

Conversational Agent

Empowers users to resolve queries, access standard and custom process guidance, and raise service requests through self-service conversations – reducing helpdesk dependency and accelerating support outcomes.

Overview

Conversational Agent enables users to raise queries, service requests, and process-related clarifications through a conversational interface. It helps users access relevant information, process guidance, and document references without depending entirely on the helpdesk or support teams.

The agent is designed for business users, support teams, administrators, managers, and external stakeholders who need faster access to the standard and custom process information and service request assistance across business functions such as finance, procurement, supply chain, sales order processing, manufacturing, master data management, project operations, customer service, and IT/AMS support.

Challenges

- High dependency on helpdesk team
- Increased ticket volume
- Longer resolution time
- Manual effort by support team
- Lack of self-service capability
- Difficulty in accessing relevant documents
- Inconsistent user experience
- Repetitive operational tasks
- Delayed access to information
- Resource utilization on low-value activities

Key capabilities

- Conversational query handling
- Knowledge base search
- Intelligent response generation
- Document link sharing
- Standard and custom process guidance support
- Service request assistance
- Error handling and fallback response
- Status feedback
- Self-service support enablement
- Multi-channel accessibility
- Centralized knowledge access
- Reduced helpdesk dependency
- Faster information retrieval
- Scalable support model
- Future integration readiness
- Sending outcome / query results to email

How it works

1. Query intake and capture

The agent captures user requests and questions from conversational channels such as Microsoft Teams Bot. It receives the user query in natural language, identifies the request category, captures keywords and intent, and acknowledges the user request.

Benefit: Ensures quick and seamless query registration.

2. Query understanding and classification

The AI Understanding Engine identifies user intent and entities, understands the process or service request, detects the relevant business function, and classifies the request type.

Benefit: Improves response accuracy through intelligent intent recognition.

3. Knowledge base search

The agent searches configured repositories for relevant information. Supported knowledge sources include SharePoint, OneDrive, and Dataverse.

Benefit: Provides quick access to the right documentation and process information.

4. **Response generation and document sharing**

The Conversational Response Engine provides a summarized answer, shares related document URLs or links, displays process guidance, and suggests next steps.

Benefit: Enables users to resolve issues quickly through self-service support.

5. **Notifications, status and audit logging**

The agent communicates status updates while maintaining traceability of actions through Teams, Audit Logger, and Outlook. It provides updates such as query received, searching knowledge base, response generated, and success or error feedback. It also logs request and response details and sends the response by email.

Benefit: Improves transparency, monitoring, and compliance tracking.

6. **Exception handling and helpdesk escalation**

The agent handles cases where information is unavailable or response confidence is low. It detects no-result scenarios, identifies low-confidence responses, displays fallback or error messages, and suggests helpdesk ticket creation.

Benefit: Reduces turnaround time and improves user satisfaction through faster issue resolution.

Who benefits

- System administrator
- Finance manager
- Accounts payable (AP) user
- Accounts receivable (AR) user
- Procurement/purchasing user
- Supply chain manager
- Sales order processing user
- Production/manufacturing user
- Master data management user
- Project operations user
- Business analyst
- Approver/manager
- End user/employee
- IT support/AMS team
- Executive/CXO users

- Vendor/supplier (external user)
- Customer service user

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