

Inmind

Copilot and AI in
Dynamics 365 Business Central



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Introduction

Copilot is an advanced AI assistant that enhances and simplifies workflows in various applications. Using natural language processing and machine learning, Copilot boosts creativity, increases productivity, and eliminates tedious tasks for users. It understands simple, conversational language and provides relevant suggestions based on the context of your work.

Copilot in Business Central?



Guide

Explains concepts and helps you learn new skills



Find

Identifies records and pages, finds products based on natural language queries or similar products



Compare

Matches bank statements and incoming electronic documents



Analyse

Organizes data to help you obtain information more quickly



Suggest

Writes product descriptions, suggests number series

Overview of Features

Chat with Copilot

Public Preview (all regions)

Language(s): Eng

Boost your productivity with Copilot by asking it questions in natural language.

Find your data:

Search and open data related to your business processes (customers, vendors, orders and items). Example: "Show me the latest sales order for Adatum."

Organize and analyze your data:

Copilot groups records and performs calculations such as sums or averages. The results are displayed in an analysis tab. Example: "In which countries are my best customers?"

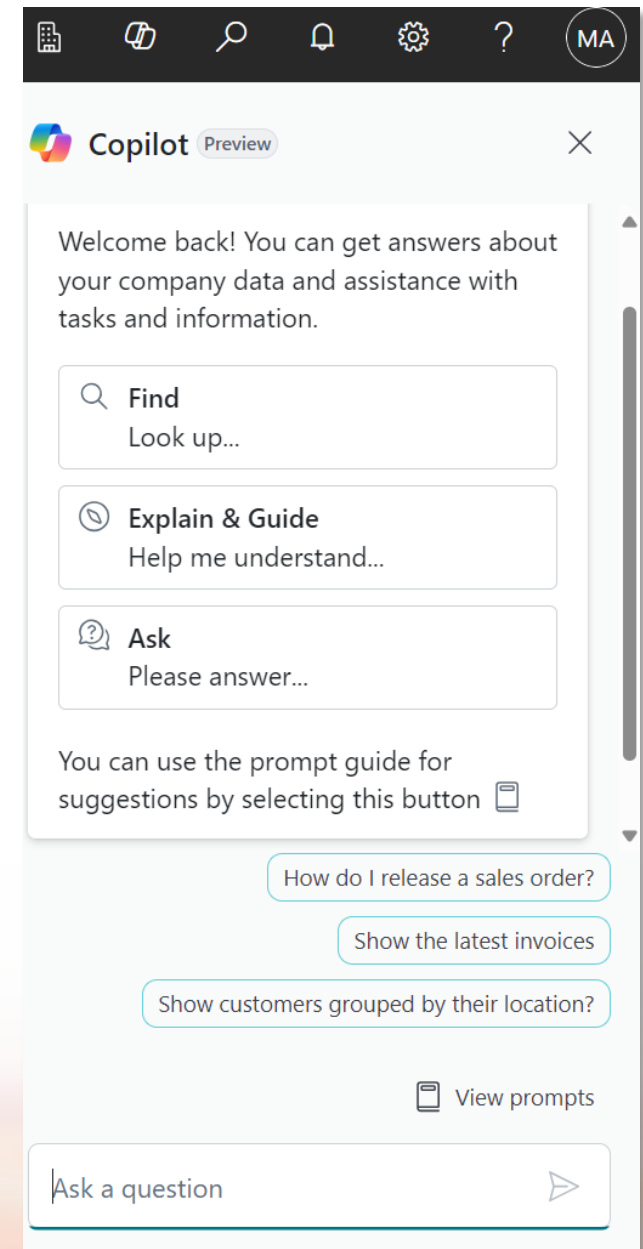
Provide explanations:

Ask questions such as "Help me understand dimensions" or "How to record a sales order."

Specify fields:

Use the "Ask Copilot" option on a tooltip to get a detailed explanation of a field, with links to the referenced articles.

Learn more: [What's new: Chat with Copilot in 2025](#)



Bank Account Reconciliation with Copilot

General Availability (all regions)

Language(s): Eng and Fr

Copilot is your AI-powered accounting assistant, turning a tedious monthly task into a simple quick review. This feature complements the automatic matching operation (auto match) already available in Business Central.

Reconciling BNC statement 7 for 24-05-31

AI-generated content may be incorrect

[Terms of use](#)
[Learn more](#)

Auto-matched · 3 of 7 lines (42.9%)

Copilot matc... · 4 of 7 lines (57.1%)

All lines (100%) are matched. Review ...

Statement En...

Match proposals

Delete Line

Transacti... Date	Description	Amount to Apply	Proposal
→ 2024-04-...	PAIEMENT DI...	-172.46	Match with entry 3510 (Invoice 1.
2024-04-...	DIVERS	3,182.38	Match with entry 3543 (Miscella..
2024-04-...	DEPOSIT TREY	1,724.63	Match with entry 3557 (Deposit ..
2024-04-...	FRAIS BANCAI...	-250.00	Match with entry 4214 (FRAIS BA

Keep it
 Discard it

Enhanced Matching :

Automatic Matching:

Automatically matches most bank transactions with ledger entries.

Matching with Copilot :

Examine unmatched transactions and identify more matches based on dates, amounts, and descriptions. For example, Copilot matches a bank statement line with multiple ledger entries if a customer has paid several invoices in a single bulk payment.

Suggest General Ledger (G/L) Accounts:

Suggest the most likely G/L accounts based on transaction descriptions for unmatched transactions. For example, if the description of a transaction is "Bank fees," Copilot suggests assigning it to the associated bank account.

Learn more: [Simplify bank reconciliation with Copilot in Dynamics 365 Business Central](#)

Create product information faster with Copilot

Public Preview (all regions)

Language(s): Eng

Suggest substitute items and reduce the effort needed to create and manage your product information. Display the confidence level of the suggestion. The recommendation of dimensions, variants, and units of measure is planned as a future feature.

Learn more: [What's new: Item Substitution with Copilot](#)

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

Match e-documents to purchase order lines with Copilot

Public Preview (all regions)

Language(s): Eng and Fr

Automate the matching and association of vendor invoices with purchase orders, thus reducing manual effort.

- Identifies corresponding purchase orders even when vendor invoices do not match exactly.
- Matches lines one-to-one or one-to-many.
- Adheres to predefined tolerance levels for price and purchase quantity.
- Updates the purchase order and lines with invoice information.

Learn more: [What's new: Enhanced purchase order matching with Copilot](#)

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

Auto-matched 0 of 5 lines (0%) All lines (100%) are matched. Review mat...
 Copilot matched 5 of 5 lines (100%) Invoice Total A... 10,800.00
 E-Document No. 1 Matched Total ... 10,800.00

Match proposals Delete Line

E-Document Line No. ↑	E-Document Line Description	Matc... Quan...	Proposal
10000	Colombian Roasted Coffee	20	Matched to Purchase Order Li...
20000	Rio BR Whole Roasted Bea...	20	Matched to Purchase Order Li...
30000	Fortaleza BR Whole Roast...	20	Matched to Purchase Order Li...
40000	Espresso Roast. Beans, Me...	20	Matched to Purchase Order Li...
→ 50000	Mexican Mocha Beans	20	Matched to Purchase Order Li...

Keep it Discard it

Get marketing text suggestions with Copilot

General Availability (all regions)

Language(s): Eng and Fr

Save your time and effort when launching new products with AI-powered marketing text suggestions.

Image Analysis:

Analyze the item image, suggest a corresponding category and item description. If categories with default attributes have been configured, you benefit from the automatic assignment of this information, reducing manual data entry.

Writes your marketing text:

Create product marketing text in rich text based on your item description, attributes, and category. You control the item attributes used by Copilot as well as the tone, format, and emphasis of the text.


Personalization:

Adjust language settings (tone, format, and emphasis) for text generation.

Shopify Integration:

Use the free connector to publish items and their marketing text directly to Shopify.

Learn more: [Copilot in Business Central - Marketing Text Suggestions](#)

 Draft Marketing Text with Copilot

[Terms of use](#) [Learn more](#) ✕

Describe 'PARIS Guest Chair, black' using the attributes included here:

Item Attributes


Attribute ↑	Value	Include
Colour	Black	<input checked="" type="checkbox"/>
Depth	70 CM	<input type="checkbox"/>
Height	100 CM	<input type="checkbox"/>
Item Category	Office Chair	<input checked="" type="checkbox"/>
Material Descrip...	Leather, Satin Polished Aluminum base	<input checked="" type="checkbox"/>
Model Year	1952	<input checked="" type="checkbox"/>
→ <u>Width</u>	75 CM	<input type="checkbox"/>



Generate

Tone ▾

Format ▾

Emphasis ▾

 Describe 'PARIS Guest Chair, black' by 'Office Chair: Black, Leather, Satin Polished Aluminum base, 1952'

AI-generated content may be incorrect   [Terms of use](#) [Learn more](#)

Sit in Style, Work with Grace.

Introducing the PARIS Guest Chair in black – a timeless masterpiece that blends luxury with functionality. Crafted from premium leather and featuring a satin polished aluminum base, this chair is not just a piece of furniture, but a statement of elegance and sophistication. Designed in 1952, the PARIS Guest Chair has stood the test of time, offering unparalleled comfort and support for every guest who takes a seat. Whether you're furnishing a modern office or adding a touch of vintage charm to your workspace, this chair is the perfect choice. Elevate your office aesthetics and let your guests experience the perfect blend of style and comfort with the PARIS Guest Chair.


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...

 Keep it

 Regenerate

 Adjust

 Cancel

Quickly access insights with analysis tabs generated by Copilot

Public Preview (all regions)

Language(s): Eng and Fr

Copilot reduces the time needed to identify trends and anomalies by allowing you to phrase your analysis in a simple sentence without ever leaving Business Central. By describing how you want to structure your data analysis, such as "Show me suppliers by location sorted by purchase amount," you can quickly gain insights instead of spending time building analysis views. Copilot creates, totals, pivots, and filters your data to help you find the information you're looking for

Learn more: [AI-powered analysis with Copilot in Dynamics 365 Business Central](#)

Analyse Vendors Preview

Show me suppliers by location sorted by purchase amount

Generate

Vendors: All ▾ **Suppliers by location** ▾ +

Location Code	Name	1 ↓ Sum(Balance)
> (65)		164,217.27
▾ BLUE (2)		
	Furniture Industries	23,800.00
	Top Bureau	1,051.78
BLUE		24,851.78
▾ YELLOW (3)		
	AR Day Property Management	16,668.90
	Malay-Dan Export Unit Sdn Bhd	0.00
	Club Euroamis	0.00
YELLOW		16,668.90
▾ GREEN (1)		
		7,524.03

Rows: 73 Total Rows: 73 Filtered: 73

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▾

Create new analysis

Pivot Mode ☐

☐ No.
☒ Name
☐ Responsibility Centre
☐ Location Code
☐ Phone No.
☐ Contact
☐ Allow Multiple Postin...
☐ Search Name

Row Groups

- Location Code

Values

- Sum(Balance (\$))
- Sum(Balance Du...

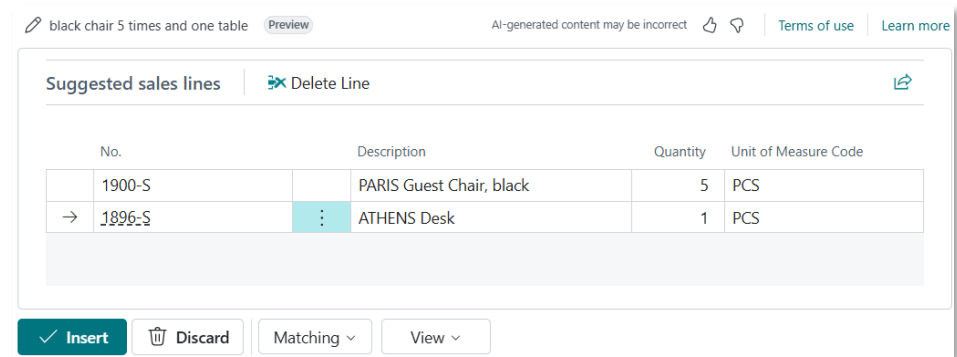
Easily create sales lines with Copilot

Public Preview (all regions)

Language(s): Eng and Fr

The sales line suggestion can help create lines on sales documents such as quotes, orders, and invoices from natural language or CSV file. Example: "black chair 5 times and one table."

Learn more: [Create sales lines with Copilot in Dynamics 365 Business Central](#)



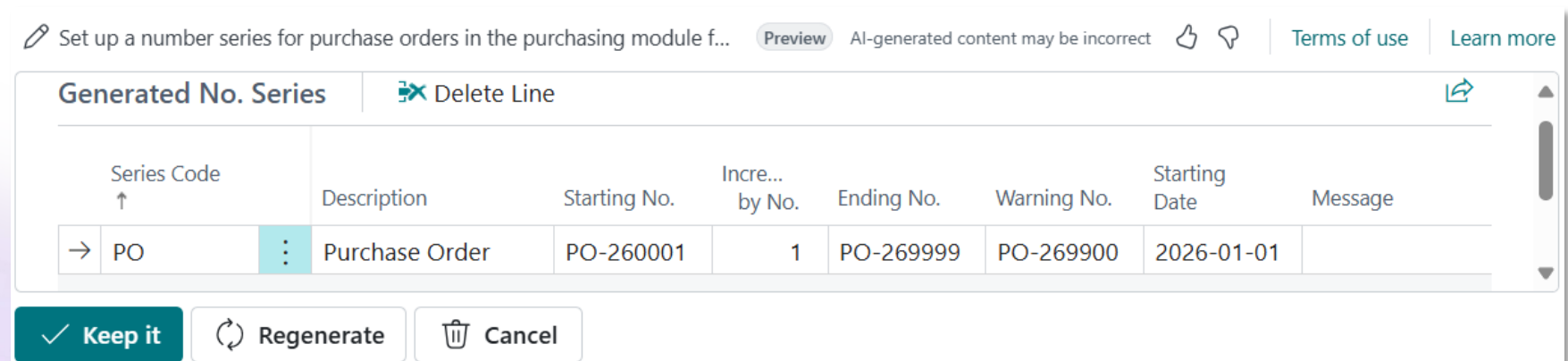
Suggest number series with Copilot

Public Preview (all regions)

Language(s): Eng and Fr

Helps generate and manage number series quickly in natural language. Example: "Set up a number series for purchase orders in the purchasing module for next year."

Learn more: [What's new: Suggest Number Series with Copilot](#)



Use the Sales Order Agent to automate order taking

Public Preview – US Only (February 2025)

Language(s): Eng

Microsoft is expanding the use of AI by enabling customers to automate business processes through autonomous agents. These agents can handle tasks, respond to events, and make decisions. They can act on behalf of an entire team or department. The first agent introduced is the **Sales Order Agent**.

Autonomous operation:

The Sales Order Agent captures orders from customer emails, prepares quotes, checks item availability, and manages the entire process with minimal user intervention.

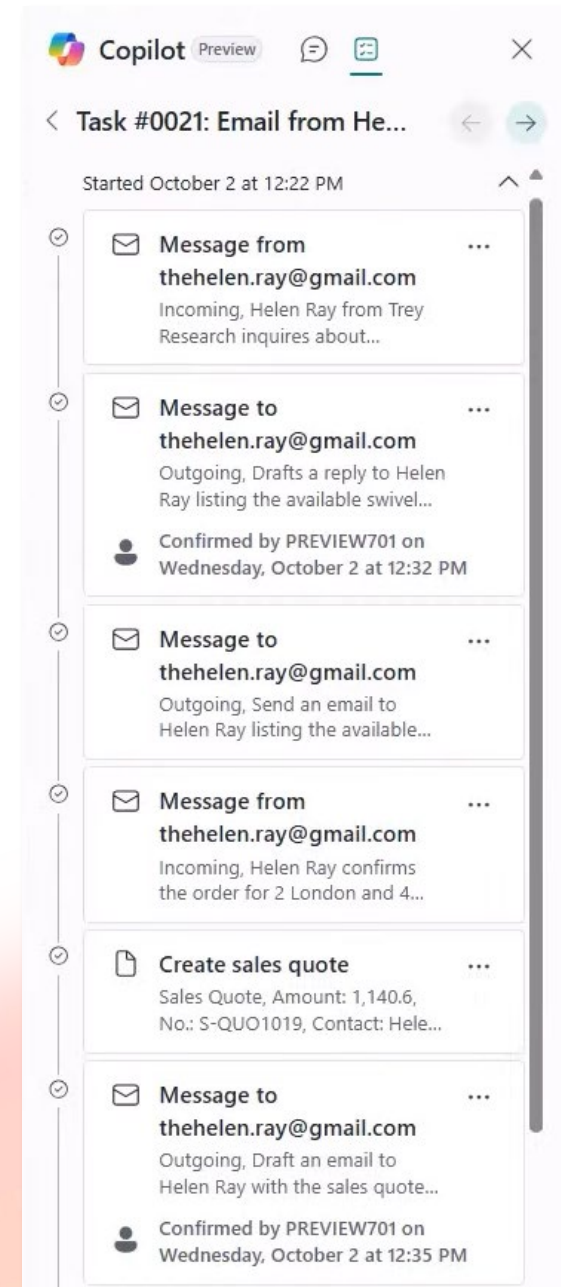
Transparency and control:

Users maintain full transparency and control over the changes made by the agent, with notifications and detailed reviews of tasks.

Configuration:

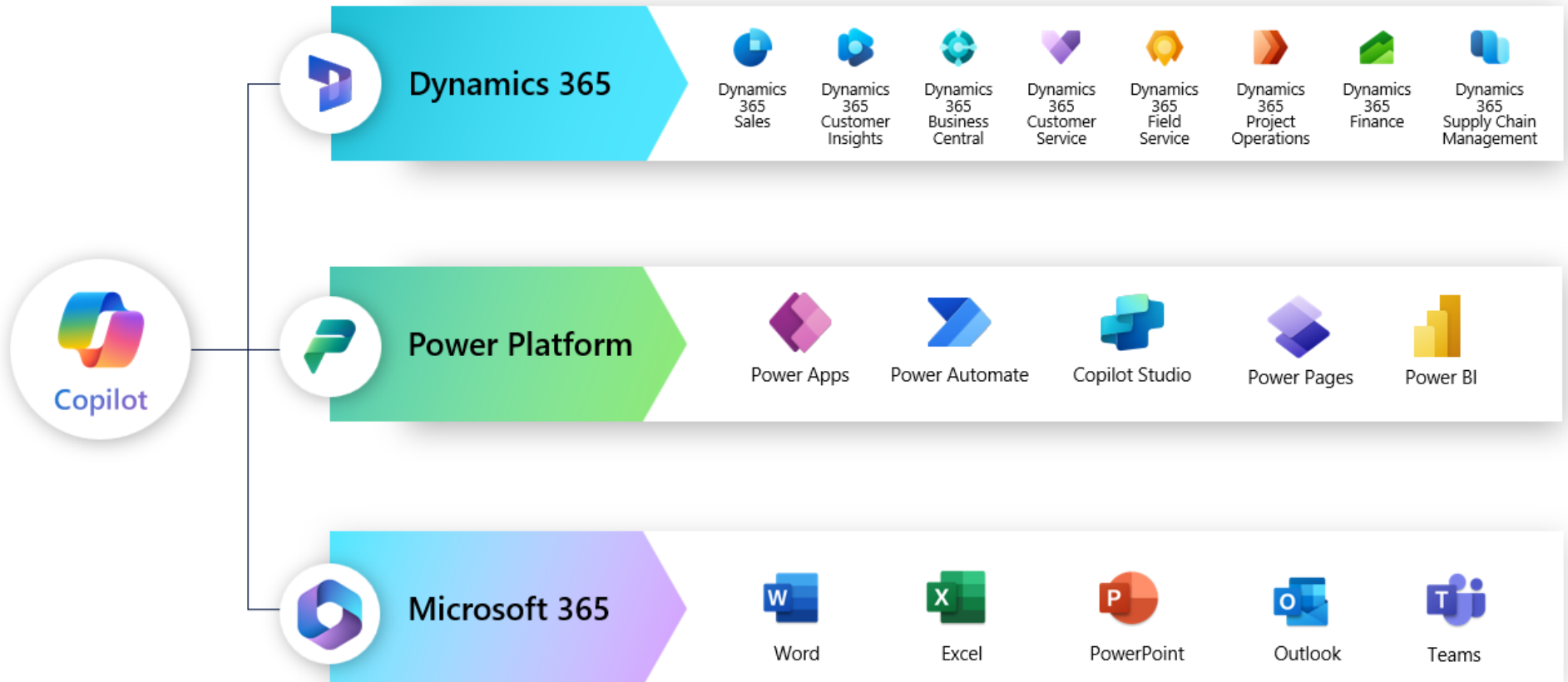
Simple setup where users can define the agent's name, messaging channel, and process steps.

Learn more: [Sales Order Agent for Dynamics 365 Business Central](#)



Available in the Microsoft suite

Copilot is integrated into a wide range of Microsoft 365 applications, including Excel, Outlook, Teams, and Power BI. As Microsoft continues to innovate, Copilot's presence will expand to even more applications within the Microsoft suite, providing users with increasingly powerful tools to achieve their goals efficiently.



Built on Microsoft's holistic approach



Copilot, built on the Microsoft cloud, provides security, privacy, and compliance tailored for businesses. It inherits user-specific data permissions, ensuring that it can only access data that the user is authorized to view. Microsoft does not read user queries or use their data to train AI models without explicit permission.

An AI system includes technology, users, stakeholders, and the deployment environment. Microsoft's Responsible AI FAQs help understand how AI works, the choices that influence its performance, and the importance of considering the entire system (technology, people, and environment).

For more information: [Responsible AI FAQs for Dynamics 365 Business Central - Business Central | Microsoft Learn](#)

To access the videos: [Microsoft Dynamics 365 Business Central - YouTube](#)



Copilot & AI capabilities

The Copilot capabilities page displays all the features available to you. This page can be accessed through the search magnifying glass in Business Central.

Definitions :

- Copilot utilise le service Azure OpenAI, indisponible au Canada. L'option « Autoriser le déplacement de données » doit être activée, sinon, les fonctionnalités de Copilot sont inaccessibles. Seule une petite quantité de données, comme les instructions (prompts) et réponses, est déplacée aux États-Unis, et non la base de données entière.
- The "Production-Ready Preview Features" section lists the features that have passed Microsoft's rigorous testing and can be used in your production environments.
- The "Generally Available" section lists the features available in all regions and languages.

Copilot & AI capabilities

Copilot and agents use the Azure OpenAI Service, which isn't available in your region. To keep using these capabilities, you must allow data movement.

[FAQ for data security and privacy](#)

By allowing data movement, you agree to data being processed by the Azure OpenAI Service outside of your environment's geographic region or compliance boundary.

Allow data movement ☒

[In which region will my data be processed?](#)

[What data is processed by Azure OpenAI Service?](#)

Production ready previews			Deactivate	Supplemental Terms of Use	
Capability ↑	Status	Publisher			
→ Chat	Active	Microsoft			
Analyse list	Active	Microsoft			
No. Series Suggestions	Active	Microsoft			
E-document matching assistance	Active	Microsoft			
Sales lines suggestions	Active	Microsoft			
Create product information	Active	Microsoft			

Generally available			Deactivate	
Capability ↑	Status	Publisher		
→ Marketing text suggestions	Active	Microsoft		Learn
Bank account reconciliation	Active	Microsoft		Learn

FAQ

In which countries/regions and languages is Copilot available?

Copilot is available wherever Business Central is available. While Copilot is available in all languages of Business Central, Microsoft only supports languages that have undergone rigorous quality assessment. Some preview features may initially be available only in certain regions and languages.

Is Copilot expensive?

Currently, Copilot is included with your Business Central online license at no additional cost. However, fair use policies, quotas, and pricing may be introduced in the future.

Do I need to train Copilot with my business data?

Copilot in Business Central relies on powerful AI models combined with Business Central's data management features. No training is required before your organization can start using Copilot with your business data. Additionally, Copilot requires no configuration and is ready to use.

What is the difference between ChatGPT and Copilot?

ChatGPT is a large language model trained by OpenAI on a vast set of text data, designed to engage in human-like conversations and answer a wide range of questions on various topics.

Copilot also uses a large language model; however, this business-oriented AI technology is optimized for your business processes, data, as well as for meeting your security, privacy, and compliance requirements.

Inmind Technologies

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