

Data Assistant for D365

Empowering business users with secure, real-time D365 insights through natural language conversations – reducing dependency on static reports and IT support.

Overview

Data Assistant for D365 is a conversational AI-powered agent built using Microsoft Copilot Studio to enable secure, role-based, real-time access to Dynamics 365 Finance & Operations data. The solution helps business users retrieve operational and analytical insights using natural language queries, reducing dependency on static reports and improving decision-making.

Challenges

- Data discoverability: Users struggle to locate required business data in Dynamics 365.
- Static reporting dependency: Business teams depend heavily on IT-generated reports.
- Slow decision making: Manual data extraction delays operational decisions.
- Role-based complexity: Users often lack clarity on accessible data.
- Low analytics adoption: Advanced analytics tools are underutilized.

Key capabilities

- Natural language query processing
- Role-based data access validation
- Real-time transactional data retrieval
- Analytical insights generation
- Context-aware conversation management
- Multi-domain data support
- Drill-down navigation into D365
- Conversational follow-up support
- Tabular and KPI-based responses
- Extensible integration framework

How it works

- Initiate data query: User asks a question in natural language to retrieve business data
- Context recognition and role validation: Understands user role and validates data access permissions
- Data source identification and routing: Determines correct system and dataset for query execution
- Data retrieval and processing: Fetches relevant, real-time data with applied filters
- Insight generation and response formatting: Transforms raw data into meaningful Insights
- User review and follow-up interaction: User reviews response and refines query if needed

Business impact

- Productivity: Faster access to business insights
- Reporting: Reduced dependency on custom reports
- Decision making: Improved operational responsiveness
- User adoption: Higher engagement with D365 analytics
- Operational visibility: Unified access to cross-functional data

Who benefits

- Sales associates
- Store managers
- Territory consultants (TCs)
- Parts and inventory teams
- Finance analysts
- Procurement users
- Operations managers
- Customer service representatives
- Executives/leadership
- IT/system administrators

Sales inquiry

Write to us: partnerupdates@sonata-software.com

