



COMMUNITY SUMMIT

**FINANCE &
SUPPLY CHAIN/F&O**

**Orlando, FL
October 19–23, 2025**



The largest Microsoft Business Applications user conference on the planet.



Extending Copilot in F&O with X++ and Copilot Studio

| Speakers



- Adrià Ariste Santacreu
- Senior developer & writer @ DOCENTRIC
- Microsoft MVP since 2020

| Agenda



- What's Copilot Studio?
- Copilots in F&O
- Architecture
- Extensibility
- Demo



What's Copilot Studio?

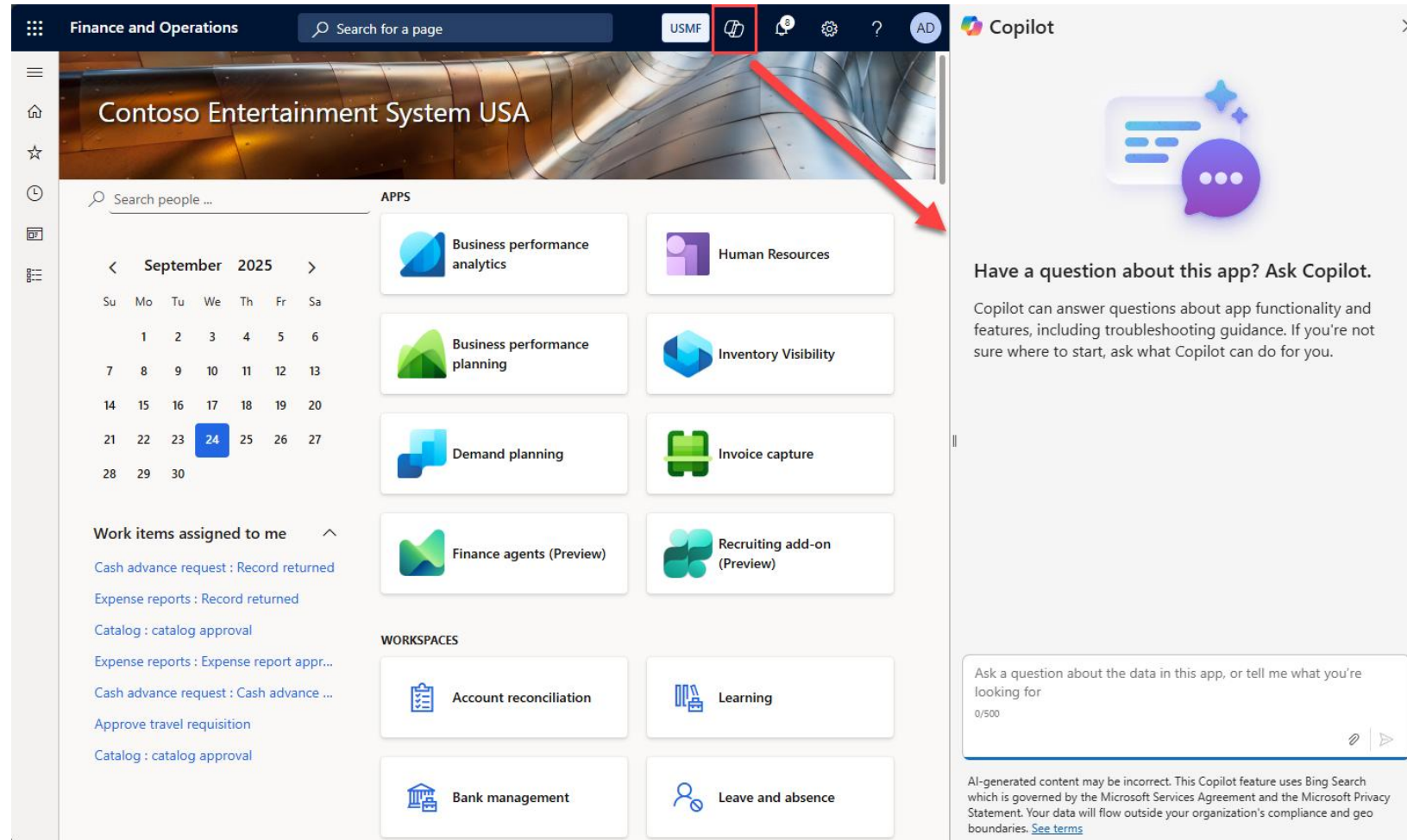
What's Copilot Studio?

- Low/No-code platform to build agents.
- Build new agents.
- Extend existing agents.
- Connectors to other systems.
- Flow-like designer.

Copilots in F&O

Copilots in F&O

Sidcar



The screenshot displays the Dynamics 365 Finance and Operations (F&O) user interface. The top navigation bar includes the "Finance and Operations" title, a search bar, and a "USMF" tab. A red box highlights the "Copilot" icon in the top right corner, with a red arrow pointing to the Copilot sidebar on the right.

The main content area shows the "Contoso Entertainment System USA" header. Below this, there is a "Search people ..." bar and a calendar for September 2025. The calendar shows the 24th as the current date. To the right of the calendar, there are two columns of app tiles under the heading "APPS".

The "APPS" section includes the following tiles:

- Business performance analytics
- Human Resources
- Business performance planning
- Inventory Visibility
- Demand planning
- Invoice capture
- Finance agents (Preview)
- Recruiting add-on (Preview)

Below the "APPS" section, there is a "Work items assigned to me" section with a list of tasks:

- Cash advance request : Record returned
- Expense reports : Record returned
- Catalog : catalog approval
- Expense reports : Expense report apr...
- Cash advance request : Cash advance ...
- Approve travel requisition
- Catalog : catalog approval

At the bottom of the main content area, there is a "WORKSPACES" section with the following tiles:

- Account reconciliation
- Learning
- Bank management
- Leave and absence

The Copilot sidebar on the right features a "Have a question about this app? Ask Copilot." prompt. Below this, it states: "Copilot can answer questions about app functionality and features, including troubleshooting guidance. If you're not sure where to start, ask what Copilot can do for you." At the bottom of the sidebar, there is a text input field with the placeholder "Ask a question about the data in this app, or tell me what you're looking for" and a character count "0/500".

Copilots in F&O



Embedded

The screenshot shows the Dynamics 365 Finance and Operations (F&O) interface. At the top, the header bar displays "Finance and Operations", a search bar, and the user "USMF | Contoso Entertainment System USA". The main navigation pane on the left includes icons for home, star, clock, and a list. The top navigation bar contains tabs for "Vendor", "Procurement", "Invoice", "General" (selected), and "Options". Below these tabs is a grid of activity cards: "Activities" (with a dropdown), "Set up" (with sub-items: Business classifications, Responsibilities, Intercompany, Print management, Categories), "New" (with "Create case"), "Accounts" (with "Cases", "Transaction log", "Prospect", "Knowledge articles"), "Market" (with "Campaign", "Call list", "Mailings"), and "Statistics" (with "Period statistics", "Prospect"). The main content area is titled "1001 : Acme Office Supplies". Below the title is a "Summary by Copilot" section, which is highlighted with a red border. This section contains two panels: "Status" and "Insights". The "Status" panel provides a summary of the vendor's financial activity: "The total number of posted invoices is 0, with 0 posted vendor payments. There are 2 purchase orders with an open status, 0 received, and 2 invoiced. No purchase agreements are on hold or effective, and there are no active rebate agreements or deals. Both vendor and accounting currencies are USD. The data range covers the last one year." The "Insights" panel states: "The vendor overdue invoice count is 0, with a pending vendor invoice total of 0. There are 4 delayed product receipts recorded within the data range of the last one year." Below the summary is a "General" section with a "Change party association" link. It contains a table with fields for "IDENTIFICATION" (Vendor account: 1001, Type: Organization, Payment priority), "ORGANIZATION DETAILS" (Search name: Acme Office Supplies, Group: 40, Number of employees), "OTHER INFORMATION" (ABC code: None, DUNS number), and "VENDOR COLLABORATION" (Phonetic name, Language: en-us, Collaboration activation). A status bar at the bottom right of the "General" section shows "40 | Not Active".

Copilots in F&O



External

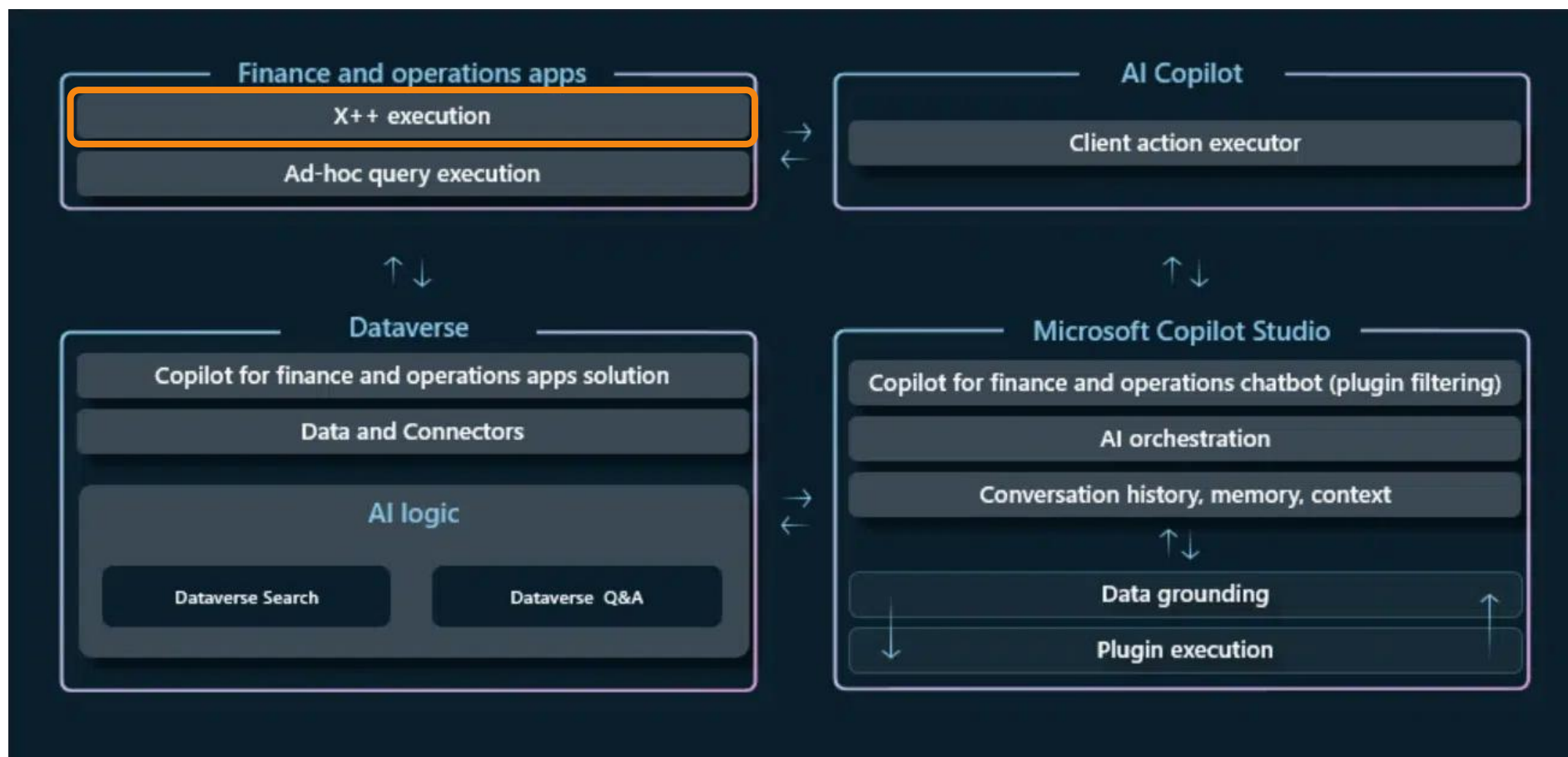
The screenshot shows the Microsoft Teams interface. On the left is a sidebar with navigation icons for Activity, Chat, Teams, Calendar, Calls, Files, and Apps. The main area is split into two panes. The left pane, titled "Chat", shows a list of recent conversations. The right pane, titled "Copilot", shows a chat window with a search bar and a "What can I help you with now?" prompt. Below the prompt are three buttons: "Summarize", "Create", and "Ask". The "Ask" button is highlighted with a "BETA" label. Below these buttons is a text input field with the prompt "Who is (person)?". The chat history shows a message from Copilot at 1:02 PM: "This is what I have on the latest on the Brand Marketing Campaign launch. There was an email sent by Alex on May 25th, 2023 saying that there were some changes that needed to be made to the messaging, and now the launch has been pushed back by a week. 1 The Brand Marketing Campaign Timeline was edited by Alex on May 25th, 2023 as well. 2". Below the message are two references: "1 Brand Marketing Campaign Update" and "2 Brand Marketing Campaign Timeline". At the bottom of the chat window is a text input field with the prompt "Ask a work question or use / to reference a file or person".

Architecture

Architecture



Architecture



Extensibility

Client plugins

- Actions linked to the interface (forms).
- The form is the context.

✓ Global actions

No specific context.

Run on any form.

[SysCopilotChatGlobalAction]

✓ Form actions

Only apply in defined forms.

[Export] and [ExportMetadata]

✓ Runtime actions

Available where defined.

SysCopilotChatAction::addToCopilotRuntimeActions

SysCopilotChatAction::removeFromCopilotRuntimeActions

AI tools (in preview)

- Actions with no context.
- Ex.: return the available quantity of an item.

✓ Data contract implementing ICustomAPI

Creates an API in Dataverse.

MCP server

- Open standard: Model Context Protocol.
- Anthropic.

✓ Copilot Studio

Add as tool.

✓ Predefined

13 available tools.

✓ Not extensible

Yet?

Demo

Suggested Resources

<https://ariste.info/events/csna25>

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**Thank you for
Attending!**

Questions?



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