

AI Briefing Sheet

Q3 2026



Help without the hype!

Welcome to the third in our series of briefing sheets to share some ideas and resources with our customers. In this edition we have chosen to highlight how **productivity in Business Central** can be enhanced by AI and give a summary of what is in place that you could try out right now.

Disclaimer: We offer these simply as suggestions of resources that we have used and found helpful; Tecman / Technology Management Limited takes no responsibility for any external content. None of the links or resources mentioned are paid promotions, this sheet was put together by our Training Team here at Tecman to simply share some ideas..

The screenshot displays the 'Tecman Talks AI Podcast' interface. On the left, a sidebar shows the podcast title, 'Technology Management' category, and a list of episodes. The main content area on the right lists episodes 5 through 10. Episode 9, 'An Introduction to Copilot Cowork: AI Multitasking in Action', is highlighted with a red border. Each episode entry includes a thumbnail image, the episode title, and view statistics.

Episode	Title	Views	Time
Ep10	Copilot Writing Coach: Your Shortcut to a Stronger Brand Voice	93 views	28:50
Ep9	An Introduction to Copilot Cowork: AI Multitasking in Action	136 views	21:33
Ep8	8 Copilot Quick Wins to Use Often (and Reclaim a Few Hours)	196 views	18:03
Ep7	Excel Made Easy: How Copilot Can Do the Heavy Lifting	108 views	13:01
Ep6	Workflows Agent: Instant Automation to Keep You Organised and Informed	220 views	11:48
Ep5	Building a Microsoft SharePoint Agent in Under 10 Minutes	188 views	26:50

Where next?

10 episodes in and going strong, our podcast continues to grow, it aims to take you through some of the new areas as we explore them, with the level pitched to be not too technical.

[Q Tecman Talks AI Podcast.](#)

Here we highlight an episode that discusses how Copilot Cowork can help you with multi-stranded tasks in your working life, give it a task and it can use a variety of tools to create your requested output. Take a look [Q Ep9: An Introduction to Copilot Cowork: AI Multitasking in Action](#)

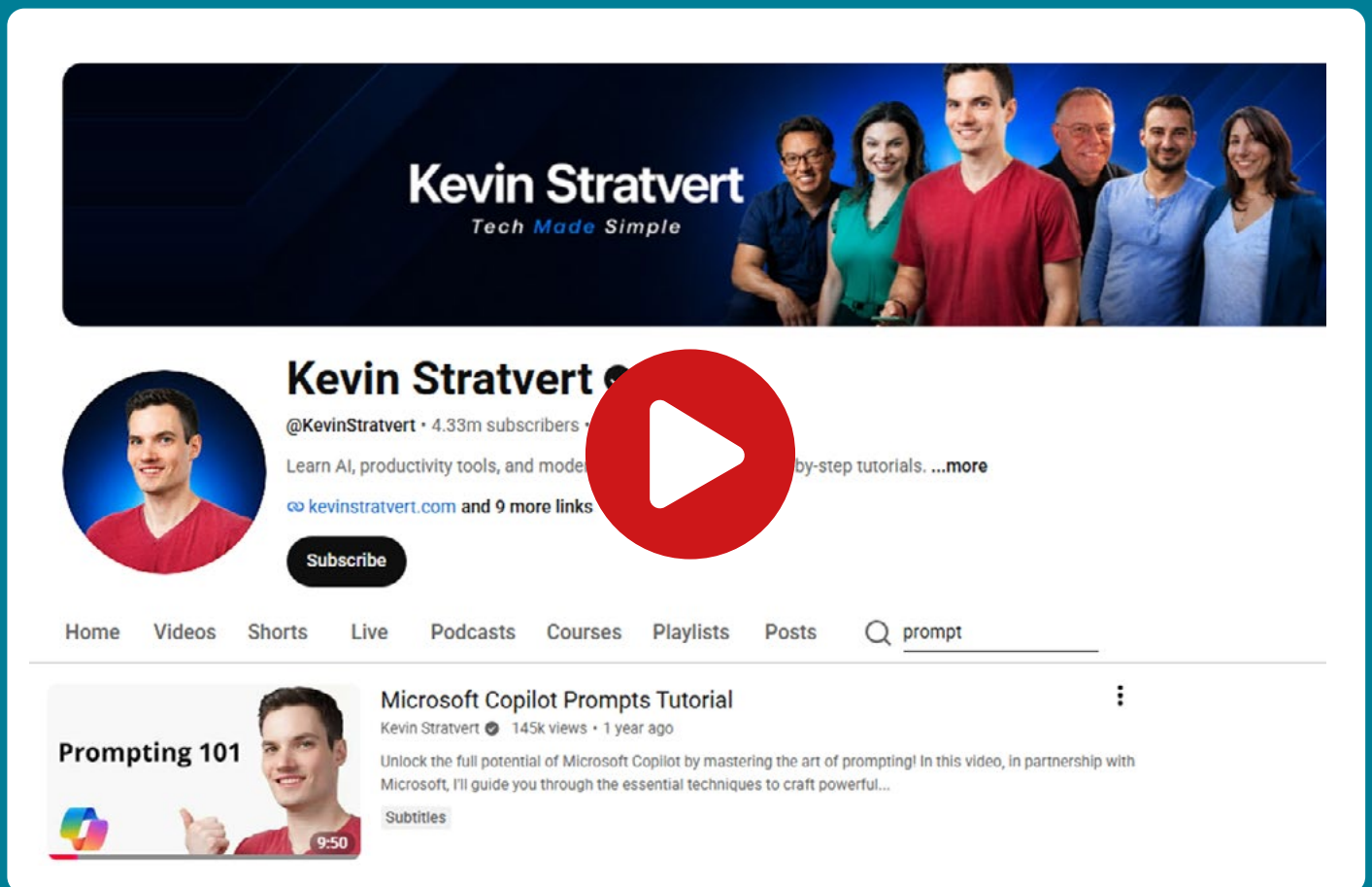
But we are learning too!

So, we thought we would offer to share a curated set of resources, to help guide you to the people that we watch on YouTube and the podcasts and blogs that we pay attention to. We will try to steer things to be as potentially helpful to as many people as possible and not get too nerdy too quickly!

Really want to use AI more effectively?

Then work on your prompts!

When working with AI what you type in directly affects the quality of what you get back from it. So if you have tried in the past and got unhelpful answers then it might just be a case of needing to reframe how you ask and giving the AI more information to work with.



This tutorial from **Kevin Stratvert** (ex Microsoft) is a tutorial for beginners on how to prompt effectively. We like the **GCSE** method, give the AI the: **Goal, Context, Source** and **Expectations** and you should get much better results. He also shows help can be found for prompt inspiration within Microsoft products like PowerPoint or Excel and other Microsoft 365 apps.

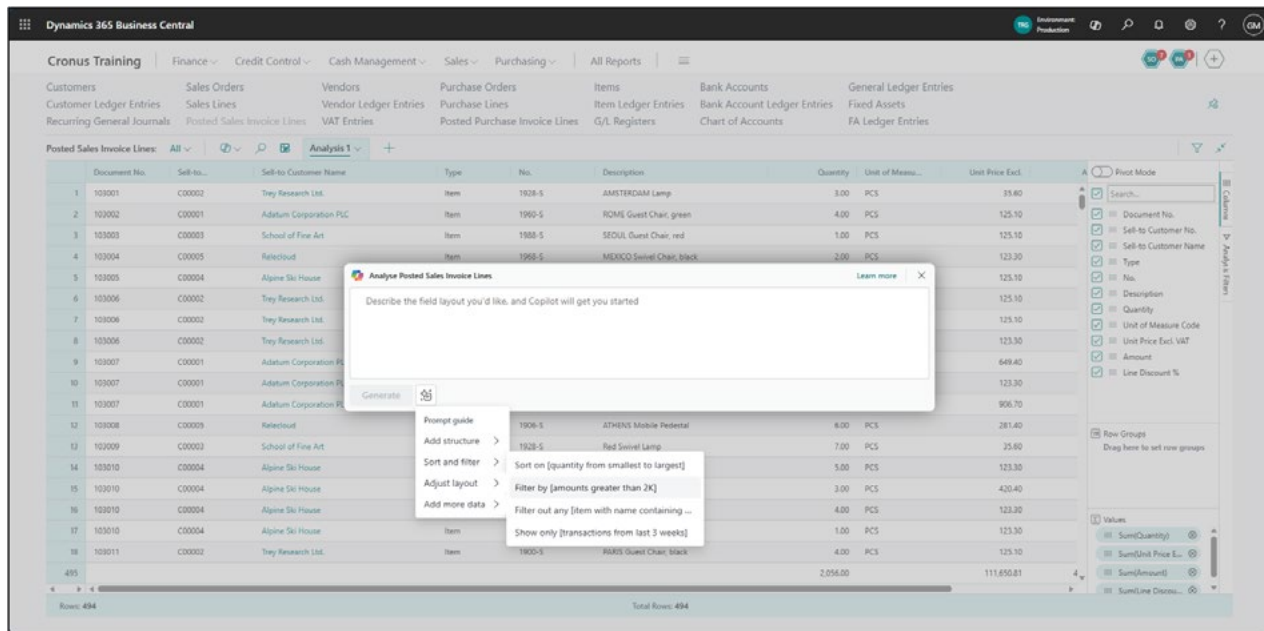
Ok I'm Business Central focused, can Copilot really help me and what is available?

In recent versions a variety of Copilot functionality has been added in to different areas of Business Central so there's a high-level overview below where we give a brief summary of each aspect and a link to find out more.

Analyse list

Helps you work with your data in the analysis mode, to build grouping reports and pivot tables on list pages in your system. It can help you describe what you want to see to help you calculate, summarize and examine data. It has some built in prompt guidance, you can use it to get started quickly and you can refine things before deciding whether or not to keep the end result.

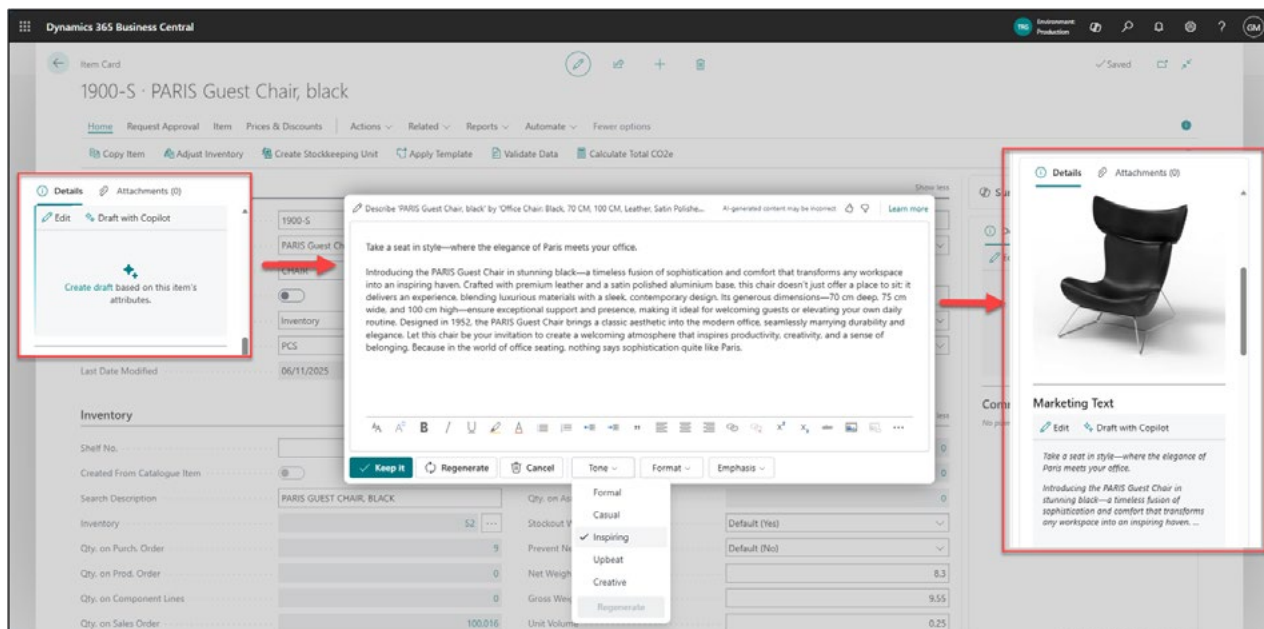
[Q Analyze data in lists with Copilot \(preview\) - Business Central | Microsoft Learn](#)



Marketing text suggestions

Does what it says really, helps you create descriptions of new products based on their characteristics, for the purposes of marketing. You are able to set the style and emphasis and then can edit it afterwards, so it's a good tool to get you started. It uses item attributes to enhance the basic information available from the description field to create 'copy' that you can use for promotional purposes.

[Q Add marketing text to items - Business Central | Microsoft Learn](#)



Bank account reconciliation

Helps with the reconciliation process, giving improved matching capabilities over the automatch function ("match automatically" as copilot uses AI to review the data such as dates, amount and descriptions to identify more matches. It can also suggest appropriate G/L accounts to post an expense too that can't be matched to an existing ledger entry,

🔍 Reconcile bank accounts with Copilot (preview) - Business Central | Microsoft Learn

Chat (preview)

As with all AI tools its success is often down to the prompts you give it, Copilot Chat was embedded in BC recently as a preview tool to help with user queries but if we're being honest it was underwhelming and struggled to answer many questions. However, the full Microsoft 365 Copilot is certainly capable of finding you detailed answers about Business Central, so perhaps use this for now.

🔍 Chat with Copilot (preview) - Business Central | Microsoft Learn

The screenshot shows the Dynamics 365 Business Central interface. On the left, there's a list of items under 'Cronus Training'. The main area displays a table of items with columns like No., Description, and various attributes. A Copilot Chat window is open on the right, showing a conversation with 'Hi George Murcott'. Below the chat, there's a 'Document Links' section with a list of links. A red arrow points from the 'Document Links' section to the 'Ask' button in the Copilot Chat window. Another red arrow points from the 'Ask' button to the 'How do I release a sales order?' prompt in the chat.

No.	Description	Costing Method	Base Unit of Measure	Assembly BOM	Production BOM No.
1005-F578	1KG Fertiliser Bag	FIFO	PCS	No	
1005-F579	5KG Fertiliser Bag	FIFO	PCS	No	
1005-F580	10KG Fertiliser Bag	FIFO	PCS	No	
1896-S	ATHENS Desk	FIFO	PCS	No	
1900-S	PARIS Guest Chair, black	FIFO	PCS	No	
1906-S	ATHENS Mobile Pedestal	FIFO	PCS	No	
1908-S	LONDON Swivel Chair, blue	FIFO	PCS	No	
1920-S	ANTWERP Conference Table	FIFO	PCS	No	
1925-W	Conference Bundle 1-6	FIFO	PCS	Yes	
1928-S	AMSTERDAM Lamp	FIFO	PCS	No	
1929-W	Conference Bundle 1-8	FIFO	PCS	Yes	
1936-S	BERLIN Guest Chair, yellow	FIFO	PCS	No	
1953-W	Guest Section 1	FIFO	PCS	Yes	
1960-S	ROME Guest Chair, green	FIFO	PCS	No	
1964-S	TOKYO Guest Chair, blue	FIFO	PCS	No	
1965-W	Conference Bundle 2-8	FIFO	PCS	Yes	
1968-S	MEXICO Swivel Chair, black	FIFO	PCS	No	
1969-W	Conference Package 1	FIFO	PCS	Yes	

The feature also works on **tooltips**, the help element that pops out a little box that explains the field or column you are hovering over, this has an "ask Copilot" option, this will open up the Copilot pane on the right and 'ask' about that field, the results are not always detailed enough and can often be circular simply restating the field name.

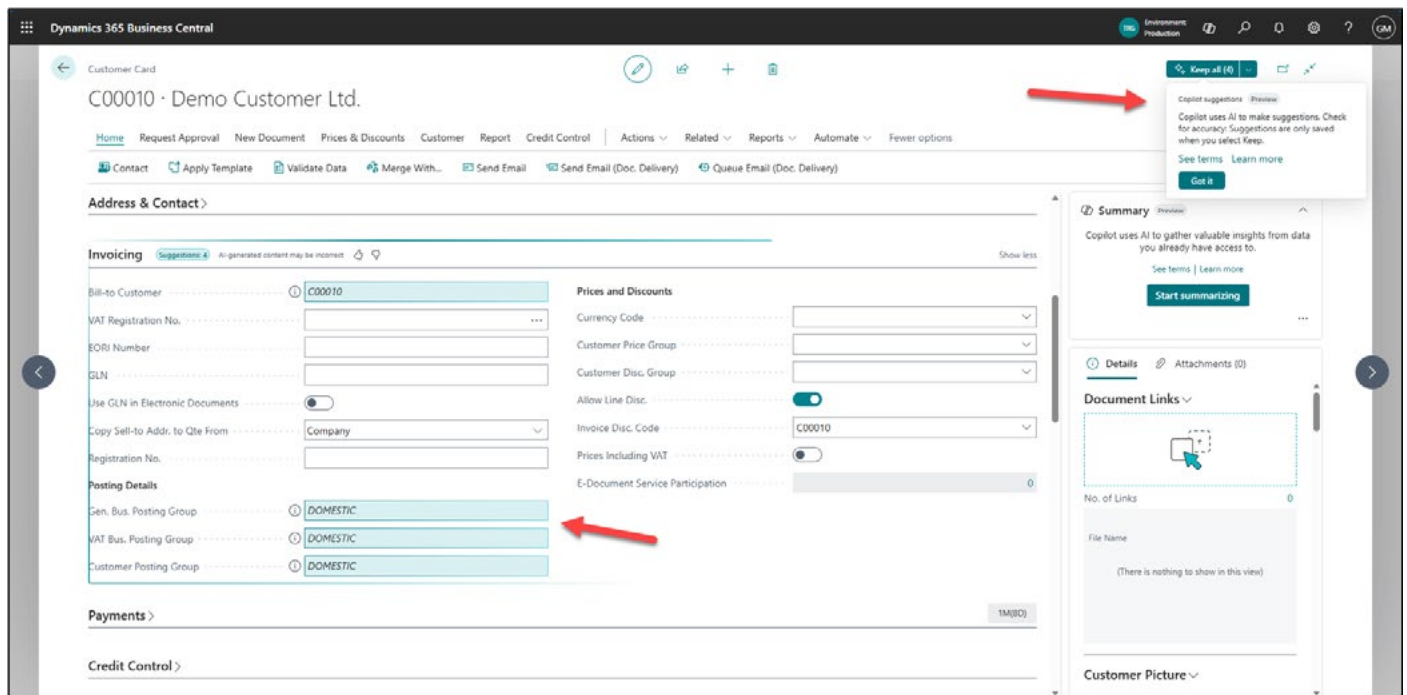
The screenshot shows the Dynamics 365 Business Central interface. A tooltip for 'Item Category Code' is visible, explaining that it specifies the category that the item belongs to. A red arrow points from the tooltip to the 'Ask Copilot' button. Another red arrow points from the 'Ask Copilot' button to the 'How do I release a sales order?' prompt in the Copilot Chat window. A third red arrow points from the 'Ask Copilot' button to the 'Explain field name "Item Category Code"' prompt in the chat.

No.	Description	Inventory	Type	Costing Method	Base Unit of Measure	Assembly BOM	Production BOM No.	Routing No.	Standard Cost	Unit Cost
1005-F578	1KG Fertiliser Bag	570	Inventory	No	FIFO	PCS	No		0.00	10.0
1005-F579	5KG Fertiliser Bag	640	Inventory	No	FIFO	PCS	No		0.00	25.0
1005-F580	10KG Fertiliser Bag	730	Inventory	No	FIFO	PCS	No		0.00	45.0
1896-S	ATHENS Desk	0	DESK	Inventory	No	FIFO	PCS	No	506.60	506.6
1900-S	PARIS Guest Chair, black	52	CHAIR	Inventory	No	FIFO	PCS	No	97.50	100.0
1906-S	ATHENS Mobile Pedestal	20	TABLE	Inventory	No	FIFO	PCS	No	219.50	219.5
1908-S	LONDON Swivel Chair, blue	0	CHAIR	Inventory	No	FIFO	PCS	No	96.10	96.1
1920-S	ANTWERP Conference Table	99,960	TABLE	Inventory	No	FIFO	PCS	No	328.00	328.0
1925-W	Conference Bundle 1-6	0		Inventory	No	FIFO	PCS	Yes	959.60	0.0
1928-S	AMSTERDAM Lamp	42	MISC	Inventory	No	FIFO	PCS	No	27.80	27.8
1929-W	Conference Bundle 1-8	40		Inventory	No	FIFO	PCS	Yes	1,151.80	1,151.8
1936-S	BERLIN Guest Chair, yellow	20	CHAIR	Inventory	No	FIFO	PCS	No	97.50	97.5
1953-W	Guest Section 1	0		Inventory	No	FIFO	PCS	Yes	609.90	0.0
1960-S	ROME Guest Chair, green	165	CHAIR	Inventory	No	FIFO	PCS	No	97.50	97.5
1964-S	TOKYO Guest Chair, blue	0	CHAIR	Inventory	No	FIFO	PCS	No	97.50	97.5
1965-W	Conference Bundle 2-8	0		Inventory	No	FIFO	PCS	Yes	1,151.80	0.0
1968-S	MEXICO Swivel Chair, black	99,664	CHAIR	Inventory	Yes	FIFO	PCS	No	96.10	96.1
1969-W	Conference Package 1	0		Inventory	No	FIFO	PCS	Yes	1,816.30	0.0

Autofil (preview)

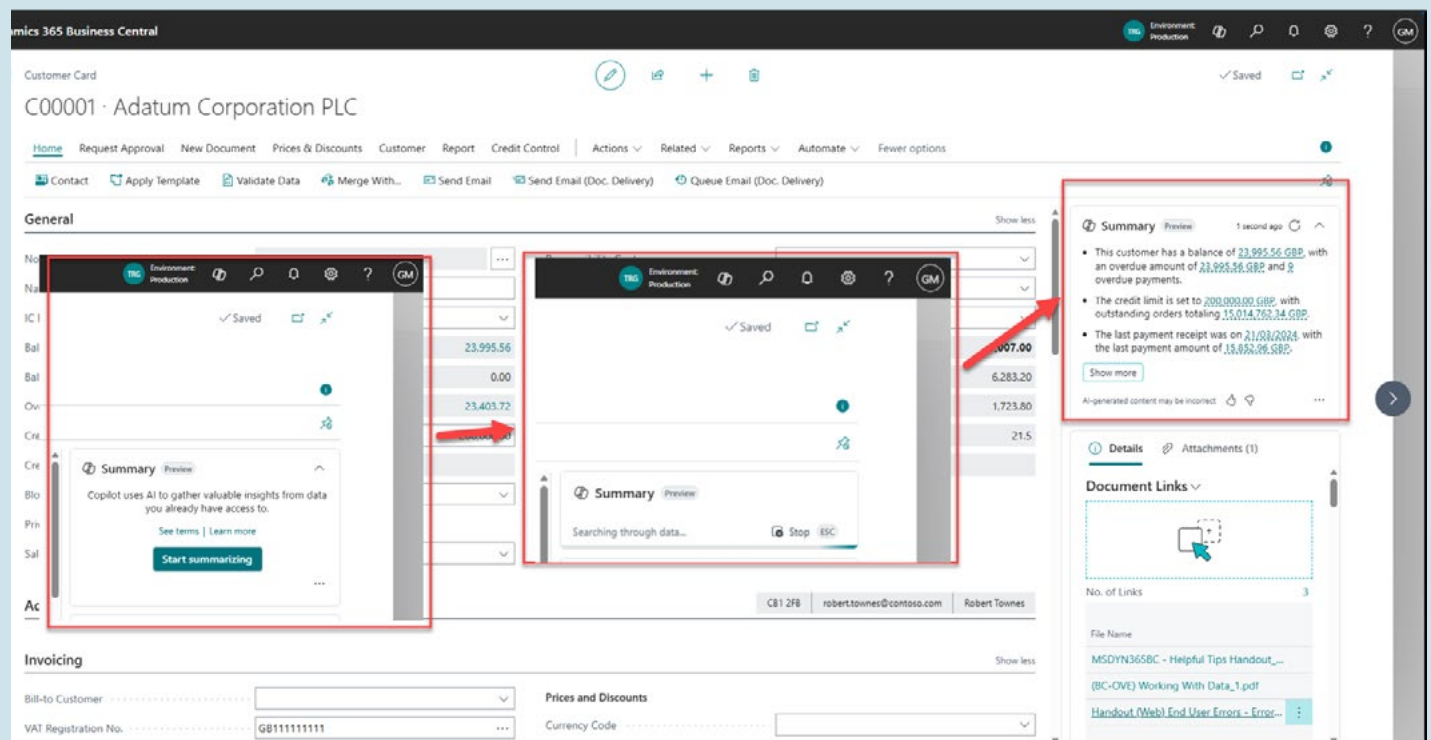
Helps speed things up creating or modifying records in Business Central such as a customer card or sales order card page by making suggestions for what could go in the editable fields, that you can accept or reject.

Q Autofill fields with Copilot (preview) - Business Central | Microsoft Learn



Summarize (preview)

This builds you a quick overview of a record, such as a customer, item or sales order directly in the FactBox pane.

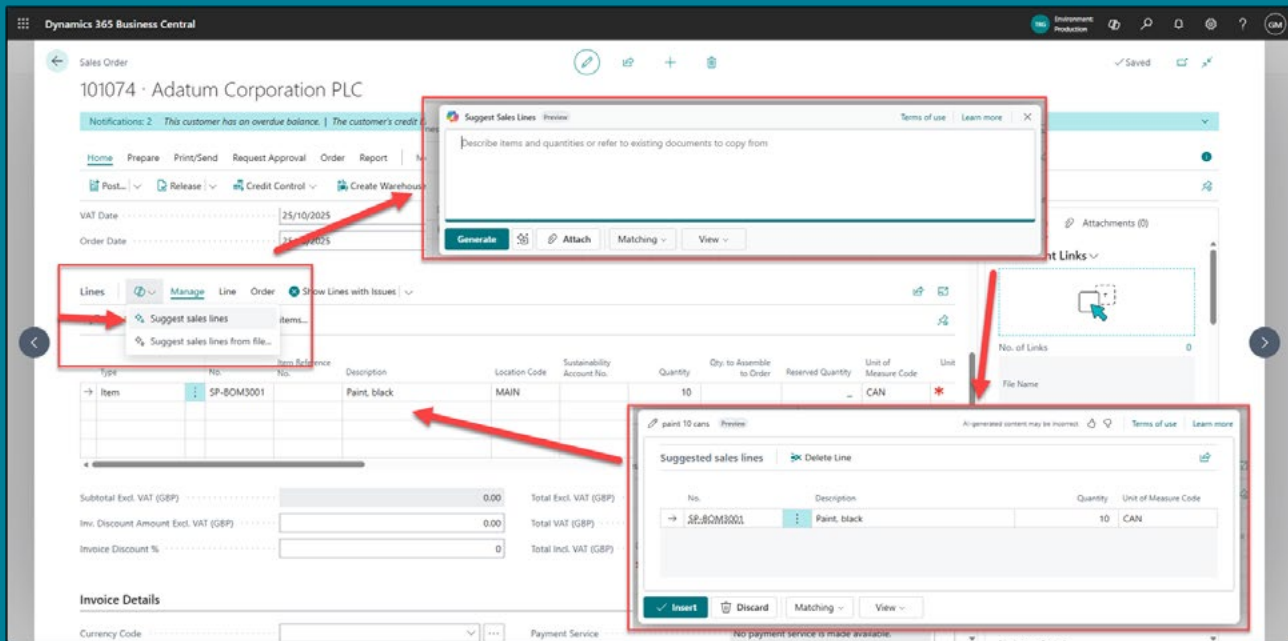


Q Summarize a record with Copilot - Business Central | Microsoft Learn

Sales Lines Suggestions (preview)

This attempts to let users create sales documents quicker by suggesting the items to add, this includes sales quotes, sales orders and sales invoices. The suggestions can be based on typed notes or an existing document in the system.

Q Sales line suggestions with Copilot - Business Central | Microsoft Learn



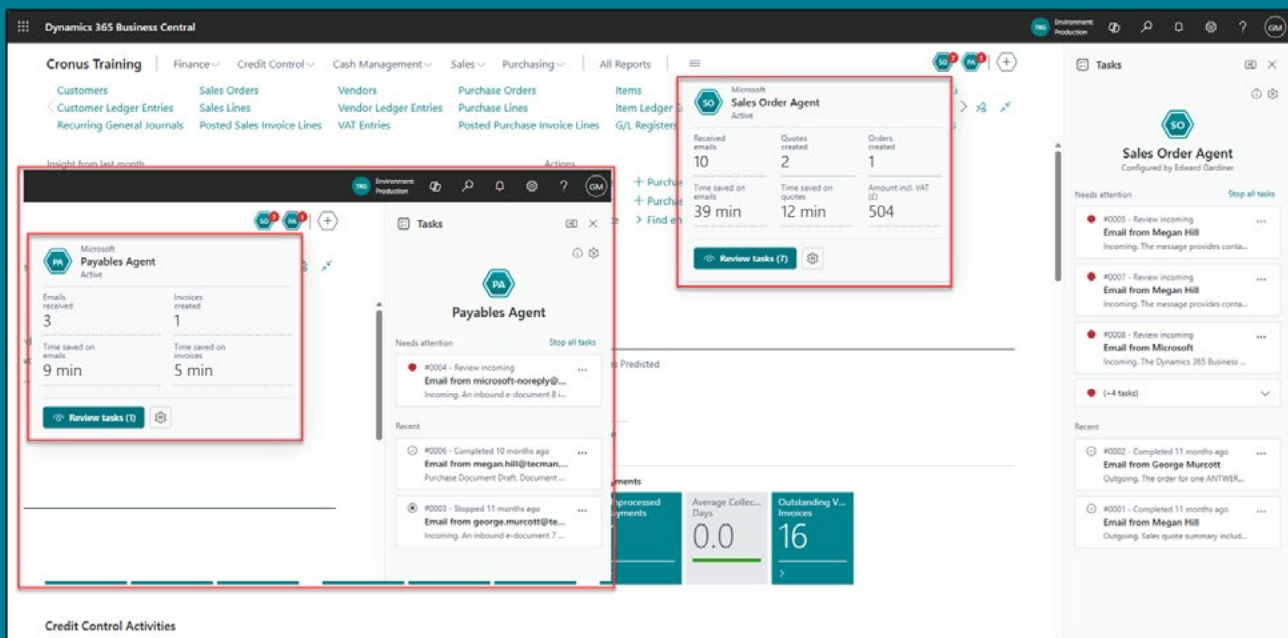
Sales Order Agent and Payables Agent

Agents? Well yes there are two already and a third on the way. A Sales Order Agent and a Payables Agent, with the new Expense Agent following hot on their heels as a preview.

So how do Agents work? Well they are like a junior team member, processing certain tasks within agreed boundaries and will often need some guidance. Just like a 'real' end user, they have specific permissions and a defined role centre assigned to them that restrict their scope. Generally they will require a specific email address and then they will monitor that inbox for documents of the type that they are authorised to deal with for example a sales order from a customer or an invoice from a supplier. Our next briefing sheet will look at these in greater detail.

Q Sales Order Agent overview - Business Central | Microsoft Learn

Q Payables Agent Overview - Business Central | Microsoft Learn



This all sounds powerful but how much is this going to cost me?

Well at the moment, only the **Agents** are billed separately, and that is in terms of tokens, which need to be purchased either as a pack to use or as a recurring subscription.

The other features are all included within your Business Central licence cost, at the moment, though this may change (but that doesn't mean it will).

There is a **billing type** column on the main page in Business Central, this is shown in the images in the next section.

Can I control things? Yes you can, the page in BC called **Copilot & Agent capabilities** is essentially your setup page. As well as the controls for you to decide on what to enable there are several links that take you out to the relevant Microsoft pages to enable you to learn more about that aspect and make an informed decision.

Copilot & agent capabilities

✕ By activating AI capabilities, you understand your organisation may be billed for its use in the future. [Learn more](#)

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](#)

Allow data movement ☒

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

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

Some features use Microsoft Bing Search to improve results. To get the most out of these features, you must enable Bing Search.

[Features using Bing Search](#)

Enable Bing Search ☒

[Microsoft Services Agreement](#)

[Microsoft Privacy Statement](#)

The page continues with two specific sections the first being is “**production-ready previews**” for new elements you can enable but are not yet fully finished so they are designed for you to start trying them out in a sandbox first, then your Production environment if you choose to. But you need to keep in mind that they may change and are possibly not ready for your business to incorporate them into its standard practices.

They often come with more caveats (**supplemental terms of use**) and are previews but you can start to harness the power they offer and explore the business value.

The lower section is “**generally available**” this is the features that have been around longer and are now an embedded part of the product, with more stability as they have been developed and improved.

Production-ready previews ■ Deactivate i Supplemental Terms of Use				
Capability ↑	Status	Publisher	Billing Type	
→ Chat	⋮ Active	Microsoft	Not Billed	Learn More
Summarise	Active	Microsoft	Not Billed	Learn More
Autofill	Active	Microsoft	Not Billed	Learn More
No. Series Suggestions	Active	Microsoft	Not Billed	Learn More
E-document matching assistance	Active	Microsoft	Not Billed	Learn More
E-Document MLLM analysis	Active	Microsoft	Not Billed	–
Expense Agent	Active	Microsoft	Microsoft billed	Learn More
Sales lines suggestions	Active	Microsoft	Not Billed	Learn More
Create product information	Active	Microsoft	Not Billed	Learn More
Data Validation Rule Suggestions	Active	Clever Dynamics	Not Billed	Learn More
Document Links Linked Docume...	Active	Clever Dynamics	Not Billed	Learn More

Generally available ■ Deactivate				
Capability ↑	Status	Publisher	Billing Type	
→ Analyse list	⋮ Active	Microsoft	Not Billed	Learn More
Marketing text suggestions	⋮ Active	Microsoft	Not Billed	Learn More
Payables Agent	Active	Microsoft	Microsoft billed	Learn More
Sales Order Agent	Active	Microsoft	Microsoft billed	Learn More
Bank account reconciliation	Active	Microsoft	Not Billed	Learn More

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