



Microsoft Partner Tech Deal Ready

# ERP Transformation with AI and agents in Dynamics 365

Weekly series





# ERP Transformation with AI and agents in Dynamics 365

## Episodes in this series

EPISODE 01 ⌚ 60 mins



**ERP Transformation with AI and Dynamics 365**

EPISODE 03 ⌚ 60 mins



**Design to Retire** transformation with AI and Dynamics 365

EPISODE 05 ⌚ 60 mins



**Hire to Retire** transformation with AI and Dynamics 365

EPISODE 07 ⌚ 60 mins



**Inventory to Deliver** transformation with AI and Dynamics 365

EPISODE 09 ⌚ 60 mins



**Project to Profit** transformation with AI and Dynamics 365

EPISODE 11 ⌚ 60 mins



**Source to Pay** transformation with AI and Dynamics 365

EPISODE 02 ⌚ 60 mins



**Acquire to Dispose** transformation with AI and Dynamics 365

EPISODE 04 ⌚ 60 mins



**Forecast to Plan** transformation with AI and Dynamics 365

EPISODE 06 ⌚ 60 mins



**Order to Cash** transformation with AI and Dynamics 365

EPISODE 08 ⌚ 60 mins



**Plan to Produce** transformation with AI and Dynamics 365

EPISODE 10 ⌚ 60 mins



**Record to Report** transformation with AI and Dynamics 365



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★ You are here

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EPISODE 10 ⌚ 60 mins



Record to Report transformation with AI and Dynamics 365



Episode 2  
**Acquire to Dispose**  
**transformation with AI and**  
**Dynamics 365** 

# Agenda

01 Acquire to dispose overview

03 Acquire assets

05 Perform asset maintenance

07 Analyze assets

02 Acquire to dispose business process areas

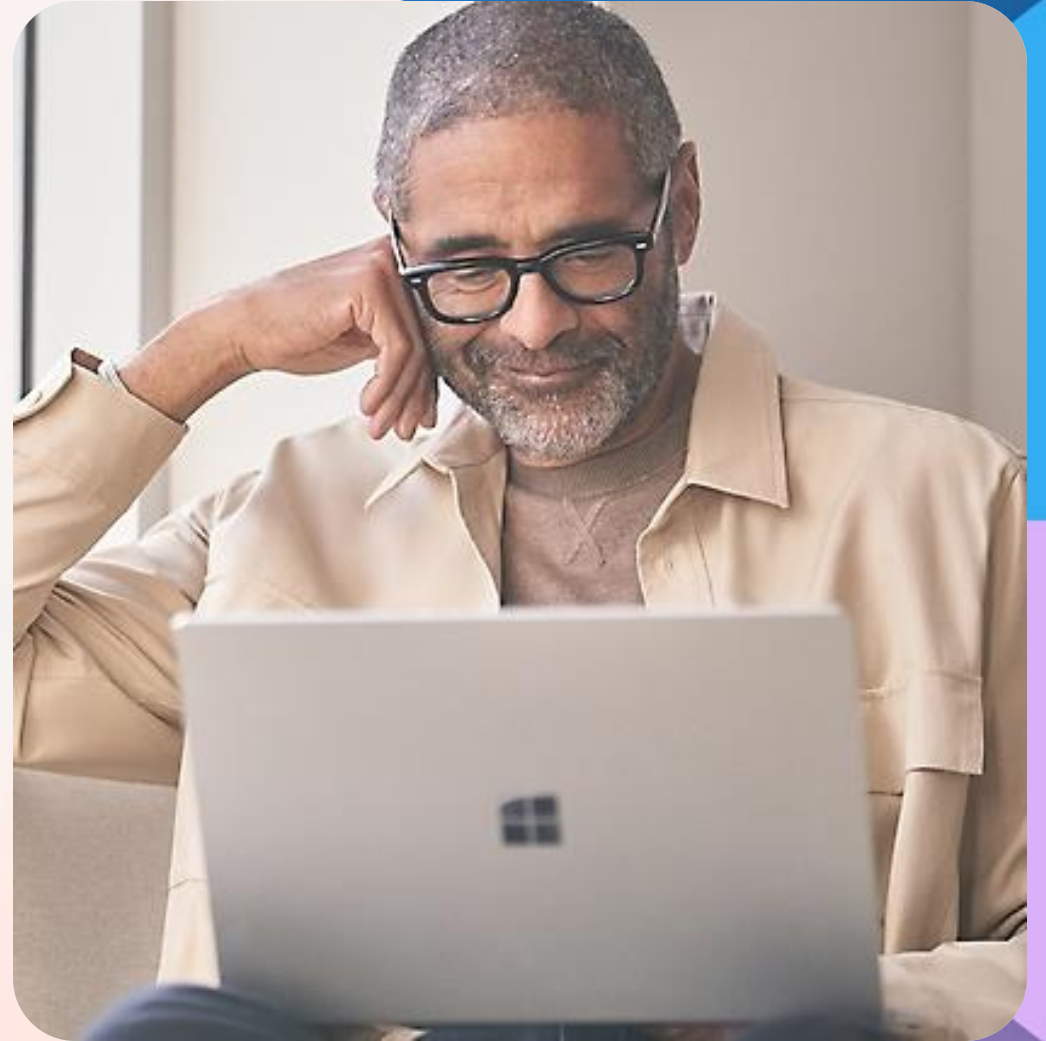
04 Manage active assets

06 Dispose of assets


07 Customer evidence




# Acquire to dispose overview






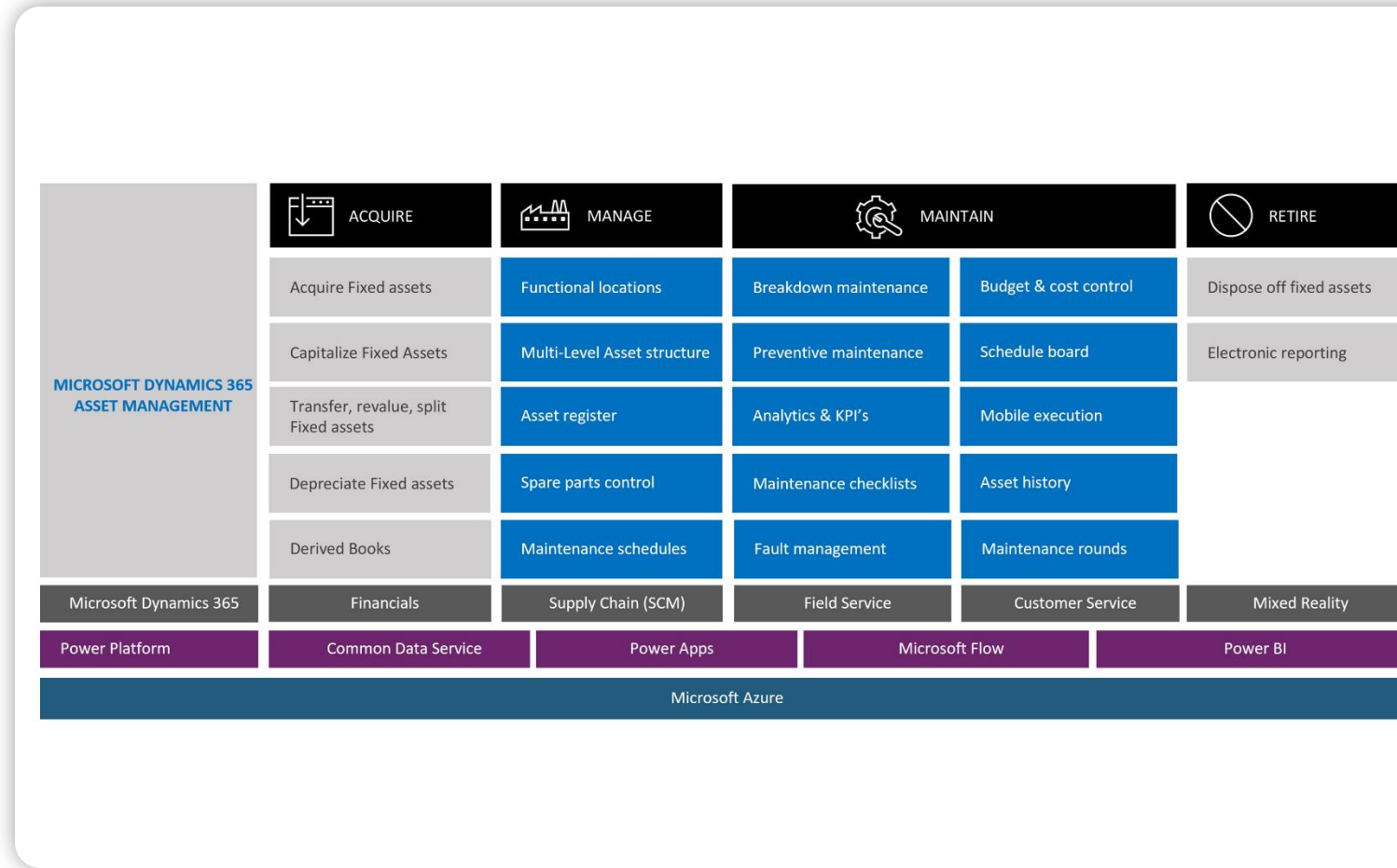
# Acquire to dispose overview

 It is a critical business process that involves managing the lifecycle of both owned and leased assets


 Process includes the acquisition, deployment, maintenance, and eventual disposal of assets


## Effect:


-  Improve the visibility and control over assets
-  Minimize downtime, reduce maintenance costs, and extend the useful life of assets
-  Ensure compliance with regulatory requirements





# Acquire to dispose benefits

 Improved asset tracking

 Accurate asset valuation

 Improved asset leasing management (lessee)

 Streamlined maintenance management

 Improved financial reporting

Finance and Operations | Asset leasing > Leases > Lease summary | USMF

Post | Journal details | Options

Asset leasing Journals | USMF-00001:ASC 842: Headquarters - HQ

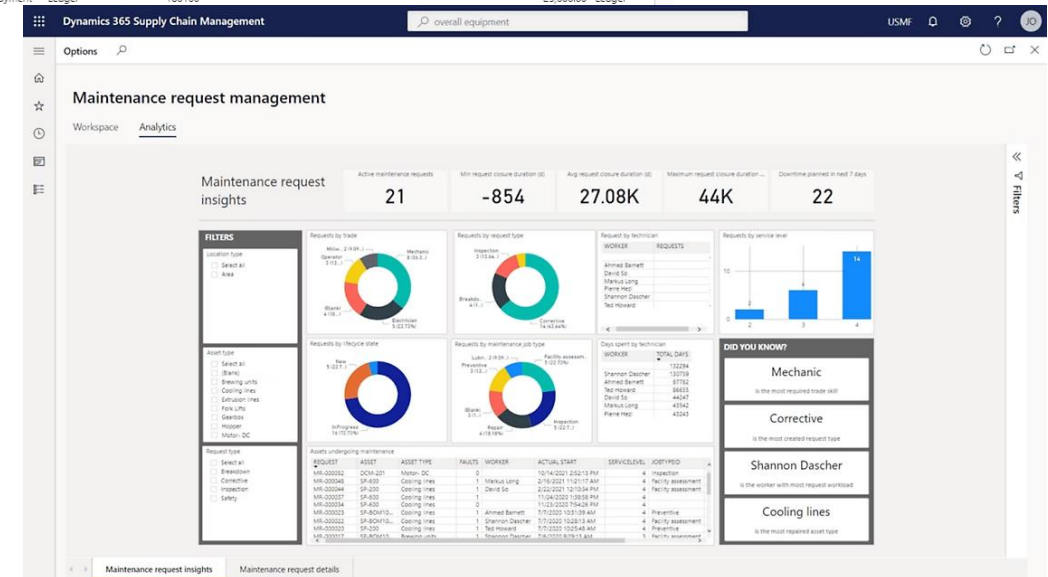
Standard view

Overview

Name	Journal ba...	Description	Journal type	Posted	Log
LEASE	01655	LEASE	Asset leasing	✓	
ADJ	01656	Lease Adjustment	Asset leasing	✓	
LEASE	01782	LEASE	Asset leasing	✓	
LEASE	01783	LEASE	Asset leasing	✓	
ADJ	01785	Lease Adjustment	Asset leasing	✓	

Lines

Date	Voucher	Description	Account type	Account	Financial tags	Debit	Credit	Offset acco...
6/1/2022	GNIL001009	Finance lease payment	Ledger	180100--		25,000.00		Ledger
6/1/2022	GNIL001009	Finance lease payment	Ledger	180100--			25,000.00	Ledger



# Acquire to dispose process relationship

## Upstream

Case to resolution

Forecast to plan

Procure to pay

Design to retire

Project to profit

Record to report

## Acquire to dispose

Plan and budget assets

Acquire assets

Manage internal assets

Manage and report on asset  
financials

Maintain and repair internal  
assets

Retire and dispose of assets

## Downstream processes

Case to resolution

Hire to retire

Inventory to deliver

Order to cash

Plan to produce

Procure to pay

Project to profit

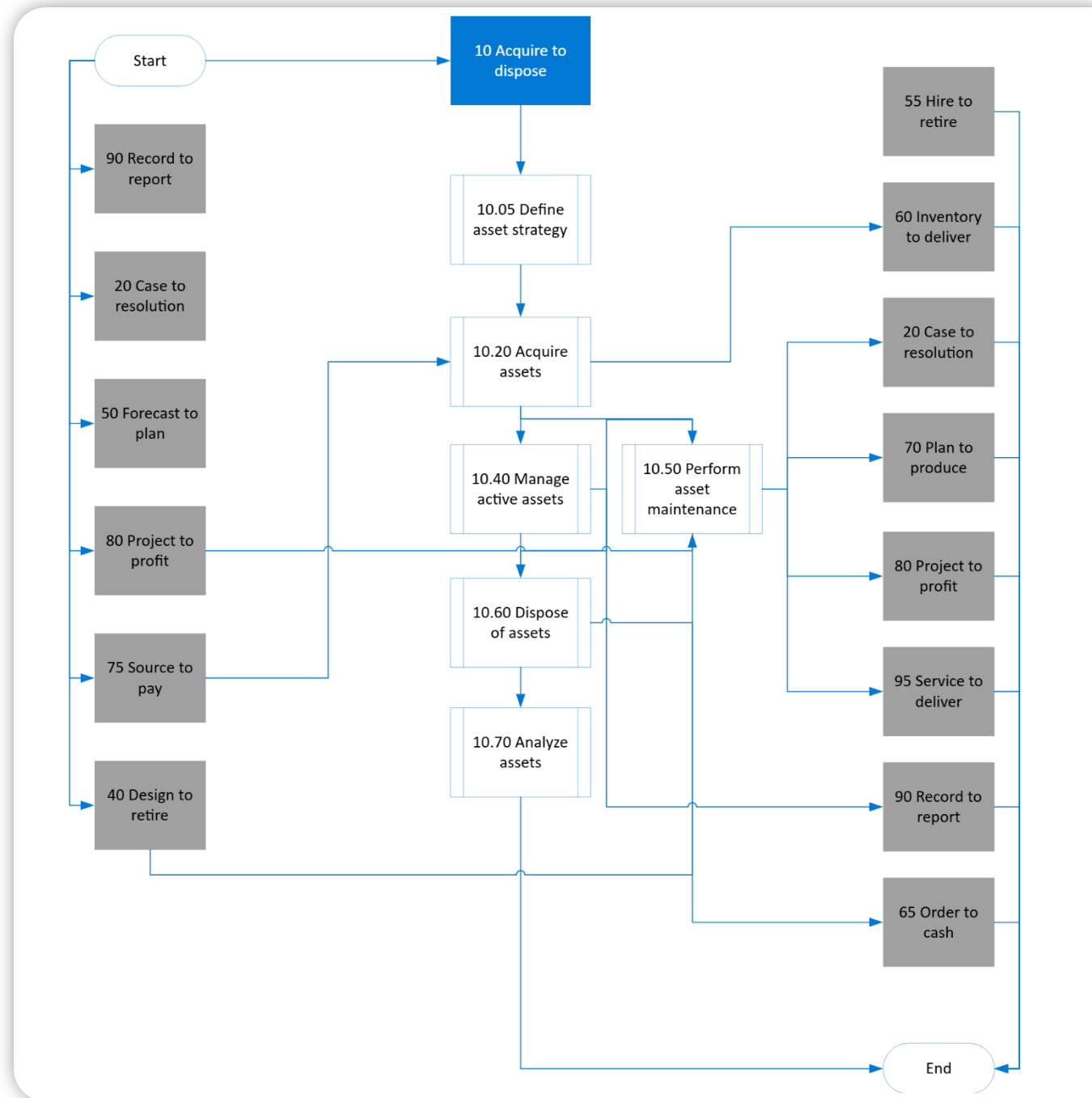
Record to report

Service to cash

# Acquire to dispose business process flow



It represents the complete lifecycle of an asset—from planning to disposal—supported by interconnected business subprocesses across the organization



# Acquire to dispose business process areas



# Acquire to dispose business process areas



Define asset strategy



Acquire assets



Manage active assets



Perform asset maintenance



Dispose of assets



Analyze assets

**Acquire assets**



# Acquire assets



Acquire assets functionality supports acquisition, monitoring, and use of assets throughout their lifecycle



Asset data is often maintained in worksheets



Asset leasing enables access without large upfront investments and supports legal lease contracts



Common methods to acquire assets:

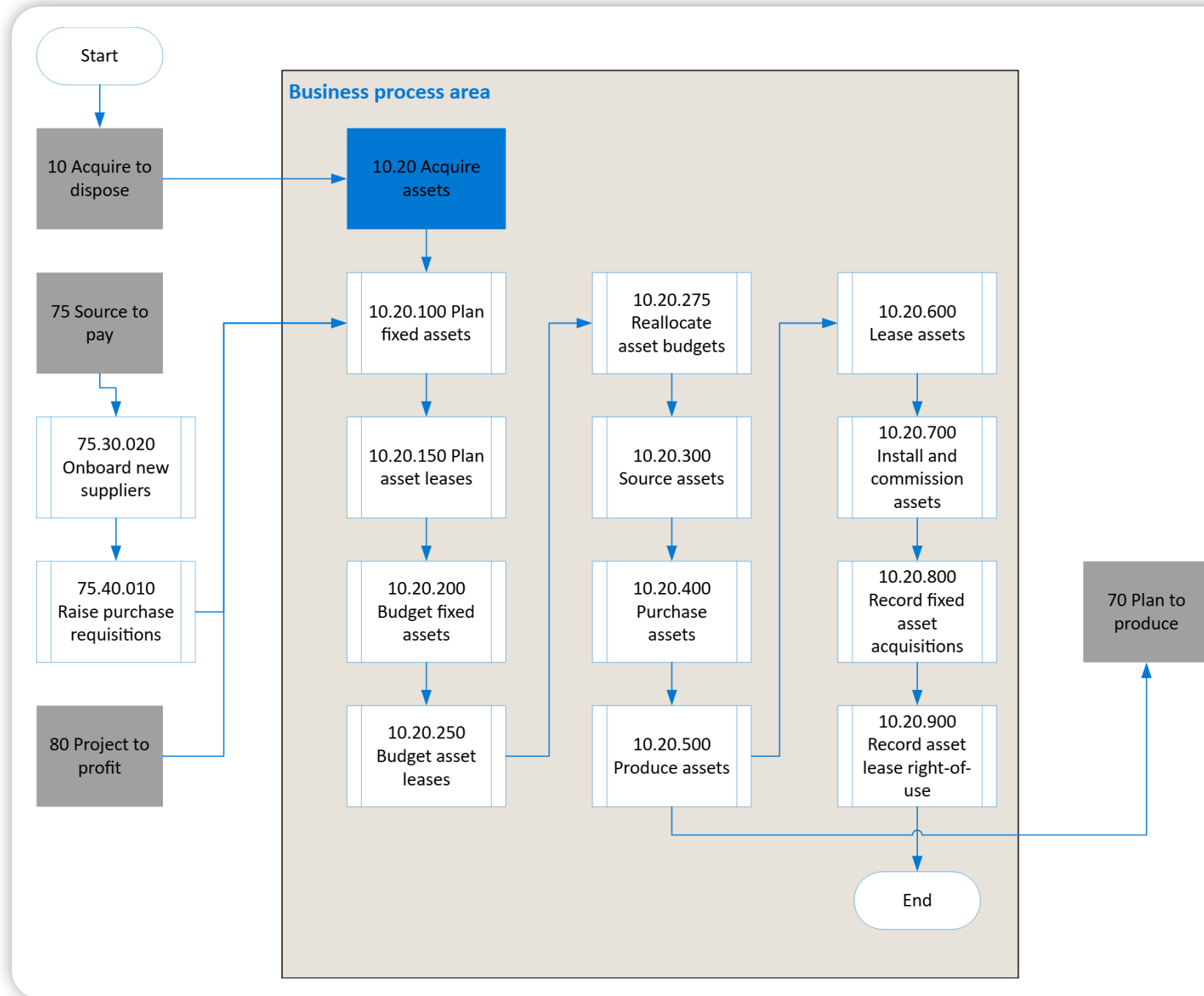
- Procurement and sourcing
- Fixed assets

The screenshot displays the 'Fixed Asset Card' for 'Mercedes 300' in Dynamics 365 Business Central. The interface includes a navigation bar with 'Contoso Electronics' and 'Dynamics 365 Business Central'. The card is titled 'FA000010 · Mercedes 300' and features a 'Home' button and a menu with options like 'Fixed Asset', 'Report', 'Related', 'Reports', 'Automate', and 'Fewer options'. Below the title, there are 'Acquire' and 'Copy Fixed Asset...' buttons. The card is organized into sections: 'General', 'Depreciation Book', and 'Maintenance'. The 'General' section includes fields for 'No.' (FA000010), 'Description' (Mercedes 300), 'FA Class Code' (TANGIBLE), 'FA Subclass Code' (VEHICLES), 'Serial No.' (EA 12 394 Q), 'Search Description' (MERCEDES 300), and 'Responsible Employee'. The 'Depreciation Book' section shows 'Depreciation Method' (Straight-Line), 'Depreciation Starting Date' (11/1/2024), 'No. of Depreciation Years' (10.00), and 'Depreciation Ending Date' (10/31/2034). The 'Maintenance' section includes 'Vendor No.' (10000), 'Maintenance Vendor No.' (10000), 'Under Maintenance' (toggle), 'Next Service Date' (4/10/2024), 'Warranty Date', and 'Insured' (No). A 'Book Value' field shows 0.00. The bottom of the card has an 'Electronic Document' link.


# Acquire assets process flow




The acquire assets process covers identifying asset needs, selecting suppliers or lessors, completing procurement or lease setup, and commissioning the asset into operation.




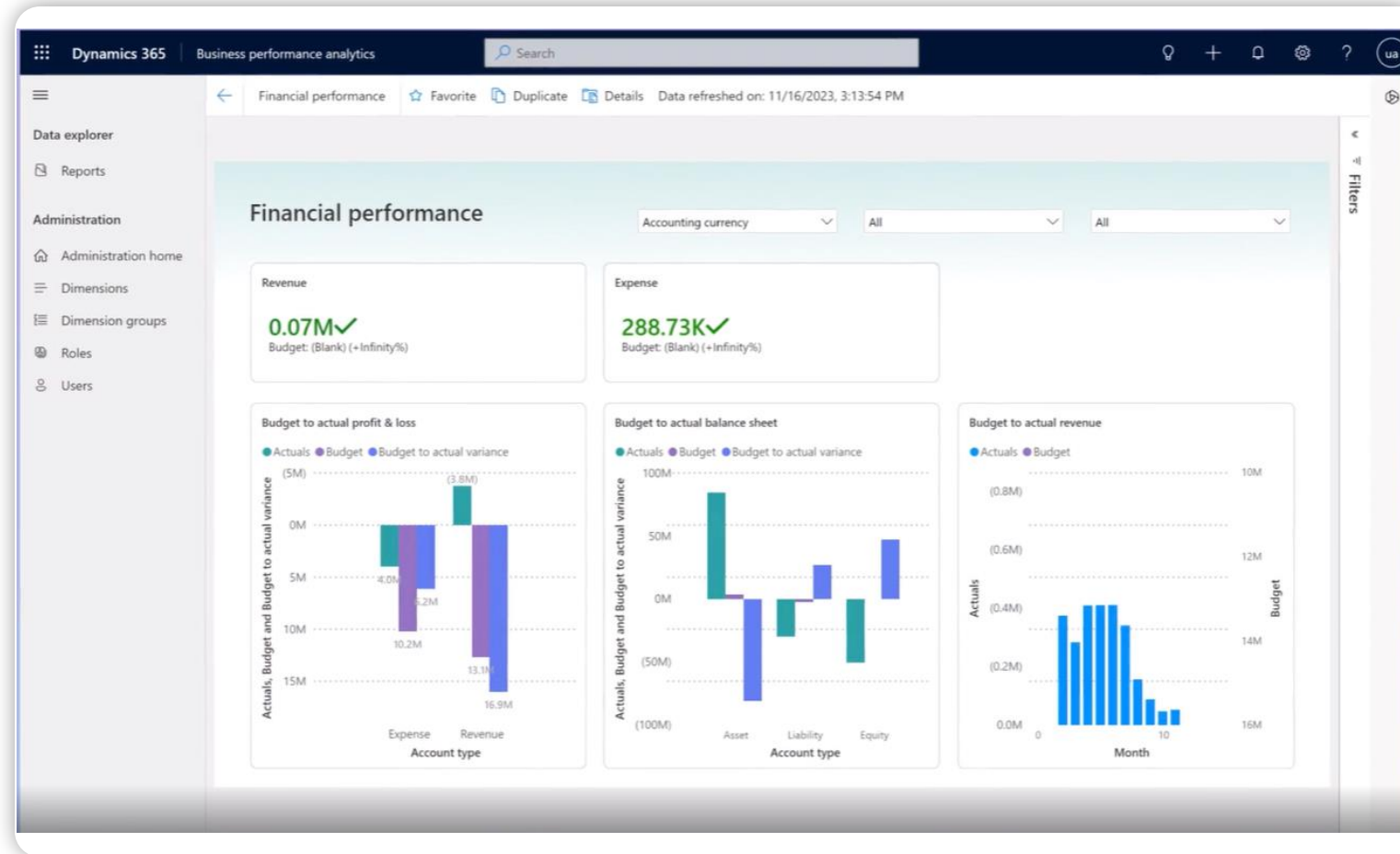
# Acquire assets benefits

 Improved operational efficiency

 Improved decision-making

 Improved financial health

 Access to high-end assets



**Manage active assets**



# Manage active assets

## It involves

Managing the ongoing status, value, and documentation of assets to ensure operational efficiency and financial accuracy throughout their lifecycle.

Identifying and tagging fixed assets

Maintaining asset register and books

Running depreciation cycles

Maintaining and reconciling asset details

Reporting asset information

The screenshot displays the Microsoft Dynamics 365 Finance and Operations interface. The top navigation bar shows "Finance and Operations" and a search bar. The main content area is titled "Asset states" and shows a list of asset lifecycle states: Active, InRepair, New, and Scrapped. The "Active" state is selected and highlighted. To the right, there is a "Details" section for the selected "Active" state, showing the "ASSET" name and a toggle for "Active" (set to Yes) and "Delete open schedule lines" (set to No).

Lifecycle state	Name
Active	Active asset, which is currently in

**Details**

**General**

**ASSET**

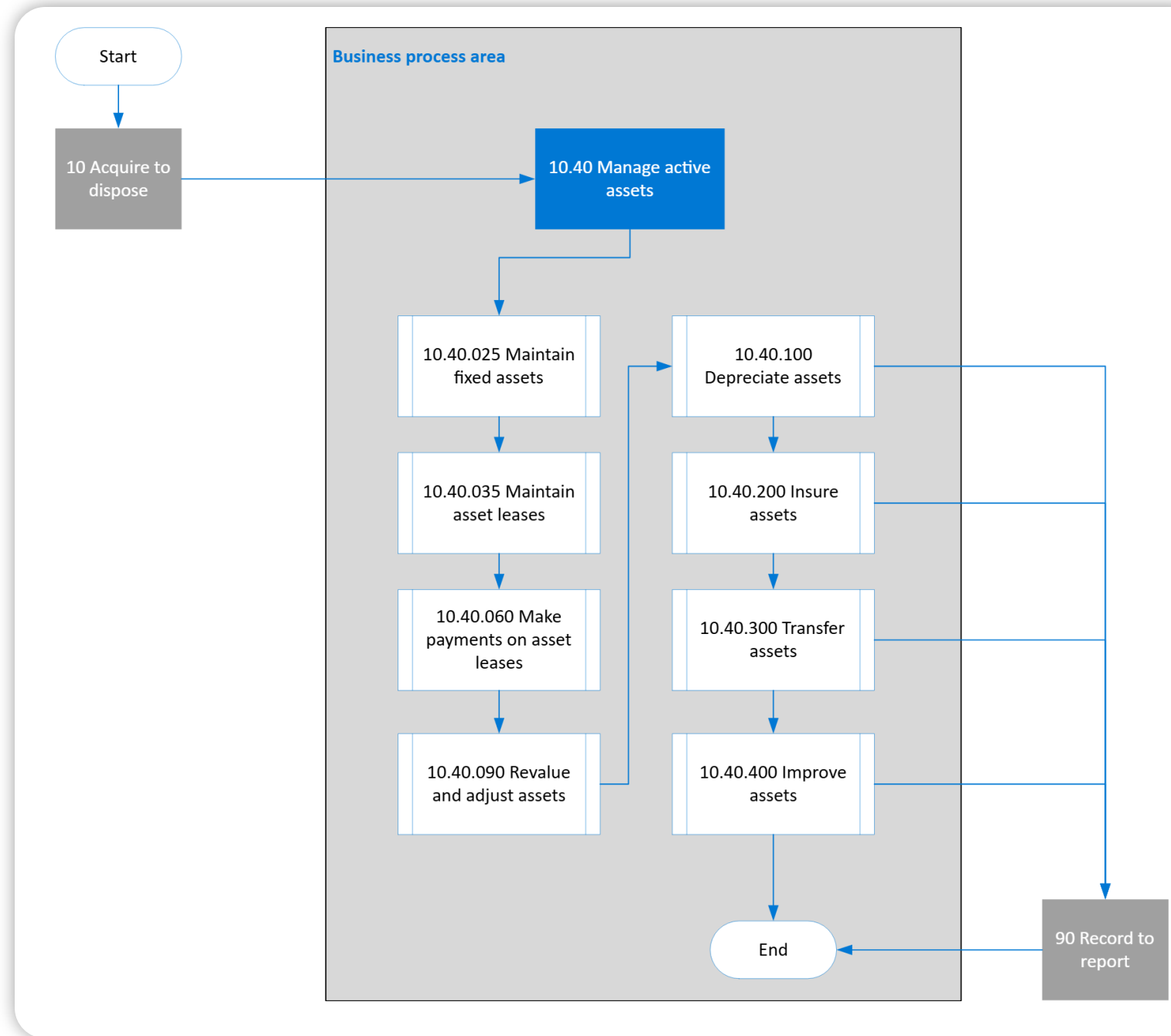
Active  Yes

Delete open schedule lines  No

# Manage internal asset process flow





The manage-internal-assets process outlines how organizations maintain, update, insure, and transfer active assets through interconnected subprocesses within the broader acquire-to-dispose lifecycle




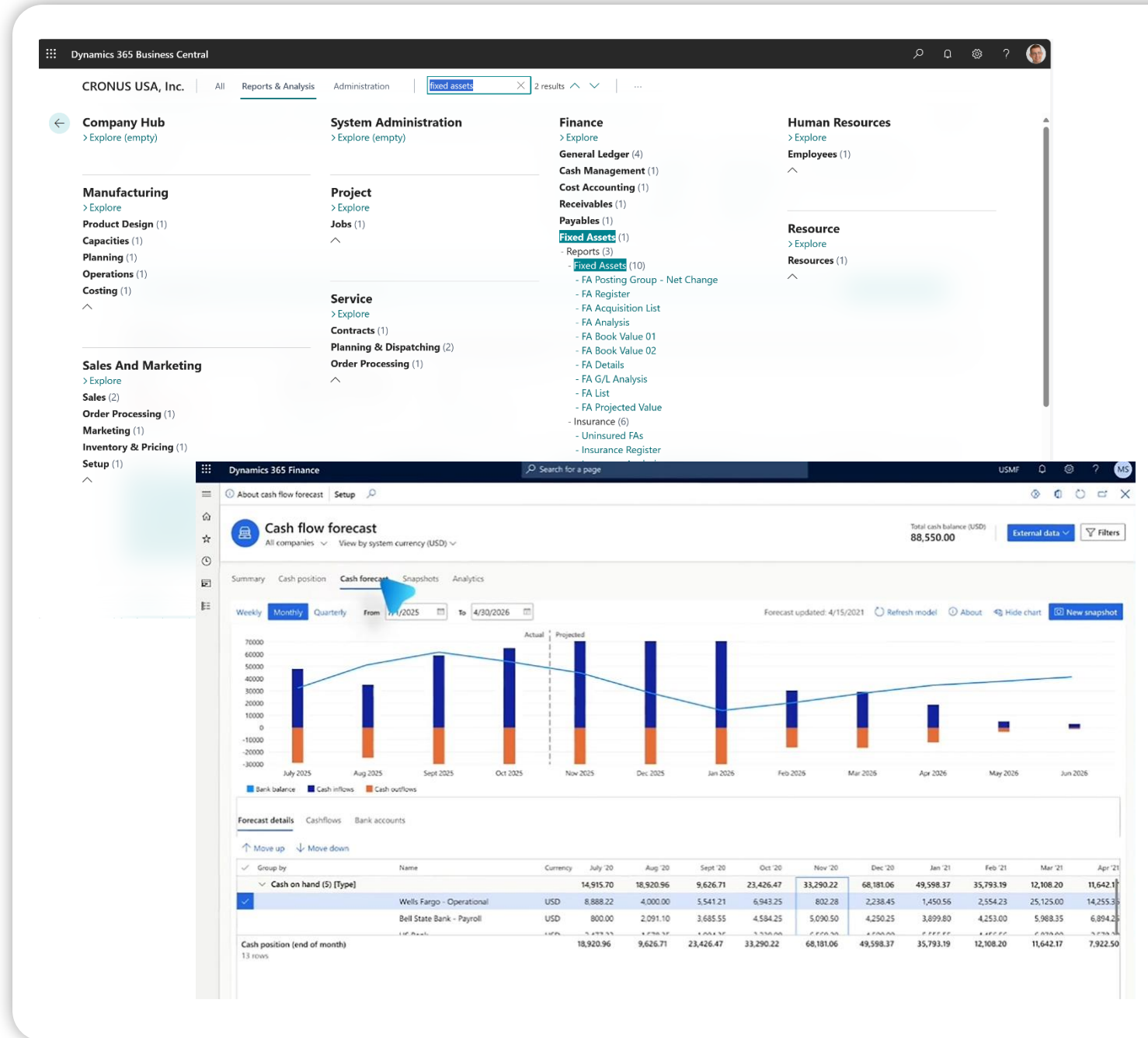
# Benefits

 Maintain centralized information

 Record asset status

 Monitor insurance coverage cost

 Improve operational efficiency



The screenshot displays the Dynamics 365 Business Central interface for CRONUS USA, Inc. The top navigation bar includes 'Reports & Analysis', 'Administration', and a search for 'fixed assets' with 2 results. The left-hand navigation pane lists various functional areas such as Manufacturing, Sales And Marketing, System Administration, Project, Service, Finance, and Human Resources. The Finance section is expanded, showing 'Fixed Assets' with 10 items, including 'FA Posting Group - Net Change', 'FA Register', 'FA Acquisition List', 'FA Analysis', 'FA Book Value 01', 'FA Book Value 02', 'FA Details', 'FA G/L Analysis', 'FA List', 'FA Projected Value', 'Insurance (6)', 'Uninsured FAs', and 'Insurance Register'.

The main content area shows a 'Cash flow forecast' report for 'All companies' in USD. The report includes a summary, cash position, and a detailed cash flow forecast. The forecast is displayed as a bar chart from July 2025 to June 2026, with a line graph showing the total cash balance. The chart is divided into 'Actual' (up to October 2025) and 'Projected' (from November 2025 onwards) periods. The total cash balance is shown as 88,550.00 USD.

Below the chart, the 'Forecast details' section provides a table of cash flows and bank accounts. The table is grouped by 'Cash on hand (5) [Type]' and shows data for various bank accounts over time.

Group by	Name	Currency	July '20	Aug '20	Sept '20	Oct '20	Nov '20	Dec '20	Jan '21	Feb '21	Mar '21	Apr '21
<b>Cash on hand (5) [Type]</b>												
✓	Wells Fargo - Operational	USD	8,888.22	4,000.00	5,541.21	6,943.25	802.28	2,238.45	1,450.56	2,554.23	25,125.00	14,255.30
✓	Bell State Bank - Payroll	USD	800.00	2,091.10	3,685.55	4,584.25	5,090.50	4,250.25	3,899.80	4,253.00	5,988.35	6,894.25
<b>Cash position (end of month)</b>			18,920.96	9,626.71	23,426.47	33,290.22	68,181.06	49,598.37	35,793.19	12,108.20	11,642.17	7,922.50

**Perform asset maintenance**



# Perform asset maintenance process



Maintenance includes activities that can be scheduled and/or performed at a specific time



Repairs help restore the functionality of assets when they are damaged



Three main types of maintenance tasks:

- Reactive
- Preventive
- Predictive

The screenshot shows the SAP Finance and Operations interface for Maintenance plans. The breadcrumb trail is: Asset management > Setup > Preventive maintenance > Maintenance plans. The main content area displays a list of maintenance plans on the left and a details view on the right.

**Maintenance plans list:**

Maintenance plan	Name
EX-PM	Extruder Line PM
FL-PM	Forklift PM
GEN-PM	Emergency Generator PM
<b>Standard</b>	Standard

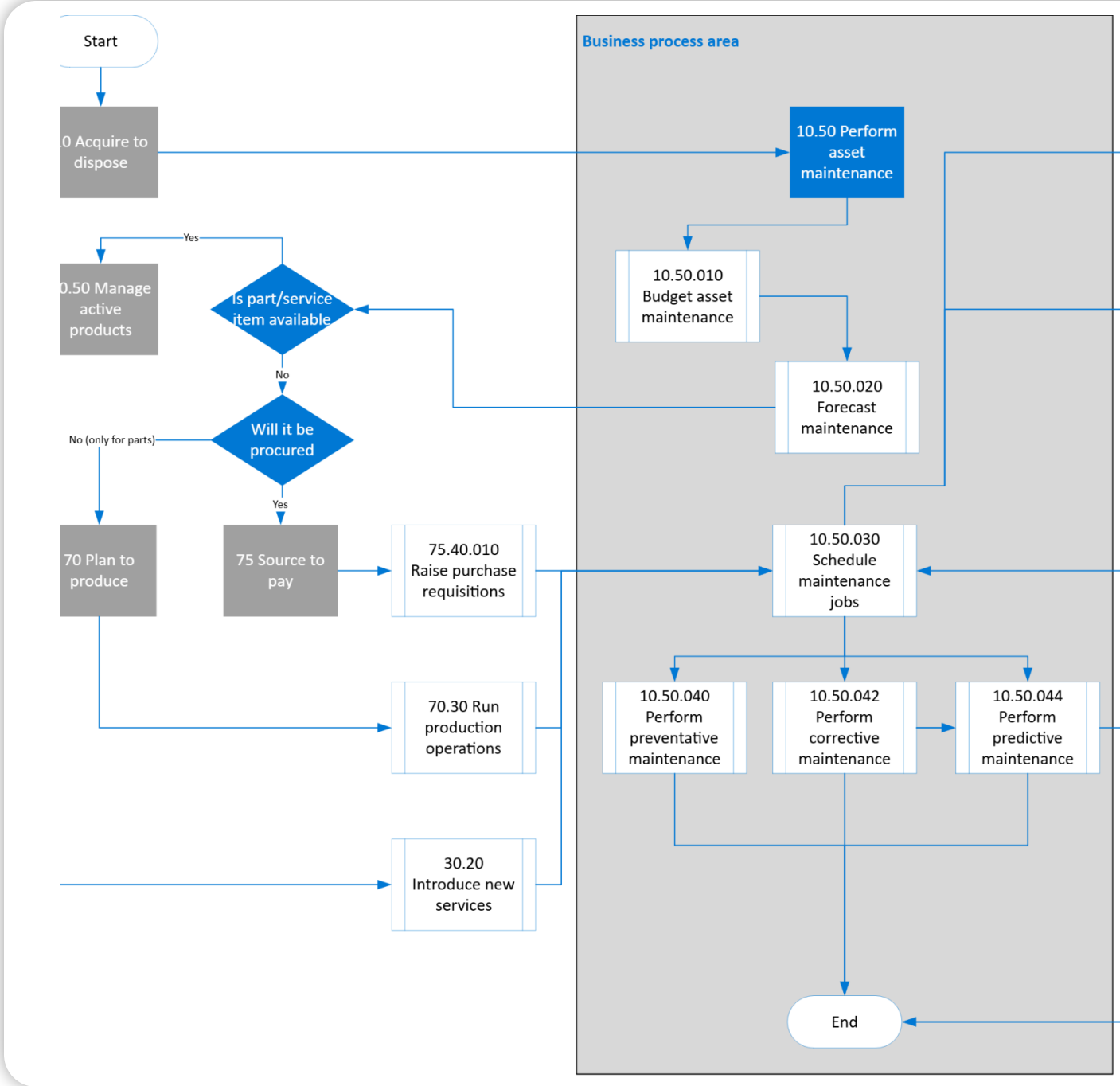
**Maintenance plan details (Standard):**

PLANNING	SKIP TOLERANCE	DETAILS
Plan date 6/27/2023	Tolerance days before 2	Lines 1
Active <input checked="" type="checkbox"/> Yes	Tolerance days after 2	Assets
		Functional locations 34


# Flow for the Perform asset maintenance process





The perform asset maintenance process manages the planning, sourcing, scheduling, execution, and analysis of maintenance activities to ensure assets remain operational and reliable

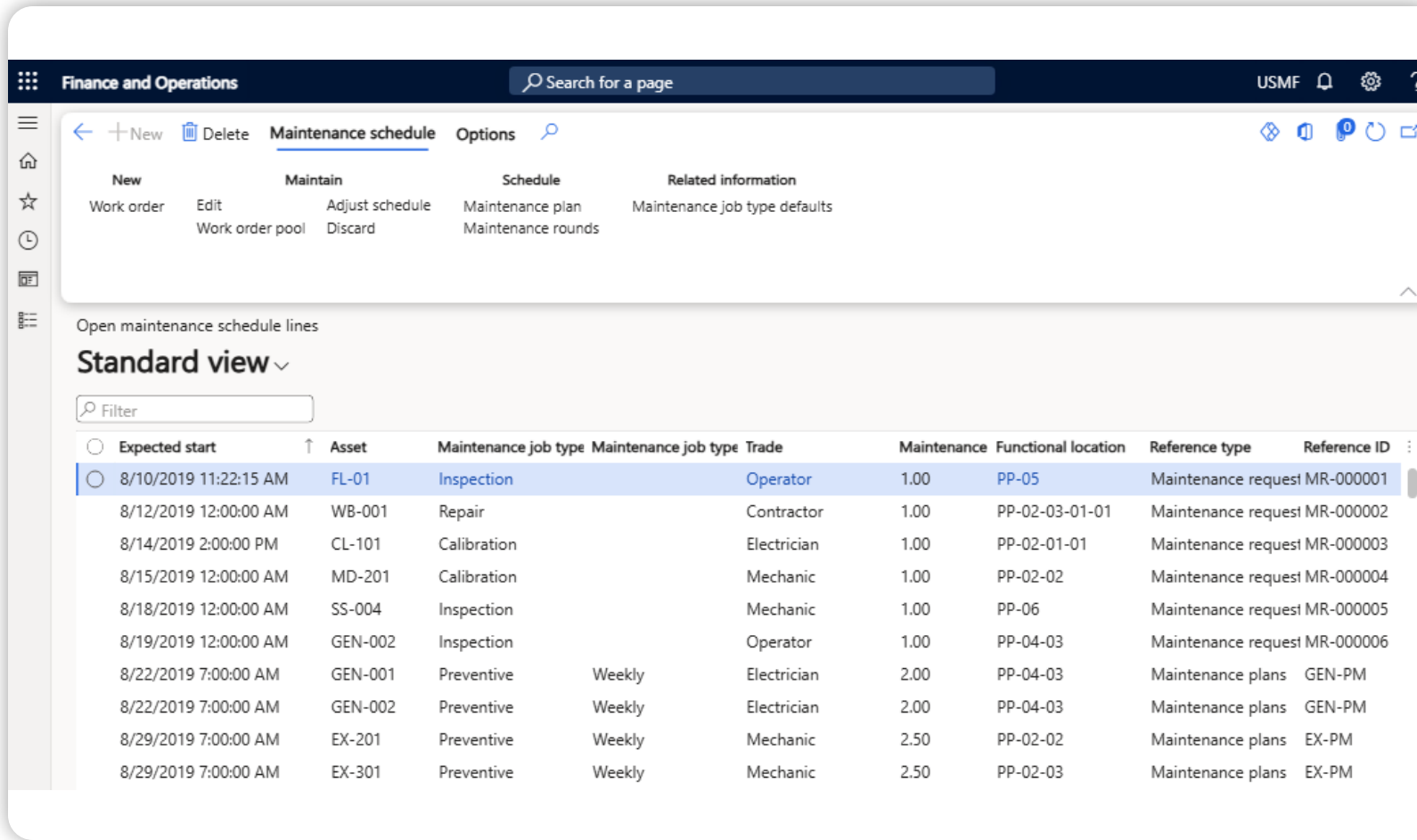


# Benefits of the Perform asset maintenance process

 Improved asset tracking

 Increased longevity of assets

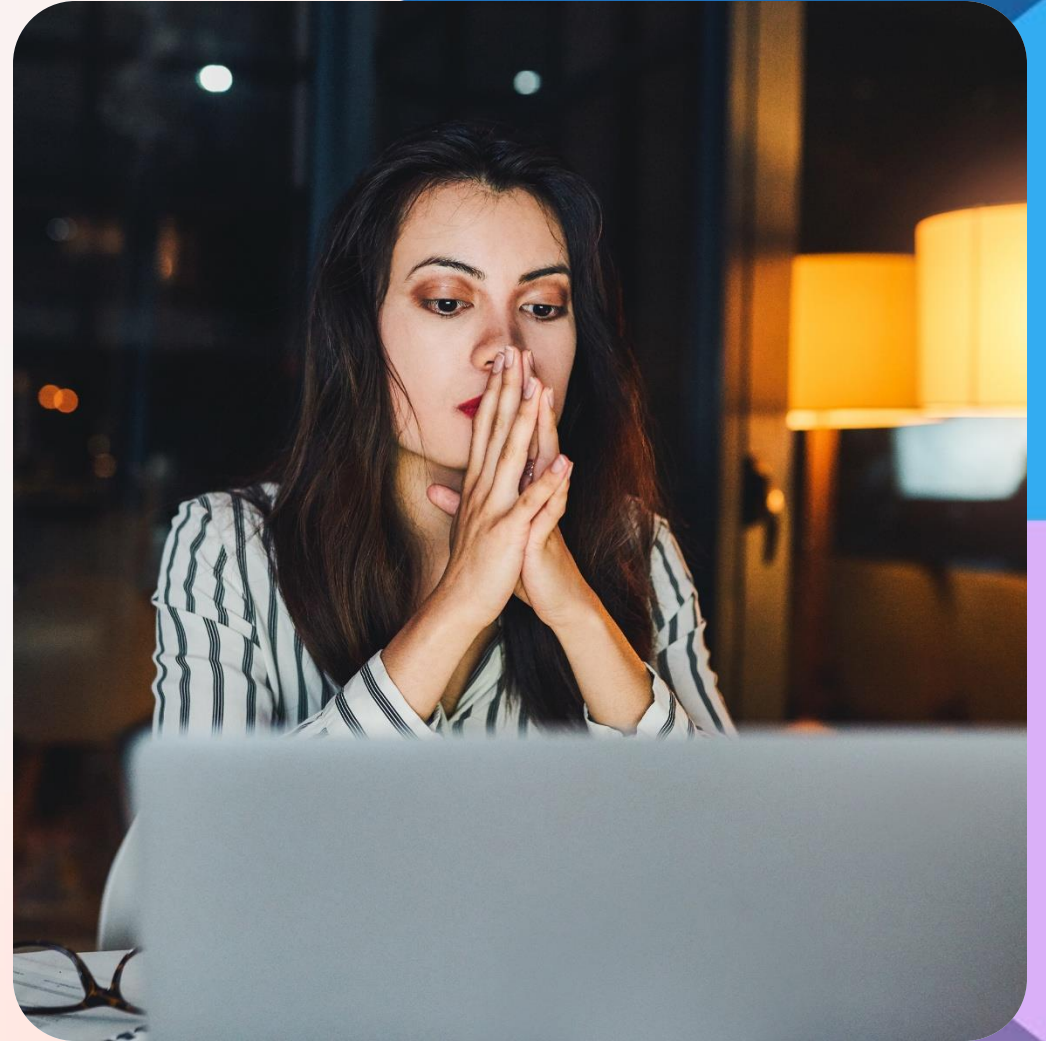
 Organizational compliance



The screenshot displays the Dynamics 365 Finance and Operations interface for the Maintenance schedule module. The top navigation bar includes the 'Finance and Operations' title, a search bar, and user information (USMF). The main content area shows a 'Maintenance schedule' view with tabs for 'New', 'Maintain', 'Schedule', and 'Options'. Below the tabs, there are sections for 'Open maintenance schedule lines' and 'Standard view'. A table lists maintenance schedule lines with columns for 'Expected start', 'Asset', 'Maintenance job type', 'Trade', 'Maintenance', 'Functional location', 'Reference type', and 'Reference ID'.

Expected start	Asset	Maintenance job type	Maintenance job type	Trade	Maintenance	Functional location	Reference type	Reference ID
8/10/2019 11:22:15 AM	FL-01	Inspection		Operator	1.00	PP-05	Maintenance request	MR-000001
8/12/2019 12:00:00 AM	WB-001	Repair		Contractor	1.00	PP-02-03-01-01	Maintenance request	MR-000002
8/14/2019 2:00:00 PM	CL-101	Calibration		Electrician	1.00	PP-02-01-01	Maintenance request	MR-000003
8/15/2019 12:00:00 AM	MD-201	Calibration		Mechanic	1.00	PP-02-02	Maintenance request	MR-000004
8/18/2019 12:00:00 AM	SS-004	Inspection		Mechanic	1.00	PP-06	Maintenance request	MR-000005
8/19/2019 12:00:00 AM	GEN-002	Inspection		Operator	1.00	PP-04-03	Maintenance request	MR-000006
8/22/2019 7:00:00 AM	GEN-001	Preventive	Weekly	Electrician	2.00	PP-04-03	Maintenance plans	GEN-PM
8/22/2019 7:00:00 AM	GEN-002	Preventive	Weekly	Electrician	2.00	PP-04-03	Maintenance plans	GEN-PM
8/29/2019 7:00:00 AM	EX-201	Preventive	Weekly	Mechanic	2.50	PP-02-02	Maintenance plans	EX-PM
8/29/2019 7:00:00 AM	EX-301	Preventive	Weekly	Mechanic	2.50	PP-02-03	Maintenance plans	EX-PM

# Dispose of assets



# Introduction to Dispose of assets



The Dispose of assets business process involves retiring and disposing of fixed assets that are no longer needed



It also covers when assets must be replaced



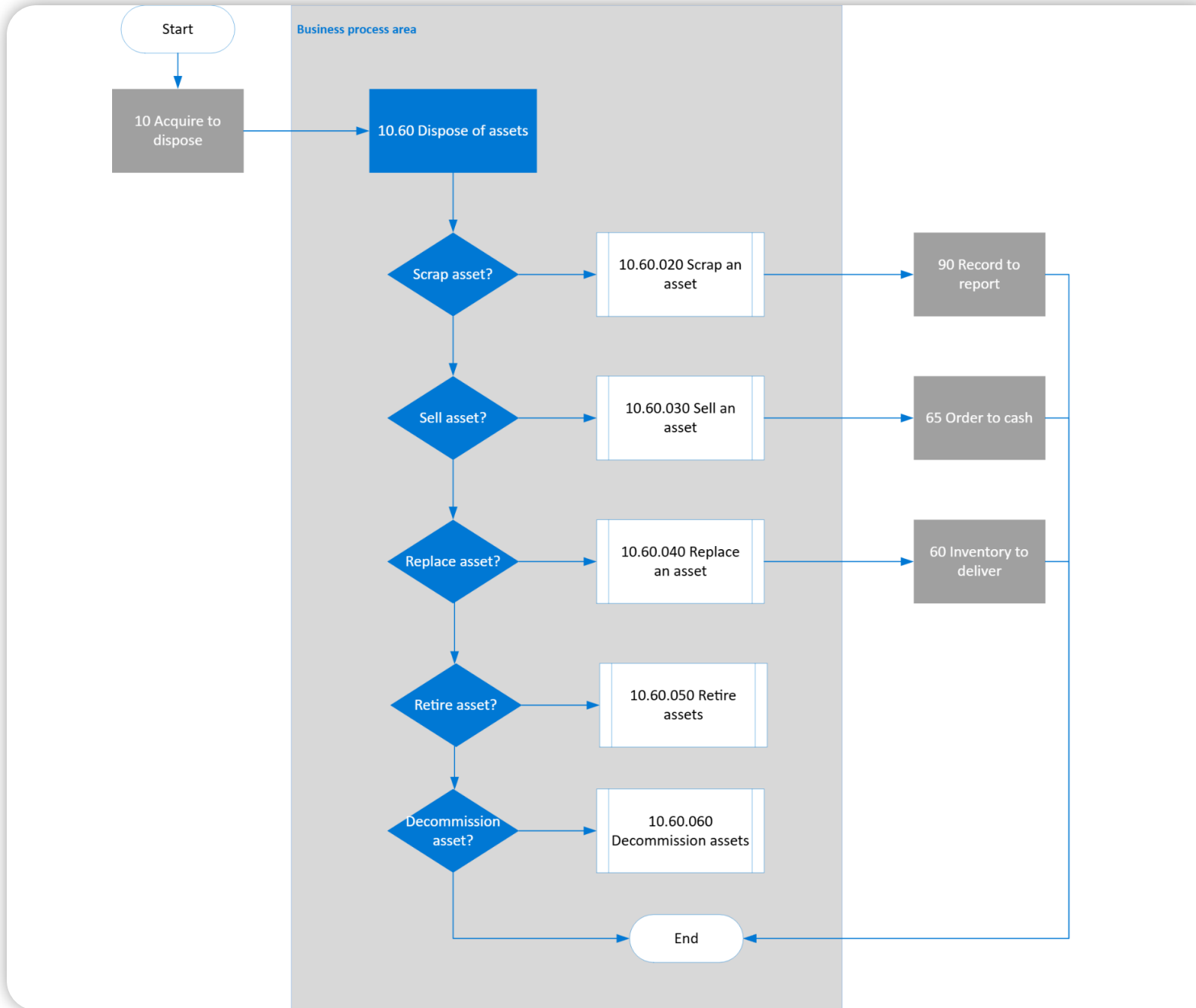
When a fixed asset is no longer needed, it can either be scrapped or sold

The screenshot displays the Dynamics 365 Finance and Operations interface for a fixed asset. The breadcrumb trail is 'Fixed assets > Fixed assets > Fixed assets'. The asset ID is 'VEHC-000009 : SLSL'. The 'Options' menu is open, showing 'Edit', '+ New', 'Delete', 'Transactions', 'Inquiry', 'Balances', 'Profile', 'Functions', 'Budget', and 'Options'. The left navigation pane shows a filter and a list of assets, with 'VEHC-000009 : SLSL' selected, showing 'Scrapped' and 'Current' status. The main content area has tabs for 'General', 'CHECK NET BOOK VALUE', 'ACQUISITION', and 'ISSUE'. The 'ISSUE' tab is active, showing 'Disposal date' as 3/31/2019. The 'BALANCE' tab shows 'Status' as 'Scrapped'. Other fields include 'Book' (SLSL), 'Posting layer' (Current), 'Round off depreciation' (0.00), 'Round off depreciation in reporting cu...' (0.00), 'CHECK NET BOOK VALUE' (Allow net book value higher than ac... No, Allow negative net book value No), 'ACQUISITION' (Acquisition date 1/1/2018, Acquisition price 24,000.00, Acquisition price in reporting currency 24,000.00, Acquisition method), and 'PROVISIONS' (Type).

# Dispose of assets process flow



It defines how organizations retire assets through scrapping, selling, or replacement, ensuring proper financial and operational closure



# Dispose of assets benefits



Improved cost savings



Reduced depreciation impact



Accurate financial reporting



Better compliance and safety



Alignment with business goals



Improved risk management



Enhanced employee productivity

**Analyze assets**



# Introduction to Analyze assets



Fixed assets appear on the balance sheet, while acquisitions and disposals flow through the cash flow statement



Asset management must comply with international accounting standards and local financial regulations



Companies define rules for acquisition, depreciation, disposal, write-ups, and write-downs



Dynamics 365 provides reports to analyze and review fixed asset information

## Book Value Analysis

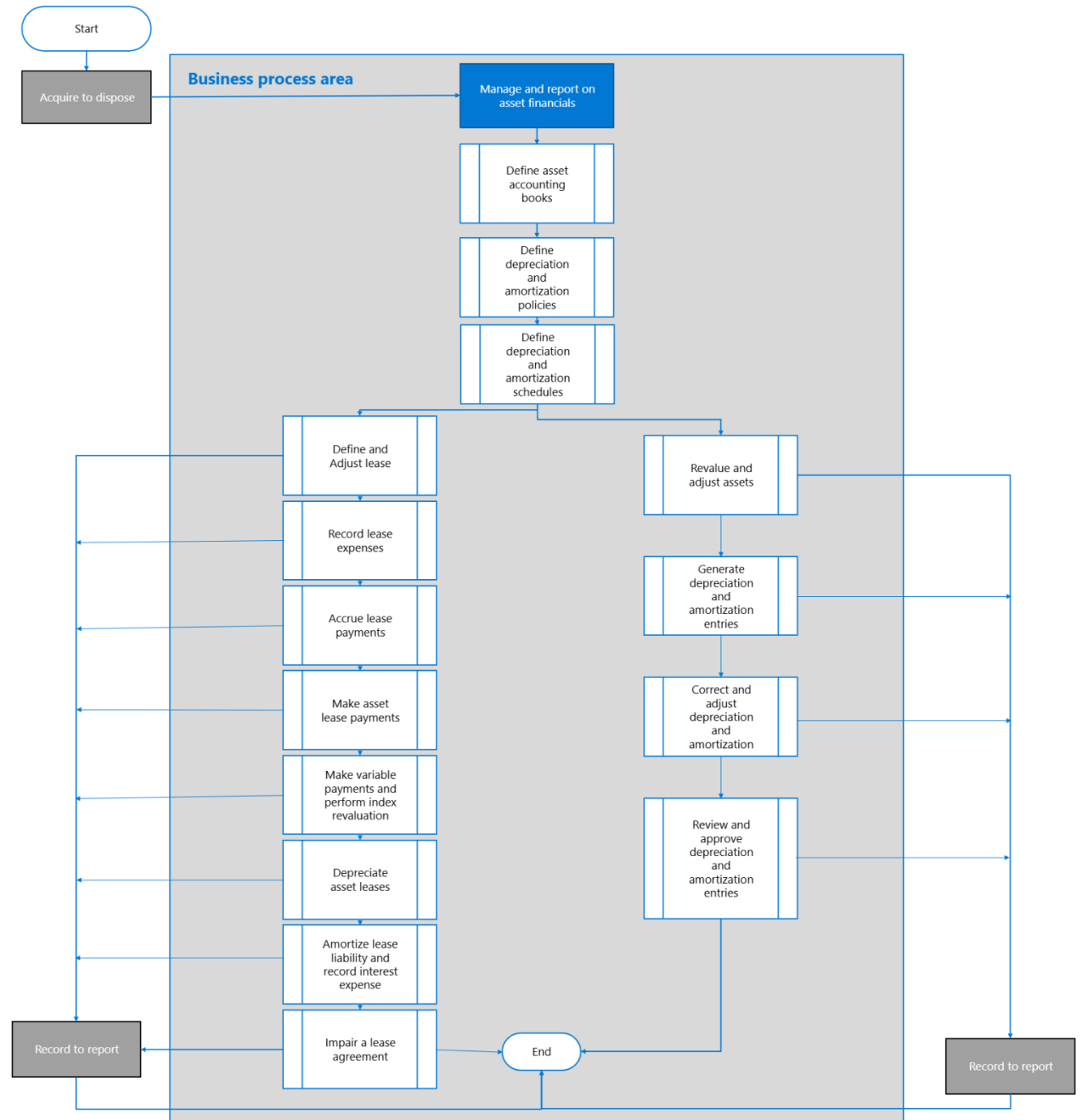
Depreciation COMPANY

FA Class Code	FA Subclass Code	No.	Description	Acquisition Cost	Addition in Period	Disposal in Period	Acquisition Cost After	Depreciation Before	Depreciation in Period	Depreciation After
TANGIBLE	VEHICLES	FA000010	Vehicle 1	0,00	17.000,00	0,00	17.000,00	0,00	-9.067,00	-9.067,00
TANGIBLE	VEHICLES	FA000020	Vehicle 2	0,00	12.000,00	0,00	12.000,00	0,00	-8.800,00	-8.800,00
TANGIBLE	VEHICLES	FA000030	Truck 1	0,00	14.000,00	0,00	14.000,00	0,00	-3.500,00	-3.500,00
TANGIBLE	EQUIPMENT	FA000070	Conveyor Lift	0,00	2.800,00	0,00	2.800,00	0,00	-1.050,00	-1.050,00
TANGIBLE	EQUIPMENT	FA000090	Switchboard	0,00	3.400,00	0,00	3.400,00	0,00	-769,00	-769,00
TANGIBLE	EQUIPMENT	FA000050	Conveyor Belt	0,00	5.600,00	0,00	5.600,00	0,00	-1.167,00	-1.167,00
TANGIBLE	EQUIPMENT	FA000080	Cargo Lift	0,00	4.800,00	0,00	4.800,00	0,00	-400,00	-400,00
TANGIBLE	EQUIPMENT	FA000060	Conveyor Computer	0,00	5.100,00	0,00	5.100,00	0,00	-1.009,00	-1.009,00
TANGIBLE	EQUIPMENT	FA000040	Conveyor, Main Asset							
<b>TANGIBLE Total</b>				0,00	64.700,00	0,00	64.700,00	0,00	-25.762,00	-25.762,00
<b>Grand Total</b>				0,00	64.700,00	0,00	64.700,00	0,00	-25.762,00	-25.762,00

# Analyze assets process flow



It defines how organizations evaluate asset value, depreciation, leases, and adjustments to ensure accurate financial reporting and compliance



# Analyze assets benefits



Effective financial management



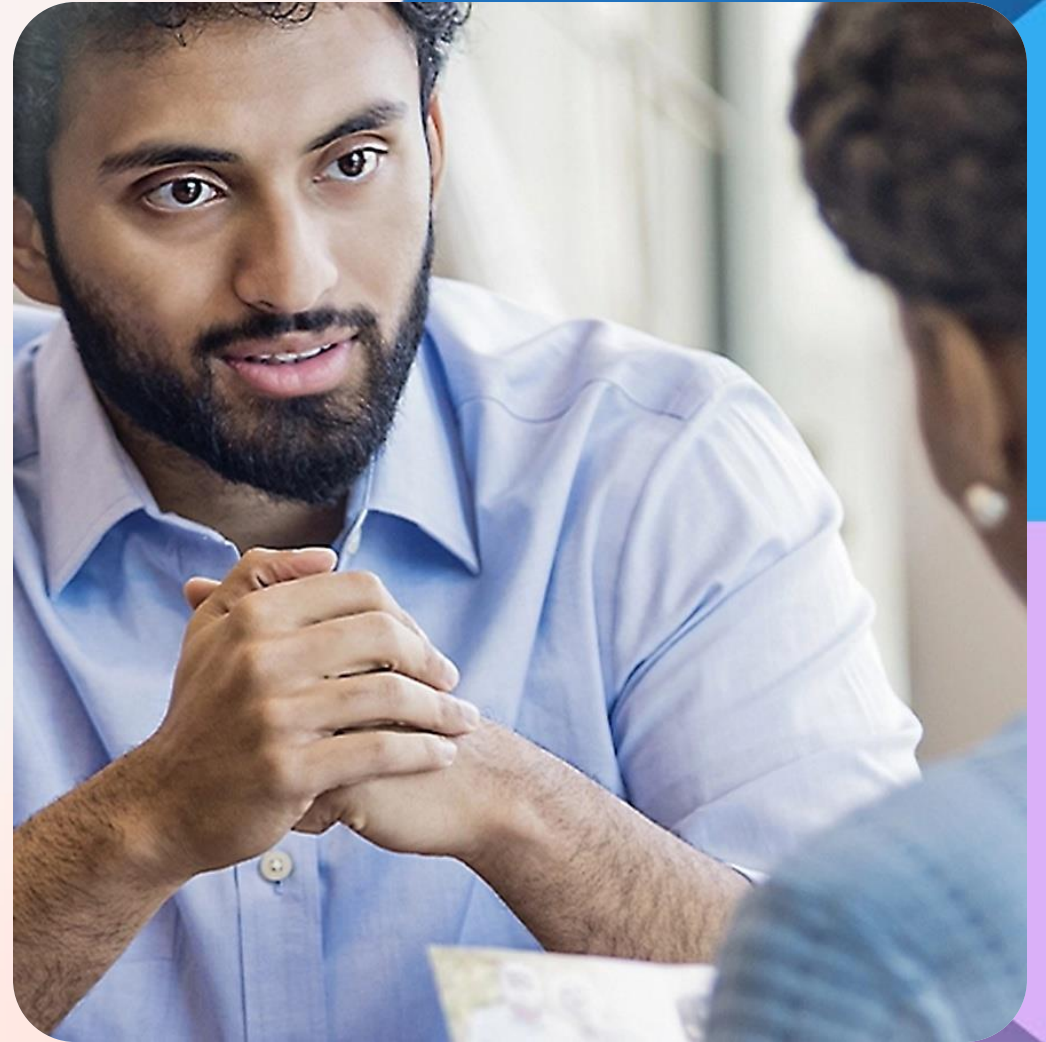
Improved reporting

Financial Reports

Search + New Edit List Delete Edit Financial Report... Print...

Name ↑	Description	Row Definition	Column Definition
→ <a href="#">ACC-CAT</a>	Account Categories overview	ACC-CAT	PERIODS
<a href="#">ANALYSIS</a>	Capital Structure	ANALYSIS	BAL ONLY
<a href="#">CASHFLOW</a>	Calculation Of Cash Flow	CASHFLOW	CASHFLOW
<a href="#">COST</a>			
<a href="#">I_CACycle</a>	Data for Cash Cycle Chart	I_CACycle	PERIODS
<a href="#">I_CASHFLOW</a>	Data for Cash Flow Chart	I_CASHFLOW	PERIODS
<a href="#">I_INCEXP</a>	Data for Income & Expense Chart	I_INCEXP	PERIODS
<a href="#">I_MINTRIAL</a>	Data for Reduced Trial Balance Info Part	I_MINTRIAL	PERIODS
<a href="#">M-BALANCE</a>	Balance Sheet	M-BALANCE	M-BALANCE
<a href="#">M-CASHFLOW</a>	Cash Flow Statement	M-CASHFLOW	M-NETCHANG
<a href="#">M-INCOME</a>	Income Statement	M-INCOME	M-NETCHANG
<a href="#">M-RETAIND</a>	Retained Earnings	M-RETAIND	M-NETCHANG
<a href="#">REVENUE</a>	Revenues	REVENUE	BUDGANALYS

# Customer evidence



# Modernize asset management to extend equipment life and reduce downtime

**ENERJİSA ÜRETİM**

## Dynamics 365 ERP

Enerjisa Üretim replaced its legacy maintenance system with Dynamics 365 to manage the full asset lifecycle across 29 power plants. By digitizing work permits, standardizing safety processes, and using real-time data to predict failures, the company improved equipment reliability, reduced paper use, and increased field adoption through mobile access.

[Read the story >>](#)

**312,500**

Assets across 29 power plants managed by Dynamics 365 to ensure uptime

**70%**

Reduction in paper use by eliminating manual work and digitizing workflows

Improved asset reliability by reducing unplanned downtime



Thank you!

**mavim**  
change it

