



Vendor Onboarding Assistant Agent

Vendor registration and onboarding journey

Current Challenges

- Time-consuming manual onboarding and follow-ups.
- No automated duplicate vendor validation.
- Compliance documents reviewed manually.
- Limited visibility across teams (AP, Procurement).
- Disconnected channels between Teams and D365.

Capabilities

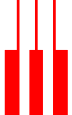
- Vendor Request Initiation
- Duplicate & Validation Check
- Pre-Approval Workflow (AP Team)
- Vendor Document Request
- AI Document Extraction
- Fraud & Compliance Checks
- AP Summary Review
- AP Final Approval
- Vendor Creation in Dynamics 365
- Vendor & Requestor Notification

Business Impact

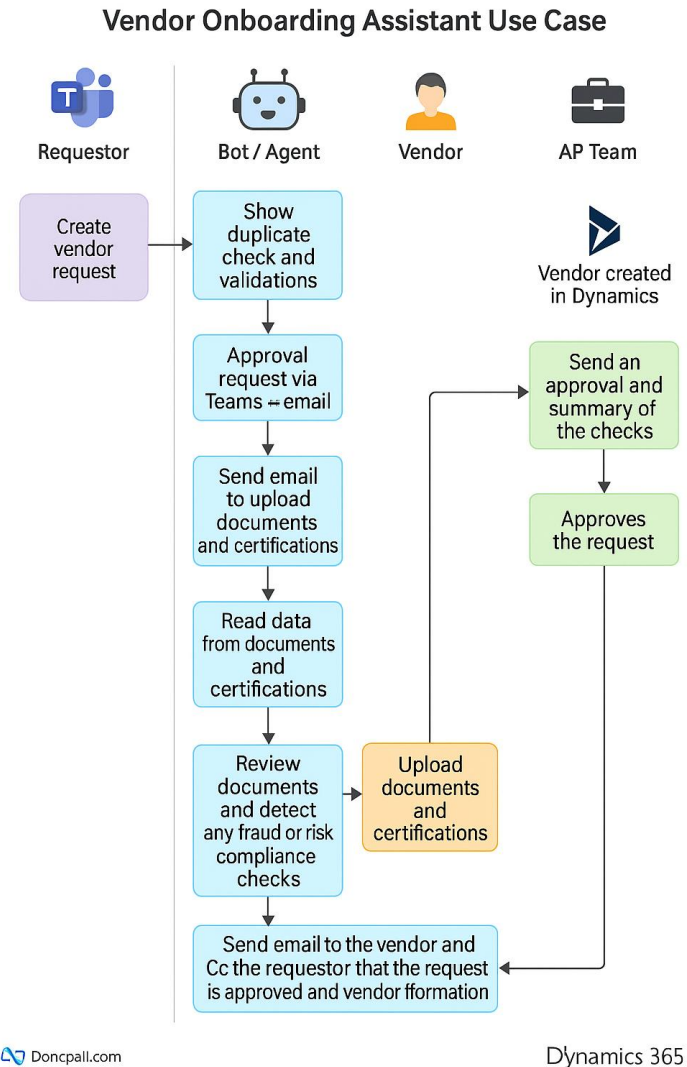
- Efficiency
- Accuracy
- Compliance
- Collaboration
- Auditability

Key User(s)

- Requestor (Procurement / Project Manager)
- Accounts Payable Team
- Vendor (External Party)
- System Administrator / Compliance Officer



Vendor Onboarding Assistant Agent – Process Flow



Handles end to end sales process—ensuring efficiency and improve customer efficiency.

KPIs impacted

Value

Enhanced customer experience

Productivity gains

Integration and Scalability.

Improved accuracy and scalability.

Benefit

Average order cycle time

Staff productivity

Customer wait time

1. Submit vendor request

Submits a new vendor request

AI Agent

- + Connection to ERP for Vendor duplicate check

Benefit: Streamlines the onboarding process and eliminates manual inefficiencies

2. Real time inventory lookup(Skid steer) and configure

Collects inventory availability based on attributes, model and location. Allows customer to pick available options.

AI Agent

- + Connection to ERP for on-hand information and returns with key information that the customer is looking for.
- + Real time options configuration.

Benefit: quick on hand availability and simple configurator.

3. Automated Quote Generation

Generate a Sales quote and retrieve pricing information

AI Agent

- + Connection ERP for pricing information and delivery information.
- + Send email confirmation to customer.

Benefit: Quick quote generation and simplified user & customer experience

5. Pickup Scheduling and Confirmation

Communicates updated schedules or potential delays through email, or alerts

AI Agent

- + Connection to Email system (e.g., Outlook) for schedule alerts
- + Connection to Collaboration tools (e.g., Teams) for planning updates

Benefit: Keeps planners informed and enables faster course corrections

4. Order Confirmation and Payment

Integrated POS and payment gateways streamline order confirmation and payment processing.

AI Agent

- + Connection to ERP to create order->Confirm->Collect payment

Benefit: End to end order processing with minimal clicks and customer wait time.



Vendor Onboarding Assistant Chat Shared

Vendor Onboarding Form

Basic Vendor Information

Vendor Type *

☒ Organization

Vendor Name *

Corp office supplies

Vendor Category *

Office supplies

Contact Person Details

Name *

Kaushik Ramakrishna

Email *

kaushik2311@gmail.com

Phone *

6305121049

Address Information

Address Type *

☒ Business

☐ Remit to

Address *

2000 bent grass way

Country/Region *

USA

State *

Illinois

City *

lombard

Zip/Postal Code *

60118

Type a message



Approvals | Power Automate

Vendor Onboarding Request - Corp office supplies

Requested by **P01User05** <p01user05@dynamicssonata.onmicrosoft.com>

Date Created Wednesday, October 29, 2025 3:04 PM

Vendor Details

1. Basic Vendor Information

Vendor Name: Corp office supplies

Vendor Type: Organization

Vendor Category: Office supplies

2. Contact Person Details

Contact Name: Kaushik Ramakrishna

Email Address: kaushik2311@gmail.com

Phone Number: 6305121049

3. Address Information

Address Purpose: Business

Address Line: 2000 bent grass way

City: lombard

State/Province: Illinois

Zip/Postal Code: 60148

Country/Region: USA

Currency: USD

Approve ▾

Reject ▾



From: **P01User05** <p01user05@dynamicssonata.onmicrosoft.com>
Date: Wed, Oct 29, 2025 at 3:16 PM
Subject: Vendor onboarding request for Corp office supplieshas been approved
To: kaushik2311@gmail.com <kaushik2311@gmail.com>

Hi Kaushik Ramakrishna,

Your request to onboard a Corp office supplies from a category of Office supplies has been **approved**.

Please provide the additional documents for further process in the link below:

[Click Here to Upload Document](#)

Regards
Vendor Assistant

Vendor Submission Form

* Vendor Name

Tech Solutions India Pvt. Ltd.

* W-9 Form

W-9-Vendor W-9 Demo.pdf

Attach file

* Insurance Certificate

ICVendor COI Demo.pdf

Attach file

Additional Documnets

ADDVendor Details Demo (1).pdf

Attach file

Reset

* Uploaded By

Ramesh

* Master Agreement Certification

MSAVendor MSA Demo.pdf

Attach file

* Bank Details

BANKVendor Bank Demo.pdf

Attach file

* Attachments

W-9-Vendor W-9 Demo.pdf

MSAVendor MSA Demo.pdf

BLVendor BL Demo.pdf

ICVendor COI Demo.pdf

BANKVendor Bank Demo.pdf

ADDVendor Details Demo (1).pdf

* Uploaded Date

10/29/2025

* Business License

BLVendor BL Demo.pdf

Attach file

Financial Statements

There is nothing attached.

Attach file

Submit



Vendor Form

Please select the Vendor Group and Vendor Profile for Tech Solutions India Pvt. Ltd., then click Submit.

Select Vendor Group

30 - Tax authorities

Select Vendor Profile

- ☐ Bid only
- ☐ One-time supplier
- ☐ Locally owned
- ☐ Small business
- ☐ Woman owner
- ☐ Minority owned

Welcome Onabord Tech Solutions India Pvt. Ltd.

[Summarize](#)



P01User05 <p01user05@dynamicssonata.onmicrosoft.com>

To: Kanuri Srinivasa Ganesh Kumar

Wed 10/29/2025 5:45 PM

CAUTION: This email originated outside of Sonata. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Rajesh Kumar ,

Tech Solutions India Pvt. Ltd. have succuessfully onboarded into the environment

Regards,
Vendor Assistent

Finance and Operations

Accounts payable > Vendors > All vendors

[←](#) [≡](#) [Edit](#) [+ New](#) [Delete](#) **Vendor** [Procurement](#) [Invoice](#) [General](#) [Options](#) [🔍](#)

Maintain

On hold [▼](#)

Copy

Add vendor to another legal entity [▼](#)

Set up

[Contacts](#) [▼](#)[Bank accounts](#)[Vendor state tax IDs](#)[Summary update](#)[Certifications](#)[Purchase orders with retention](#)[Product filters](#)[Vendors advanced notes setup](#)

Transactions

[Transactions](#)[Global transactions](#)[Invoices](#)[Balance](#)

All vendors

Standard view [▼](#)

0002292 : Tech Solutions India Pvt. Ltd.

Vendor account

0002292

30

Address books

Known as

Tech Solutions India Pvt. Ltd. [✎](#)

Phonetic name

Language

en-us

Collaboration activation

Not Active

COMMODITY TRADING

Commodity trading partner

☐ No

Use address

☐ No

Default commodity location

Type

Organization

Payment priority

Name

Tech Solutions India Pvt. Ltd.

Search name

Tech Solutions India

ORGANIZATION DETAILS

Number of employees

0

Organization number

ABC code

None

DUNS number

All vendors

Standard view [▼](#)

0002292 : Tech Solutions India Pvt. Ltd.

Payment

PAYMENT

Terms of payment (requires approval)

Net30

Method of payment (requires approval)

ELECTRONIC

Payment type

Electronic payment

Payment specification

Payment schedule

Cash discount

Bank account

SBI

Payment ID

Payment day

Bank account number

32456789012

Use cash discount

Normal

Finance and Operations

Accounts payable > Vendors > All vendors

USMF [🔍](#)[←](#) [≡](#) [Edit](#) [+ New](#) [Delete](#) **Options** [🔍](#)[Filter](#)

SERVICE

MSA-TSI-2023-001

W-9 Form

CERT-TSI-2023-001

LICENSE

BL-TSI-2023-001

INSURANCE

COI-TSI-2023-001

0002292 : Tech Solutions India Pvt. Ltd. | Standard view [▼](#)

Certifications

Certification type

LICENSE

Certification number

BL-TSI-2023-001

Details

Certifying organization

Ministry of Corporate Affairs

Certification date

10/29/2025

In process

☒ Yes

Due date

Certificate received

☒ Yes

Liability amount/Bond limit

0.00

Comments

License permits operations thro...

Effective date

1/15/2023

Expiration date

1/14/2028



Vendor Onboarding Assistant Agent – Use case

Steps	Capability	Description	Involved Components
1. Vendor Request Initiation	Teams Bot for Vendor Request	User (Requestor) chats with Vendor Onboarding Bot in Teams or posts in a channel (e.g., "Create new vendor"). The bot prompts for details like vendor name, country, contact info, and category.	Teams Bot, Power Virtual Agents, Adaptive Card, Dataverse
2. Duplicate & Validation Check	The bot triggers the agent to run a duplicate check in Dynamics 365 Vendor Master. It compares vendor name, tax ID, and email, using fuzzy match logic.	Agent, Dynamics 365	
3. Pre-Approval Workflow (AP Team)	If no duplicate found, the bot automatically sends an adaptive approval card in Teams and an email to AP Team for pre-approval.	Teams, Power Automate, Outlook, D365	
4. Vendor Document Request	After AP pre-approval, the agent emails the vendor a secure link to upload W9, Tax forms, Certifications, etc.	Outlook, SharePoint / Azure Blob Storage	
5. AI Document Extraction	The agent uses Azure AI Document Intelligence to extract key data fields like vendor name, tax ID, certification expiry, etc.	AI Document Intelligence	
6. Fraud & Compliance Checks	Agent validates documents for tampering, blacklisted vendors, or expired certificates using integrated compliance APIs.	Azure AI / External APIs	
7. AP Summary Review	The agent compiles a summary card in Teams for AP: includes extracted data, compliance score, and document status.	Teams Adaptive Card	
8. AP Final Approval	AP team approves via Teams button or Outlook link. The bot confirms approval status.	Teams Bot, Power Automate	
9. Vendor Creation in Dynamics 365	Once approved, the agent automatically creates the vendor record in Dynamics 365 Finance & Operations using the Vendor Master API.	Dynamics 365	
10. Vendor & Requestor Notification	The bot/agent emails and messages both vendor and requester confirming approval, vendor ID, and any missing details.	Outlook, Teams Bot	