

Use case

Reducing sales order processing cycle time by up to 50% with AI-powered order capture in D365 F&O

Overview

Environment Microsoft Azure/Hybrid | **Engagement type** Funded Assessment / PoC | **Duration** 3 Months

ERP platform Microsoft Dynamics 365 Finance & Operations (D365 F&O)

This PoC demonstrates the end-to-end automation of sales order entry for the US Additives business unit of the client. The AI agent handles two primary order channels, email (including attachments) and phone-call-assisted entry, and orchestrates validation, ERP posting, and CSR approval workflows.

Customer snapshot

Industry Agri-tech | **Headquarters** Kentucky | **Company size** 5,000+ employees

The business challenge

- Sales order entry is largely manual, with orders received via emails and phone calls
- CSRs manually validate and extract order details from unstructured inputs (emails, attachments, calls)
- Manual mapping of customer details, product codes, and quantities increases dependency on human effort
- High reliance on CSR judgment to ensure order completeness and accuracy
- Lack of automation creates inefficiencies in order processing and ERP order creation

Impact of the problem

Dimension	Observed impact
Cycle time	Multi-step manual process from receipt to ERP entry; delays compounded by back-and-forth correspondence for missing details.
Productivity	CSR bandwidth is heavily consumed by repetitive data entry tasks, limiting capacity for customer-facing activities.
Error risk	Manual transcription of product codes, quantities, and customer identifiers increases the risk of mismatch and rework.
Customer experience	Delayed order acknowledgements and inconsistent communication reduce buyer confidence.

PoC objective

- Support CSRs with AI-assisted transactional processing of incoming sales orders
- Improve accuracy of captured sales order information
- Reduce manual effort in order entry process
- Enable efficient processing of orders from email and phone channels

The Sonata solution – what we did

Sonata deployed an AI-powered intelligent agent integrated with Microsoft D365 F&O to automate the sales order entry lifecycle for US Additives. The agent operates across two primary channels – email ingestion and phone-call conversational assistance – and orchestrates business rule validation, CSR approval workflows, and automated ERP posting.

Phase 1 – Email order channel

- AI agent monitors the shared mailbox and identifies incoming emails containing new sales order requests, even when subject lines are vague or non-standard.
- Extracts structured order data from email body and attachments (PDF, Word, plain text).
- Automatically sends a branded acknowledgement email to the customer confirming receipt, with the original email attached.
- Appends all identified orders to a shared staging list in D365, updated with status (success /failed/incomplete).
- Applies business rule validation: customer identification (by email, phone, or customer ID), product code mapping against catalog, and quantity unit normalization to kilograms.
- Notifies CSR for validation and approval via the shared list view before ERP posting.
- On CSR approval, creates the confirmed sales order in D365 F&O and removes the entry from the staging list.

Phase 2 – Phone call conversational channel

- CSR activates the AI conversational assistant during an incoming customer call.
- Agent provides real-time look-up of customer purchase history and account data from D365 to support the CSR during the conversation.
- CSR inputs order details via the conversational interface; the AI agent checks order completeness and prompts the CSR for missing information
- Same validation, staging, approval, and ERP posting workflow as the email channel applies.

Pilot dashboard

- A one-page summary dashboard (manually created in the pilot phase, if required) provides visibility into:
 - orders received per day/week/month
 - Successfully posted to ERP
 - With incomplete customer-provided data
 - Failed during validation or ERP posting

Microsoft technologies used

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Current scope vs. future enhancements

Current scope	Future enhancements
<ul style="list-style-type: none"> • Email order identification and parsing • Attachment processing (PDF, Word, text) • Automated customer acknowledgement • Customer account matching • Product code mapping • Quantity conversion to Kg • CSR conversational assist (phone) • CSR validation and ERP posting workflow • Pilot scorecard dashboard 	<ul style="list-style-type: none"> • Order updates and delivery tracking via AI • Order links embedded in email body • Processing by product/item number (vs. name) • Modifications to existing orders • Backend ERP validations (inventory, schedules) • Voice/voicemail transcription • Near-real-time purchase history access • Cross-sell / upsell recommendations

Microsoft + Sonata credibility

30+ years of partnership | **Microsoft AI Business Solutions Inner Circle member** | **Microsoft Frontier Firm Partner**

Why Sonata

Reusable AI agent architecture designed for rapid deployment across order channels | ERP-safe human-in-the-loop validation pattern | Funded PoC-to-scale approach enabling faster realization of business value with low upfront risk

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Results and benefits

Metric	Before PoC	After PoC
Order entry effort per CSR – Manual to AI assisted validation and ERP posting	High – full manual entry for every order	Up to 60% reduction in manual effort spent towards extraction and validation
Order capture accuracy	Prone to human error in transcription	<ul style="list-style-type: none"> • AI-validated customer, product, and quantity data • Higher accuracy (improvement from ~85% to up to 98%) with structured validation
Order processing cycle time (email)	Multiple back-and-forth email exchanges	<ul style="list-style-type: none"> • Single-pass extraction + CSR approval • Up to 50% faster processing; and fewer follow-ups to same day posting
Order processing cycle time (phone)	Manual notes + delayed ERP entry	<ul style="list-style-type: none"> • Reduced lag between call and order creation • Real-time conversational assist + direct ERP posting
ERP posting errors	Manual entry risks incorrect codes/quantities	<ul style="list-style-type: none"> • Reduced mismatches and rework by up to 75% due to AI product mapping and unit conversion • AI product mapping + quantity conversion + CSR sign-off
CSR productivity	Focused on data entry tasks	Shifted ~40% of the time from data entry to customer engagement.

Next steps for you

Contact Sonata

*Sonata Software is recognized as a Microsoft Frontier Partner, underscoring its leadership in AI transformation through an AI-first, human-led approach that drives innovation and scalable impact across cloud and AI platforms, AI business solutions, and security.

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