Copilot Activation Assessment for Dynamics 365 Business Central.
1-week engagement.

velrada
AN NRI COMPANY

Business First.
Technology Second.

THAT'S THE POINT

In this deck

Microsoft is releasing new AI functionality within their Dynamics 365 suite each month. This is a fast-moving landscape in the era of AI.

Velrada run this Copilot Assessment engagement for our Dynamics 365 Business Central customers to help them plan for new AI capabilities for users.

Allow us to discover where these capabilities can deliver value into your organisation and foster an understanding of how it will benefit users, improve processes, and employee experiences.

Microsoft, in a recent survey, found that 9 in 10 workers hope to use AI reduce the repetitive tasks they do daily to perform their jobs. SMBs that leverage Business Central can use AI capabilities within the Microsoft stack to unlock their data, automate processes, leverage GenAI, and provide intelligent augmentation with common workflows.

Some of these new AI capabilities in Dynamics 365 are automatically activated for your users, so you would want to be prepared. Some of opt-in and require activation manually, so you might want to know what capabilities are being paid for but not leveraged.

During this engagement, we will discuss the challenges that your current Dynamics 365 users are facing to author a summary of potential solutions that use the latest platform capabilities to overcome them.

Contents:

1) Overview of Copilot & AI Capability within Dynamics 365 Business Central

2) Our Activation & Assessment Engagement

---

velrada
AN NRI COMPANY

Microsoft Solutions Partner

Business Applications
Data & AI
Digital & App Innovation
Modern Work

Microsoft

Microsoft Gold Partner

Gold Application Development	Gold Enterprise Resource Planning
Gold Application Integration	Gold Project & Portfolio Management
Gold Cloud Business Applications	Gold Security
Gold Cloud Platform	Advanced Specialization –
Gold Cloud Productivity	Windows Server &
Gold Collaboration & Content	SQL Server Migration to Azure
Gold Data Analytics	Advanced Specialization –
Gold Data Platform	Low Code Application Development
Gold Datacenter	

Microsoft

Microsoft Partner

2023 Microsoft ANZ Business Applications & Industry Winner

2023 Partner of the Year Finalist
Microsoft Mixed Reality
& Microsoft Dynamics 365 Services

2022 Partner of the Year Finalist
Microsoft Dynamics 365 Customer Service & Field Service Partner of the Year Award

Microsoft

2023/2024 INNER CIRCLE
for Microsoft Business Applications

wiise
2023 NFP Partner of the Year Award Winner

Victorian iAWARDS 2023
Business and Industry Solution Winner

---

velrada
AN NRI COMPANY

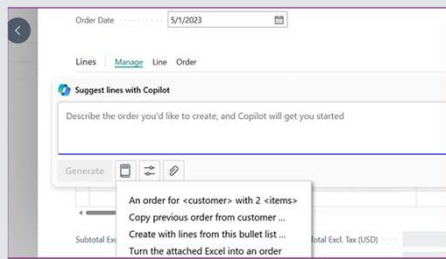# Overview of Copilot capability in D365 Business Central

Copilot in Dynamics 365 Business Central

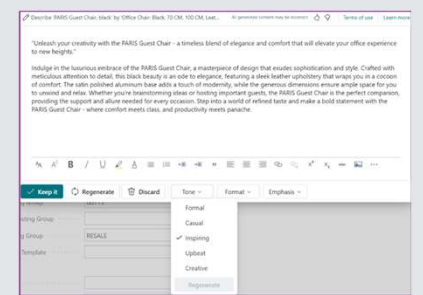## TRANSFORMING THE WAY YOUR FINANCE TEAM OPERATE WITH AI

Accelerating Processes

- AI powered actions within Business Central allow for pre-defined or custom suggestions to help perform processes.
- This can reduce the time it takes to create and process records such as Orders.
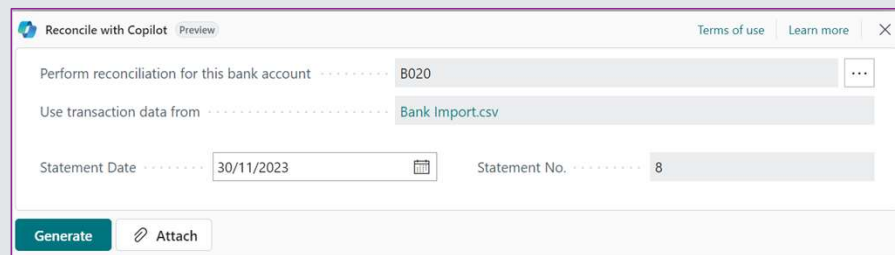
Generative AI

- When configuring products within Business Central, GenAI capabilities allows for overcoming writers block by drafting descriptions.
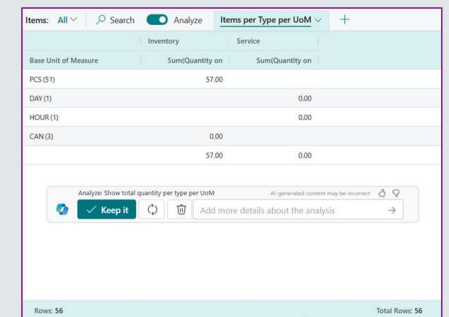- Use GenAI from AL configuration code to enhance your solution and create AI-enriched capability.

Intelligent Automation

- AI powered functions allow for certain tasks to be automated or reduce bourdon when simpler logic fails.
- An example is leveraging the large language models help reconcile bank transactions where Boolean logic cannot be applied.

Query & Analyse Data

- Instead of manually configuring reports to find data, describe what you're wanting to produce to have the AI generate the report for you.
- Features such as Late Payment Prediction, Inventory Forecasting, and Cashflow Forecasting allows for data to be analysed to produce enriching insights.
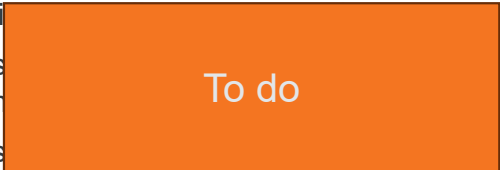
Overview of Key Benefits
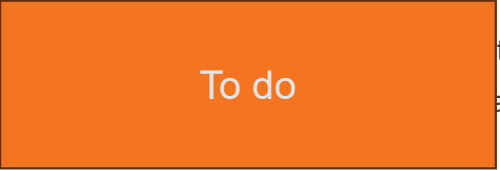
THE BUSINESS VALUE IN LEVERAGING AI & COPILOT

Copilot & AI Capability provide reprieve to the following common challenges faced in managing a business:

- Over 66% of a seller's day is devoted to e-mail.
- Repeti... ...d from scratch.
- Time s... ...nce, chats, docum...
- Time s... ...ions, summarising meetings and producing action items. Some of which are inaccurate or missing details.

To do

Advantage your business operations with Copilot & AI Capability within the software they use daily:

- Generative AI to produce e-mail responses modelled from templates, co... ...to...
- Integrate into... ...ta.
- Automatically... ...action items.
- Produce reca... ...Opportunity from recent interactions and captured data.
- Leverage Dynamics 365 Sales data and processes from within Microsoft 365 – Word, Excel, OneNote, Teams, Outlook, etc.

To do

More automation for otherwise manual tasks	Improve quality of customer engagement	Drive efficiency the way systems are used to operate your business

Our Activation Assessment Engagement.

Our Assessment Process

ACTIVATING COPILOT WITHIN DYNAMICS 365 BUSINESS CENTRAL

Velrada perform this engagement across 3 sessions and provide a final deliverable with outcomes & a roadmap.

1 **Session: Getting Up to Speed on AI Landscape**
Engaging session to bring the customer up to speed with the estate of technologies and solutions available in the Microsoft Ecosystem.

2 **Session: Discovery Workshop**
Collaborative workshop designed to discover the current usage of Dynamics 365 Business Central within the organisation. This will identify the current licensing model, userbase, workflows that will benefit from Copilot capability, and approach to introducing it.

3 **Report: Assessment Outcomes & Roadmap**
Velrada will take the discussion and decisions from the discovery workshop and curate an approach to activating the Copilot "in & for" Dynamics 365 Business Central. This includes licensing, training, communications, performing a pilot, benefits, and next steps.

4 **Session: Playback Session**
Velrada will take you through our assessment outcomes & roadmap deliverable in a final session.

What comes next.
Work with Velrada through the next stage for **Activation**. We can support implementation & change management in turning on in-product capabilities and producing tailored Copilot workloads

Engagement Overview

ACTIVATING COPILOT CAPABILITY IN DYNAMICS 365 BUSINESS CENTRAL

Engagement Length

Delivered typically across 1 week:
- Workshop 1 – Intro to Microsoft Platform AI *(90 mins)*
- Workshop 2 – Discovery Workshop *(120 mins)*
- Workshop 3 – Roadmap Playback *(90 mins)*

Investment
- Engagement start at AUD $19,500 (excl. GST)
- Available in both fixed-price and time & materials
- Not inclusive of Microsoft licensing
- Microsoft funding can be available – *if applicable*

Session Delivery

Engagement can be delivered either:
- In person (your office or Velrada's)
- Remotely using Microsoft Teams

The final assessment report will be delivered as a PDF.

Pre-Requisites
- Client must be prepared for participating in discovery & design workshops
- Ability to showcase current usage of Dynamics 365

Client Participants

The engagement is collaborative & benefits from your input by:
- IT strategy & architecture leadership
- D365/Power Platform leads/owners
- Critical process owners – benefiting from AI

Velrada Resources

Our experienced resources utilised in this engagement:
- Delivery Manager
- D365 BC Consultant– *Copilot & AI specialisation*

PROGRESS IS THE POINT

Progress is impossible without change.

velrada
AN NRI COMPANY

velrada.com

1300 835 723

Australia. Europe. North America.

info@velrada.com

PROGRESS
IS THE POINT

Perth
Level 14/123 St Georges
Terrace Perth WA 6000

Adelaide
7/101 Pirie Street
Adelaide SA 5000

Melbourne
11/446 Collins Street
Melbourne VIC 3000

Sydney
1/40 Millers Street
North Sydney NSW 2060

Brisbane
7/348 Edward Street
Brisbane QLD 4000

London
45 Gresham Street, London,
EC2V 7BG, United Kingdom

Texas
6160 Warren Parkway, Suite 600,
Frisco, TX 75034 U.S.A