



**Njoo Tuinue viwango!**

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The Sales Order Agent: Smarter Sales Automation in Business Central





## Key Points:

- Discover the **Sales Order Agent** in Dynamics 365 Business Central.
- Built on Microsoft's **Agent Framework**—no coding or AI expertise needed.
- Acts like a **virtual sales coordinator**: reviews, validates, and processes orders.
- Includes a **hands-on demo** of setup, logic, and real-world customization.
- Ideal for streamlining sales operations and **reducing manual effort**







## Sales Order Agent (Public Preview)

Use AI to automate the full process of capturing sales quotes and orders from customers' requests expressed in natural language.



Processing many emails is **time-consuming**, **distracting sales teams from strategic activities** like customer engagement and business development



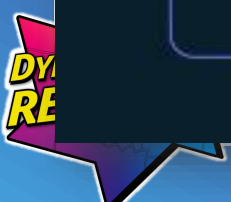
Manual entry of sales orders can lead to **mistakes in capturing key details** like items, expected delivery dates, units of measure, resulting in **delays and dissatisfaction**



Sales representatives may struggle to keep track of follow-ups and confirmations, leading to **missed opportunities and delayed responses**



## Sales Order Agent broader available (public preview)

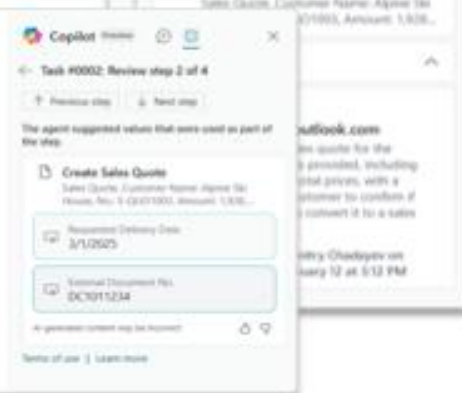
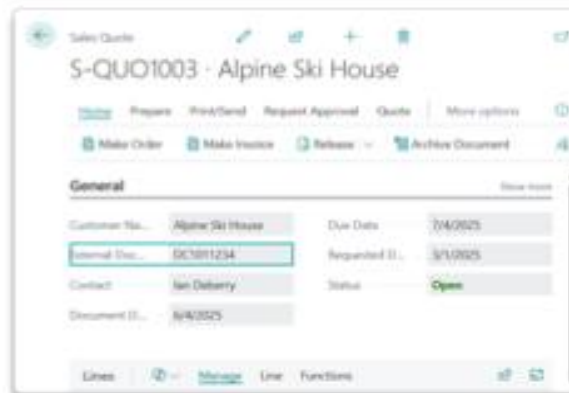
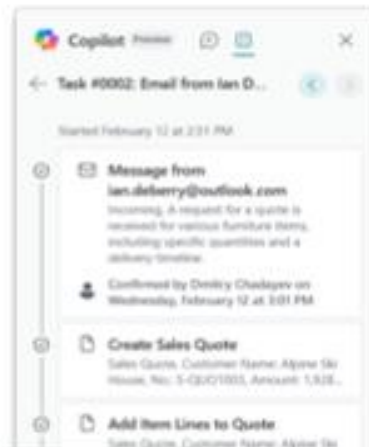
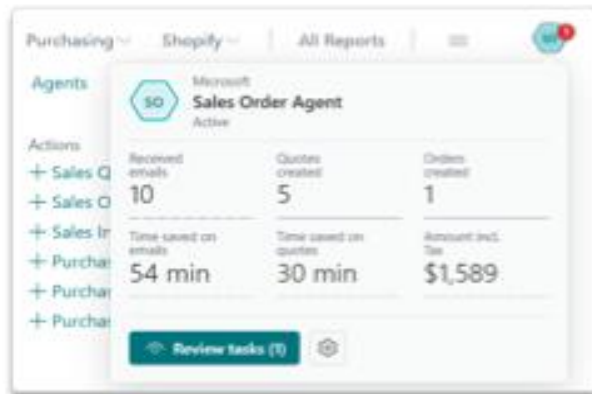




# Agent shared components

## “Human in the loop”

- List of agent tasks and notifications
- Timeline view of the agent tasks
- Review of agent steps and changes
- Confirm, stop, discard agent steps
- Agent KPIs





Sales Order  
Agent.app

Agent  
configuration

Permissions

Profiles

Agent  
instructions

Calls to generic AL  
helper functions/events





# Let's put it to test !

Send an email making an  
order request to :  
[Msangi.masera@jishinde.com](mailto:Msangi.masera@jishinde.com)

Sample!

Hi sales team, kindly share a quote for 2 chairs.







## Sales Order Agent (Public Preview)

Use AI to automate the full process of capturing sales quotes and orders from customers' requests expressed in natural language.



Receives and analyzes customers' requests via e-mail



Engages in multi-turn e-mail conversations with the customer to clarify the request



Checks available inventory, unit of measure, attributes, variants



Can be triggered automatically and on demand, by internal and external processes



Detects and deflects irrelevant and malicious e-mail content



Automatically resolves validation errors where possible



Acts within defined permissions and profile (role)



Brings humans in the loop to validate key decisions



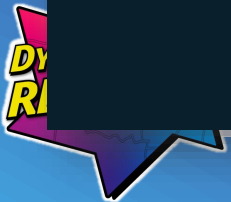
Convert sales quotes to a sales orders upon salesperson or customer confirmation



Composes emails with sales quote as attachment and share it in the same e-mail thread



Creates and updates sales quotes with requested items, configured pricing and delivery dates





# Agent billing while in Public Preview



Microsoft  
Copilot Studio

Messages are the unit that  
measures agent usage

## Billable events

- In/Out e-mail Message
- Sales Quote/Order Action

Prepaid capacity  
(message packs)

## MCS meter \*

- Generative answer x 2 msg.
- Agent action x 5 msg.

Pay-as-you-go



[aka.ms/partner/AgentPricingDeck](https://aka.ms/partner/AgentPricingDeck)

BY  
RE





# General Business Central resources

Learn more!



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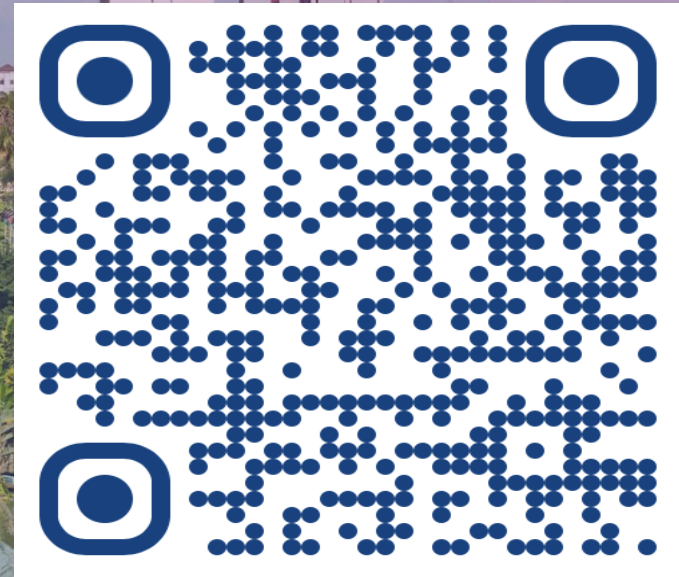


**Transform site for partners**

[aka.ms/BCPartnerPortal](https://aka.ms/BCPartnerPortal)



[aka.ms/BcAll](https://aka.ms/BcAll)



**Thank You! Asante! አመሰግናለሁ! Mahadsanid!  
Galatooma! የቅንየለይ! Murakoze! Urakoze! Webale,  
Ndatenda! Zikomo!**







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