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

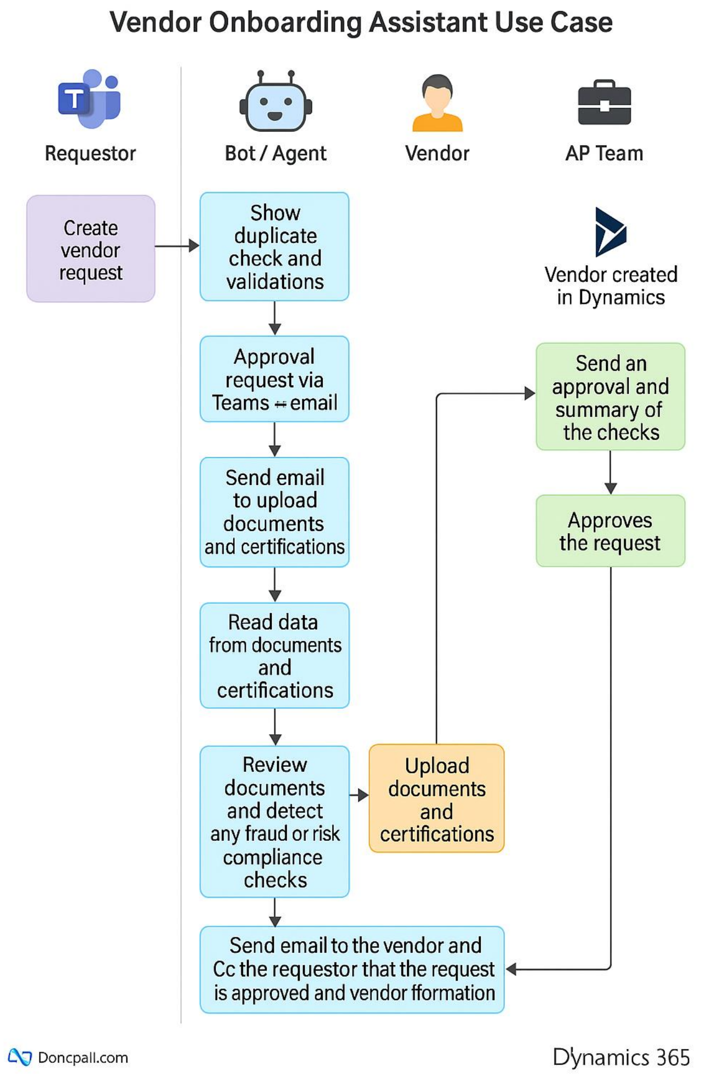
Business Impact

- 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



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Procurement

Vendor onboarding assistant

Available with:
Copilot Studio

Scenario type
Extend

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

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.

5. Pickup Scheduling and Confirmation

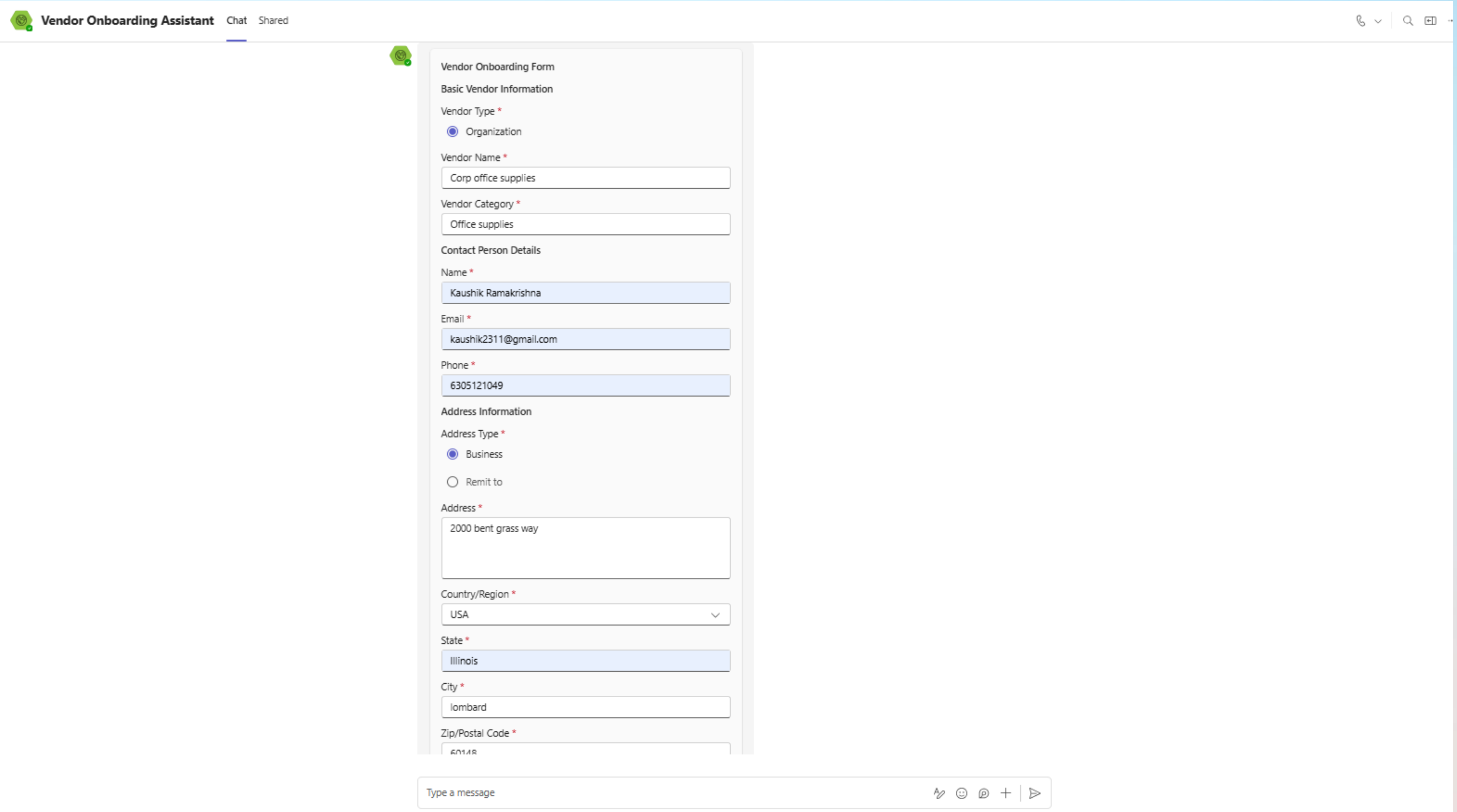
Communicates updated schedules or potential delays through email, or alerts

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

Vendor Request | Review | Vendor Onboarding | Compliance check | Approval | Complete



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SONATA

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

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Vendor Request | Initial Review | **Vendor Onboarding** | Compliance check | Approval | Complete

SONATA

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>

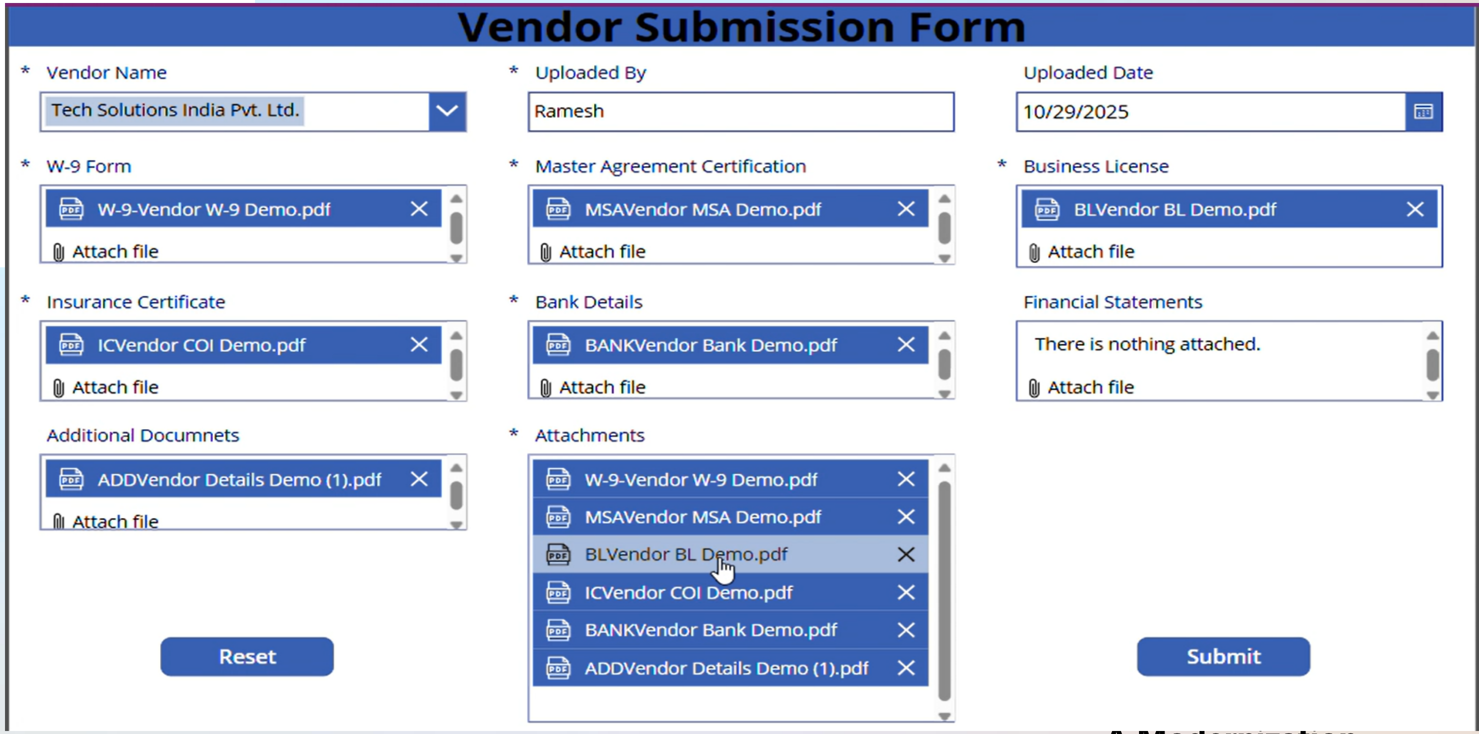
Hi Kaushik Ramakrishna,

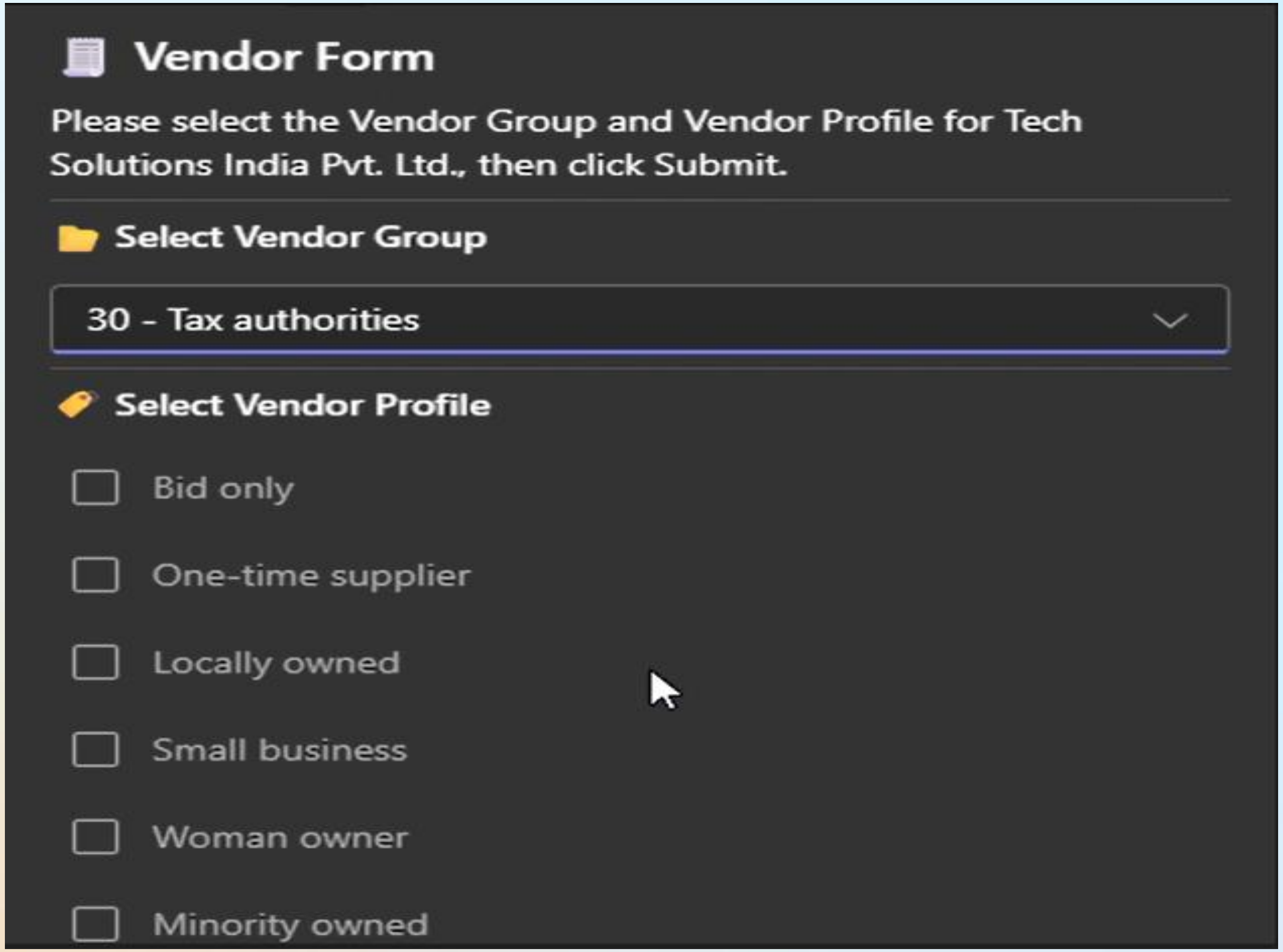
Your request to onboard a Corp office supplies from a category of Office supplies has been **approved.**

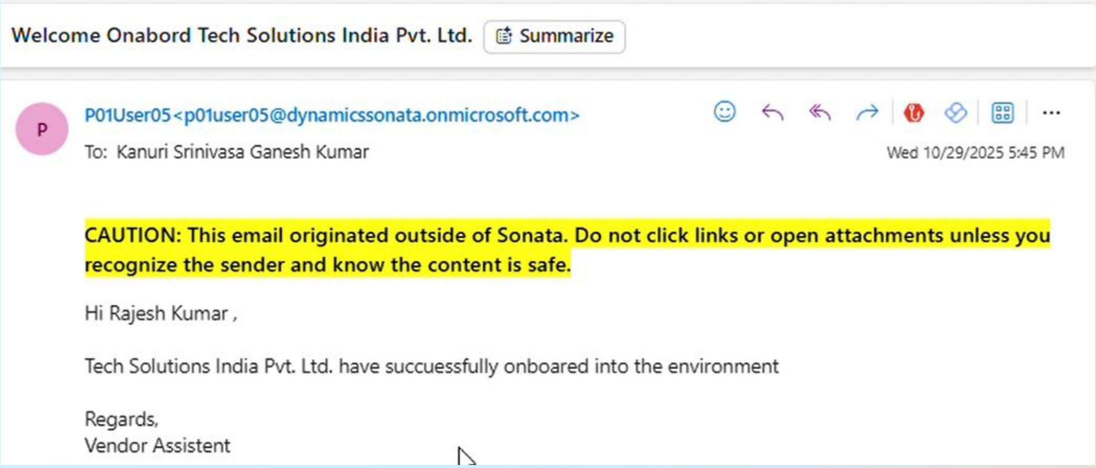
Please provide the additional documents for further process in the link below:

[Click Here to Upload Document]

Regards
Vendor Assistant

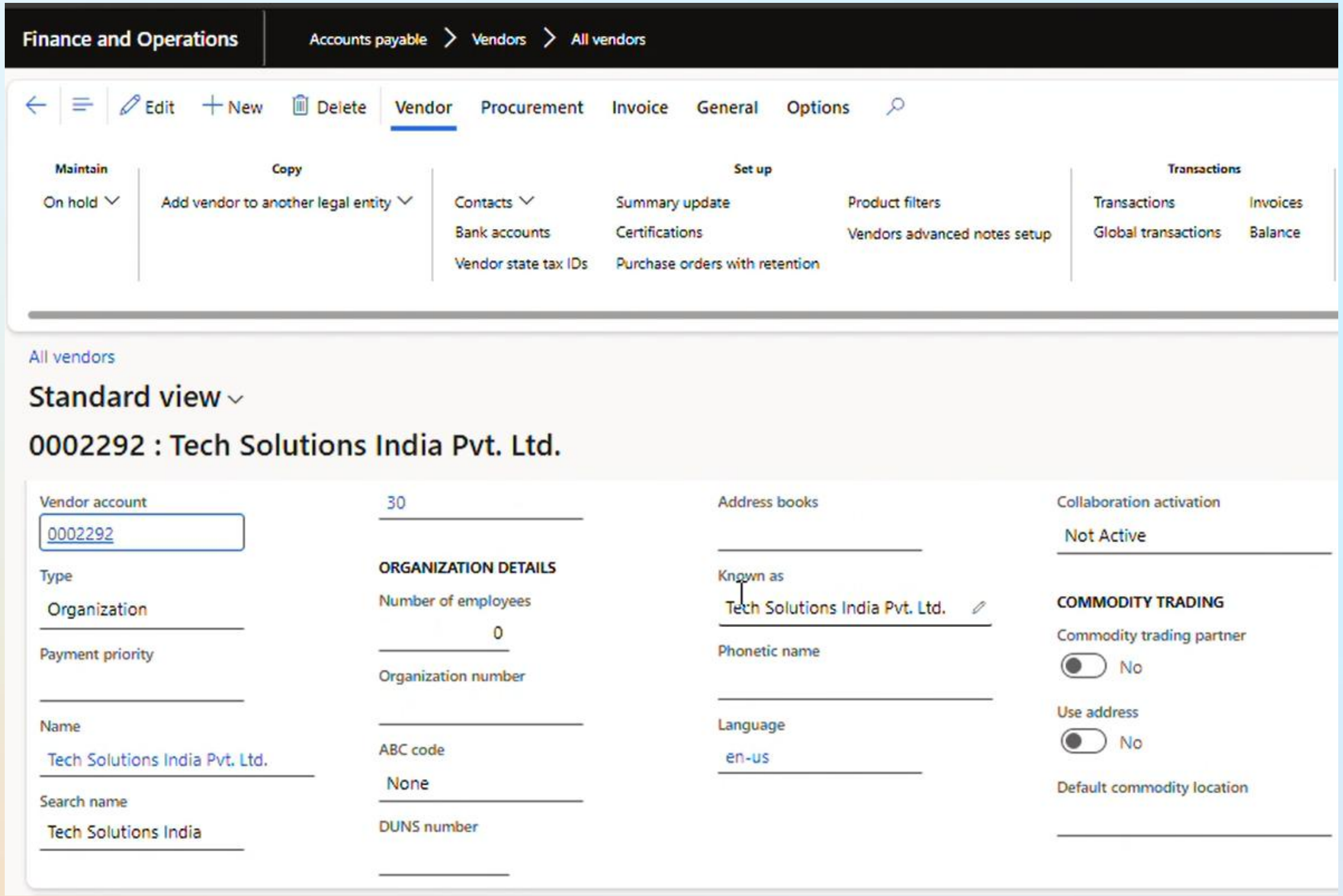


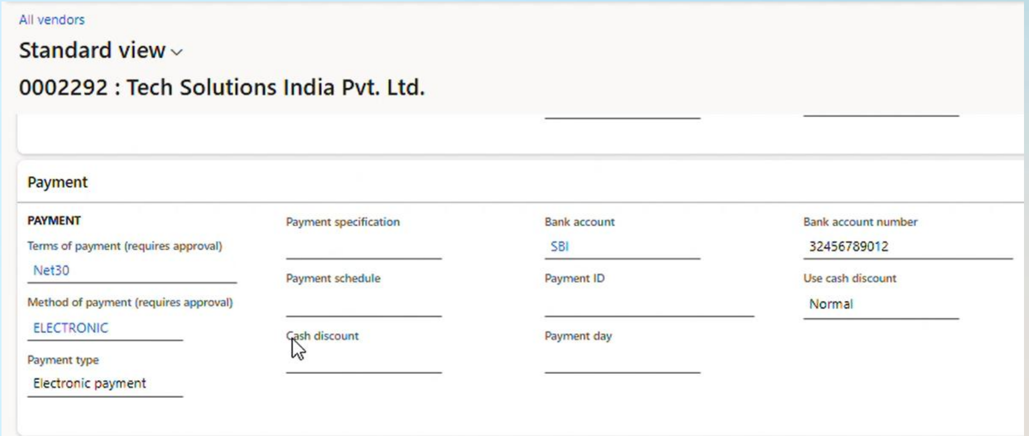

Vendor Form
Please select the Vendor Group and Vendor Profile for Tech Solutions India Pvt. Ltd., then click Submit.
Select Vendor Group
30 - Tax authorities
Select Vendor Profile
Bid only
One-time supplier
Locally owned
Small business
Woman owner
Minority owned

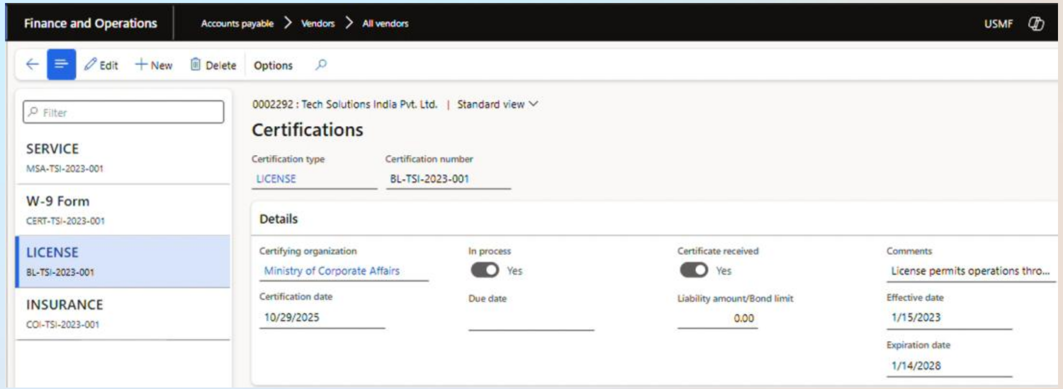

Welcome Onabord Tech Solutions India Pvt. Ltd.
Summarize
P01User05<p01user05@dynamicssonata.onmicrosoft.com>
To: Kanuri Srinivasa Ganesh Kumar
Wed 10/29/2025 5:45 PM
CAUTION: This email originated outside of Sonata. Do not click links or open attachments unless you recognize the sender and know the content is safe.
Hi Rajesh Kumar ,
Tech Solutions India Pvt. Ltd. have succuessfully onboared into the environment
Regards,
Vendor Assistent

Vendor Request | Initial Review | Vendor Onboarding | Compliance check | Approval | **Complete**

SONATA







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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	