

Copilot **Capabilities** in Business Central

How AI helps teams work
faster, smarter, and with fewer
manual steps



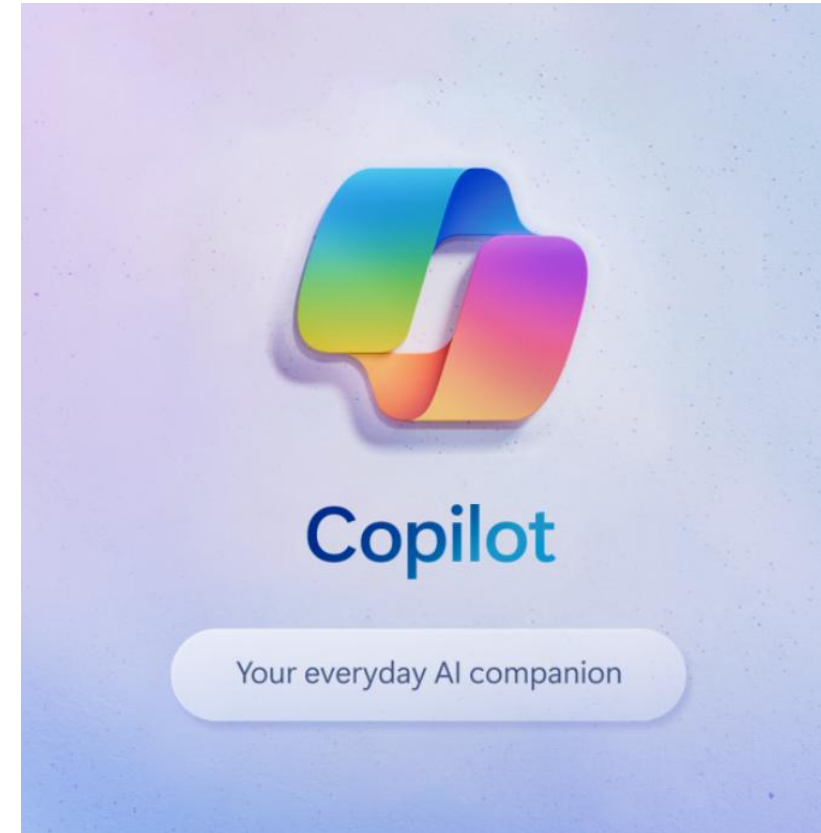
>>> Introduction

Microsoft Copilot is an AI-powered assistant embedded directly inside **Dynamics 365 Business Central**. It helps users work more efficiently by writing content, analyzing data, answering questions, and automating repetitive tasks—right where the work happens.

Instead of spending time on manual setup, data entry, or searching through records, users can simply ask Copilot what they need in plain language. Copilot then suggests insights, completes actions, or prepares content—while users stay fully in control.

👉 In simple terms:

Copilot acts like a digital colleague that handles routine work, so teams can focus on decisions that actually move the business forward.



>>> Copilot Capabilities

Analyze data in lists with Copilot

Autofill fields with Copilot

Bank Account Reconciliation Assist

Chat with Copilot

Map e-documents to purchase order lines

Marketing text suggestions with Copilot

Suggest lines on sales documents

Sales Order Agent

Payables Agent overview

Suggest substitute items

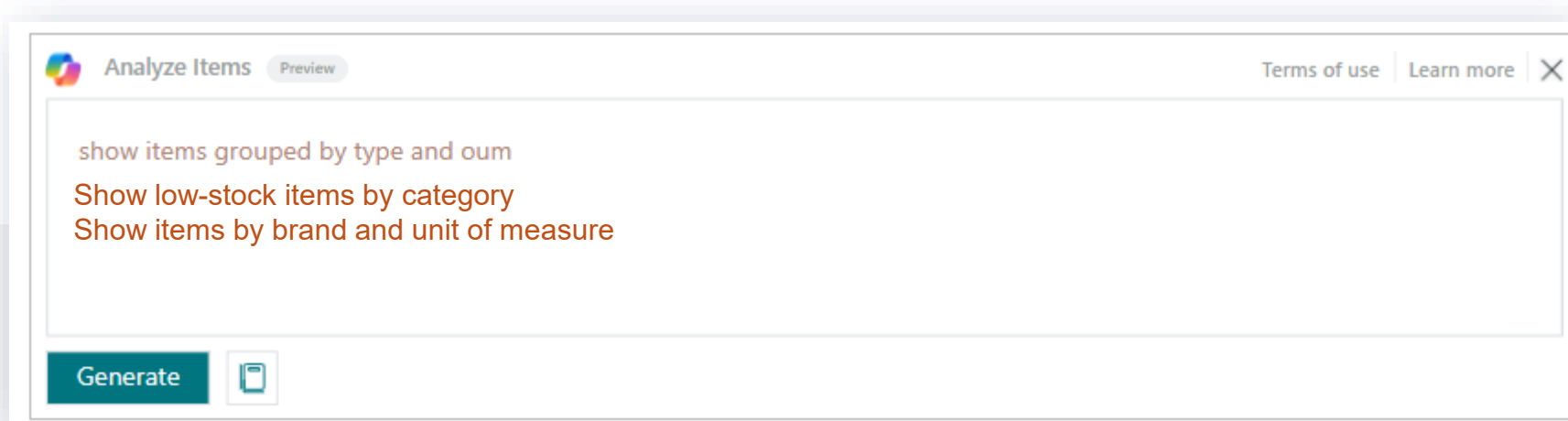
Suggest number series with Copilot

Summarize records with Copilot

>>> Analyze data in lists with Copilot

Data Analysis mode in Business Central is powerful, but setting it up manually can take time. Analysis Assist removes that friction.

With Copilot, users can analyse data simply by describing what they want to see. There's no need to configure filters, groupings, or calculations manually.



For example:

“Sort items by quantity from lowest to highest”

“Show average cost by category”

“Display low-stock items by category”

Copilot translates these requests into structured analysis instantly—making it easier to uncover trends, spot risks, and make informed decisions without technical effort.

>>> Autofill fields with Copilot

Filling forms and records is necessary—but time-consuming. Copilot's Autofill capability speeds this up by intelligently suggesting values for empty or editable fields.

When creating or updating a record, Copilot reviews the context of existing data and proposes relevant field values. Users can accept, edit, or ignore each suggestion—nothing is applied automatically.

These suggestions are based on:

- Frequently used values
- Recently used entries
- Lookup selections
- AI-generated recommendations
- Web-based references

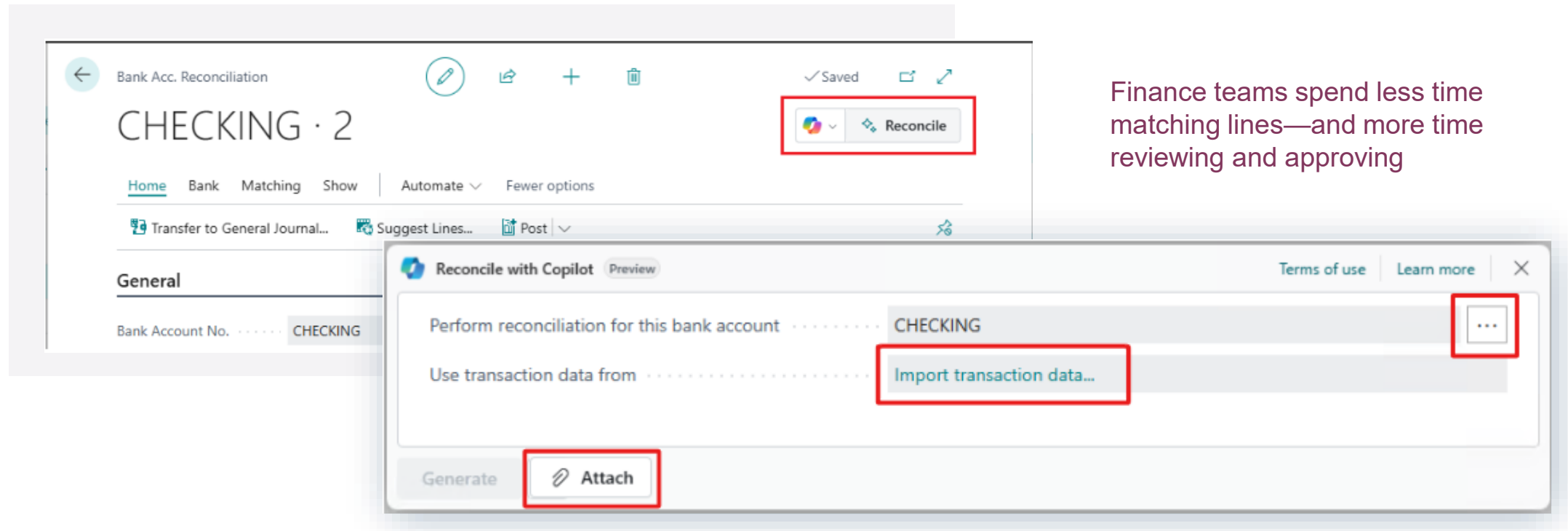
The result: faster data entry, fewer errors, and consistent records—without losing control.

The image shows a two-part screenshot of a data entry interface. The top part shows a form with several empty fields. A red box highlights a small icon in one of the fields, indicating where a suggestion is being presented. The bottom part shows the same form with suggestions displayed. A red box highlights a button in the top right corner that says "Keep all (2)" with a dropdown arrow. Another red box highlights a suggestion box that says "Suggested value" with a checkmark icon and a close icon. A third red box highlights another suggestion box that says "Suggested value".

>>> Bank Account Reconciliation Assist

Bank reconciliation is traditionally a multi-step and manual process—importing statements, matching transactions, and posting adjustments.

Copilot simplifies this by automatically matching more transactions and intelligently suggesting the correct G/L accounts for unmatched entries. This reduces manual effort and speeds up reconciliation without compromising accuracy.



The screenshot displays the 'Bank Acc. Reconciliation' interface for a 'CHECKING' account. The main window shows a 'Reconcile' button, which is highlighted with a red box. Below this, the 'Reconcile with Copilot' dialog box is open, showing a 'Preview' tab. The dialog box contains a dropdown menu for 'Perform reconciliation for this bank account' set to 'CHECKING', and a dropdown menu for 'Use transaction data from' set to 'Import transaction data...'. Both dropdown menus are highlighted with red boxes. The dialog box also features a 'Generate' button and an 'Attach' button, both highlighted with red boxes. To the right of the dialog box, a text box states: 'Finance teams spend less time matching lines—and more time reviewing and approving'.

Bank Acc. Reconciliation

CHECKING · 2

Home Bank Matching Show Automate Fewer options

Transfer to General Journal... Suggest Lines... Post

General

Bank Account No. CHECKING

Reconcile with Copilot Preview

Terms of use Learn more X

Perform reconciliation for this bank account CHECKING

Use transaction data from Import transaction data...

Generate Attach

Finance teams spend less time matching lines—and more time reviewing and approving

>>> Chat with Copilot

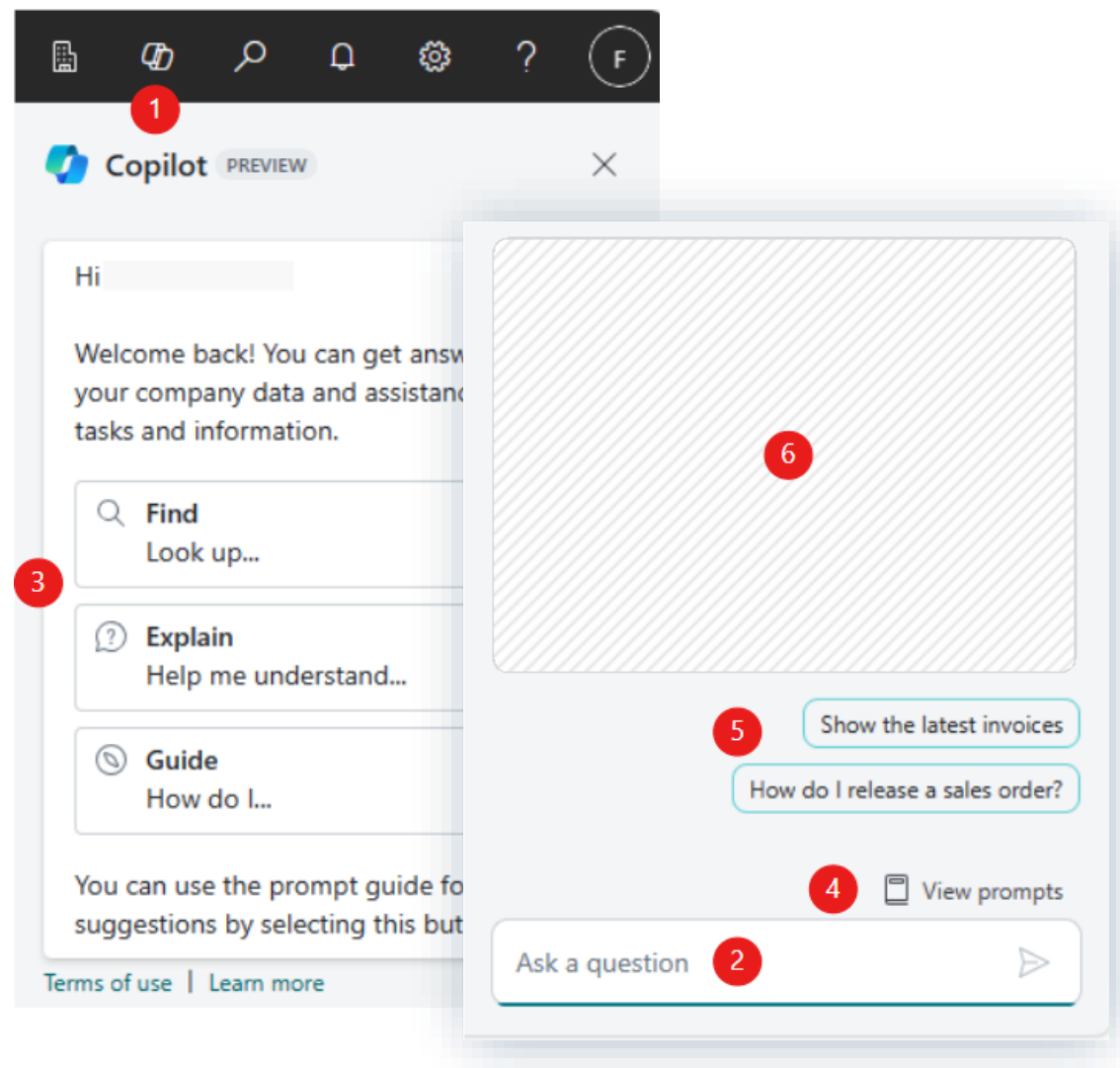
Copilot introduces a conversational way to interact with Business Central.

By chatting with Copilot, users can:

- Ask questions in natural language
- Find records and business data instantly
- Get explanations or guidance without navigating multiple pages

Copilot respects all existing permissions—it only shows data the user is authorised to see, and all security rules continue to apply.

The chat experience is available directly in the Business Central web client.



>>> Map e-documents to purchase order lines

Processing vendor invoices often involves manual searching and matching. Copilot streamlines this process through intelligent e-document matching.

When invoice lines don't exactly match purchase orders, **Copilot** can still identify and suggest the correct purchase order lines. This is especially valuable for growing businesses handling high invoice volumes.

Invoices can be matched from:

- The E-Documents page
- The Purchase Order page

E-Document Match Order Lines with Copilot Preview AI-generated content may be incorrect Terms of use

Auto-matched 0 of 6 lines (0%) **All lines (100%) are matched. Review match proposals**

Copilot matched 6 of 6 lines (100%) Invoice Total Amount ...

E-Document No. 11 Matched Total Amount...

Match proposals Delete Line

E-Document Line No. ↑	E-Document Line Description	Matched Quantity	Proposal
10000	Colombian Roasted Coffee	20	Matched to Purchase Order Line
20000	Rio BR Whole Roasted Beans	20	Matched to Purchase Order Line
30000	Fortaleza BR Whole Roasted Beans	20	Matched to Purchase Order Line
50000	Espresso Roast. Beans, Mexico	20	Matched to Purchase Order Line
60000	Mexican Mocha Beans	10	Matched to Purchase Order Line
→ 40000	Indonesian Coffee Whole Bean	25	Matched to Purchase Order Line

✓ Keep it ✗ Discard it

The result is faster invoice processing, fewer mismatches, and better purchase tracking.

>>> Marketing text suggestions with Copilot

Writing product descriptions for online channels like Shopify can be time-consuming. Copilot helps by generating high-quality, engaging marketing text with a single click.

It highlights key product attributes and adapts the content based on user preferences such as:

Tone
Format
Emphasis

This allows teams to create consistent, compelling product descriptions without relying on manual copywriting.

The screenshot displays the Dynamics 365 Business Central interface. At the top, the 'Nanoleaf®' logo is visible, followed by navigation tabs for Finance, Cash Management, Sales, Purchasing, and Shopify. Below these, a secondary menu includes Customers, Vendors, Items, Bank Accounts, and Chart of Accounts. The 'Items' tab is selected, showing an 'Item Card' for '1896-S · ATHENS Desk'. A Copilot window is open, titled 'Describe 'ATHENS Desk' by 'Office Desk: No, No, Mountable cable trunk includ...'. The window contains a generated product description: 'Elevate your work game with the Athens Desk. Upgrade your workspace with the Athens Desk, a stunning addition to any office setting. Crafted with a solid oak surface and polished stainless steel legs, this desk exudes elegance and sophistication. The desk is FSC certified, ensuring that the wood used is sourced from responsibly managed forests. Measuring 200 x 100 x 95 cm (W x D x H), the Athens Desk provides ample space for you to work comfortably. The included mountable cable trunk helps keep your workspace organized and tidy. Best of all, the Athens Desk comes fully assembled, so you can start using it right away. Bring a touch of class to your workday with the Athens Desk.' Below the text is a rich text editor toolbar and a 'Keep it' button. At the bottom of the Copilot window, there are dropdown menus for 'Tone', 'Format', and 'Emphasis'. The background shows the 'Costs & Posting' section of the item card, with 'Costing Meth...' set to 'FIFO' and 'Gen. Prod. Po...' set to 'RETAIL'. A red box highlights a button labeled 'Draft with Copilot' and a message: 'Create draft based on this item's attributes.'

>>> Suggest lines on sales documents

Copilot makes creating sales documents faster by allowing users to add items using plain language.

Instead of searching item lists, users can type:

“2 red kids bicycle”

Copilot understands the request and:

- Finds matching products
- Refers to past sales documents if relevant

This significantly reduces document creation time for quotes, orders, and invoices.

S-ORD101002 · Adatum Corporation

Home Prepare Print/Send Request Approval Order Report More options

General

Customer Name	Adatum Corporation	Due Date	6/1/2023
Contact	Robert Townes	Requested Delivery D...	5/2/2023
Document Date	5/1/2023	External Document No.	
Posting Date	5/1/2023	Status	Open
Order Date	5/1/2023		

Lines Manage Line Order

Get line suggestions... New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Location Cc
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Suggest lines with Copilot

Describe the order you'd like to create, and Copilot will get you started

2 red kids bicycle

Generate



An order for <customer> with 2 <items>

Copy previous order from customer ...

Create with lines from this bullet list ...

Turn the attached Excel into an order

Subtotal Ex

Total Excl. Tax (USD)

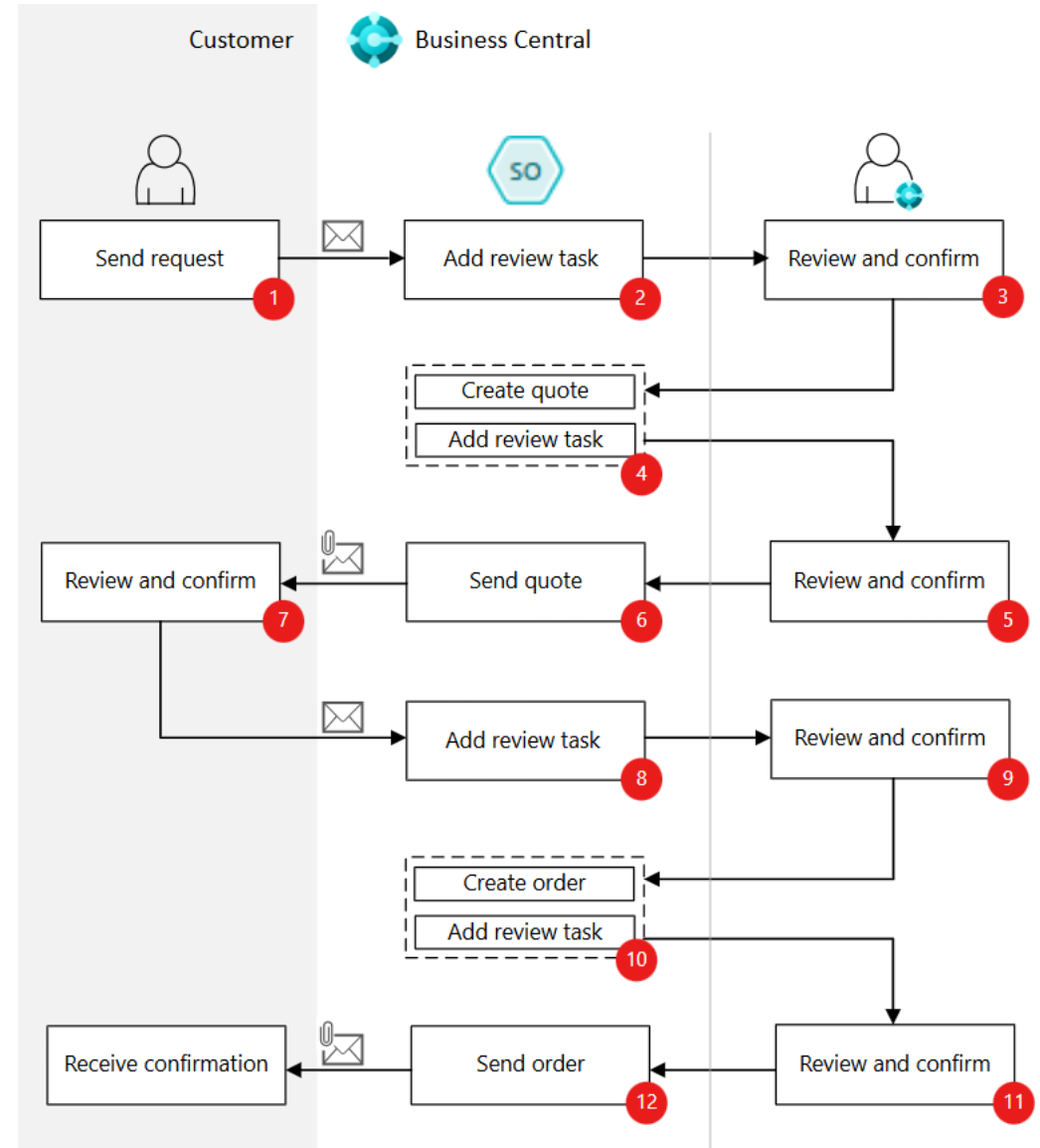
>>> Sales Order Agent

The Sales Order Agent automates the processing of customer sales orders received via email.

It can:

- Monitor incoming sales emails
- Identify the customer
- Check item availability
- Ask for missing details
- Automatically create and send a PDF sales quote

With minimal human involvement, it can update existing quotes, route approvals, and convert approved quotes into sales orders—reducing response time and manual workload.

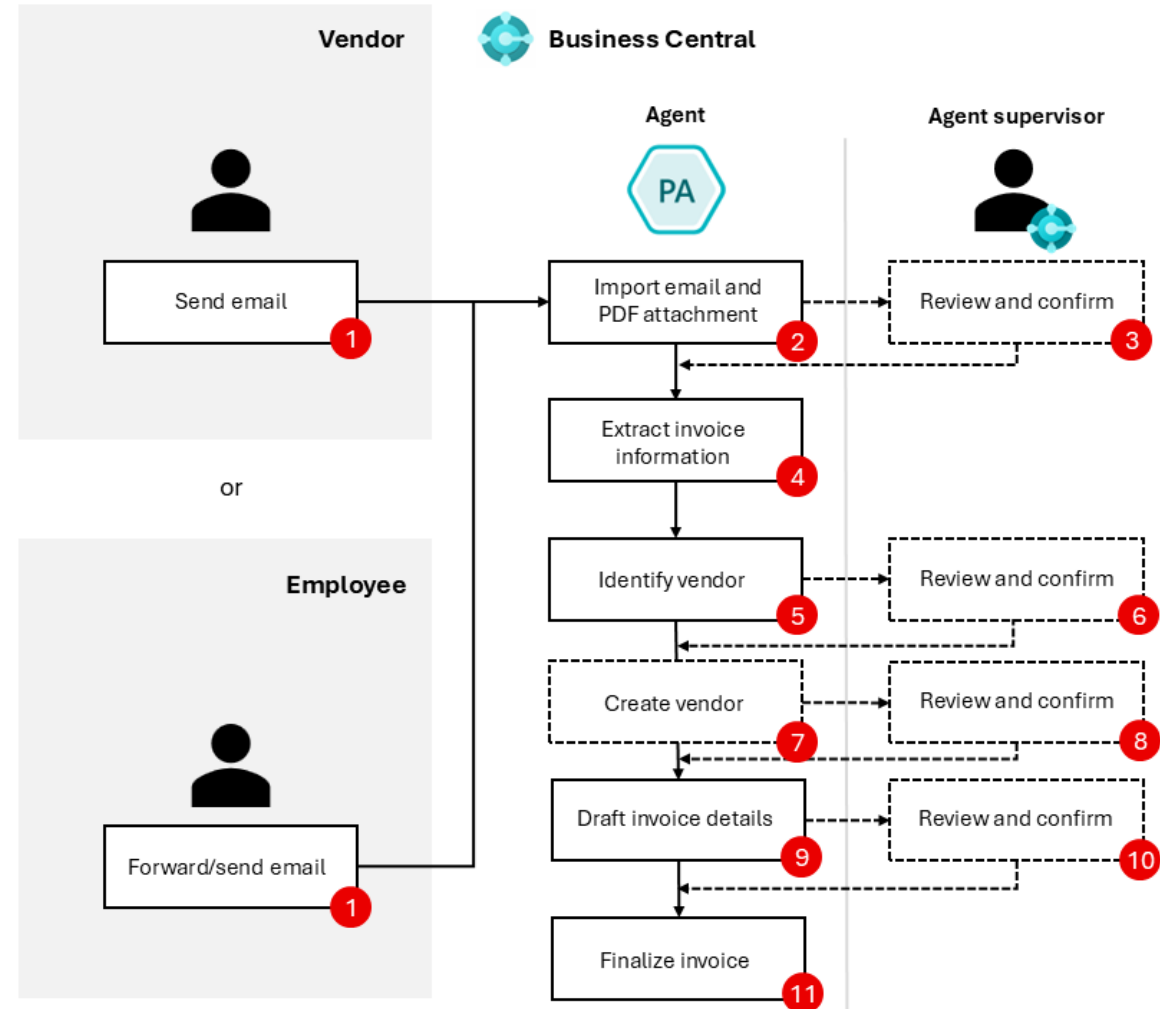


>>> Payables Agent overview

The Payables Agent focuses on removing bottlenecks in accounts payable.

It continuously monitors company email for vendor invoices, reads and understands invoice data using AI (Azure Document Intelligence), and creates draft invoices automatically.

A finance supervisor only needs to review and approve—ensuring speed without sacrificing control. This helps finance teams keep pace with business growth.



>>> Suggest substitute items

When an item is out of stock, finding a suitable alternative can delay order processing.

Copilot analyses product data such as names, descriptions, barcodes, and features across the system. Using AI-driven matching, it suggests the most relevant substitute items—ranked by similarity.

This helps teams respond quickly to customers while maintaining service quality.

1908-S · LONDON Swivel Chair, blue

Item Substitution Entry



+ New

Edit List

Delete

Conc

Variant Code ↑

Substitute Type ↑

Substitute No. ↑

Description



LONDON Swivel Chair, blue

Preview

AI-generated content may be incorrect



Learn more

Suggested item substitutions

Delete Line

	Substitute No.	Description	Score ↓	Confidence
	1980-S	MOSCOW Swivel Chair, red	0.86	High
	1972-S	MUNICH Swivel Chair, yellow	0.86	High
	2000-S	SYDNEY Swivel Chair, green	0.86	High
	1964-S	TOKYO Guest Chair, blue	0.85	Medium
→	1968-S	MEXICO Swivel Chair, black	0.85	Medium



Insert all



Discard

Matching ▾

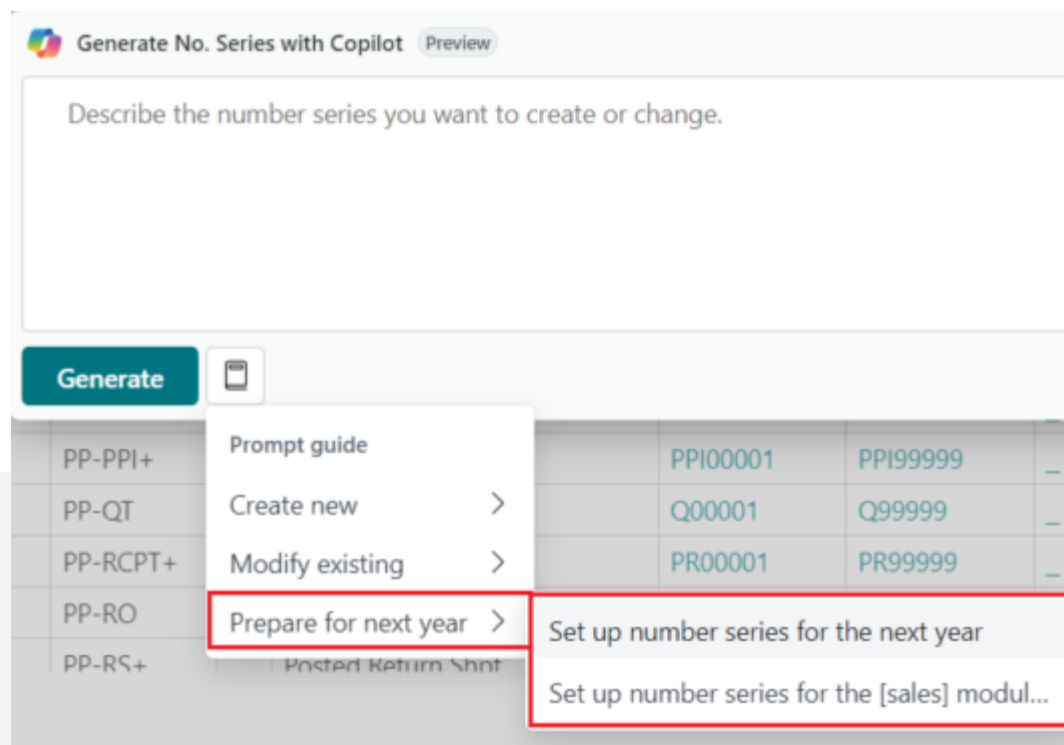
View ▾

>>> Suggest number series with Copilot

Every key record in Business Central requires a unique number—but configuring number series manually takes time.

With Copilot, users can simply describe their requirement in plain language or structured input. Copilot then generates appropriate number series suggestions, reducing setup effort and configuration errors.

Saves time by eliminating manual number series configuration and Reduces errors caused by overlapping or incorrect numbering

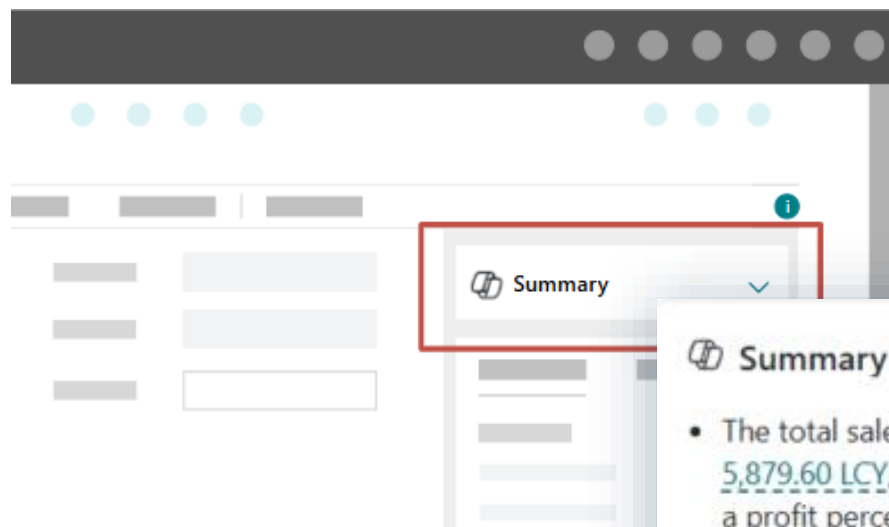


>>> Summarize records with Copilot

Copilot can generate quick, role-based summaries for records such as customers, items, or sales orders.

These summaries appear directly in the FactBox and provide:

- 2–3 key insights
- Important trends or risks
- Quick links to related data



Users get instant context and can take action faster—without scanning multiple pages.

Summary Preview now

- The total sales for the fiscal year amount to 5,879.60 LCY, with a profit of 4,207.90 LCY and a profit percentage of 71.6%, reflecting financial performance.
- The total amount owed by this customer is 14,679.38 LCY, comprising outstanding invoices of 14,679.38 LCY and outstanding orders totaling 20,028.25 LCY.
- Payments collected from this customer this year total 7,349.51 LCY, with no overdue amounts reported 0.00 LCY, and an average collection period of 36.8 days.

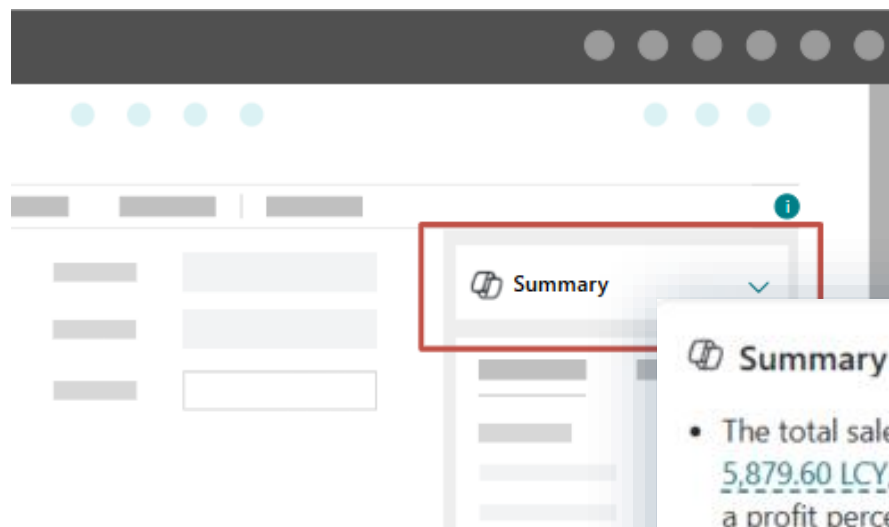
Show more

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A screenshot of a 'Summary' popup window. The window has a title bar with a document icon, the word 'Summary', a 'Preview' button, and a 'now' label with a refresh icon and an upward arrow. The main content area lists three key insights, each starting with a bullet point. The first insight discusses total sales for the fiscal year, mentioning specific LCY values and a profit percentage. The second insight discusses the total amount owed by the customer, breaking it down into outstanding invoices and orders. The third insight discusses payments collected from the customer this year, mentioning total LCY, overdue amounts, and an average collection period. At the bottom of the window is a 'Show more' button.

Summary Preview now ↻ ^

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Show more

Reduced IT Dependency

Empowers finance and operations teams to manage changes independently.



Operational Efficiency

Reduces time spent on configuration and rework, especially during scale-ups or process changes.



Scalability Without Complexity

Supports business expansion, new entities, or document types without operational friction.

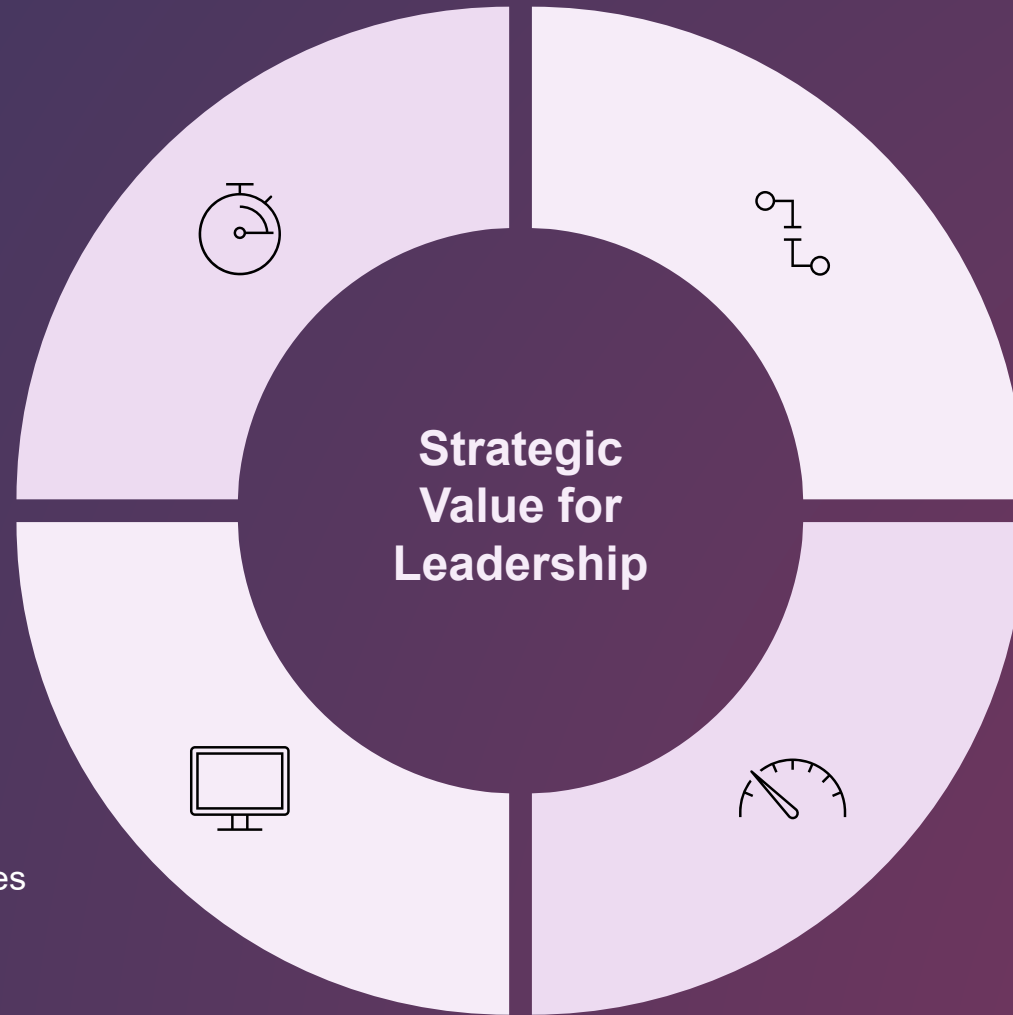


Risk & Compliance Control

Empowers finance and operations teams to manage changes independently.



**Strategic
Value for
Leadership**



Copilot turns a traditionally technical, error-prone task into a **fast, reliable, business-led decision**—supporting scale, compliance, and operational confidence.

See it in action

Book a short Copilot demo that shows how a task that once took hours can now be done in minutes—with confidence and control.

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Learn more about us at:
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