

## Mobiz Copilot Catalyst Accelerate tailored Power Platform solutions with Copilot

*A custom Power App integrated with Dynamics 365 Finance & Operations with a Copilot-enabled intelligence engine.*

### Short Description

Digitize your production floor and automate job tracking, downtime, and reporting with a Dual-Write–integrated Power App connected to Dynamics 365 Finance & Operations **now with an embedded Copilot agent** that monitors lines in real time, answers natural-language questions, and auto-creates work orders, root-cause notes, and shift reports inside Finance & Operations.

### Long Description

#### Automate Operations and Drive Production Efficiency with Mobiz Copilot Catalyst

Digitize your production floor with a Dual-Write integrated Power App connected to Dynamics 365 Finance & Operations now enhanced by a **Copilot agent**. The agent continuously analyzes orders, machines, and quality events to flag anomalies, explain *why* a line is down, and propose corrective actions. Ask, “What’s blocking WO-1432?” and get root-cause context plus a one-click draft to create or update Finance & Operations work orders, non-conformance records, and maintenance requests. It summarizes shift handovers, generates daily downtime reports, and nudges supervisors with proactive insights. Built on your tenant and governed by your existing security roles, it works across desktop, mobile, and Microsoft Teams accelerating decisions, reducing manual data entry, and shortening time-to-resolution on the shop floor.

### Key Features

- **Real-Time Dynamics 365 Finance & Operations Integration via Dual Write** – Instant bidirectional data sync with ERP.
- **Enhanced Production Order Visibility** – Access assigned operations, materials, and statuses.
- **Clock-In / Clock-Out & Job Reporting** – Simple registration of time, tasks, and indirect work.
- **Downtime & Performance Tracking** – Record machine stoppages and operator performance.
- **Multi-Device Support (Tablet / Mobile / Kiosk)** – Run seamlessly across platforms via Power Apps.
- **Material Consumption & Feedback Posting** – Record issues, scrap, and production feedback.
- **Power BI Reporting Integration** – Visualize OEE, downtime, and job performance metrics.
- **Role-Based Security & Access Control** – Operator, Supervisor, and Quality views.
- **Customizable UI & Branding** – Tailor the interface to your process and plant identity.
- **Offline Mode with Auto Sync** – Keep production data flowing even during network downtime.

### Agentic Capabilities

- Natural-language Q&A over jobs, downtime, and KPIs (Dataverse + Finance & Operations)
- Proactive alerts on anomalies; suggested corrective actions and spares
- One-click drafts for Finance & Operations work orders, NCRs, and maintenance requests
- Auto-generated shift summaries and daily downtime/throughput reports
- Guided operator checklists and escalation workflows in Teams/mobile
- Respects Finance & Operations /Dynamics security roles; activity is logged for audit

## Value Proposition

- **Digitize any operation:** Orchestrate processes across sales, service, finance, HR, supply chain, or field ops—on one Power App connected to Dynamics 365.
- **Copilot everywhere:** Embedded Copilot agent answers questions in plain language, recommends next actions, and drafts records (tasks, cases, work orders, POs, invoices, HR tickets) for one-click approval.
- **Real-time, proactive insight:** Detect exceptions, SLA risks, and bottlenecks; get root-cause context and suggested remedies before issues escalate.
- **Single source of truth:** Dual-write keeps Dataverse and Dynamics 365 Finance & Operations in lockstep.
- **Right-sized delivery:** Start small and scale **Starter** (one process/department), **Growth** (multi-process), **Enterprise** (multi-entity/global).
- **Faster outcomes:** Mobiz accelerators, templates, and guided build patterns cut time-to-value from months to weeks.
- **Reduce manual effort:** Eliminate re-keying and spreadsheet wrangling; Copilot drafts updates, reports, and summaries so teams review—not retype.
- **Meet users where they work:** Web, mobile, and Microsoft Teams with natural-language prompts and approvals.
- **Governed and secure:** Honors Dynamics roles, logs all agent actions, supports DLP and environment strategy, and runs in your tenant.
- **Low-code + pro-dev ready:** Extensible with custom connectors, APIs, and ALM/DevOps pipelines for enterprise CI/CD.
- **Decision-grade analytics:** Publish KPIs to Power BI and Microsoft Fabric; standardize metrics across departments.
- **Standardize best practices:** Guided checklists, playbooks, and approvals ensure consistent execution across teams and sites.
- **Lower TCO on Microsoft stack:** Leverage existing licenses, skills, and Azure services to reduce integration and maintenance costs.
- **Future-proof for AI:** Bring your own data and prompts; expand Copilot skills as processes mature—without re-platforming.

## Implementation Timeline

### Tier 1 Starter (1 process/department) 4–6 weeks

Week	Focus	Key Activities	Tangible Outputs
1	Discovery & Blueprint	Process mapping, data model, Dual-write entity list, Copilot use-cases & prompts, env setup (Dev/Prod)	Solution blueprint, backlog, RACI, cutover plan
2–3	Build (App + Integration)	Power App screens/flows, Dual-write config & initial sync, basic Power BI report, Teams app pin	Working app, mapped tables, seeded data, KPI draft
3–4	Copilot Agent (Core)	Grounding to Dataverse/ Finance & Operations, skills: Q&A + draft-records, guardrails & logging, sample prompts	Copilot enabled in app & Teams, audit log
4–5	UAT & Readiness	Test scripts, defect triage, role mapping, training runbook	Signed UAT, training deck, admin guide
5–6	Go-Live & Hypercare	Cutover, monitoring, hot-fixes, usage analytics	Prod release, 2-week hypercare report

**Assumptions:** single BU, ≤5 Dual-write tables, 1 dashboard, standard security/DLP.

### Tier 2 Growth (2–4 processes/departments) 8–12 weeks

Week	Focus	Key Activities	Tangible Outputs
1–2	Discovery & Architecture	Multi-process blueprint, env strategy (Dev/Test/Prod), DLP, ALM pipelines	Target architecture, test plan, CI/CD set-up
3–6	Build (Workstreams)	Parallel app modules, Dual-write extensions (lookups, virtual tables), validation rules, notifications	Modular app, extended entity maps, test data
5–6	Analytics & Insights	Power BI model, departmental KPI packs, alerts	Published reports, governed datasets
6–8	Copilot Agent (Advanced)	Skills: exception triage, summaries, action suggestions; Teams approvals; telemetry	Copilot v2 with skills catalog & usage metrics

9–10	UAT & Security	Role-based testing, performance & payload tuning, data retention	UAT sign-off, perf report, retention policy
11–12	Deploy & Hypercare	Phased rollout, adoption sessions, playbooks	Go-live waves, adoption kit, hypercare report

**Assumptions:** 6–12 Dual-write tables, 2–3 dashboards, light integrations (API/SFTP).

### Tier 3 Enterprise (multi-entity/regions) 16–24 weeks

Week	Focus	Key Activities	Tangible Outputs
1–3	Program Inception	Global process variants, data residency/compliance, integration catalog, non-prod sandboxes	Program plan, global data model, risk register
4–6	Platform & Governance	Center of Excellence (CoE), DLP tiers, RBAC, secrets & logging, DR/backup	Governance handbook, runbooks, observability
7–14	Build at Scale	Domain-based squads, complex Dual-write (custom plugins, async patterns), legacy connectors	Incremental releases, performance baselines
10–14	Copilot Agent (Enterprise)	Multi-tenant skills, policy-aware prompts, advanced grounding (RAG), audit APIs	Copilot v3 with policy packs & audit feeds
12–16	Analytics & Fabric	Enterprise semantic model, certified datasets, Fabric pipelines (optional)	KPI catalog, certified workspaces
15–18	UAT, Perf & Sec	Scale tests, SoD reviews, pen test remediation	Perf & security sign-offs
18–24	Regional Rollouts	Wave plan, change management, KT to ops, SRE playbooks	Production cutovers by region, steady-state ops

**Assumptions:** >12 tables, multiple ERPs/CRMs or entities, strict compliance.

### What's included in every tier

- Copilot agent: natural-language Q&A, draft-record actions (tasks/cases/work orders/POs), summaries, guardrails + audit logging, Teams surface.
- Dual-write: entity mapping, initial sync, cutover & reconciliation playbook.
- Governance: environments, DLP, RBAC, logging, ALM (Dev→Test→Prod).

- Adoption: role-based training, quick-ref guides, hypercare.

#### **Optional accelerators (add 1–3 weeks if selected)**

- IoT/telemetry integration, external CMMS/HRIS/QA systems, customer/partner portals, advanced Fabric pipelines, multi-lingual UX.

#### **Exit criteria by tier**

- Starter: 1 process live, ≤5 tables synced, Copilot core live, 1 KPI pack.
- Growth: 2–4 processes live, CI/CD in place, Copilot advanced skills, 2–3 KPI packs.
- Enterprise: Multi-region rollout, certified datasets, Copilot policy packs, documented SRE/ops.

#### **Pricing**

##### **Free Assessment (no-cost, 60–90 mins)**

Book a discovery call with Mobiz to review scope, data sources, security, and success metrics. We'll also check your eligibility for Microsoft funding and credits, then follow up with a tailored quotation.

##### **Right-Sized Plans (custom quote after assessment)**

- **Starter (4–6 weeks)** 1 process/department with Copilot core + Dual-write. *Custom quote; funding offsets applied if eligible.*
- **Growth (8–12 weeks)** 2–4 processes, CI/CD, advanced Copilot skills, KPI packs. *Custom quote; funding offsets applied if eligible.*
- **Enterprise (16–24 weeks)** Multi-entity/region rollout, governance, Fabric analytics, policy-aware Copilot. *Custom quote; funding offsets applied if eligible.*

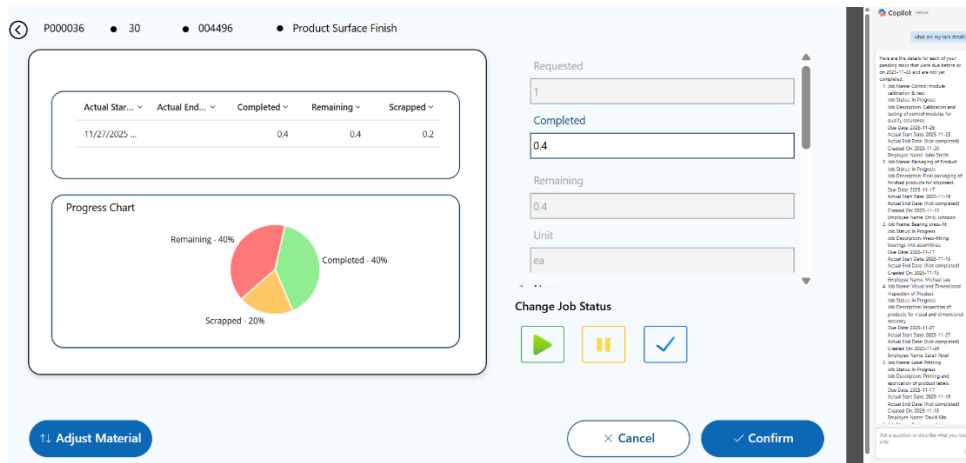
#### **How it works**

1. **Contact Mobiz for Free Assessment** → we confirm scope and funding options.
2. **Funding check & proposal** → you receive a detailed SoW + quotation, with any Microsoft funding/credits applied to reduce your total cost.
3. **Kickoff** → we start with the right-sized tier and scale as needed.

## Sample Visuals (for AppSource gallery)

You should upload **4–5 visuals** with these captions:

### 1. **Dashboard View:** “Monitor job progress and worker performance in real time.”



### 2. **Job Registration Screen:** “Simplified Clock-In, Clock-Out, and activity tracking.”

The job registration screen displays the following information:

- Header:** Thursday, November 27, 2025, 07:46:17 PM, Saman Ashraf.
- Active Assignment Table:**

Job Id	Description	Job Status	Completed	Requested	Remaining	Scrapped	Unit
004489	Surface Pol...	Started	1.2	2	0.8		ea
004496	Color Coat...	Paused	0.4	1	0.6		ea
- Navigation Sidebar:**
  - Active Assignment
  - All Assignment
  - My Machine
  - Non Operational Tasks
  - Pause
  - Report Progress
  - Report Scrap
- Buttons:** Operator Console, Machine Console.

### 3. Downtime Logging: “Capture downtime reasons for capacity optimization.”

Add Downtime

Reason Code  
Maintenance

Maintenance Stop  
From 11/27/2025 02:30 PM  
To 12/6/2025 03:15 PM

Cancel Confirm



### 4. Power BI Analytics: “Visualize OEE, job efficiency, and material consumption trends.”

Thursday, November 27, 2025  
08:03:41 PM

Saman Ashraf

Active Assignment All Assignment My Machine Non Operational Tasks

Product Surface 30  
Control module 40  
Product Quality 50

Job Id 004490  
Description Color Coating and Finishing

Assignment Details

Name	Description
Color Coating and Finishing	Color Coating and Finishing
Job Status	Job Type
Paused	Process
Actual Start Date	Actual End Date
11/27/2025 13:19	12/31/2001 00:00
Completed	Remaining
0.5	1.5
Scrapped	Unit
	ea

Operator Console Machine Console

Resume Report Progress Report Scrap

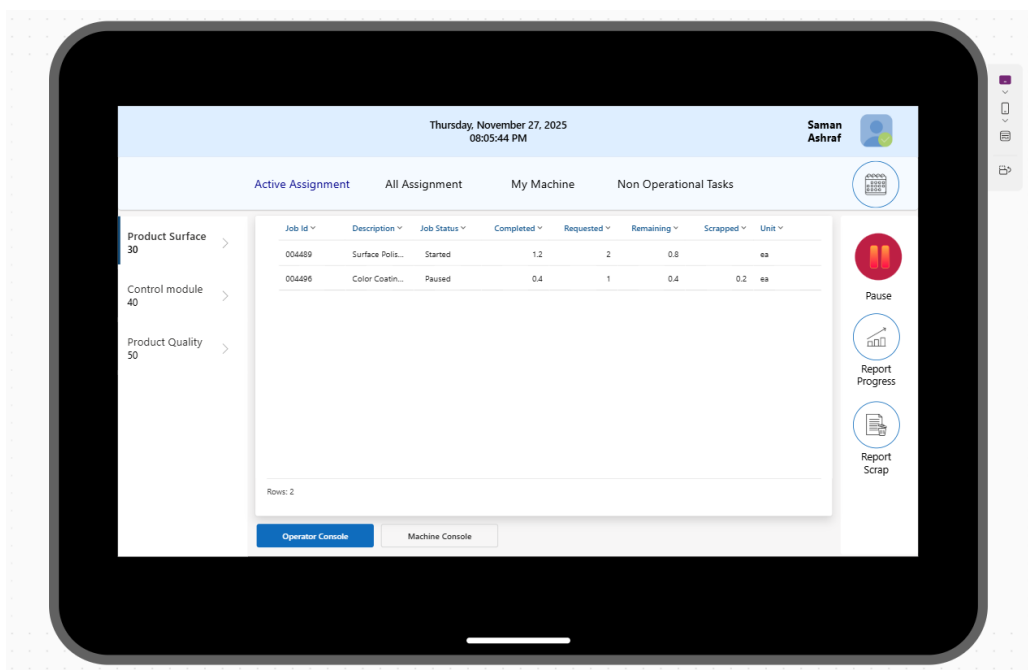
Here are the details of all tasks that are not completed and were due before November 18, 2025.

- Job Color Coating and Finishing
  - Status: 1
  - Description: Color Coating and Finishing
  - Due Date: 2025-11-27
  - Actual Start Date: 2025-11-27
  - Actual End Date: Not Finished
  - Created On: 2025-11-13
  - Assigned To: Rajan Sathyan
- Job Label Printing 2
  - Status: 1
  - Description: Label Printing 2
  - Due Date: 2025-11-18
  - Actual Start Date: 2025-11-18
  - Actual End Date: Not Finished
  - Created On: 2025-11-13
  - Assigned To: Rajan Sathyan
- Job Color Coating and Finishing 2
  - Status: 1
  - Description: Color Coating and Finishing 2
  - Due Date: 2025-11-27
  - Actual Start Date: 2025-11-27
  - Actual End Date: Not Finished
  - Created On: 2025-11-13
  - Assigned To: Rajan Sathyan
- Job Control module calibration 5s test
  - Status: 2
  - Description: Control module calibration 5s test
  - Due Date: 2025-11-26
  - Actual Start Date: 2025-11-26
  - Actual End Date: Not Finished
  - Created On: 2025-11-13
  - Assigned To: Saman Ashraf
- Job Packaging of Product
  - Status: 1
  - Description: Packaging of Product
  - Due Date: 2025-11-17
  - Actual Start Date: 2025-11-17

Ask a question or describe what you need

State turn AI-generated content is accurate and appropriate before using. (see notes)

### 5. Mobile Interface: “Operate seamlessly on mobile, tablet, or kiosk devices.”



## Keywords

Dynamics 365, Shop Floor, Manufacturing, Production, Power Apps, Dual Write, ERP, Dynamics 365 Finance & Operations, MES, Copilot, Azure Integration, Digital Manufacturing

## Category & Compatibility

- **App Type:** Power App integrated with Dynamics 365 Finance & Operations
- **Works With:** Microsoft Dynamics 365 Finance, Supply Chain Management, Power Platform
- **Hosting:** Cloud (Azure)
- **Integration:** Dual Write, Dataverse, Power BI, OData, CoPilot Studio

## Publisher Information

**Publisher Name:** Mobiz (Pvt.) Ltd.

**Website:** <https://www.mobizinc.com>

**Country/Region:** USA / Middle East / Europe / Asia Pacific

**Industry Focus:** Manufacturing, Energy, Industrial Services