Q&A and Procurement Assistant

Enable Teams-based natural language policy Q&A and automated hardware procurement workflows with eligibility checks, approvals, JIRA ticketing, and real-time status visibility.

Overview

Sonata's Q&A and Procurement Assistant professional services offering helps customers get started with and extend their use of Dynamics 365 Supply Chain Management by simplifying and automating procurement requests, policy queries, and approval workflows. The solution enables employees to ask natural language questions, submit hardware and replacement requests, and track approvals through a single conversational interface, reducing reliance on multiple disconnected systems.

By leveraging expertise in Dynamics 365 Supply Chain Management, Sonata helps organizations improve procurement efficiency through automated request classification, policy validation, and approval orchestration. The assistant integrates with existing enterprise tools such as Microsoft Teams and JIRA, enabling a connected experience that complements and extends core supply chain and procurement processes.

This professional services engagement supports IT, procurement, and compliance teams by accelerating implementation, improving process consistency, and driving policy-based outcomes. As a result, customers gain faster turnaround times, better visibility into requests and approvals, and a more streamlined procurement experience built around Dynamics 365 Supply Chain Management.

Challenges

- Manual handling of hardware procurement requests
- Employees unaware of procurement and replacement policies
- Eligibility and policy checks done manually
- Approval delays due to email-based workflows
- No real-time request status visibility
- Multiple systems (Teams, Email, JIRA) without integration

Key capabilities

- Natural language Q&A for procurement and policy queries in Teams

- Automated request classification (hardware, replacement, policy)
- Policy and eligibility validation using AA knowledge sources
- Automated manager approval workflows in Teams
- Business justification capture and validation
- Automatic JIRA ticket creation and status tracking
- Real-time user notifications and updates in Teams

How it works

- ➢ User interaction: Employees submit procurement or policy queries using natural language in Microsoft Teams
- ➢ Intent classification: The assistant classifies the request (hardware, replacement, or policy)
- ➢ Policy validation: Policy and eligibility checks are performed using AA knowledge sources
- ➢ Approval determination
- ➢ Manager approval: Manager approvals are initiated and completed within Teams
- ➢ Complete: JIRA tickets are automatically created with real-time status updates shared in Teams

Business impact

- Faster procurement cycle time
- Improved policy compliance and governance
- Reduced IT and procurement workload
- Increased transparency and auditability
- Consistent and accurate responses
- Enhanced employee experience

Who benefits

- Employees / Requestors
- IT Support Teams (L1 / L2 /L3)
- Procurement Teams
- People Managers/Approvers
- Compliance & Audit Teams
- System Administrators (Teams / JIRA / AA/ Knowledge Sources)

Sales inquiry

Write to us: partnerupdates@sonata-software.com