

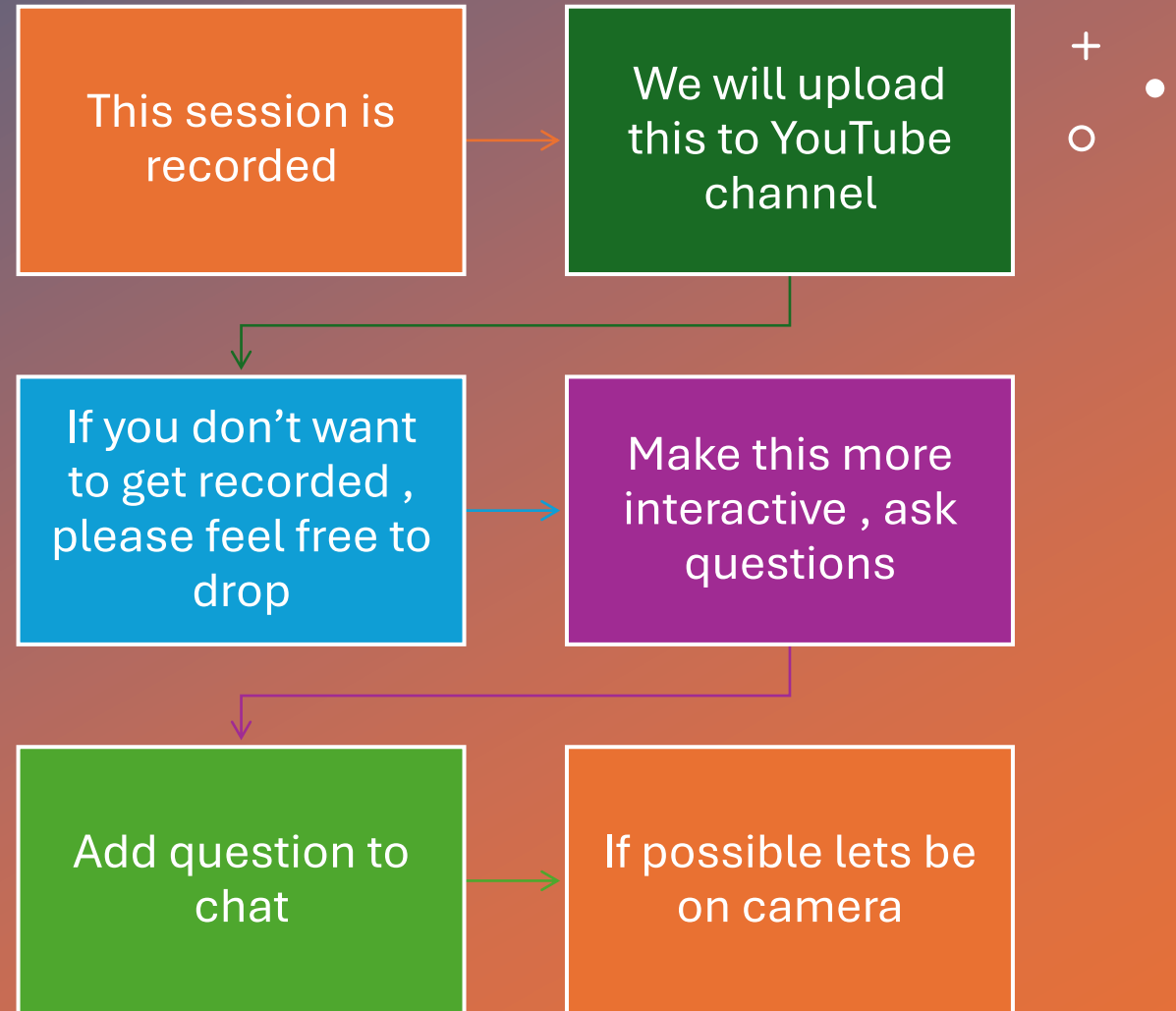
# Microsoft Dynamics 365 ERP Mentorship & AMA Initiative

Session-2: 03-May-2025

## Dynamics Class.



# Some Housekeeping



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# Disclaimer

The views and opinions shared in this session are my personal insights and do not represent the views of my employer or any other entity. This session is solely for knowledge sharing and mentorship purposes.

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# Agenda

- Introduction and Recap
- Expert topic
- Topic of the Day
- Important Announcement
- Pre-submitted question
- Q&A

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# About Me

Saurabh Bharti



- Fasttrack Senior Solution Architect at Microsoft
- Over 12 Years of experience in ERP space
- Former MVP
- YouTube: <http://www.youtube.com/@DynamicsClass>
- LinkedIn: [linkedin.com/in/saurabhbharati](https://www.linkedin.com/in/saurabhbharati)
- Blog Site: [exploredynamics365.home.blog](http://exploredynamics365.home.blog)

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# Recap

- About initiative
- Topic of the day : History of Dynamics and role of copilot in coming days
- Open AMA

**YouTube Playlist**

# Expert Topic

## Introduction Copilot Studio with Microsoft Dynamics 365

### Your Expert – Subhashish Chakraborty

Subhashish is a D365 Finance & Operations Solution Architect & MVP with over 18 years of experience in the Microsoft ecosystem. He specializes in Azure, Power Platform, Copilot & Azure AI .

He is also a global speaker, author, and a respected community voice, known for turning deep technical knowledge into practical, real-world value. You're in for a powerful learning session!

# Copilot: a short refresher

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Copilot is an AI-powered conversational assistant that Microsoft has developed, acting as a tool for users to boost productivity and streamline workflows by offering contextual assistance, automating tasks, and analyzing data.

It's essentially a chat interface where users can search for information, generate text, and even create images. Copilot can be accessed through various Microsoft applications and services, including Windows, Microsoft 365, and GitHub.





# Copilot: your Microsoft assistant

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- **AI-Powered Assistant:**

Copilot leverages artificial intelligence to understand user prompts and provide relevant information, suggestions, and actions.

- **Productivity Enhancement:**

It helps users automate repetitive tasks, manage information, and create content more efficiently, ultimately freeing up time for more strategic work.

- **Versatile Capabilities:**

Copilot can be used for various purposes, including writing emails, summarizing documents, generating code, and even creating images.

- **Integration with Microsoft Ecosystem:**

Copilot is designed to work seamlessly with other Microsoft products, making it a valuable tool for individuals and businesses using Microsoft applications.

- **Multiple Copilots:**

There are different versions of Copilot, including Microsoft 365 Copilot for work, Copilot on Windows for general use, and GitHub Copilot for coding.



# Copilot Studio

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- Microsoft Copilot Studio is a conversational AI platform that allows users to build and customize AI agents (also known as copilots) for a variety of purposes, including internal use within an organization or external use for customer interactions.
- It's a graphical, low-code tool that enables users to create agents with natural language processing capabilities and integrate them with other data sources, including Microsoft 365 apps and third-party platforms.
- Make your Copilot come alive with your target platform by leveraging Copilot Studio, with vivid usages of Topics, conversations and Agents.

# Components of Copilot Studio

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- Agents
- Topics
- Entities
- Actions
- Knowledge Bases
- Natural language processing
- Adaptive cards
- Teams integration
- Power platform integration



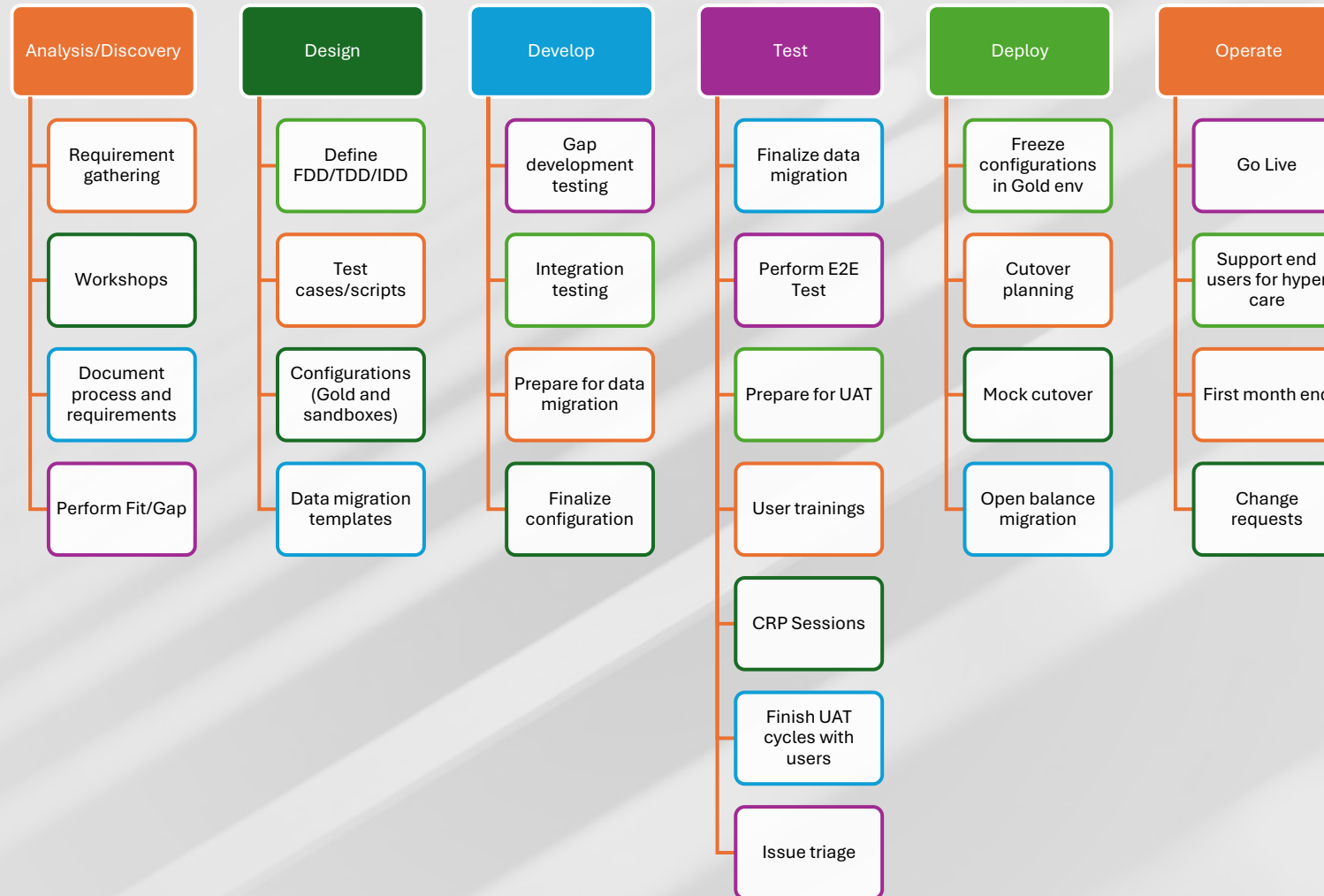
# Demo

- Copilot Studio topics and agents
- Copilot Studio to talk to D365F&O inventory
- Copilot Studio to create customers in D365F&O, and address validations
- Copilot Studio for sales orders creation
- Copilot Studio to get details of Purchase orders
- Copilot Studio with adaptive cards example

# Today's Topic

**A Day in Life of  
Functional Consultant**

# Let's look this with project life cycle



Sign off from customers/Business process owners

Prepare all workshop templates/Communication with stakeholders

Required Environments / Use of Azure DevOps/PowerPoints/Visio/Excel

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# Key Features to explore

- Microsoft released 10.0.44 preview version
- Many features but key one's are Agents to explore
  - Account reconciliation
  - Supplier communication (Tech Talk)

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# Important Announcement

- We are planning to start a functional training batch end to end covering Finance and SCM modules
- Objective is to cover key features and processes
- Every Saturday –Sunday : 1 Hour session
- Trainers: Volunteers from community
- Recordings will be shared only with people who join the Live Session
- Now how many of us are interested ?
- If we go with this, Want your support to spread this initiative to have more participation from your network, share more !

**Register for Training**



# Pre- Submitted Questions

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# Questions

- How can I start learning D365 F&O as a beginner without real projects or being in a consulting company?
- How can I start a career in Dynamics 365 with 6+ years of experience in tech support?
- What's the best way to transition into a Functional Consultant role?

[Learning Path to become Functional Consultant](#)

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# Questions

- How can I improve and effectively use Copilot for real-life business scenarios?
- What courses are available for learning AI in ERP?
- Copilot Use Case in Finance
- Microsoft will provide sponsorship after receiving an offer from the company while residing in another country?

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# Questions

- How to prepare for a D365 SCM Functional Consultant interview and which modules to focus on?
- How can a functional consultant transition from D365 CE to F&O, and what steps should be followed?
- How can I keep up with the frequent changes in D365 every day?

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# Questions

- With 13 years of experience in project and production management and a few months of practice in Power Platform and D365 CRM, is it possible to transition to a D365 CRM Functional Consultant role?
- How do Power Platform, Fabric replacing PBI, and Dataverse in D365 connect with each other as LCS is deprecated?

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# Questions

- Best resource to start learning D365 for preparing for the MB-920 exam?
- How do Power Platform, Fabric replacing PBI, and Dataverse in D365 connect with each other as LCD is deprecated?
- How can I switch from Oracle ERP to Dynamics ERP, and which modules are in high demand in the US?

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# Questions

- Do you have any predefined templates for the implementation as part of FastTrack approach ?
- How to migrate TFVC to GIT



Mike is yours

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# Thank You!



**Next Session Date:**  
**7<sup>th</sup> June 2025**

**Submit Question and feedback**