

# Microsoft Out-of-the-Box (OOB) AI Agents

A practical catalog of built-in agents across Dynamics 365



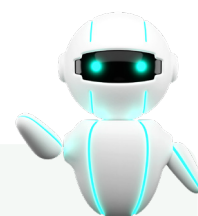
## Why OOB Agents Matter

Microsoft's out-of-the-box AI agents are designed to help teams move faster with less manual effort by automating common workflows across Sales, Service, Supply Chain, Finance, Projects, and Retail. These agents typically focus on:

- ▶ **research + prioritization** (reducing time spent finding and qualifying information)
- ▶ **workflow acceleration** (shrinking cycle times and improving throughput)
- ▶ **risk detection** (surfacing issues early and supporting faster response)
- ▶ **quality and accuracy** (reducing errors and rework)

**Outcome focus:** Higher productivity, faster decisions, improved customer and supplier experiences, and reduced operational friction.

## Agent Portfolio at a Glance



### Sales & Revenue

#### 1) Sales Qualification Agent (Dynamics 365 Sales)

- ▶ Automates lead research and prioritization by analyzing fit, intent, and likelihood to convert
- ▶ Assists with drafting personalized outreach emails

**Key value:** Improved lead prioritization; reduced manual research; more time for selling

### Supply Chain & Procurement

#### 2) Supplier Communications Agent (Dynamics 365 Supply Chain Management)

- ▶ Monitors supplier performance for potential delays/disruptions
- ▶ Communicates updates to procurement teams to enable faster response

**Key value:** Proactive issue management; reduced operational risk; improved procurement efficiency

### Customer Service & Contact Center

#### 3) Customer Intent Agent (Dynamics 365 Customer Service)

- ▶ Analyzes historical customer interactions across channels to infer intent
- ▶ Helps map issues to the right resolution path for self-service and live agents

**Key value:** Faster case resolution; improved response accuracy; better customer experience

#### 4) Customer Knowledge Management Agent (Dynamics 365 Customer Service / Contact Center)

- ▶ Continuously reviews case notes, interactions, and feedback to flag knowledge gaps/outdated content
- ▶ Helps keep knowledge articles current and relevant

**Key value:** Higher knowledge accuracy; reduced manual maintenance; improved agent consistency



### Order Management (SMB + Mid-market scenarios)

#### 5) Order Intake Agent (Dynamics 365 Business Central / Order Management)

- ▶ Automates end-to-end order capture: preferences, validation, confirmation
- ▶ Reduces human intervention and minimizes errors

**Key value:** Faster order processing; reduced manual effort; improved customer satisfaction

## Finance & Close

### 6) Financial Reconciliation Agent (Dynamics 365 Finance)

- ▶ Automates data preparation, cleanup, and reconciliation tasks
- ▶ Supports shorter, more accurate close cycles

**Key value:** Faster financial close; reduced reconciliation effort; improved accuracy

### 7) Account Reconciliation Agent (Dynamics 365 Finance)

- ▶ Matches sub-ledger transactions to the general ledger
- ▶ Improves visibility into discrepancies and reduces manual matching

**Key value:** Improved cash visibility; faster decision-making; streamlined reconciliation

## Project-Based Services

### 8) Time and Expense Agent (Dynamics 365 Project Operations)

- ▶ Automates time entry, expense submission, and approvals
- ▶ Supports timely invoicing and accurate cost tracking

**Key value:** Improved billing accuracy; reduced admin overhead; minimized revenue leakage

### 9) Client Onboarding Agent (Professional Services / Consulting scenarios)

- ▶ Automates onboarding administration: resource identification, team assembly, coordination of initial activities
- ▶ Helps reduce onboarding effort and shorten time to delivery readiness

**Key value:** Faster onboarding; reduced operational friction; quicker time-to-productivity

## Retail & Commerce

### 10) Profit Protection Agent (Retail / Commerce)

- ▶ Analyzes large datasets to detect profit leakage, anomalies, or loss patterns
- ▶ Flags high-value issues for human review

**Key value:** Loss prevention; margin protection; reduced manual analysis burden

## How to use this portfolio

**Start where friction is highest.** OOB agents deliver the fastest value when applied to workflows that are repetitive, time-sensitive, and costly when errors occur.

**Best next step:** identify 3–5 priority workflows, map the right OOB agents, and define success metrics (cycle time, throughput, error rate, cost-to-serve, customer satisfaction).

Once OOB agents stabilize the basics, you can selectively introduce custom agents for the workflows where your processes, industry rules, or competitive differentiation require deeper automation and governance.



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