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Top 5 Real-Life Use Cases of Microsoft Copilot for Wholesale Distributors and Retailers



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Welcome to the age of AI for wholesale distributors and retailers

Integrating Microsoft Copilot into all [Microsoft Dynamics 365 business applications](#) signifies a pivotal moment in the application of artificial intelligence. It introduces a significant shift, enabling AI tools to infiltrate everyday business operations without intricate programming requirements seamlessly. But what implications does this hold for your day-to-day business functions?

This white paper unveils five meticulously tailored use cases of Microsoft Copilot within Dynamics 365, crafted to cater to the distinctive demands of the wholesale distribution and retail industry.

Embark on a journey to discover how Microsoft Copilot, integrated into [Dynamics 365 Supply Chain Management](#) and Finance, is reshaping the landscape of the wholesale distribution and retail sector. Experience how it streamlines processes mitigates supply chain risks, enhances financial forecasting accuracy, and boosts productivity.

Copilot in Supply Chain Management for Wholesale Distribution and Retail Sector

Although statistical AI models have long been used in areas such as inventory Management, they have not yet led to significant changes in retail operations. They were limited to improving algorithms and automating routine tasks. However, the new generation of AI finally promises fundamental change.

As part of Dynamics 365 Supply Chain Management, Copilot can optimize highly complex and labour-intensive processes.

You can:

- Combine data and AI to identify and mitigate risks in the supply chain,
- Improve the accuracy of demand forecasting
- Support autonomous and self-regulated supply chains
- Automate processes intelligently

There are also functions to optimize inventory management and shorten warehouse cycle times. In practical application, this results in innovative use cases that fundamentally change supply chain management.

Use case 1: Automated retail and wholesale supply chain analysis

Challenges in Trading

Managing autonomous, self-regulated supply chains is one of the biggest challenges. The multitude of data sources, cross-functional units and complex processes often make it difficult for companies to harmonize them and make informed decisions.

Solutions through Microsoft Copilot

The complexity of supply chains in the retail industry spans various activities, actors and global influencing factors - from purchasing to delivery. AI-based solutions like Microsoft Copilot can help overcome these challenges. You create multi-level network models representing different, independent systems along the value chain.

Business Benefit

Implementing AI-powered assistants like Microsoft Copilot enables early identification of patterns and anomalies in the supply chain. This allows companies to identify risks promptly and take preventive measures such as adjusting order quantities or initiating quality controls to ensure optimal supply chain efficiency and increase customer satisfaction.

The Advantages at a Glance:

- Increasing sales through optimized inventory levels
- Optimization of storage costs through improved ordering processes
- Improving customer satisfaction through reliable deliveries
- Continuous improvement of forecasts and processes through machine learning
- Increasing company resilience through proactive risk management
- Strengthening your competitive position by reacting quickly to market changes

Practical Example

The company "MyTrade" specializes in the production of high-tech components. The supply chain is complex, global and dynamic. One morning, through Copilot for Dynamics 365 Supply Chain Management, MyTrade's supply chain manager discovers a potential delay at a critical supplier in Asia caused by unexpected political unrest. Instead of rushing, the manager uses Microsoft Copilot to quickly analyze alternative suppliers and assess their impact on costs and delivery times.

Within a short period of time, Copilot simulated several scenarios and recommended placing an order with a shorter delivery time with a reliable partner in Europe to avoid interruptions.

The delivery date will be changed for orders already placed with suppliers in Asia.

Thanks to Copilot, "MyTrade" can prevent potential production downtimes and continue to operate smoothly without compromising customer satisfaction.

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Copilot for Finance and Operations

Wholesale Distribution and Retail is confronted with an ever-growing mountain of data, the effective interpretation and use of which is crucial to the company's success. Detecting patterns in this data using machine learning is not an entirely new development.

However, the latest generation of AI applications in Dynamics 365 Finance & Operations in Microsoft Copilot goes far beyond traditional methods by reacting agilely to market changes and new trends. At the same time, it supports users in taking full advantage of the platform's possibilities, even without in-depth technical understanding. This creates the flexibility and scalability necessary to adapt to dynamic market conditions.

Users can:

- Increase success rates in debt collection
- Send personalized reminder letters with AI-generated content

Use case 2: Plan projects, identify risks and generate reports

Initial Situation

In project management, complex tasks such as planning, risk assessment, and performance monitoring are counteracted by time-consuming, recurring tasks such as preparing project status reports.

Project managers are often faced with the task of processing a large amount of information and making the right critical decisions despite constant time pressure.

Change through Microsoft Copilot

Here, Copilot can help in two ways: it can analyze large amounts of data and automate routine tasks. With Copilot in Dynamics 365 Project Operations, project managers can work more efficiently because the AI helps to create realistic task plans, provides data-driven risk assessments and generates meaningful project status reports.

Added Business Value

Copilot helps project managers and their teams accelerate project planning, reduce risk, and improve project visibility—both in terms of financial data (e.g., budgets) and project progress (e.g., [Dynamics 365 Project Operations](#) completed tasks and timelines).

The Benefits at a Glance:

- More efficient project planning and execution
- Increased transparency and control over project progress
- Reduced (financial) risks through proactive assessments
- Improved project performance
- Optimization of resource allocation

Use case 3: Create financial forecasts

Initial Situation

Accurate financial forecasts and analyses are essential for business planning in the retail and wholesale industry. But they are often time-consuming and complex. Financial professionals must consider many internal and external data sources and act quickly and securely. Compiling and updating reports and presentations can take hours, sometimes even days, and distract from strategic tasks.

Change by Microsoft Copilot

By integrating Copilot into [Dynamics 365 Finance](#), financial experts are relieved of routine tasks and supported in data analysis. Copilot can quickly compile meaningful reports and automate the creation of presentations and reports in Microsoft Dynamics 365 applications. With the help of a comprehensive database, tailored, current and precise analyses can be created.

Even complex financial requirements can be analyzed faster and better with the help of AI. With Copilot, questions like "What if..." can be easily asked in natural language, with Copilot building corresponding models that can be used in reports.

Business Added Value

Copilot in Dynamics 365 Finance increases productivity in financial management, especially accounts receivable management, by automating tasks such as accessing credit and payment histories. Through financial planning and analysis functions, Copilot automates recurring tasks and ensures secure data access and exchange.

Benefits at a Glance

- Better interaction with customers and higher success rates in debt collection
- Innovative planning and analysis in the financial sector
- Flexible and dynamic financial forecasting

Practical Example

Astrid, finance team manager at our fictional company MyTrade, uses Copilot to automate time-consuming financial forecasting. Instead of spending hours customizing and updating various inputs, Copilot in Dynamics 365 Finance enables rapid creation and customization of forecast scenarios.

An example is that Astrids' team uses Copilot for detailed demand and inventory planning.

Historical data is combined with current trends to make granular predictions. This allows MyTrade to react more efficiently to market fluctuations and dynamically adapt its financial strategy.

Use case 4: Automation of business processes

Initial Situation

In the retail and wholesale industry, many companies already use Microsoft Power Automate to execute tasks triggered by specific events automatically. Cloud flows are integrated into Dynamics 365 to automate processes such as invoicing, inventory management, and sales forecasting.

The challenge so far? Creating workflows in cloud flows required using buttons that weren't always intuitive.

Creating flows required a deep understanding of how Power Automate works, as well as the ability to configure and combine different connectors and actions manually. This was mainly a hurdle for users without a technical background.

Copilot Change in Cloud Flows

Cloud Flow Copilot makes it easy for users to create and edit flows through natural language prompts. Users can describe and create flows with simple instructions without extensive knowledge of Power Automate's specific features, dramatically simplifying the process and making it accessible to a broader audience.

Business Added Value

Improved accessibility and ease of creating cloud flows in [Power Automate](#), especially for people with little experience in the platform or automation, allows complex automation processes to be developed quickly and efficiently. This will enable companies to save time when onboarding new employees and reduce the risk of human error when setting up flows.

Advantages at a Glance

- Accelerated flow development
- Shorter training time in Power Automate
- Increased accuracy and fewer sources of error
- Promoting innovation and creativity

Practical example

Linda, as head of controlling at MyTrade, is responsible for the invoice and inventory management processes. Thanks to Copilot in Cloud Flows, Lena can easily describe in natural language the automation she needs. For example, she enters: "When a delivery arrives, check the items against the order and update the inventory." Based on this description, Copilot generates a corresponding flow that automatically handles these tasks.

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Increasing Employee Efficiency through Microsoft Copilot

Companies in the retail and wholesale sectors, in particular, face major challenges due to a shortage of skilled workers and skills deficits. Service companies are particularly hard hit by the shortage of skilled workers, with 42% complaining about a lack of staff. Although Microsoft Copilot cannot conjure up new employees, it still offers an extremely effective solution: it enables employees to work more productively and get up to speed more quickly.

Using Copilot, users can:

- Open the Copilot chat window in any Dynamics 365 business application to ask questions about functionality and processes
- Quickly familiarize yourself with new applications
- Develop your own AI applications with Copilot Studio
- Automate time-consuming routine activities
- Have Copilot create emails and other messages

According to experts, the expected increase in productivity with Copilot will be unprecedented compared to what we have seen in recent decades. The faster companies use the new AI technologies, the greater their lead over the competition.



Use case 5: Transforming the customer experience in customer service

The Initial Situation

The challenges in customer service for retail and wholesale companies are diverse. Customers today expect fast and personalized service across various channels, whether by phone, chat or in person. To survive in the competition, companies must optimize their service processes and ensure the productivity of their teams.

Change By Copilot

Copilot changes this status quo by integrating Dynamics 365 Customer Service with AI, IoT, and Mixed Reality. This platform enables seamless, connected, end-to-end customer service across all channels. Copilot and customer service teams gain access to comprehensive customer information. They can focus on queries that chatbots cannot handle automatically. During customer conversations, copilots clarify questions in real-time.

Business Added Value

The business value is significant: companies can manage all customer information centrally and give their teams access to relevant customer histories. Simple queries can be processed quickly through AI-driven chatbots and virtual agents while the team focuses on complex and individual customer needs.

The Advantages at a Glance

- More efficient customer communication thanks to self-service portals
- Relief for support staff
- Improved use of customer feedback
- Ability to provide customer support from anywhere

Practical Example

Robert, Customer Support Manager at MyTrade, starts his day with an overview of the performance of the AI-driven chatbots and virtual agents responsible for quickly and efficiently processing simple customer queries.

Throughout the day, Karl leverages Dynamics 365's omnichannel capabilities to serve customers across multiple channels, such as live chat, social media, and SMS. He is always supported by Copilot, who designs reply emails, quickly finds suitable solutions for telephone inquiries and summarizes customer interactions for documentation. This takes the workload off Robert and his team and allows them to concentrate on individual customer concerns.

Maximize the Potential of AI

Even in the new era of AI, the fundamental principle remains unchanged: the quality of the results directly depends on the quality of the input data. As a result, the automation, analysis and decisions generated by Microsoft Copilot are heavily dependent on the quality of the underlying data.

Incorrect, incomplete or outdated data in your CRM and ERP systems increases the risk of inaccurate or misleading information and automation. That's why it's critical to invest time and resources in maintaining and managing your data before implementing Copilot.

As a Microsoft Inner Circle Partner with 25 years of experience in the wholesale distribution and retail industry and in the area of Microsoft Business Applications, we are at your side to make the most of the new generation of artificial intelligence.



Unlock the Power of AI

From supply chain management to financial forecasting, Copilot offers an innovative solution to retail and wholesale challenges. Integrating Copilot with all Dynamics 365 business applications opens up opportunities to streamline workflows and increase productivity while improving customer experience and employee satisfaction. By using Copilot in Dynamics 365, you can expect a noticeable increase in productivity, which can give you a crucial competitive advantage.

*Unlock the Power of AI for Your Company Today with our Tailored Industry Suites: **wholesale360** and **retail360***

Our industry suites extend the power of the Microsoft cloud platform with pre-built solutions for the unique requirements of our core industries. With AI-infused apps, deep data & analytics capabilities and modern workplace tools, you can harness the power of Microsoft to drive automation, real-time actionable insights and deliver results.

Integrating wholesale360 and retail360, both built on the industry-leading Microsoft Dynamics 365 cloud platform, offers businesses the agility and intelligence needed to meet industry challenges. wholesale360 empowers wholesalers and distributors to make demand-driven decisions, enhancing operational efficiency and customer engagement. With solutions that span the entire value chain, it prepares companies for growth, agility, and innovation, even during times of disruption. retail360, similarly, focuses on optimizing customer experiences and operations, enabling businesses to stay resilient and competitive in a constantly changing market.

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With HSO's wholesale360 and retail360 you're not just investing in software—you're securing a trusted advisor committed to guiding you through every step of your operational transformation.

Together, we can achieve sustainable growth, innovation, and a competitive edge in the wholesale distribution and retail industry.

Learn more about wholesale360 and retail360

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