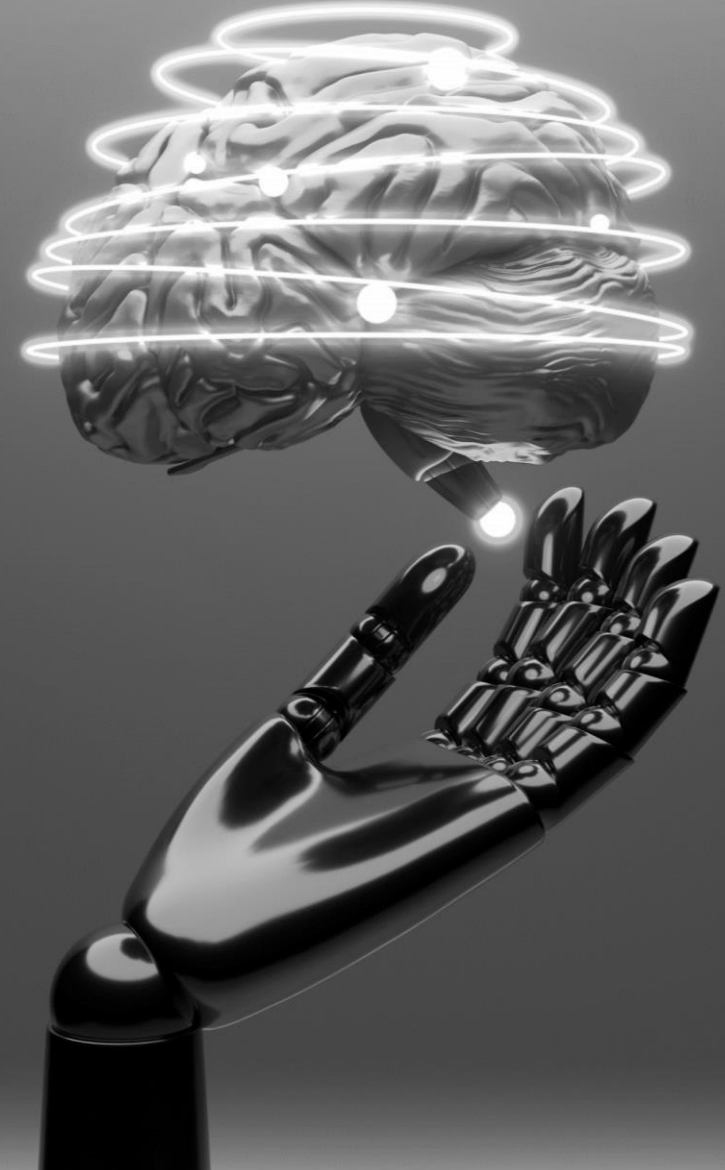


Procure to Pay Automation with Microsoft Copilot Studio: 10-Week Implementation



Previous Landscape



Process – Procurement and material management operations were fragmented across multiple systems and manual workflows, resulting in poor synchronization of vendor management, requisitions, and returns. These gaps led to delays, inconsistent decisions, and increased risk—especially during emergency procurement, multi-vendor bidding, and quality-related returns.



Business Challenges

- Disconnected vendor and procurement data across functions.
- Manual approvals and email-based coordination.
- Limited visibility into inventory, spend, and supplier performance.
- Prolonged cycle times and compliance risks.

Celebal's Solution



Solution – A Copilot Studio-powered Procure-to-Pay solution streamlines procurement scenarios by automating key functions such as PO creation, returns, and multi-vendor bidding. Conversational AI agents in Microsoft Teams enhance decision-making by analyzing inventory and demand data, triggering approvals, and flagging exceptions. Designed for flexibility, the solution can integrate with existing systems as needed—reducing manual effort, improving compliance, and accelerating procurement cycles.



Business Impact

- Reduced procurement cycle time.
- Enhanced governance, auditability, and cost control.
- Unified experience for QA, procurement, and finance teams.



Personas

- Plant Operations Supervisor
- Operations Planner
- Strategic Buyer
- Finance Controller
- QA Lead / Managers
- VP Operations
- Procurement Lead



Integrations

- MS Dataverse
- Microsoft Teams
- Power Automate
- SAP (Future Scope)
- Vendor Systems (Future Scope)



Industry

- Manufacturing
- Food Processing
- FMCG
- Pharma

AI-Powered Procure-to-Pay Transformation through Microsoft Copilot Studio

Control Tower Agent

Operational Control

- Monitors and orchestrates all P2P agent activities requisition, PO, QA, and payment flows.
- Tracks SLA adherence & triggers escalations

Business Observability

- Provides unified **Operational Analytics Dashboard**
- Detects anomalies, compliance gaps, for proactive resolution.

Functional Observability

- Continuously tracks agent health, workflow latency, and integration failures across systems.
- Enables auto-retry and exception handling

Multi-Vendor Bidding



Key Features

- Automated RFQ creation & dispatch
- Smart vendor shortlisting
- AI-Driven bid scoring & evaluation
- PO generation & audit ready summary



Personas Involved

- Operations Planner
- Procurement Lead
- Finance Controller



Business Values

- Transparent vendor selection
- Faster sourcing cycle

Raw Material Procurement



Key Features

- Demand vs Inventory analysis
- Intelligent buffer Logic
- Autonomous Reorder Recommendations
- Draft Purchase Order Generation
- QA clause integration
- Budget-Linked and Hierarchical Approvals



Personas Involved

- Operations Planner
- QA Manager
- Strategic Buyer
- Finance Controller



Business Values

- Proactive procurement decisions
- Forecasting accuracy

Emergency Procurement



Key Features

- Trigger emergency POs via Teams chat
- Auto inventory check across plants
- QA retest & fallback vendor logic
- Escalations & governance routing



Personas Involved

- Plant Operations Supervisor
- QA Lead
- Strategic Buyer
- VP Operations
- Finance Controller



Business Values

- Zero downtime during production
- Faster emergency procurement

Raw Material Return



Key Features

- Automatic quarantine on QA failure
- Return & credit memo automation
- Vendor contract clause validation
- Automated return processing
- Return tracking



Personas Involved

- QA Manager
- Procurement Lead
- Finance Controller



Business Values

- Faster credit cycles
- Full audit readiness

User Interface layer



MS Teams



Power Apps



Copilot Studio

Data & Integration Layer



Microsoft Dataverse



Power Automate

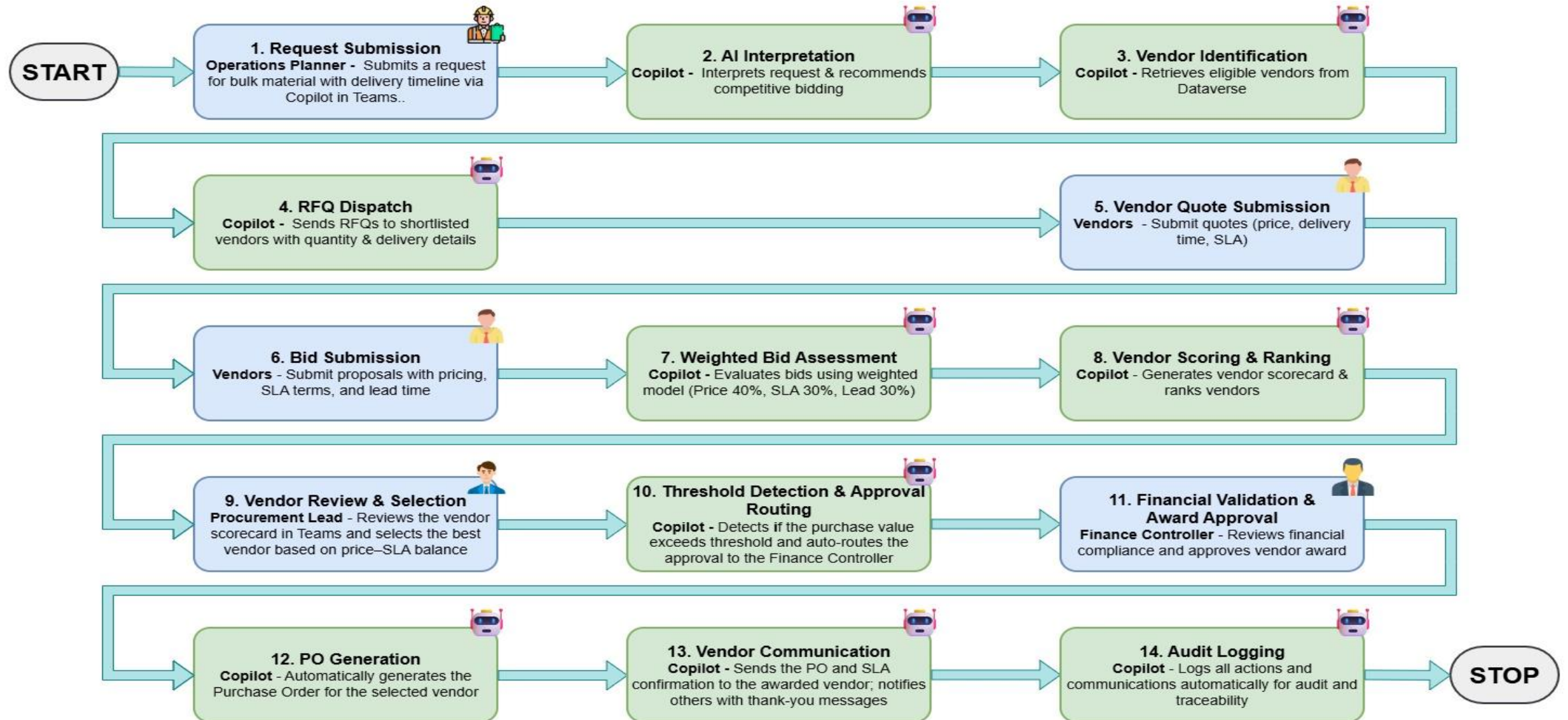
- ERP
- Finance
- QA Tools
- Inventory DBS

Governance Layer

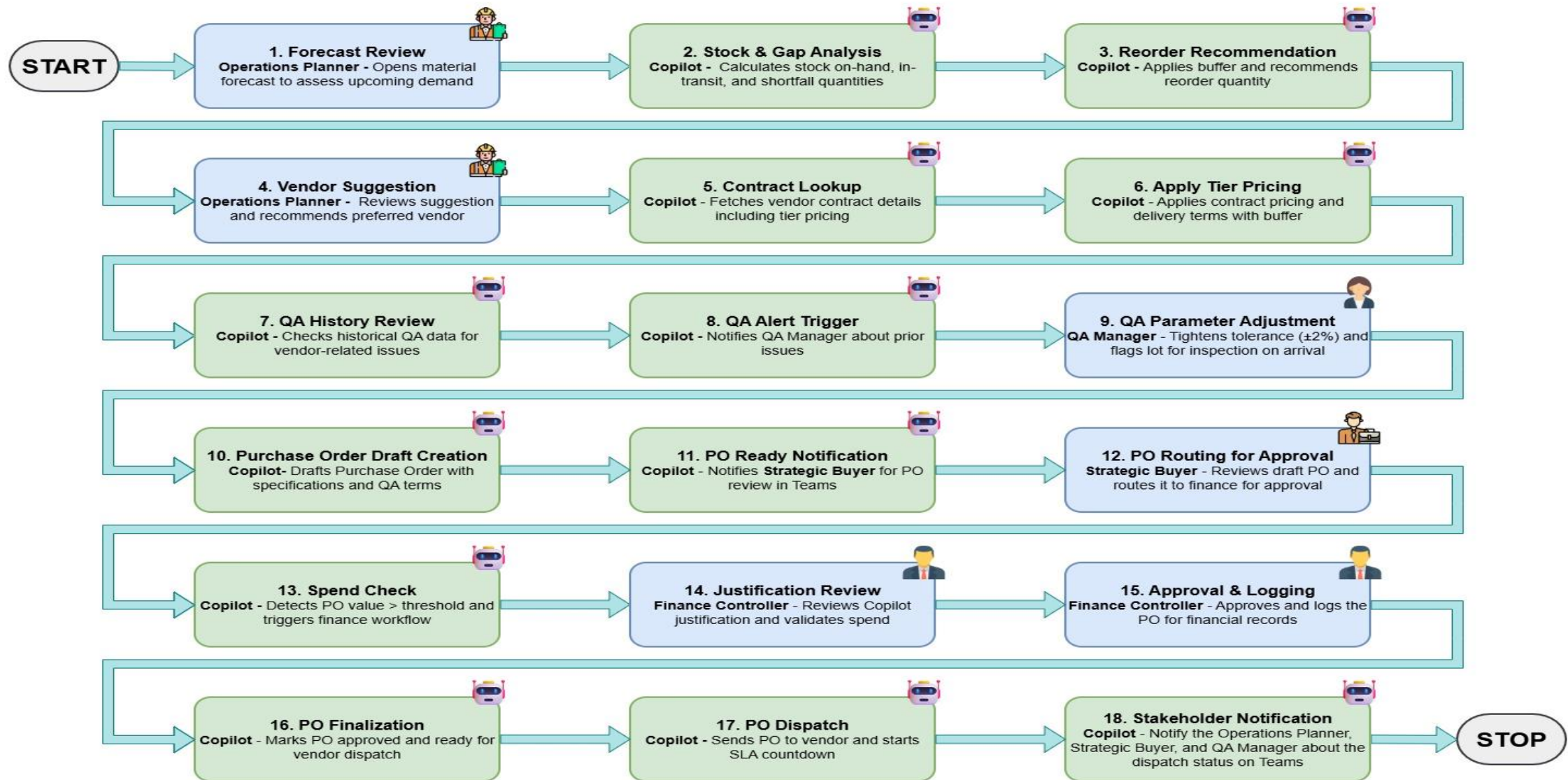
- Role-Based Access Control (RBAC)
- Approval Hierarchies & Escalation Rules

- Audit Logging
- Policy Validation

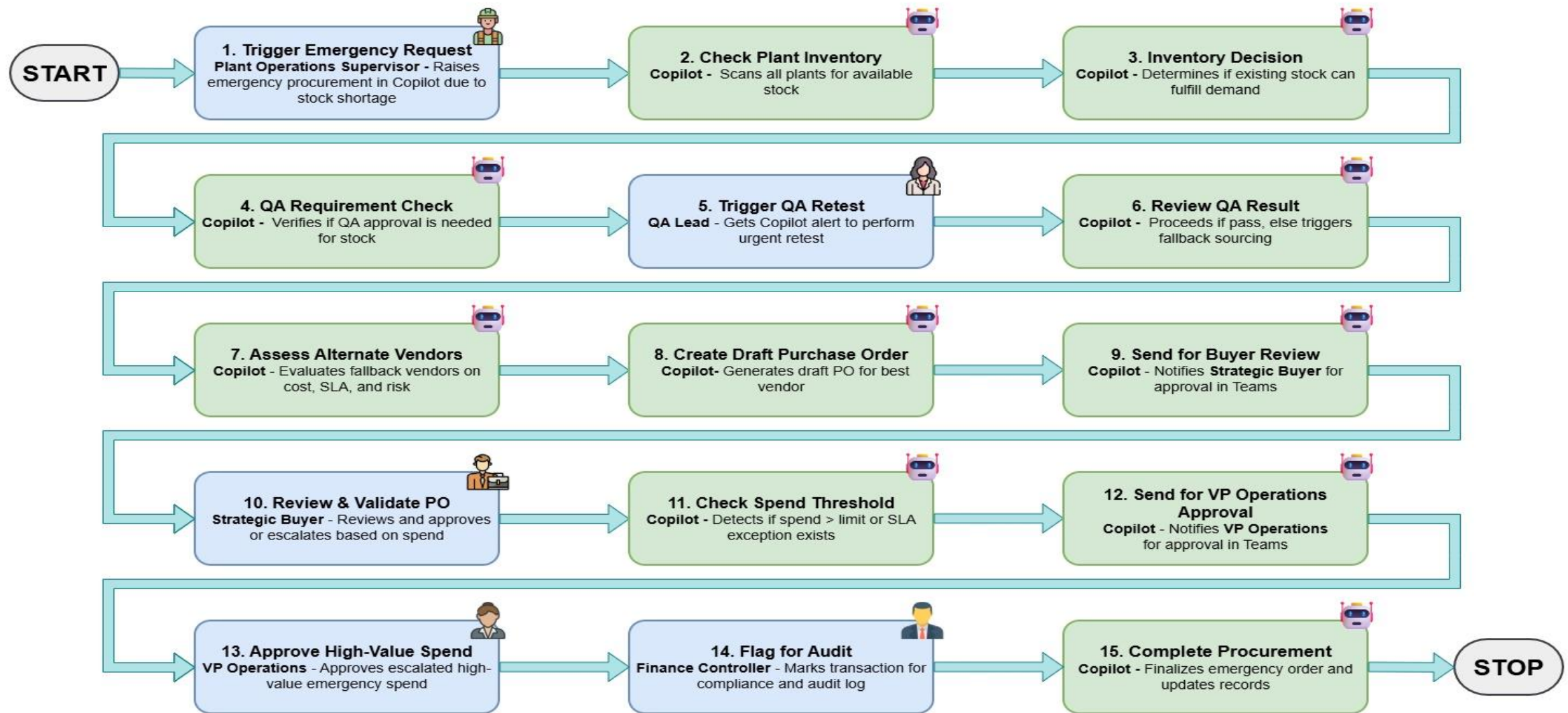
Multi-Vendor Bidding – Functional Workflow



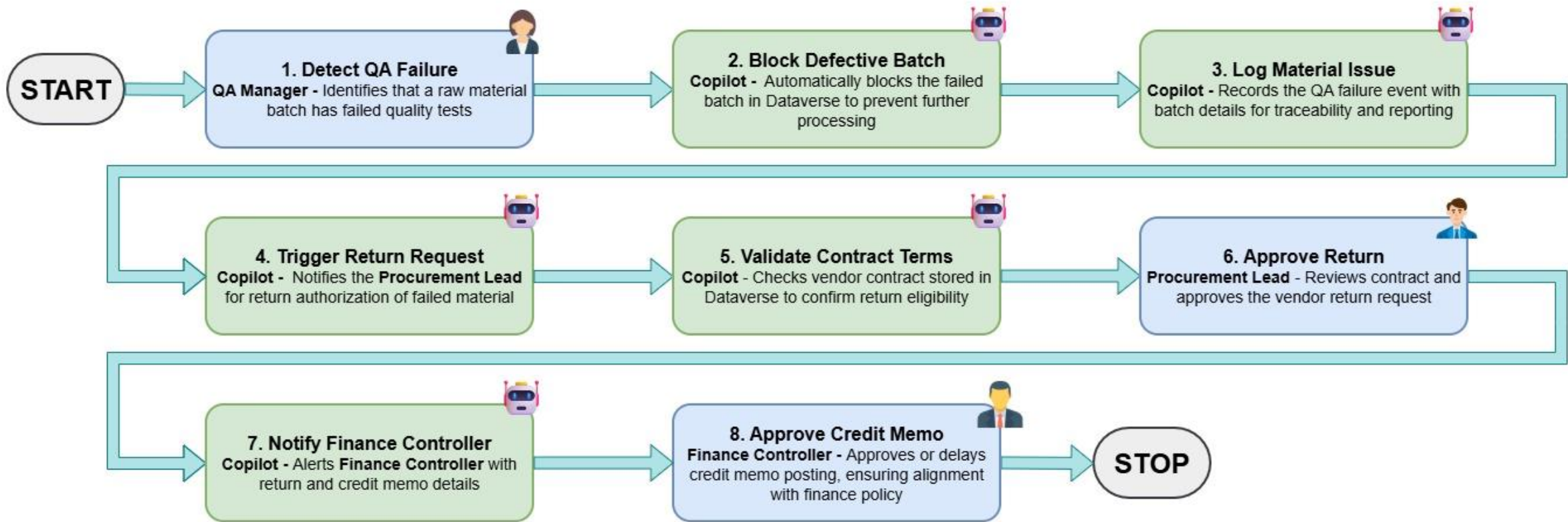
Raw Material Procurement – Functional Workflow



Emergency Procurement – Functional Workflow



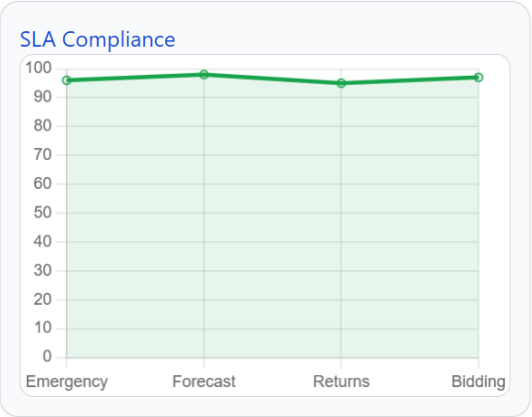
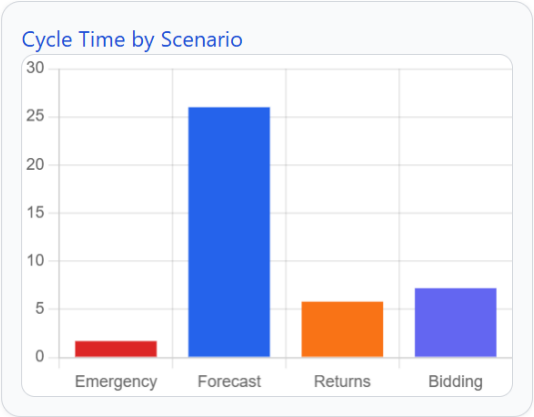
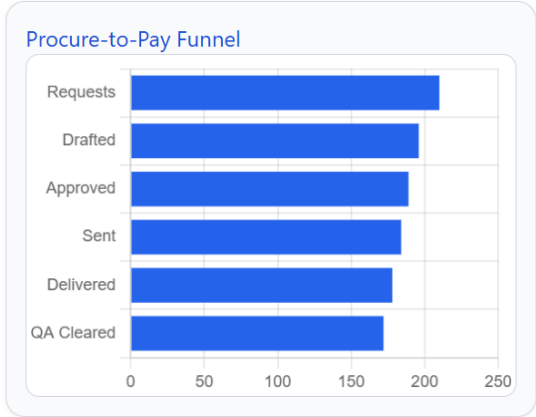
Raw Material Return – Functional Workflow



Operational Analytics Dashboard (1 of 2)

Procure-to-Pay Copilot — Operations & Governance Dashboard

Live KPIs and operational insights across emergency, forecast, QA, returns & vendor flows.

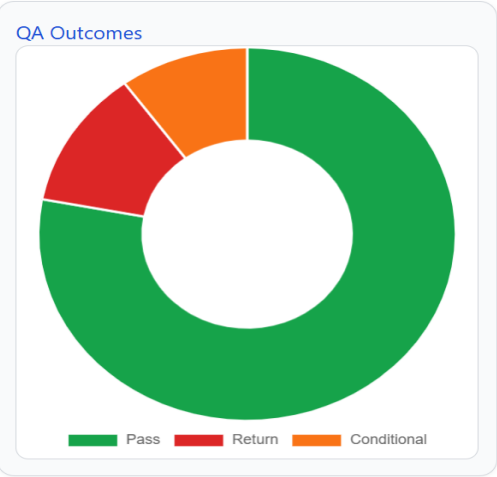


Top KPI's

- **Emergency PO Cycle Time** – Measures how fast urgent procurement moves from request to PO dispatch.
- **Forecast PO Cycle Time** – Tracks efficiency of planned, forecast-driven purchase orders.
- **End-to-End SLA Compliance** – Shows how consistently the entire P2P process meets defined SLAs.
- **Auto-Decision Handling** – Indicates how much of the workflow is executed autonomously without human input.
- **Vendor SLA Breach Rate** – Reflects supplier reliability based on delivery and performance failures.
- **Plant Downtime Reduction** – Highlights operational improvement in minimizing production interruptions.

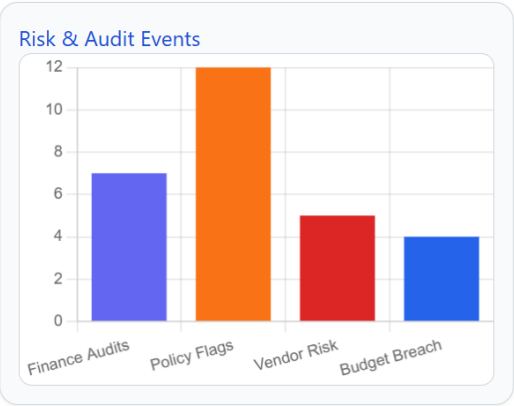
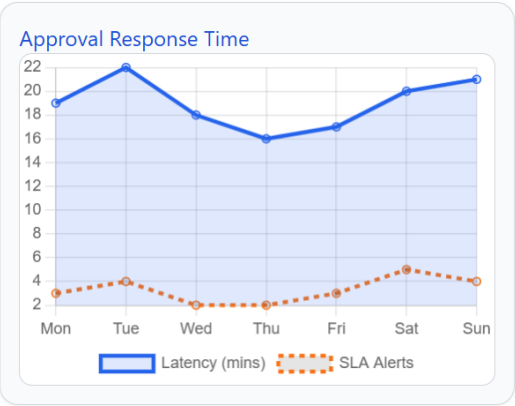
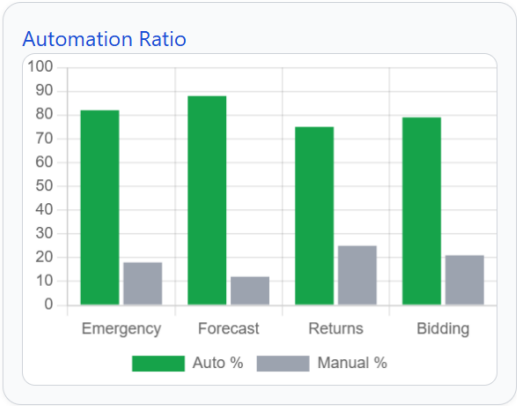
Graph Insights & Interpretation

- **Procure-to-Pay Funnel**
Shows how requests progress through each procurement stage, highlighting overall process throughput.
- **Cycle Time by Scenario**
Compares how long each procurement scenario takes end-to-end, revealing efficiency gaps.
- **SLA Compliance**
Tracks adherence to service-level commitments across all scenarios to ensure reliability.



Graph Insights & Interpretation

- Vendor Radar** - Compares vendor performance across price, SLA reliability, lead time, risk, and compliance.
- QA Outcomes** - Shows the distribution of quality results across passed, returned, and conditionally accepted batches.
- Returns Efficiency** - Tracks monthly return volumes alongside the time taken to receive credit issuance.



Graph Insights & Interpretation

- Automation Ratio**: Compares automated vs manual execution across P2P scenarios (Bidding, Forecast, Emergency, Returns), showing process maturity.
- Approval Response Time**: Tracks latency in approval cycles and SLA alerts across weekdays to reveal productivity patterns and potential workflow delays.
- Risk & Audit Events**: Captures financial and policy-related anomalies (e.g., budget breaches, vendor risk, policy flags), ensuring proactive governance and compliance.



CELEBAL
TECHNOLOGIES

Thank You