



Extendiendo Copilot en F&O con X++ y Copilot Studio

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SPEAKER

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Technical Architect/Developer Dynamics 365 F&O @ Docentric



aaariste



ariste.info

Agenda

1

Qué es CS y Copilots en F&O

2

Arquitectura

3

Extensibilidad

4

Demo

¿Qué es

Copilot Studio?

¿Qué es Copilot Studio?

- Plataforma low-code para creación de agentes.
- Evolución de Power Virtual Agents (PVA).
- Conectores a distintos sistemas.
- Flujos.

Power Automate para bots.

Copilots

en F&O

Copilots en F&O

Sidecar

The screenshot displays the Microsoft 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 Sidecar panel on the right. The main area shows the 'Contoso Entertainment System USA' header, a calendar for September 2025, and a list of work items assigned to the user. The 'APPS' section contains tiles for Business performance analytics, Human Resources, Business performance planning, Inventory Visibility, Demand planning, Invoice capture, Finance agents (Preview), and Recruiting add-on (Preview). The 'WORKSPACES' section includes Account reconciliation, Learning, Bank management, and Leave and absence. The Copilot Sidecar panel on the right features a chat interface with the text: 'Have a question about this app? Ask Copilot. 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.' Below this is a text input field with a character count '0/500' and a 'Send' button. A disclaimer at the bottom of the sidecar states: '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](#)'.

Copilots en F&O

Embebidos

Finance and Operations

Search for a page

USMF | Contoso Entertainment System USA

Activities

Activities

Set up

Business classifications
Responsibilities
Intercompany

New

Create case

Accounts

Cases
Prospect

Transaction log
Knowledge articles

Market

Campaign
Call list
Mailings

Statistics

Period statistics
Prospect

All vendors

My view

1001 : Acme Office Supplies

Summary by Copilot

Status

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.

Insights

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.

40

Not Active

Change party association

IDENTIFICATION

Vendor account

1001

Type

Organization

Payment priority

Search name

Acme Office Supplies

Group

40

ORGANIZATION DETAILS

Number of employees

ABC code

None

DUNS number

OTHER INFORMATION

Address books

Phonetic name

Language

en-us

VENDOR COLLABORATION

Collaboration activation

Copilots en F&O

Externos

New Teams

Activity

Chat

Teams

Calendar

Calls

Files

...

Apps

Chat

Pinned

Copilot

This is what I have on the latest o...

1:47 PM

Beth Davies

Thanks, that would be nice.

1:43 PM

Kayo Miwa

I reviewed with the client on...

Yesterday

Dream team

Kayo: It would be great to sync...

12:00 PM

AB

August Bergman

I haven't checked available time...

1:20 PM

Recent

Charlotte and Babak

Babak: I asked the client to send...

1:58 PM

EC

Emiliano Ceballos

🤔🤔

1:55 PM

Marie Beaudouin

Sounds good

1:00 PM

OK

Oscar Krogh

You: Thanks! Have a nice day, I...

11:02 AM

Marketing team sync

I think Babak might know more...

10:43

Kian Lambert

Have you run this by Beth? Mak...

Yesterday

E

Team Design Template

Reta: Let's set up a brainstormi...

Yesterday

Marie's B-day gift

I was thinking of a gift card for...

Yesterday

Copilot

Chat

About

FAQs

What's new

What can I help you with now?

Summarize

Review key points from (file)

Create

Draft next steps from (meeting)

Ask BETA

Who is (person)?

You can always use the prompt guide for suggestions by selecting this button

What is the latest on the Brand Marketing Campaign launch?

Copilot 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

Copy

5 of 30 responses

2 references

1

Brand Marketing Campaign Update

2

Brand Marketing Campaign Timeline

How do I write a Contoso project brief? Brainstorm ideas for a virtual team bonding activity Summarize emails from Alex

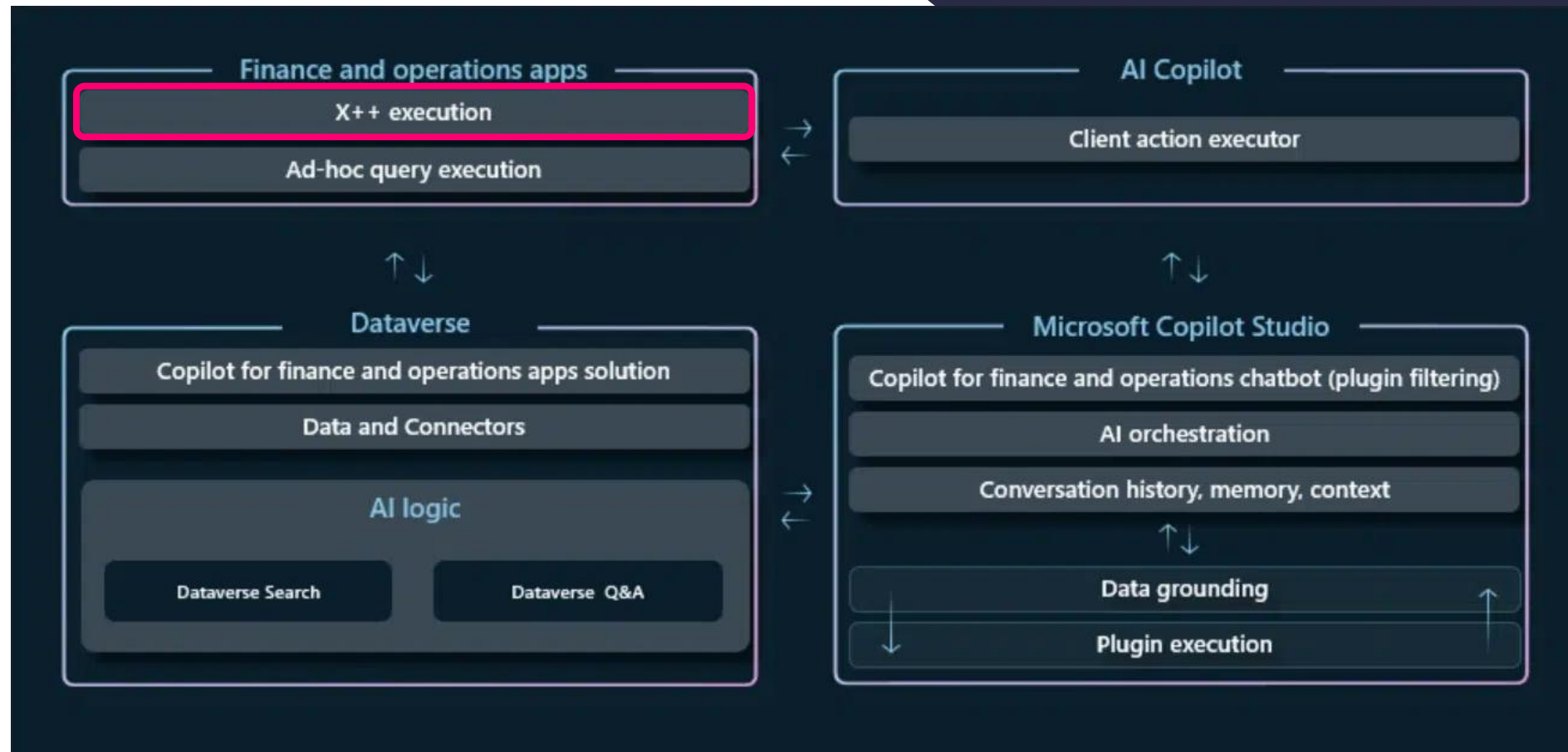
Ask a work question or use / to reference a file or person

Arquitectura

Arquitectura



Arquitectura



Extensibilidad

Client plugins

Acciones vinculadas con la interfaz (formularios).

El formulario es el contexto.

✓ Global actions

No tienen contexto específico.

Ejecutable en cualquier formulario.

[SysCopilotChatGlobalAction]

✓ Form actions

Aplicables en un formulario en concreto.

[Export] y [ExportMetadata]

✓ Runtime actions

Disponibles donde se definan.

SysCopilotChatAction::addToCopilotRuntimeActions

SysCopilotChatAction::removeFromCopilotRuntimeActions

AI tools

Acciones sin contexto.

Ej.: devolver el disponible de un artículo.

✅ Data contract que implemente ICustomAPI

Crea una API en Dataverse.

Servidor MCP

Estándar abierto Model Context Protocol.

Anthropic.

✓ Copilot Studio

Se añade como herramienta en Copilot Studio.

✓ Predefinido

13 herramientas predefinidas.

✓ No extensible

¿De momento?

Demo

¡Gracias!

¿Preguntas?

Redes sociales y contacto



<https://bizzsummit.es>



<https://twitter.com/bizzsummites>



<http://youtube.com/bizzsummites>



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