Transform your **finance operations** on **D365** with **Copilot** and **AI agent-based automation**

Driving financial excellence through AI and automation with Sonata

Finance and procurement functions are at a turning point – traditional, manual processes are no longer sustainable in a fast-paced digital world. Reliance on paper-based workflows and spreadsheets slows operations, while siloed data across departments makes expense tracking and vendor management inefficient.

To stay competitive, organizations must embrace AI-driven automation to boost efficiency, reduce costs and ensure compliance with evolving regulations.

Sonata's **AI-powered process automation solution**

Sonata's cutting-edge **Copilot and AI agent-based automation** solution redefines finance and procure-to-pay (P2P) operations, eliminating manual inefficiencies and enabling real-time decision-making, seamless process automation and delivering measurable business impact.

With automation driven invoice processing, predictive spend analytics and automated vendor onboarding, enterprises achieve **50-70%** faster processing, **40-50%** cost savings and real-time risk management.

Maximize your **Microsoft Dynamics 365 investment**

Many organizations underutilize Microsoft Dynamics 365, leveraging only **~40%** of its capabilities while grappling with high costs, compliance risks and challenges in modernizing back-office operations.

Sonata's solution is **seamlessly integrated with Dynamics 365,** helping enterprises:

1 Capitalize on Copilot and AI agent-based automation capabilities for enhanced business value

2 Leverage surround applications and Dynamics as a growth platform

3 Enhance agility, ensure compliance and scale for future-ready finance operations

Sonata's
core offerings

1 Out-of-the-box D365 AI agents for accelerated deployment

2 Custom build Copilots for process automation to boost process agility and efficiency

Delivering **tangible business outcomes**

Reduce costs and improve efficiency
- Automates **60-80%** of manual finance tasks, reducing operational costs
- **50-70%** faster invoice approvals and payments, improving working capital

Ensure compliance and reduce financial risks
- Automation powered compliance tracking for SOX, IFRS, GDPR and ESG mandates
- Fraud detection algorithms prevent duplicate payments and vendor risk

Gain a competitive edge with Copilot and agent-based innovation
- Real-time analytics and automation drive strategic decision-making
- Copilot and agent-based automation boosts efficiency by 40%+

Scale seamlessly with business growth
- Copilot and Dynamics agent adapt to evolving business needs

Success story: UK-based telecom provider transformation

Challenges

1

Outdated legacy systems and high IT costs

2

Lack of standardized processes and poor customer experience

Solutions
- Technology modernization: modernization: Implemented RPA-driven workflows and AI dashboards
- Process standardization: Established a CoE using AI automation agents
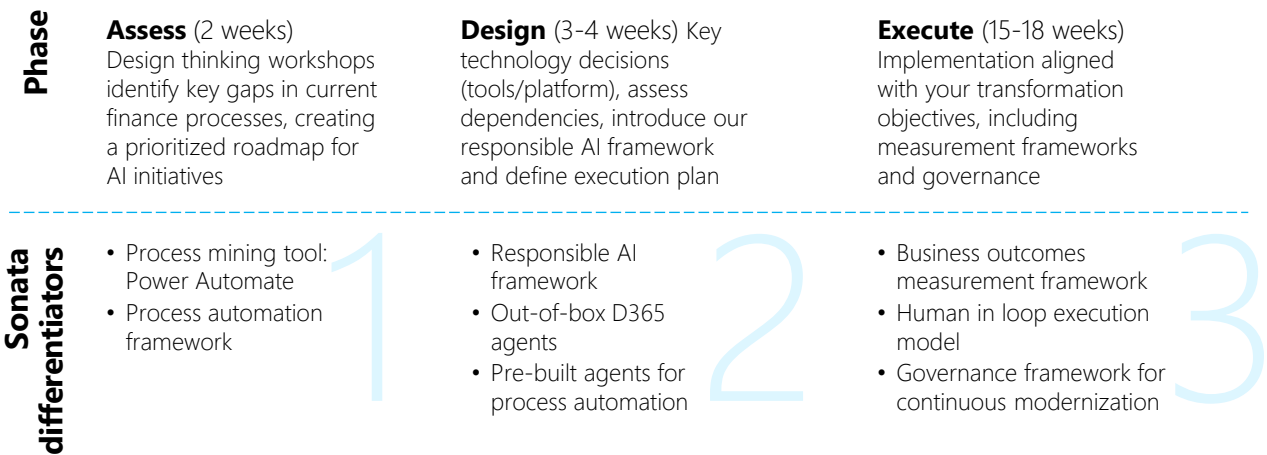- Resource optimization: Reduced manual interventions through autonomous AI agents

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Benefits
- Payment processing accelerated from 7 days to 4 workdays
- Collections consistently managed at 95-98% volume using AI agents
- Team utilization improved from 65% to 95%
- Operational costs reduced by 25% through AI-led process standardization

Our **engagement model**

Sonata's three-phase approach ensures a successful transformation.

Phase	**Assess** (2 weeks) Design thinking workshops identify key gaps in current finance processes, creating a prioritized roadmap for AI initiatives	**Design** (3-4 weeks) Key technology decisions (tools/platform), assess dependencies, introduce our responsible AI framework and define execution plan	**Execute** (15-18 weeks) Implementation aligned with your transformation objectives, including measurement frameworks and governance

Sonata differentiators	1	2	3
	• Process mining tool: Power Automate • Process automation framework	• Responsible AI framework • Out-of-box D365 agents • Pre-built agents for process automation	• Business outcomes measurement framework • Human in loop execution model • Governance framework for continuous modernization

Why **Sonata?**

30+ years
of engineering relationship with Microsoft

Deep expertise
in both the Dynamics ecosystem and generative AI services

Microsoft Inner Circle
member for FY24-25 (fourth consecutive year)

Responsible AI
design and adoption framework ensuring ethical implementation

Transform your finance operations with Sonata

Learn how our AI-powered process automation solution can drive efficiency, compliance and innovation in your organization.

[Schedule a consultation](#)