



Wipro D365 Intelligent Data Management Copilot

This solution leverages the power of Copilot (Sidecar) integrated with Dynamics 365 Finance and Operations (D365 FO) to enhance user productivity and streamline operational tasks through conversational AI and adaptive interfaces.

Order. Automate. Accelerate. – Copilot in Action



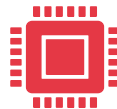
Conversational Order Creation

Users can create sales orders, purchase orders, etc. by simply chatting with Copilot. Key inputs like customer name, product ID, quantity, delivery date, etc. are captured via structured prompts then processed in D365 FO



Master Data Updates

Update vendor master and other critical records directly through the chat interface. The updates are seamlessly pushed to D365 FO—eliminating the need for screen navigation



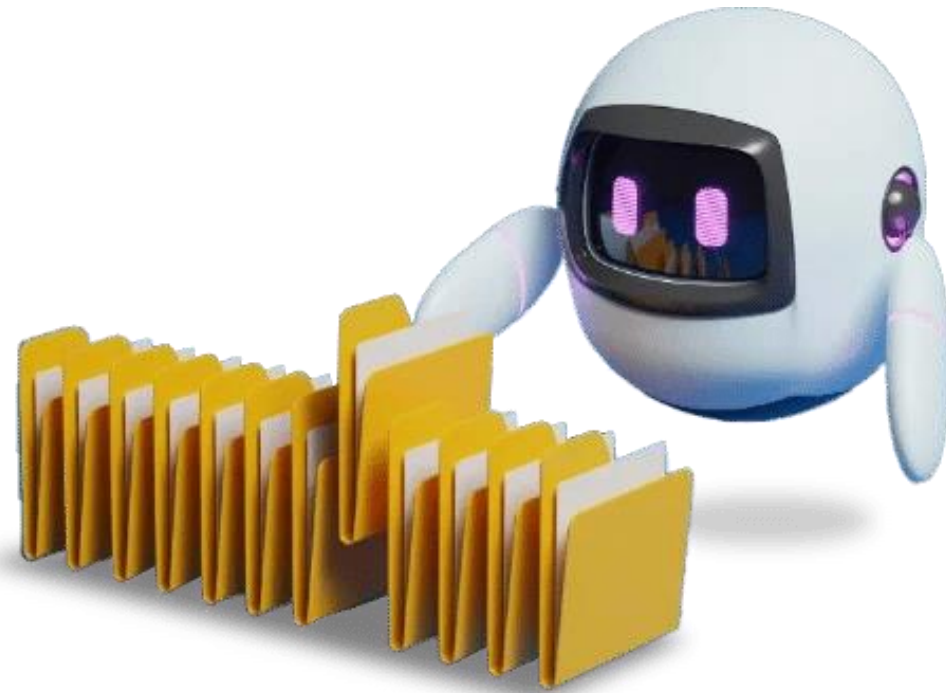
Adaptive Interface & Guided Prompts

Uses intuitive cards and prompts to guide users through complex tasks, ensuring accuracy and reducing training overhead



Backend Automation

All inputs are processed through backend logic, ensuring data integrity and compliance with business rules.



Business Use cases



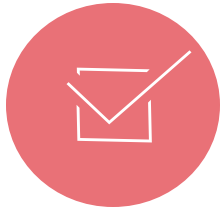
Update Vendor Details

Update vendor details like phone number and address through the sidecar



Create Sales Order

Create a sales order by providing details (e.g., customer name, product ID, quantity, delivery date, etc.) through interactive forms



Update Vendor Details

Browser address bar: <https://wiprocopilotpoc.sandbox.operations.dynamics.com/?cmp=usmf&mi=VendTableListPage>

Navigation: Finance and Operations > Procurement and sourcing > Vendors > All vendors

USMF | Search | Help | User: AU

Vendor Actions: Edit, New, Delete, Vendor, Procurement, Invoice, General, Options

Sub-actions: 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, Transaction Global tran)

All vendors

My view ▾

Filter

Vendor account	Name	Vendor hold	Phone	Extension	Primary contact
000051	Footwear Supplies	No	8789784512		
1001	Acme Office Supplies	No	773-998-8892		
1002	Lande Packaging Supplies	No			
1003	Ade Supply Company	No			
104	Best Supplier - Europe	No			
11221122	Test Vendor Sample	No			
9001	9001	No			
AirCarrier	Air Cargo Carrier	No			
CN-001	Contoso Asia	No	80123} 4567 8901		
CN-002	Footwear Supplies	No			
CompanyCC	CompanyCC	No			

Copilot Panel:

10

Enter updated phone number

AI-generated content may be incorrect

7789784511

Working on it...

Ask a question about the data in this app, or tell me what you're looking for

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Create Sales Order

Sales order details -- Finance and Operations | Topics - Copilot for finance and Operations

https://wiprocopilotpoc.sandbox.operations.dynamics.com/?cmp=usmf&mi=SalesTableDetails

Finance and Operations | USMF

Save + New Delete Complete Sales order Sell Manage Pick and pack Invoice

Sales order details

My view * v

Filter

Sales order	Source	Customer acco...	Invoice account	Customer name	Order type
000000294		US-004	US-004	Cave Wholesales	Sales order
000000295		US-004	US-004	Cave Wholesales	Sales order
000000296		US-004	US-004	Cave Wholesales	Sales order
000000297		US-004	US-004	Cave Wholesales	Sales order
000000298		US-004	US-004	Cave Wholesales	Sales order
000000299		US-004	US-004	Cave Wholesales	Sales order
000000300		US-004	US-004	Cave Wholesales	Sales order
000000301		US-004	US-004	Cave Wholesales	Sales order
000000302		US-004	US-004	Cave Wholesales	Sales order
000000303		US-004	US-004	Cave Wholesales	Sales order
000000304		US-004	US-004	Cave Wholesales	Sales order
000000305		US-004	US-004	Cave Wholesales	Sales order
000000306		US-004	US-004	Cave Wholesales	Sales order
000000308		US-004	US-004	Cave Wholesales	Sales order
000000309		US-004	US-004	Cave Wholesales	Sales order
000000310		US-004	US-004	Cave Wholesales	Sales order

Copilot

Please enter following details for Creating Sales order

Customer:

US

Company

Please enter the Legal Entity

Site:

Please enter the Site

Warehouse:

Please enter the warehouse

Ask a question about the data in this app, or tell me what you're looking for

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Thank You

