

# Sales Order Delivery Promise Agent

Handles the end-to-end sales order and fulfillment process—ensuring accurate delivery promises, streamlined order processing, and enhanced customer satisfaction

## Overview

Sales Order Delivery Promise Agent helps automate the sales order and capable-to-promise fulfillment process. It supports accurate delivery promise dates, streamlined sales order processing, and improved fulfillment planning.

The agent helps users identify whether an order is a pickup or ship scenario, perform real-time availability checks, create complete sales orders, suggest related items or alternatives, and reduce errors throughout the order entry process.

It is designed for sales, customer service, store, warehouse, e-commerce, and fulfillment teams that manage customer orders, delivery commitments, warehouse selection, and order processing workflows.

## Challenges

- Sales orders requiring multiple manual entries and steps
- Delivery time not being consistently calculated, leading to incorrect promised dates
- Manual processing of picking, packing, and invoicing activities
- Limited real-time inventory visibility across warehouses
- Users struggling to choose the correct delivery modes and warehouses
- Cross-sell opportunities being missed during order entry
- New users finding the sales order process long and complex

## Key Capabilities

- Automatically identify pickup vs. ship scenarios
- Run accurate availability checks in real time
- Generate complete sales orders with all required details
- Suggest related items, accessories, and alternative products
- Validate items, quantities, and order setup details
- Minimize operational and data entry mistakes

## How It Works

- **Define the Sales Order Process:** The agent identifies whether the order is for store pickup or customer shipment and captures the requested items and required order details.
- **Cross-Sell Recommendations:** The agent suggests related products, accessories, warranties, or alternative items to help users make informed ordering decisions.
- **Create Sales Order in Dynamics 365:** The agent creates the sales order in Dynamics 365 Finance & Operations based on the selected fulfillment scenario (pickup or ship) after validating the required information.
- **Fulfillment Support:** Once the sales order is created, standard fulfillment activities such as picking, packing, shipment, and invoicing continue through the existing Dynamics 365 Finance & Operations business processes.

## Business Impact

- Faster sales order creation and processing
- More accurate delivery promise dates through reliable CTP calculations
- Reduced manual errors during order processing
- Faster task completion for sales and warehouse teams
- Improved communication and delivery reliability
- More consistent and standardized order-handling processes
- Reduced complexity for new users handling sales orders

## Who Benefits

- Sales representatives
- Customer service agents
- Store associates
- Warehouse staff
- Sales managers
- E-commerce teams
- Supply chain and fulfillment teams

## Sales Inquiry

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