

Engineering Item Agent

Simplify, govern, and accelerate engineering product creation in Dynamics 365 F&O with a conversational agent that reduces duplicates, streamlines ECO approvals, and speeds product release across legal entities.

Overview

The Engineering Item Agent simplifies engineering product creation in Dynamics 365 Finance & Operations through a conversational experience. It helps users search for similar products, create new engineering products, create and manage Engineering Change Orders, and release approved products to selected legal entities.

The agent is designed to standardize ECO-driven product creation and release while improving data quality, governance, and visibility across the product lifecycle. It orchestrates the end-to-end engineering item creation process, helping ensure data accuracy, governed approvals, and seamless integration across systems.

The solution is intended for organizations using Dynamics 365 Finance & Operations and Engineering Change Management that need to reduce manual effort, prevent duplicate product creation, and accelerate product release across legal entities.

Challenges

- Manual engineering product creation process
- Duplicate product creation risks
- Multiple ECO-related activities
- Delays in product release across legal entities
- Limited visibility into approval and release status

Key capabilities

1. Search similar products
2. Create a new engineering product
3. Copy an existing product as a template
4. Create and manage ECOs

5. Track ECO approval status
6. Release products to legal entities
7. Receive automated notifications

How it works

1. User authentication and product request: The agent authenticates the logged-in user, retrieves security roles, verifies access permissions, and captures the engineering item creation request.
2. Product discovery and recommendation: The agent searches similar products in Dynamics 365 Finance & Operations, retrieves attributes and categories, identifies duplicate products, displays matching products, and recommends the appropriate next action.
3. ECO creation and product setup: The agent creates an Engineering Change Order, populates ECO details, assigns the Product Owner, configures the Engineering Category, and reuses template attributes where applicable.
4. Product creation and workflow approval: The agent creates the engineering product, assigns the lifecycle state, submits the ECO for approval, routes it to the Product Owner, and captures approval decisions.
5. Product processing and legal entity release: After approval, the agent processes the ECO, generates the product structure, allows users to select target legal entities, releases the product structure, and synchronizes tracking and storage dimensions.
6. Status tracking and notifications: The agent tracks ECO status, provides approval updates, sends confirmation emails, shares created product details, and notifies users when release is complete.

Business impact

- Faster product creation
- Reduced manual effort
- Improved master data quality
- Faster legal entity rollout

Who benefits

- Central Product Managers (CPM)

- Production Planning Controllers (PPC)
- Engineering teams
- Procurement teams
- Managers and leads
- MDM / Data Governance teams
- Dynamics 365 Functional Consultants
- Integration and Platform teams

Sales inquiry:

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