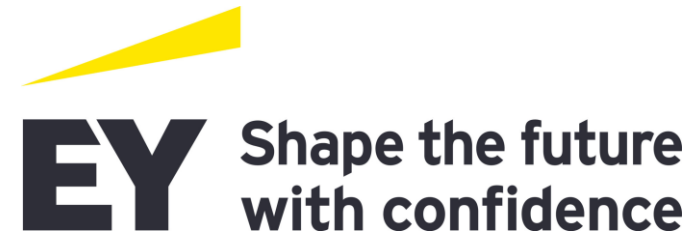
DIAMOND SPONSOR



PLATINUM SPONSOR



GOLD SPONSORS



SILVER SPONSORS



BRONZE SPONSOR



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

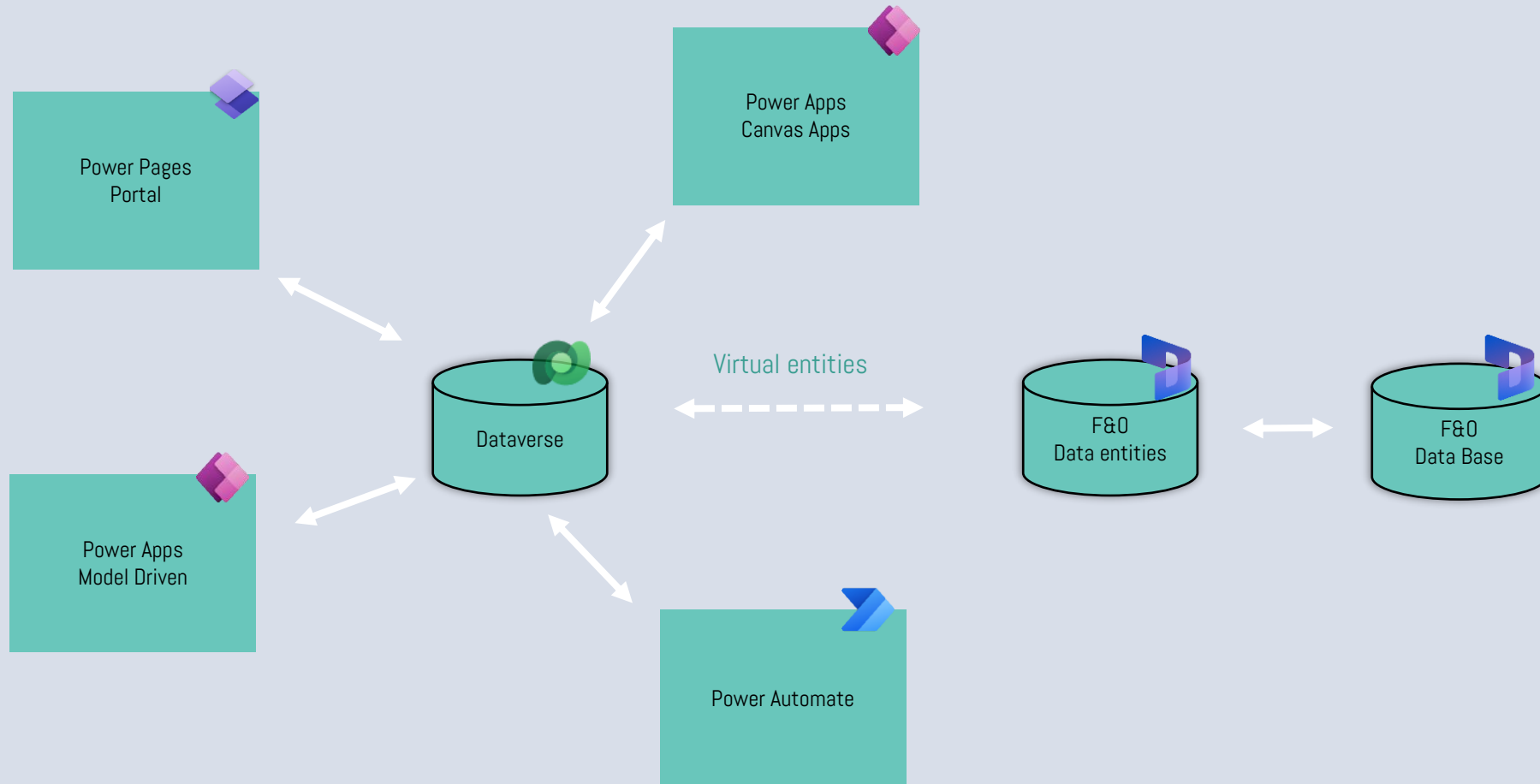


F&O Platform

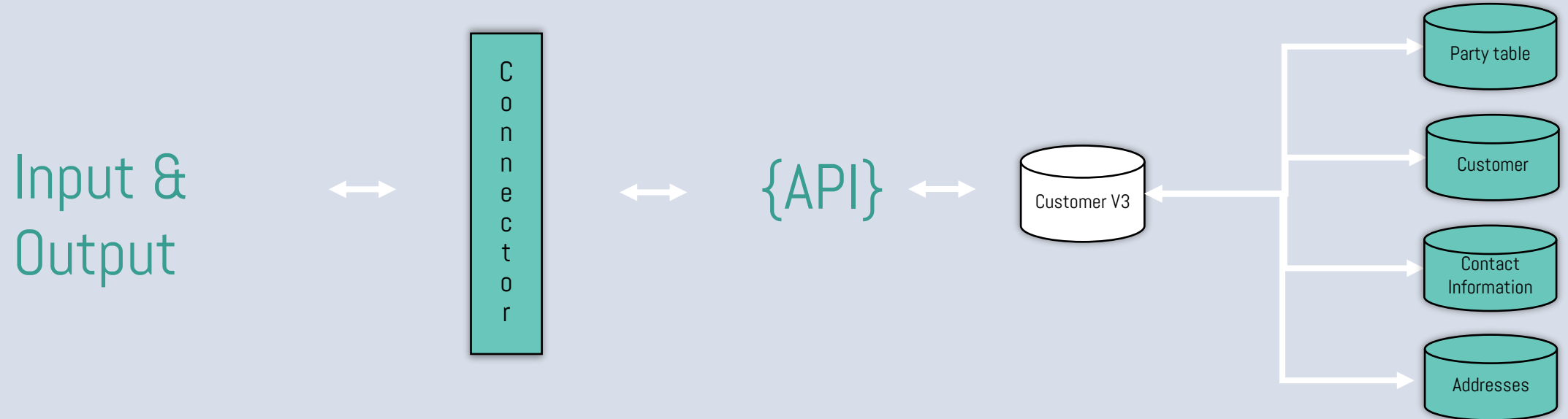
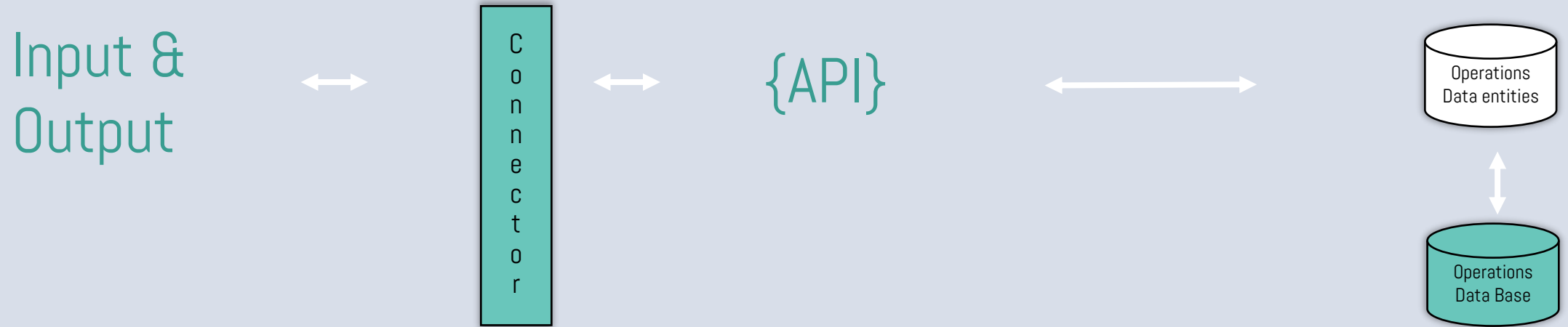
Power Platform



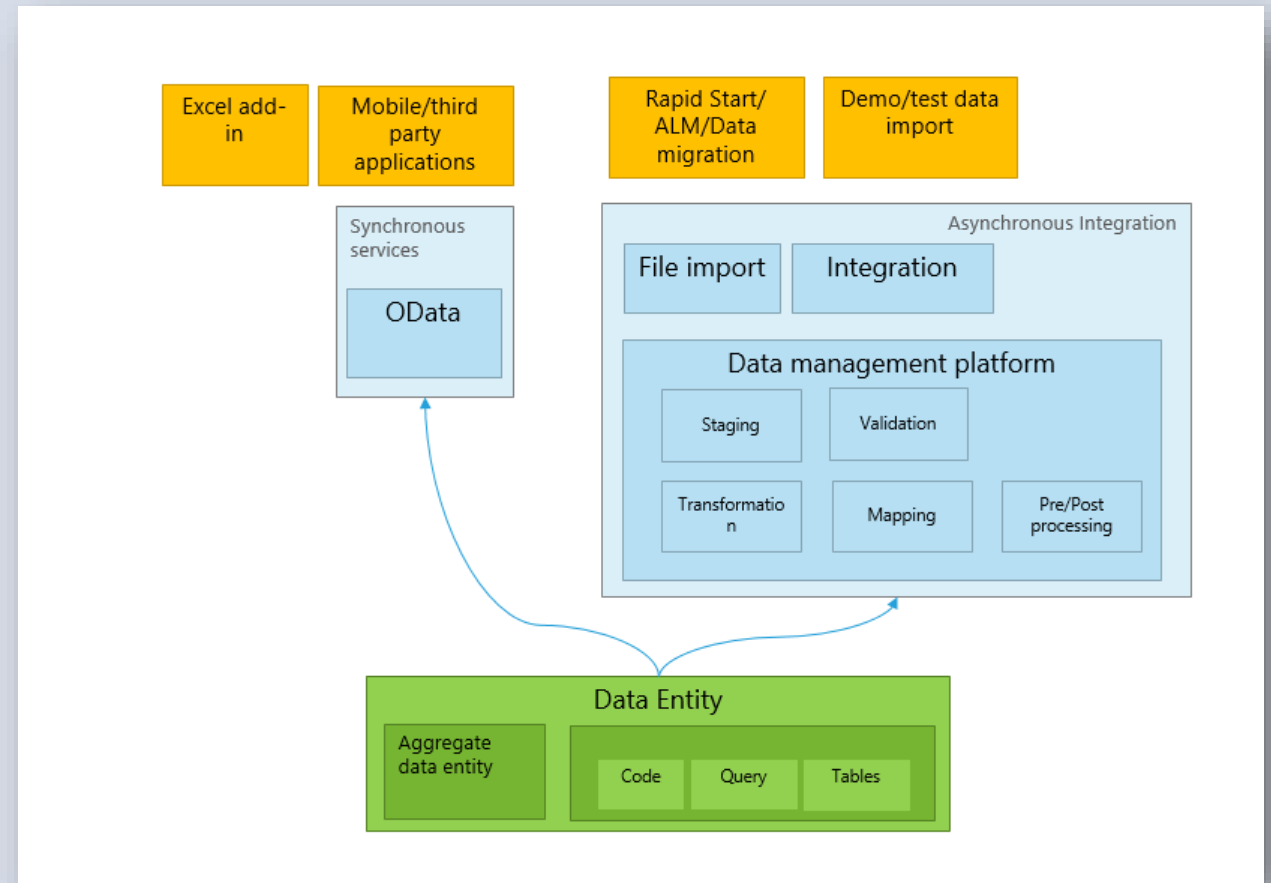
Power Apps with F&O – Virtual Entities



F&O Data Entities



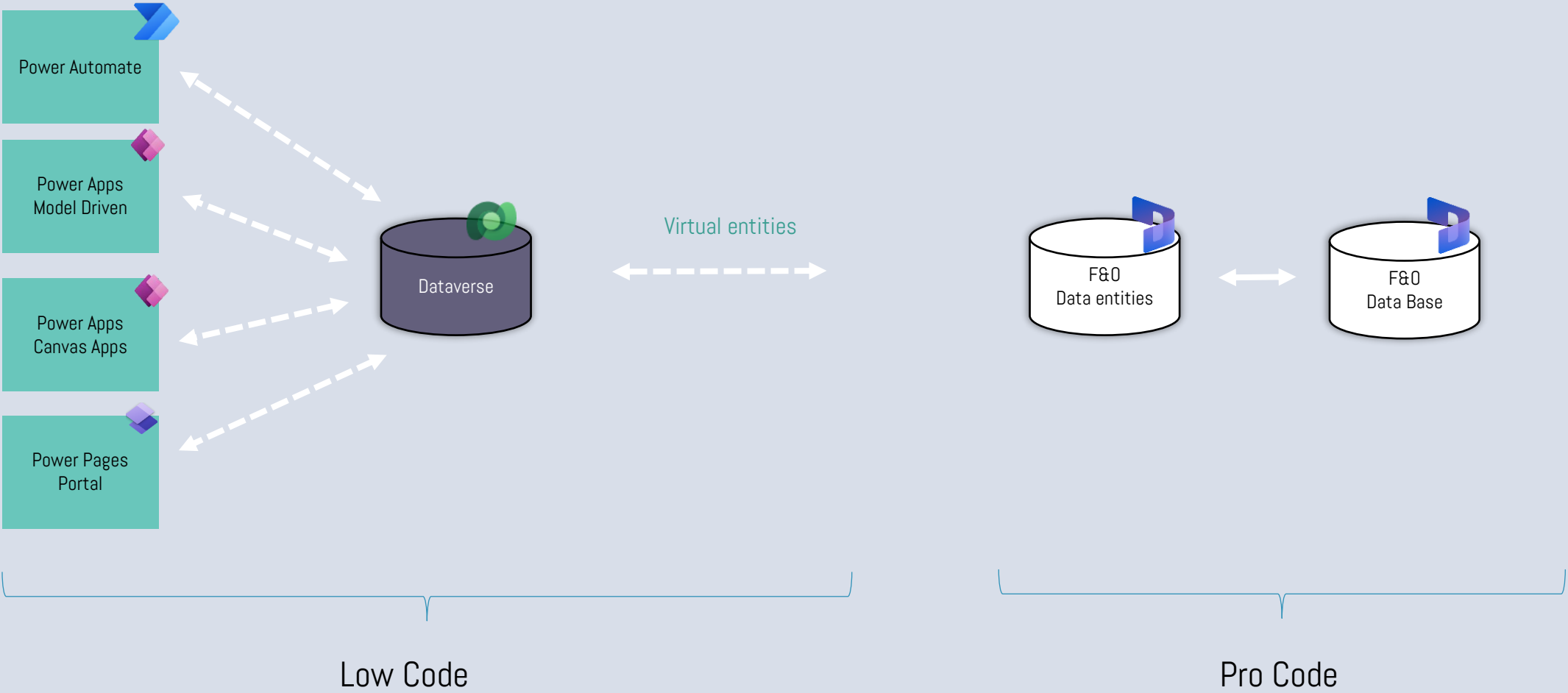
Public vs Private Data entities



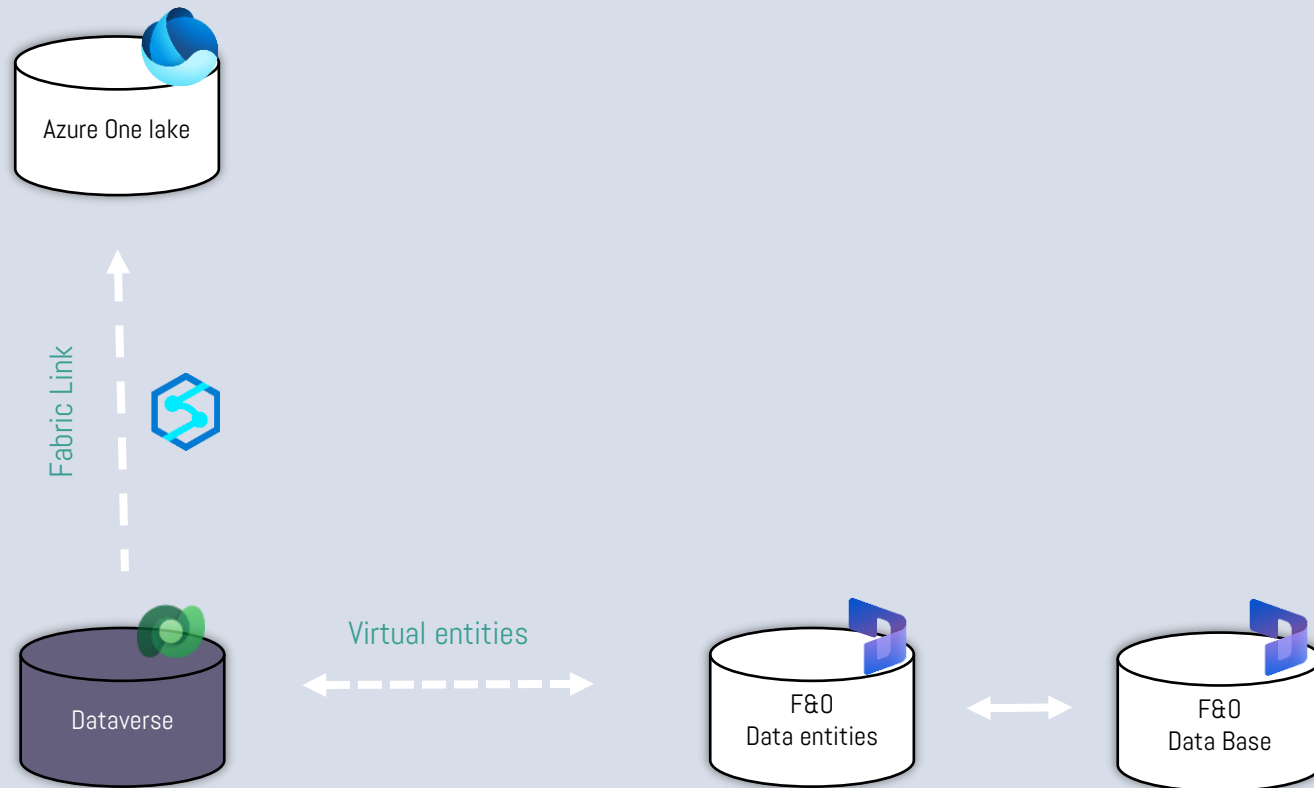
<https://YourFOEnvironment.operations.eu.dynamics.com/Data>

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

Low Code vs Pro Code



Fabric Link



Training Material

- <https://github.com/Teeeeeeeeeeeeed/TrainingMaterial>

(11 "e"s in Ted)

COPILLOT STUDIO



Extra task

Finance and Operations

Welcome, [User Name] 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 X

No tasks to do

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 [Icons]

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

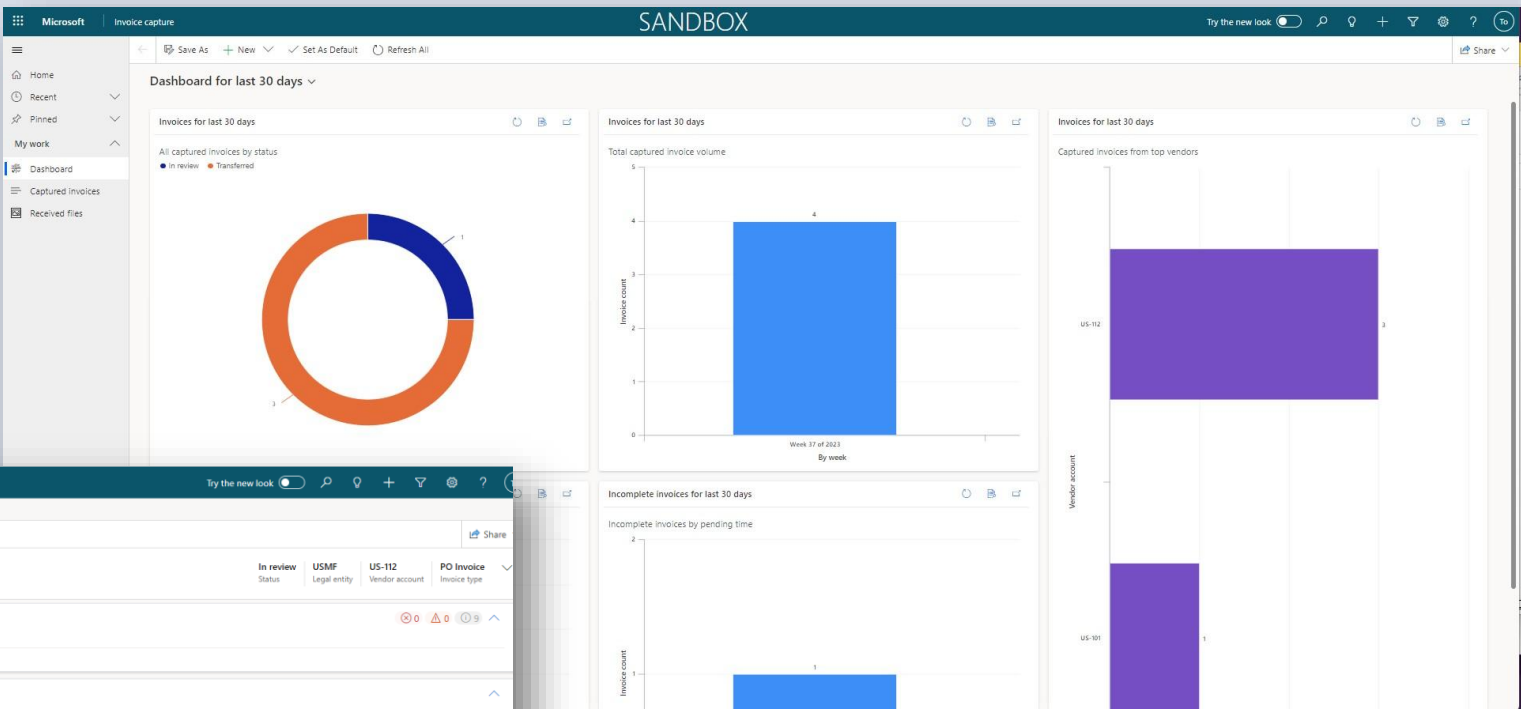
Finance and Operations

Home My Network Post Notifications Jobs

MODEL-DRIVEN APPS



Demo – Invoice Captrue App



Microsoft | Invoice capture | SANDBOX

A new version of this app is available. Please refresh to update.

445551 - Saved
Captured invoice

SAMSUNG
September 7, 2023

INVOICE 445551

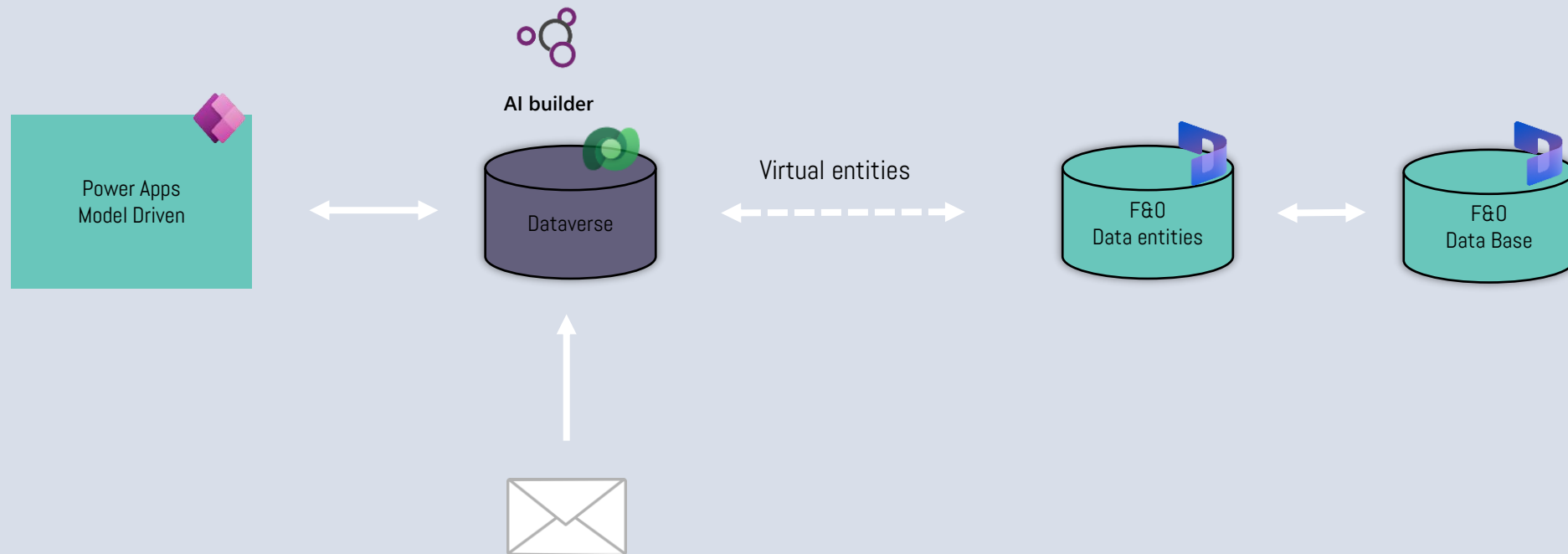
Qty.	Item#	Description	Unit price	Discount	Line total
1	4555	Portable hard drive	300		300

Invoice Header

General

- Invoice number: 445551
- Vendor name: SAMSUNG
- Vendor address: 129, Samseong-ro Yeongtong-gu Gyeonggi-do 16677, Korea
- Purchase order: 00000251
- Buyer name: Contoso Entertainment System USA
- Buyer address: Contoso Entertainment System USA
- Bill-to name: Contoso Entertainment System USA
- Bill-to address: 123 Coffee Street, Redmond
- Invoice date: 9/7/2023
- Due date: 10/8/2023
- Total tax: 0.00

Invoice Capture Infrastructure



Todays landscape

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Power Pages



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F&O Interphase

Automation Tools



Power Virtual Agents



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AI builder

Platforms &
Databases



Dataverse

Virtual entities for F&O

Dual-Write

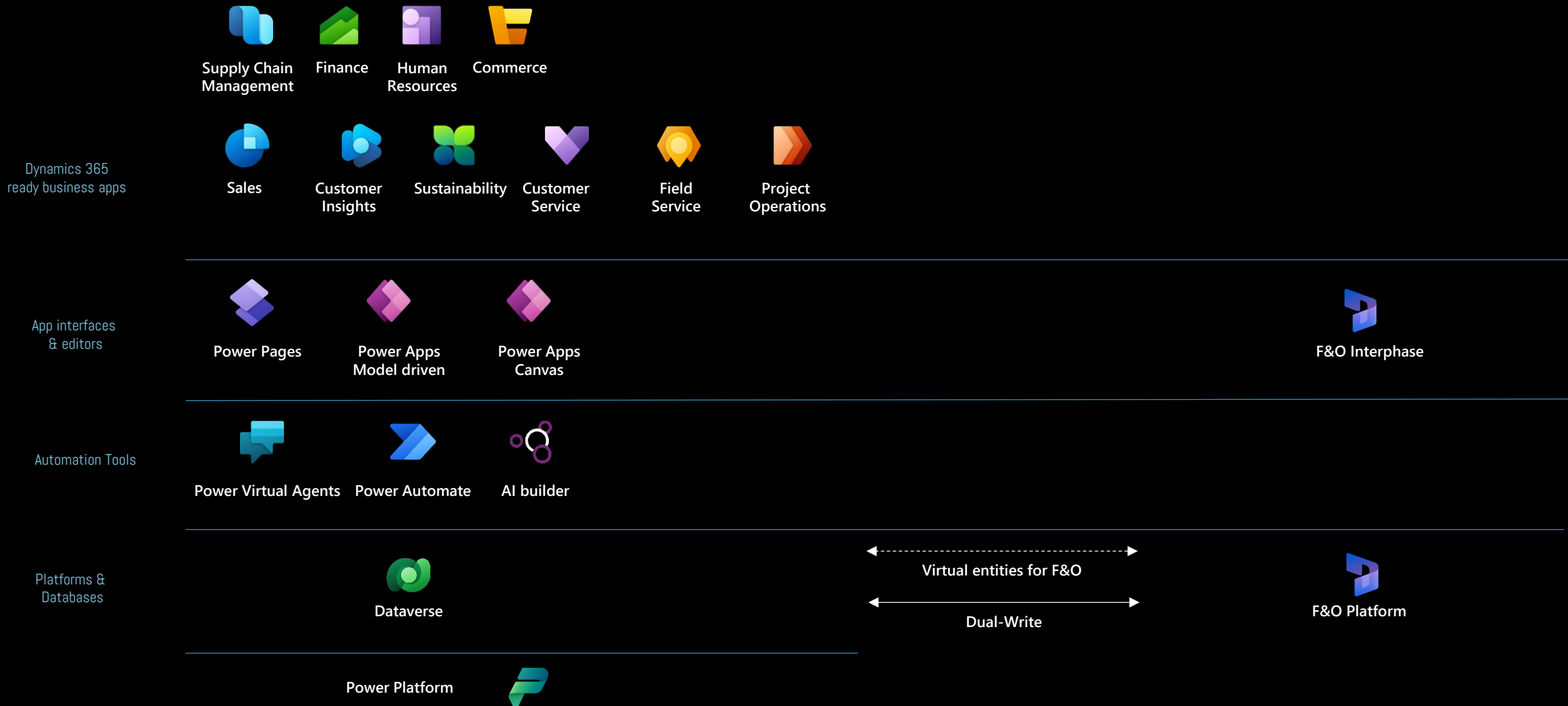


F&O Platform

Power Platform



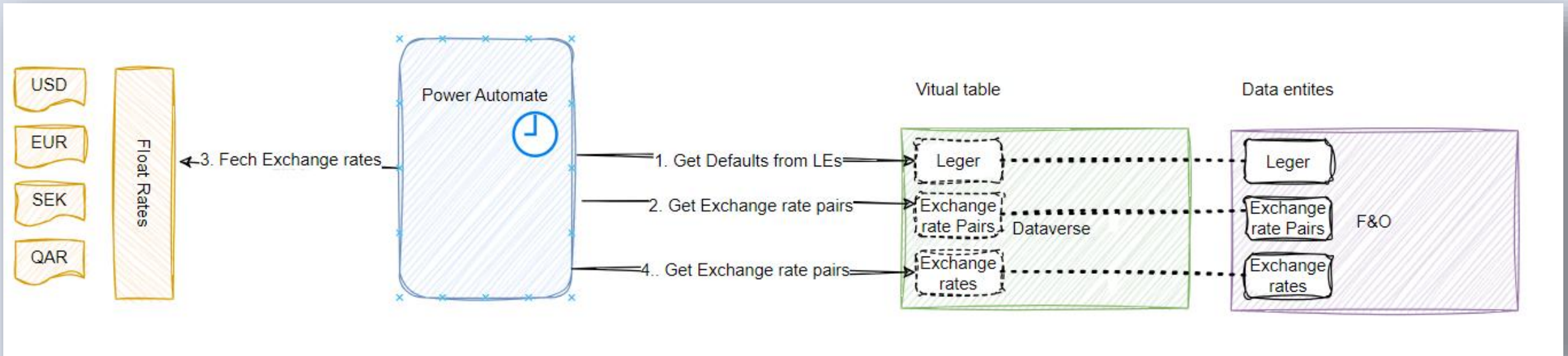
Tomorrows landscape



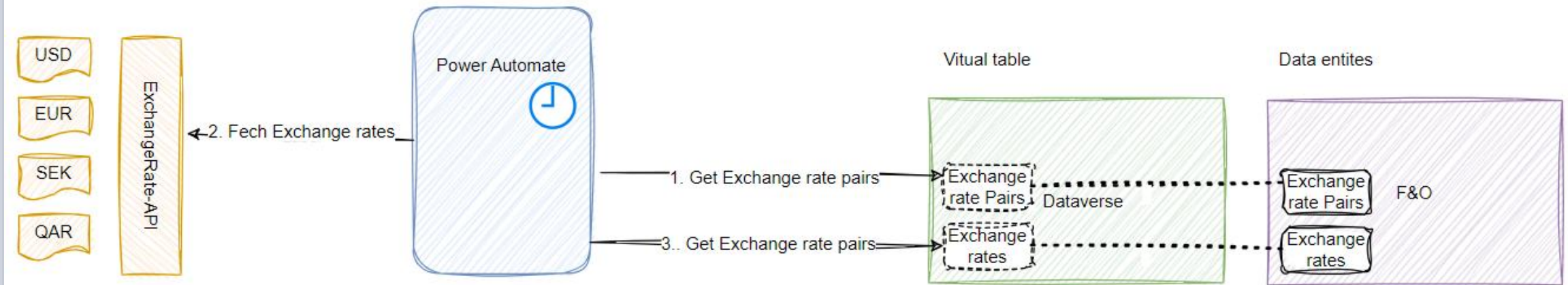
POWER AUTOMATE



Power Automate



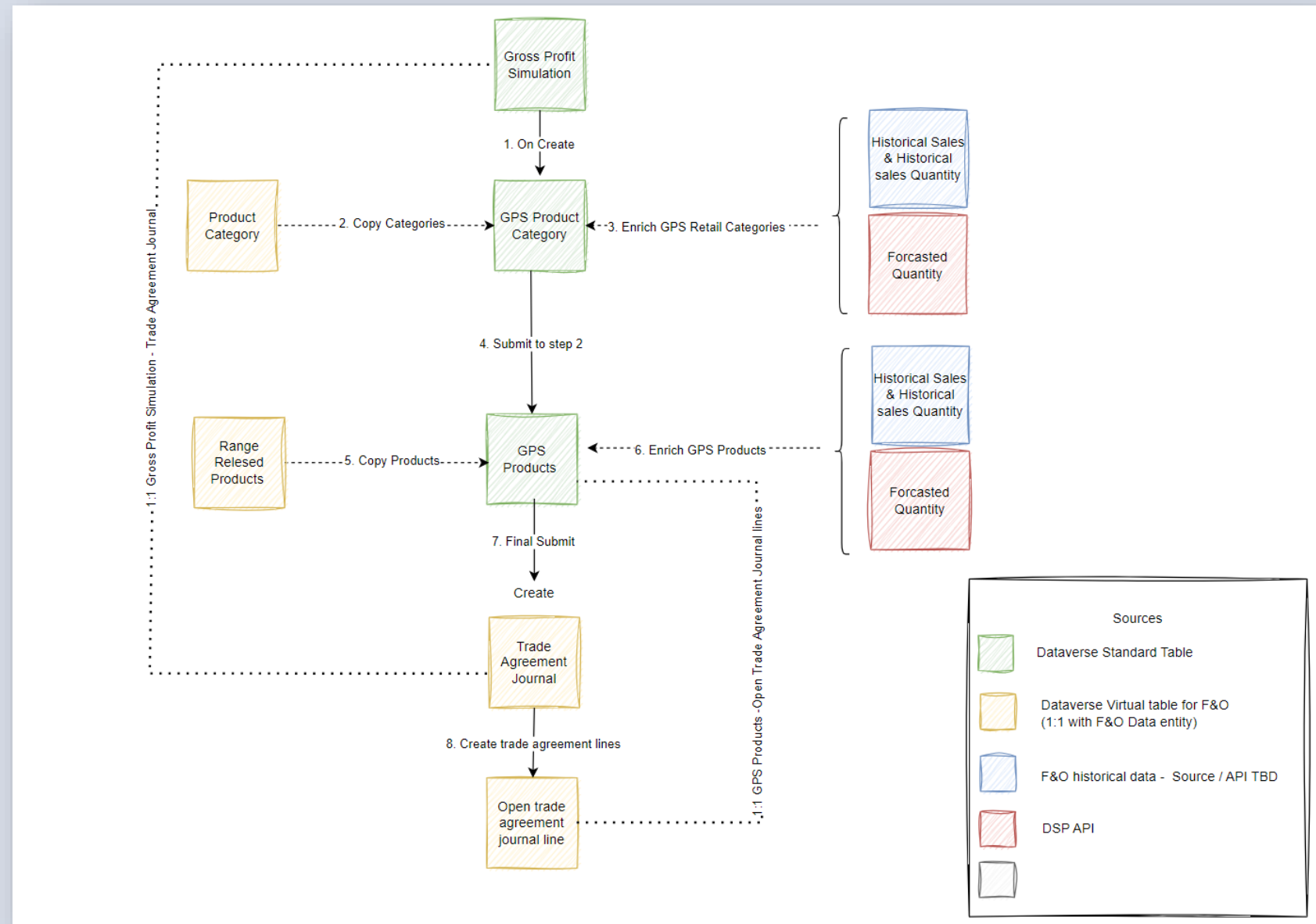
Power Automate



CANVAS APPS



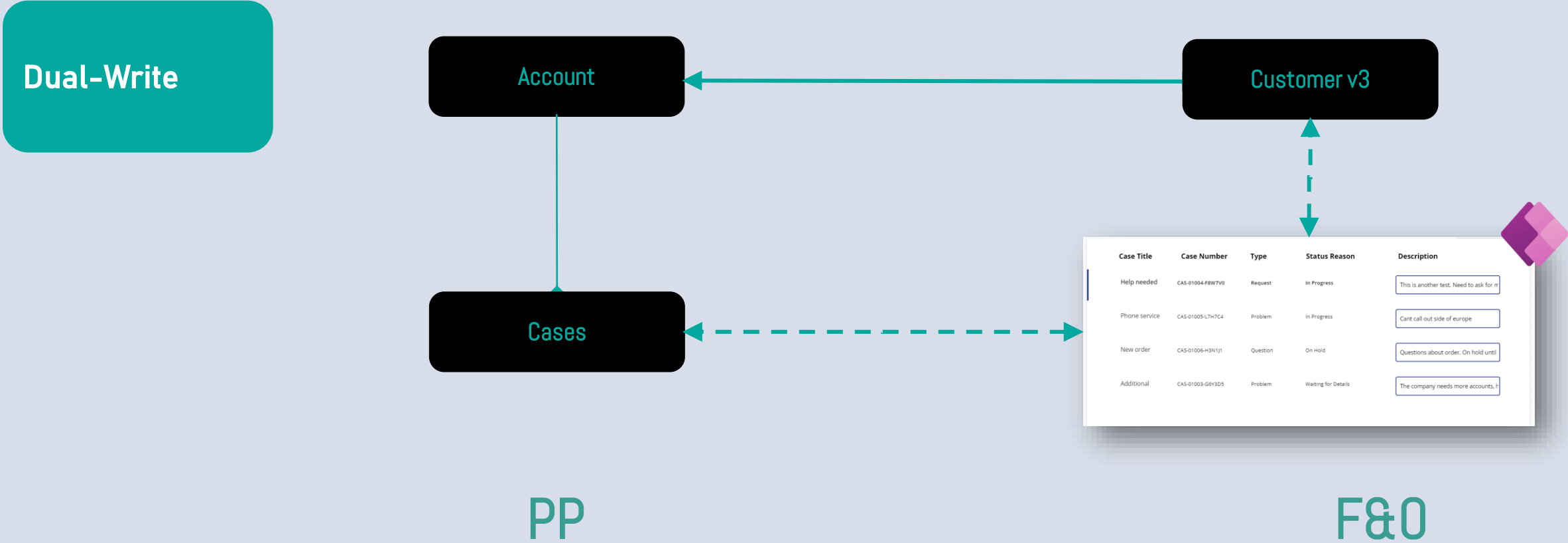
Canvas Apps



CANVAS APPS - EMBEDDED IN F&O



Flow to build



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, ""));
```

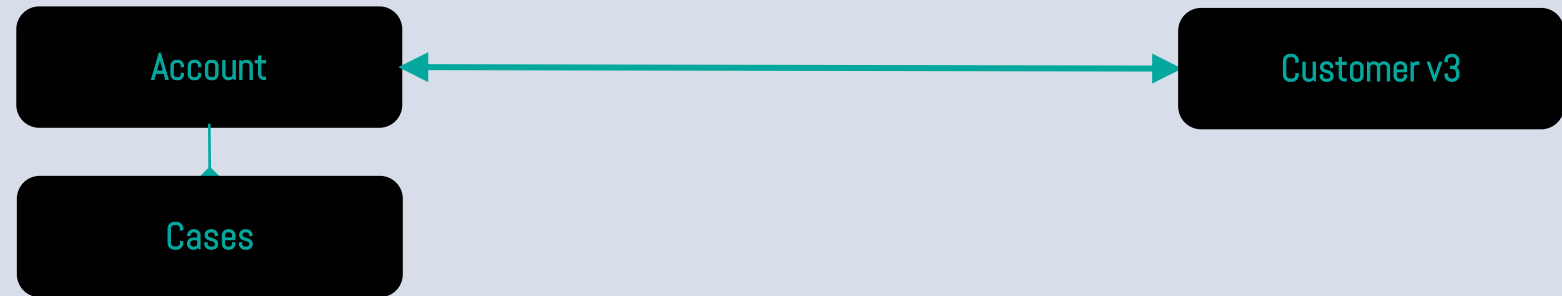
<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/get-started/embed-power-apps>

Parent F&O Data - Child Dataverse Data

PP

F&O

Dual-Write



Virtual Entities
for F&O



Virtual table filter Issue

Power Apps | Payment Plan 2 (Editing)

Environment: capdmo

Back | Undo | Redo | Insert | Add data | Edit fields | Layout | ...

Editing | ...

Items = fx

```
//Filter('Payment Plans', 'Project Number' = "00000001")  
Filter('Payment Plans', Project.'Project ID (mserp_projectid)' = "00000001")
```

Error when trying to retrieve data from the network: Sql error: Generic SQL error. CRM
ErrorCode: -2147204784 Sql ErrorCode: -2146232060 Sql Number: 208
[View Problem \(Alt+F8\)](#) No quick fixes available

Format text | Remove formatting | Find and replace

Filter('Payment Plans', Project.'Project ID (mserp_proj... Data type: Table

Popular

- Text label
- Edit form
- Text input
- Vertical gallery
- Rectangle
- Date picker
- Button
- Input
- Button
- Text input
- Pen input
- Drop down

Data source: Payment Plans

Views: None

Fields: 7 selected

Layout: Image, title, and subtitle

Visible: On

Position: X: 20, Y: 65

Size: Width: 1314, Height: 703

Color: [Color picker]

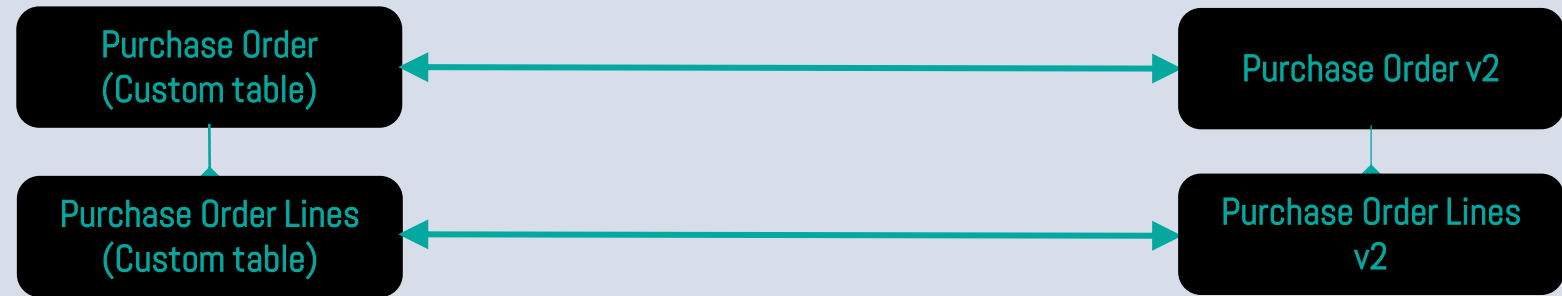
Border: [Border style] 0 [Border color]

Parent and Child F&O Data

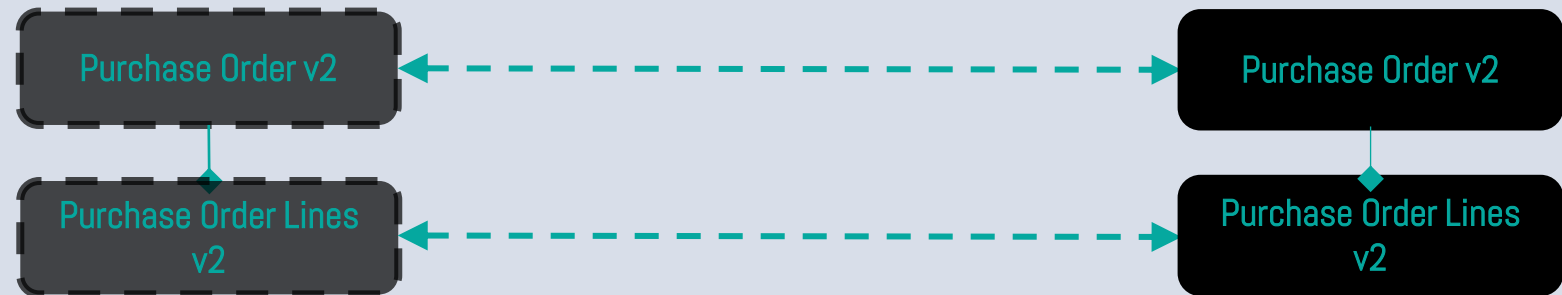
PP

F&O

Dual-Write



Virtual Entities
for F&O



Parant F&O Data - Child any source

PP

F&O

System X

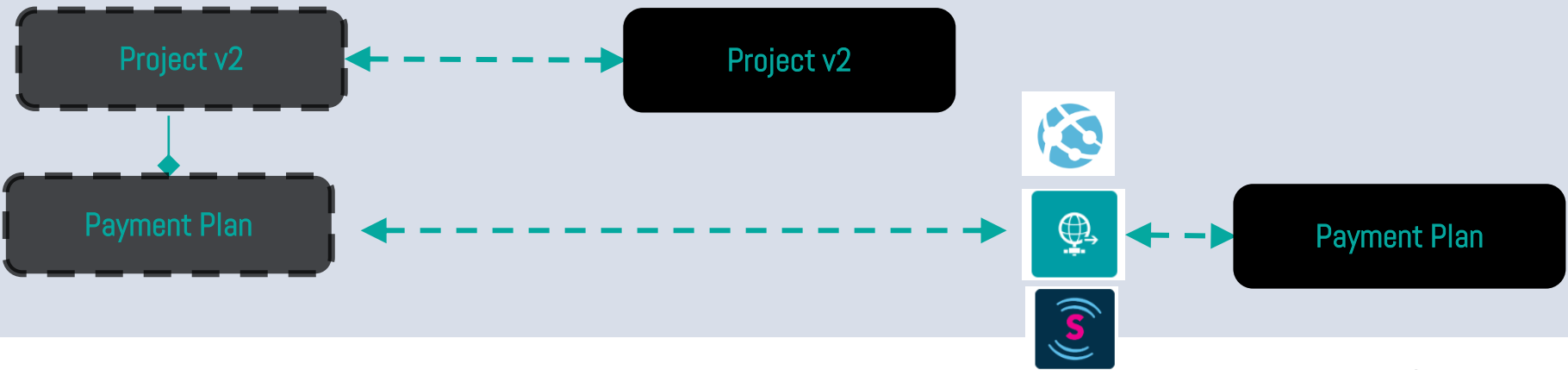
Dual-Write

VT or Connector



Virtual Entities for F&O

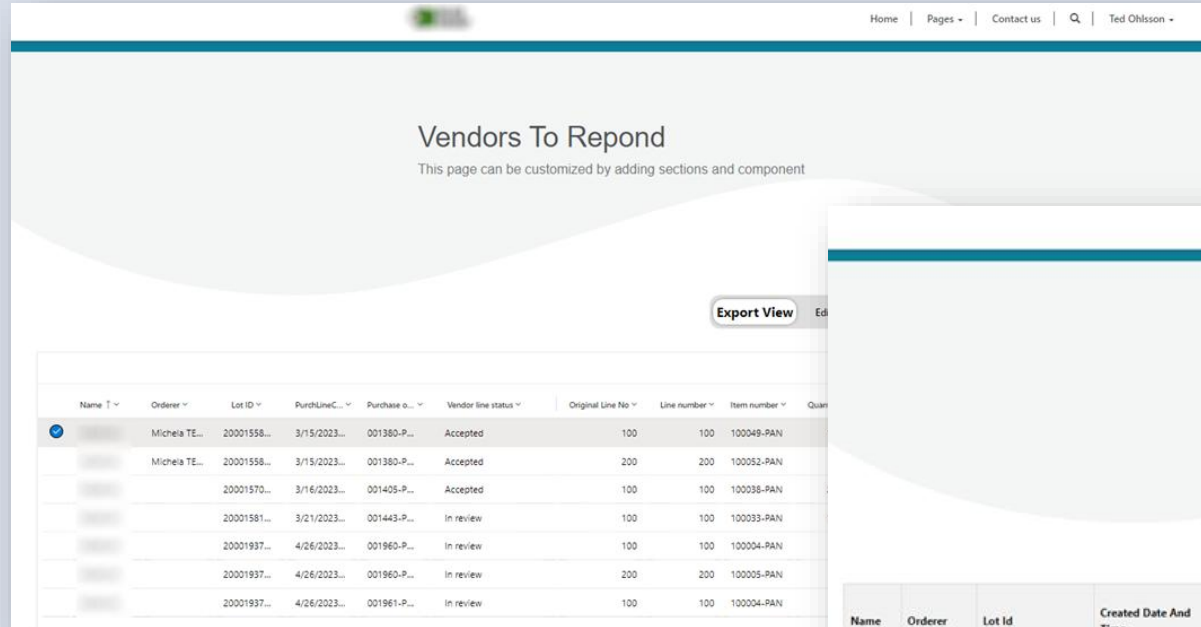
VT or Connector



POWER PAGES



Power Pages



Home

Pages

Contact us

Q

Ted Ohlsson

Vendors To Repond

This page can be customized by adding sections and component

Export View

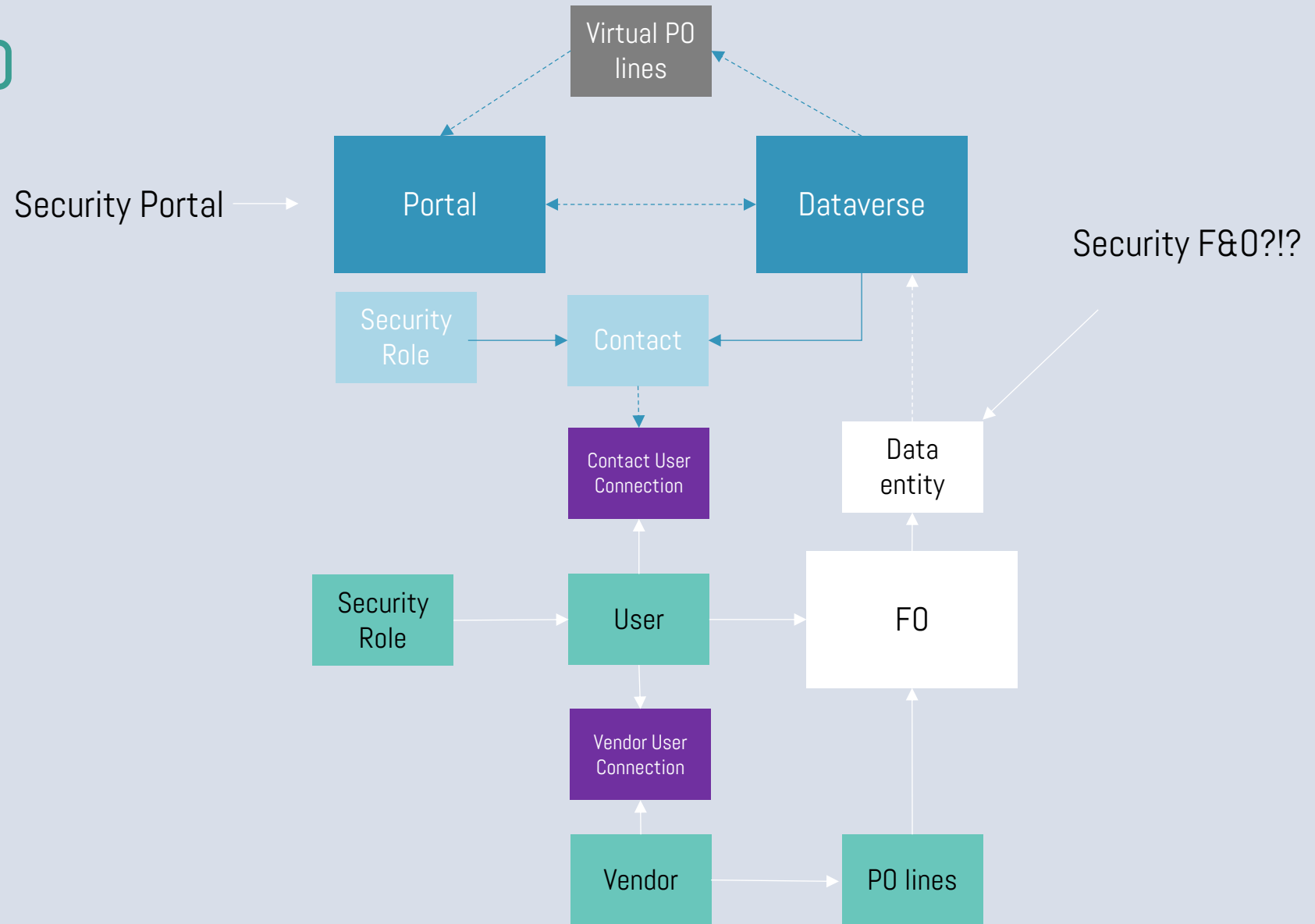
Edit View

Name	Orderer	Lot Id	Created Date And Time	Purchase Order	Vendor Line Status	Original Line No	Line Number	Item Number	Quantity	Unit Price	Unit	Mode Of Delivery	QC Required	Requested Factory Shipping Date	Confirmed Factory Shipping Date	Vendor Proposed Shipping Date	Vendor Change Request Details	Comments	Plant Description
Michela TEST	200015584-L0T-UK01	2023-03-15 8:45 AM	001380-POR-UK01	Accepted	100	100	100049-PAN	1 000.000000	1	PCS	DSV-Sea	No	2023-04-03	2023-04-03					
Michela TEST	200015585-L0T-UK01	2023-03-15 8:45 AM	001380-POR-UK01	Accepted	200	200	100052-PAN	500	15	PCS	DSV-Sea	No	2023-03-22	2023-03-31					
	200015707-L0T-UK01	2023-03-16 2:37 PM	001405-POR-UK01	Accepted	100	100	100038-PAN	2 002.000000	0	PCS	DHL-Econ	No	2023-04-19	2023-04-19					
	200015816-L0T-UK01	2023-03-21 12:44 PM	001443-POR-UK01	In review	100	100	100033-PAN	1 000.000000	1	PCS	DSV-Sea	No	2023-04-07						
	200019370-L0T-UK01	2023-04-26 8:59 AM	001960-POR-UK01	In review	100	100	100004-PAN	10	100	PCS	DSV-Sea	No	2023-05-12						Tianjin Printronics Circuit
	200019371-L0T-UK01	2023-04-26 9:00 AM	001960-POR-UK01	In review	200	200	100005-PAN	10	100	PCS	DSV-Sea	No	2023-05-12						TPCC Tianjin
	200019377-L0T-UK01	2023-04-26 9:02 AM	001961-POR-UK01	In review	100	100	100004-PAN	10	100	PCS	DSV-Sea	No	2023-05-26						Tianjin Printronics Circuit

<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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take a moment to rate it in the app.





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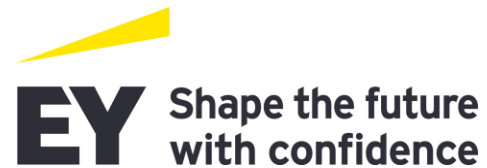
Do you have any questions?



Feedback



resco



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CTO Dynamics 365 Nordics - Capgemini



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<https://www.linkedin.com/in/tedohlsson/>



<https://medium.com/@ted.ohlsson>





THANK YOU!