

Sales Order Entry Agent by Sonata Software

Transform your order management with AI powered automation – from inbox to ERP in minutes, not hours

Sonata's **Sales Order Entry Agent** is an **intelligent AI assistant** that automates the complete order lifecycle – from the moment a purchase order lands in an inbox to the instant a confirmed sales order is created in Dynamics 365 Finance & Operations.

How the agent works

Receive customer order

For email requests, the agent automatically reads and extracts PO details. For phone requests, the receiver manually enters the information via the chatbot. The AI agent captures the message and initiates the order creation workflow.

Outlook, Teams, Power Automate

- Email trigger from Outlook monitored inbox
- Teams message capture for chat-based orders
- Power Automate initiates the order creation workflow

Benefit: Centralized capture of all order channels; eliminates missed or delayed order requests

Order data extraction

AI reads the email or attachment and extracts order fields like customer ID, product, quantity, price, and delivery date.

AI Builder, Power Automate (Email Parser)

- Uses a pre-trained AI model for PO document extraction
- Maps extracted fields into Dataverse schema
- Flags unrecognized data for CSR review

Benefit: Eliminates manual data entry; increases accuracy and reduces turnaround time.

Order validation

The extracted order data is validated against existing records to prevent duplicates or incorrect entries.

Dataverse, Dynamics 365 F&O

- Checks customer and item master data
- Validates pricing and credit limits
- Detects duplicate orders using unique PO number logic

Benefit: Enables faster, auditable approvals within Teams; enhances transparency and accountability.

AI summary and approval

The system compiles an AI-generated order summary for CSR or Sales Manager approval before ERP posting.

Teams Bot, Adaptive Card, Power Automate

- Generates an approval card summarizing key order fields
- Approver can approve/reject directly in Teams
- Workflow logs the approval trail in Dataverse

Benefit: Centralized capture of all order channels; eliminates missed or delayed order requests

Sales order creation in Dynamics 365 F&O

Once approved, the system automatically creates the order in Dynamics 365 F&O and updates related records.

Dynamics 365 F&O, Power Automate, Dataverse

- Creates the sales order in a staging table
- Applies business rules (pricing, taxes, delivery schedule)
- Confirms order and updates the customer record

Benefit: Streamlines order lifecycle; reduces manual ERP entry and ensures consistency

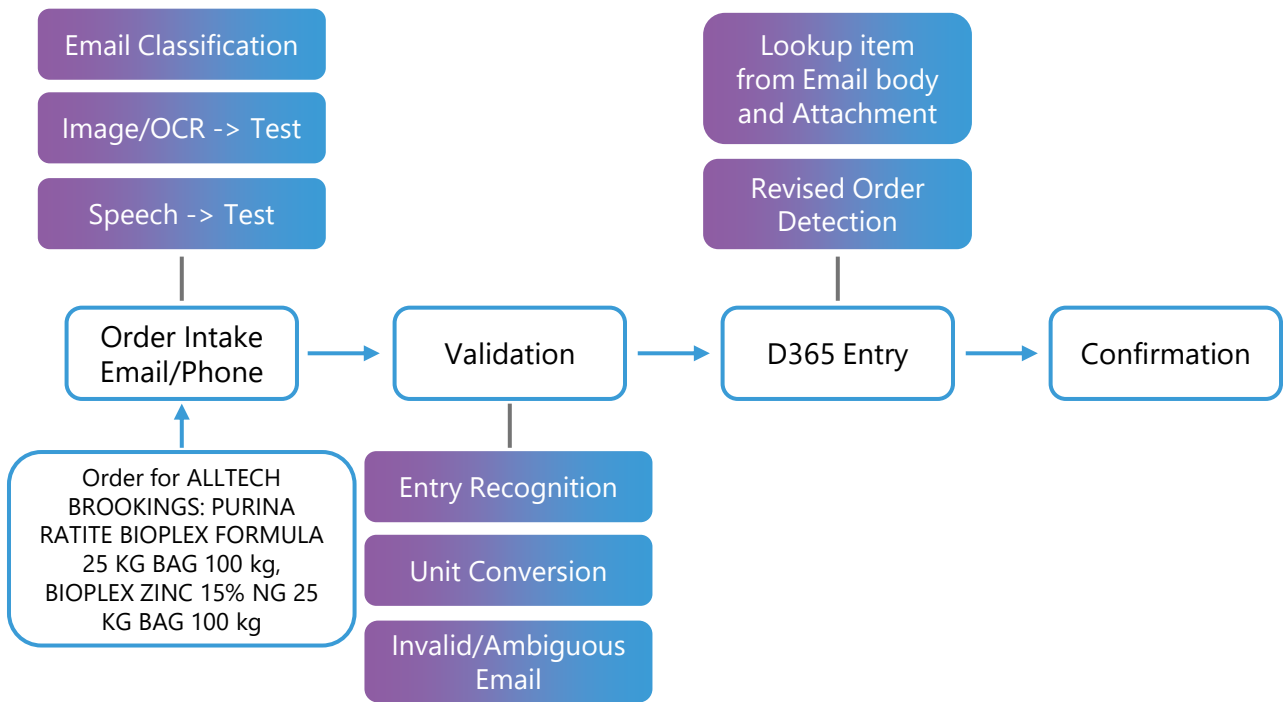
Confirmation and backup

The system sends an order confirmation to the customer and securely archives order data for audit.

Outlook, Azure Blob Storage, Application Insights, Azure Key Vault

- Sends an automated confirmation email with order details
- Stores order JSON and email backup in Azure Blob
- Logs performance and process status in Application Insights
- Uses Key Vault for secure credentials

Architecture overview



Business value delivered

- End-to-end automation
- Reduced manual effort
- Improved data quality
- Scalable and secure architecture
- Real-time visibility

The result: Faster processing, higher accuracy, improved compliance, and enhanced customer experience.

Ready to transform your order management?

Partner with Sonata to invest in an AI-driven sales order process that delivers speed, accuracy, and competitive advantage.

Write to us at partnerupdates@sonata-software.com