

Purchase Order Agent for D365 F&O with AI Builder Prompt

Convert PDF or Chat into Draft Purchase Order **instantly**

Create and validate purchase orders in Dynamics 365 Finance & Operations directly from Microsoft Teams, Outlook email, or Vendor Portal, even when requests arrive as PDFs.

It automatically extracts and checks vendor, item, pricing, and delivery information against D365 F&O master data. Purchase orders are created in draft status, using existing approval workflows without changing the current procurement controls.

Key **Capabilities:**

- Create purchase orders from Teams or email
- Extract line items from PDFs using AI builder prompt.
- Validate vendor, item, pricing, and delivery data
- Generate draft purchase orders using existing approval workflows
- Monitor delivery dates and escalate the vendor delays
- How to maintain a full Dataverse audit trail.

How Does It **Work?**



Business **Benefits:**

- Faster purchase order creation
- Fewer errors and reduced rework
- Improved on-time delivery
- Audit-ready procurement processes

Built on **Microsoft Ecosystem:**

- Copilot Studio
- Agent flows
- AI builder
- Dataverse
- Dynamics 365 F&O - MCP

Mazik Global is a Microsoft Solutions Partner specialising in Dynamics 365, Power Platform and Azure-led business transformation. We design and deliver intelligent, enterprise-ready solutions that improve operational efficiency and governance.

Speak to our team to book a demo or start a pilot.