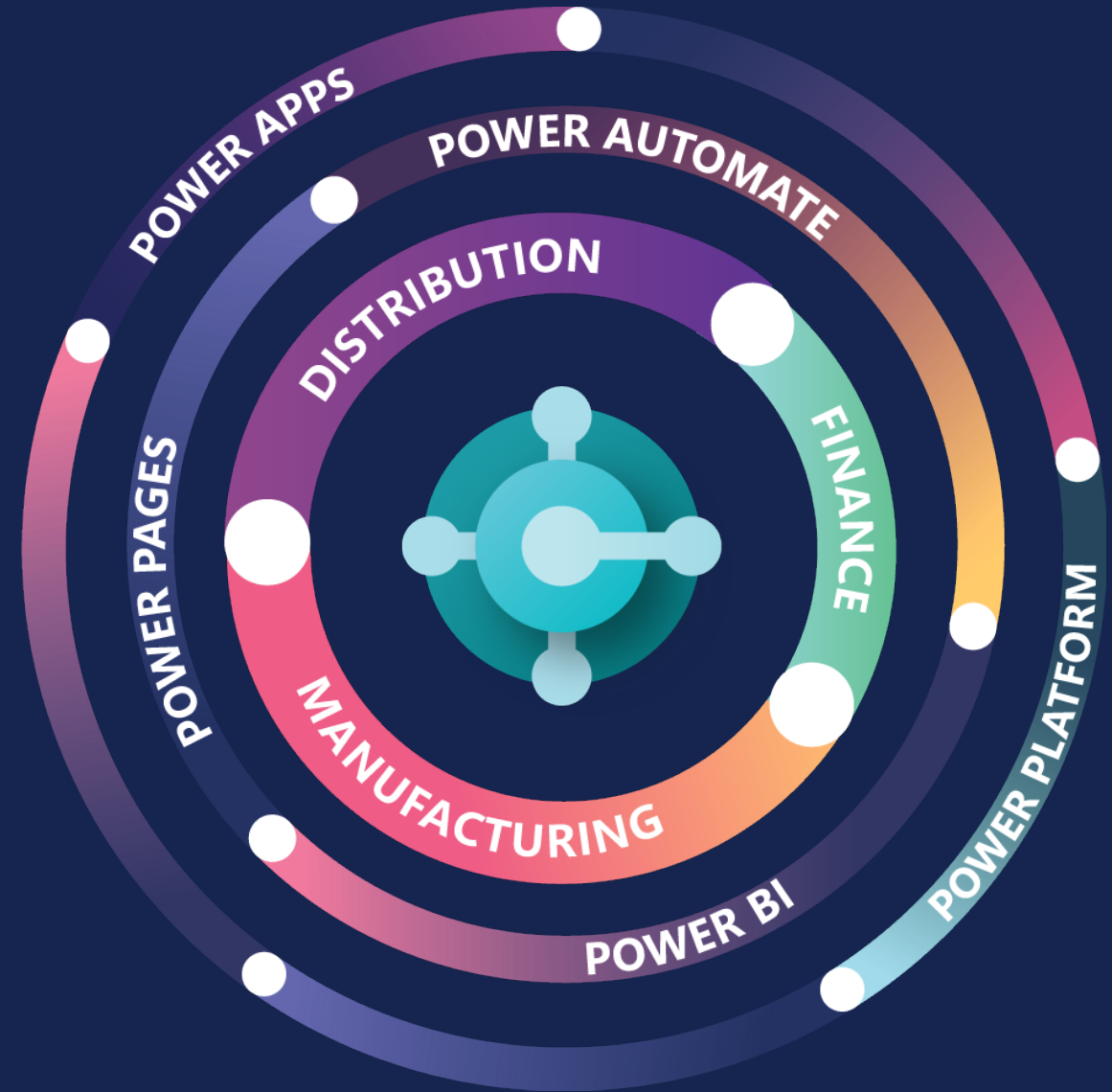


BUSINESS CENTRAL connect

Transforming work with AI –
Practical Playbook



18th & 19th NOVEMBER 2025

What we'll cover

1. Why CoPilot
2. CoPilot Chat – what's new?
3. CoPilot Researcher
4. Facilitator Agent in Teams
5. Create an Agent in 5 mins
6. Other AI Tools.....



M365 Copilot

Search

Chat

Agents

Researcher

Analyst

HR Policy Agent

Tecman Tone of Voice Age...

Prompt Coach

All agents

Create agent

Conversations

Clever Quality Lot Status and A...

Preparing Intro Call Strategy fo...

Unable to Replace "Heck" Due ...

Professional Indemnity Insuran...

Critical Thinking Coaching for ...

All conversations

Pages

Notebooks

Create

Apps

Liam Walton

WorkWeb

Try GPT-5

Hi Liam, I can help you recap and prep for meetings

Message Copilot

Help me prepare for Regular Op
Review 2025
Coming up

Recap Fortnightly Marketing
Catch Up
Recently attended

Rewrite this to sound more
professional and less verbose:...

See more

OPTIMISE MANUFACTURING & BOOST WAREHOUSE PRODUCTIVITY

WITH MICROSOFT D365
BUSINESS CENTRAL



Microsoft D365
Business Central

M365 Copilot

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GPT-5 On

Hi Liam, I can help you recap and prep for meetings

You are using Copilot with GPT-5. Learn more.

Message Copilot

Help me prepare for Regular Op Review 2025
Coming up

Recap Fortnightly Marketing Catch Up
Recently attended

What's the latest from person, organised by emails, chats, and...

See more

Liam Walton

M365 Copilot

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Prompt Coach

All agents

Create agent

Conversations

24-Hour Action Summary an...

Microsoft 365 Copilot and Dyn...

Aggregate all emails and Team...

Joanne Evans' BC Connect 202...

Executive Summary of Recent ...

All conversations

Pages

Notebooks

Create

Apps

24-Hour Action Summary and Microsoft Updates

Today

WorkWeb

Try GPT-5

✎

⌵

✓

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🚫

↔

Aggregate all emails and Teams messages and Teams meetings from the past 24 hours that contain action points, deadlines, or decisions required. Summarise key actions by priority, assign responsible parties, and suggest realistic timeframes. Highlight any blockers or dependencies. Include updates on CRM, campaign performance, and partner communications. Format the output as a checklist with due dates, also check the web for recent news over the last 7 days around Microsoft Dynamics 365 Business Central and Microsoft Co Pilot for Microsoft 365

Copilot

Here's a consolidated summary of your request, broken into two parts:

✓ Enterprise Summary: Action Points, Deadlines & Decisions (Past 24 Hours)

I reviewed several emails and 3 meetings from the last 24 hours. Below is a checklist with priorities, responsible parties, suggested timeframes, and blockers/dependencies:

✉ RE: Soreen MSA ... +10

High Priority

✓ Finalise Soreen MSA updates and send for DocuSign

Responsible: [Chris Gresswell](#) / [Liam Walton](#)

Due: Today

Dependency: Ensure clause 7.13 email address update confirmed before sending.

✉ RE: Soreen MSA com... +10

✓ Node4/NAV People subscription billing decision

Responsible: [Liam Walton](#)

Action: Decide whether to continue billing despite unpaid invoices.

Due: Next 48 hours

Blocker: GM Chamber and Danx Carousel unpaid; consider DD payment terms.

✉ RE: Node4 Limited +10

✓ Omega Acq Corp BC On-Prem upgrade escalation

Responsible: [Moses Stepanyants](#), [Fang Liu](#), [Zia Tariq](#)

Due: Immediate (server access confirmed; SharePoint folder accessible)

Dependency: Meeting follow-up for v25 & v26 upgrade steps.

✉ RE: Omega Acq C... +1

Yes, please prepare the checklist as a downloadable file

Draft follow-up emails for high-priority items

🔗

Message Copilot

+

🗣

AI-generated content may be incorrect

BUSINESS CENTRAL CONNECT 2025

tecman

M365 Copilot

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Tecman Tone of Voice Age...

Prompt Coach

All agents

Create agent

Conversations

Sales CV Review and Interview ...

Reviewing Sales CVs and Interv...

24-Hour Action Summary and ...

Microsoft 365 Copilot and Dyn...

Aggregate all emails and Team...

All conversations

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Liam Walton

Work

Web

Try GPT-5



Hi Liam, try asking me to recap a meeting

Message Copilot



What's the latest from Nick Perry
, organised by emails, chats, an...

Your direct report



Help me prepare for Regular Op
Review 2025

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Catch Up

Recently attended

See more



CoPilot Memory



Researcher Agent

AutoSave Acme Sausages Proposal 250821 No Label Search

File Home Insert Draw Design Layout References Mailings Review View Help Acrobat

Clipboard Font Paragraph Styles Editing Create a PDF Voice Sensitivity Add-ins Editor Copilot

technology management

Microsoft Dynamics Solution Proposal

Prepared for
Acme! Food Limited

August 2025
Darran Neary
Business Development

Date: 21/08/2025
Version: 3.0.
Proposal Valid Until: 30th September 2025

Page 1 of 39 7826 words English (United Kingdom) Text Predictions: On Accessibility: Investigate

Let's connect the dots

Message Copilot

Rewrite this to sound more professional and less verbose: [text](#)

Analyse the following text and make suggestions on how to improve it: [text](#)

Explain this document in three sentences

See more

You have premium Copilot features enabled

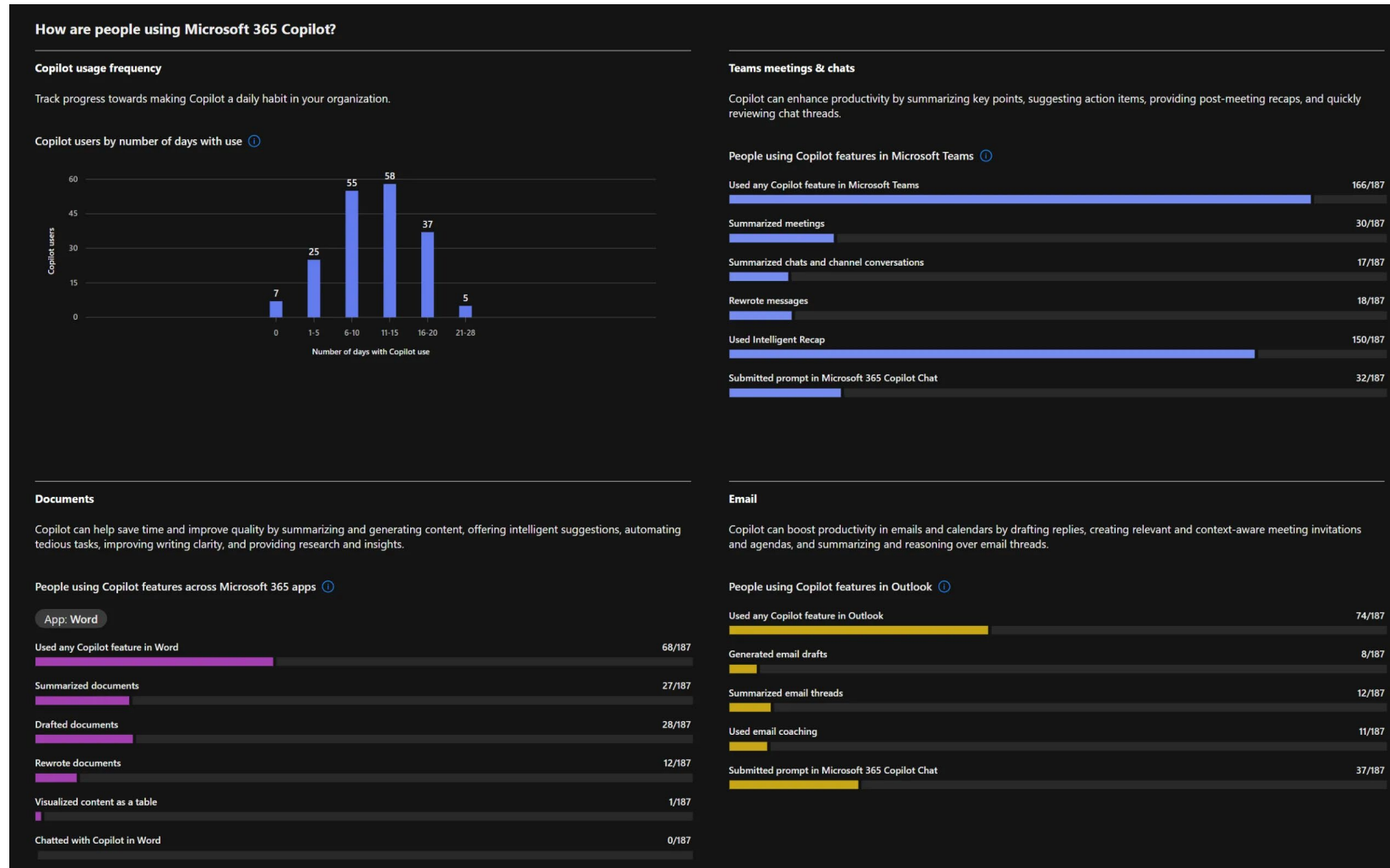


Teams / Facilitator Agent



Other Favourite Tools....

Measure Usage and help with gaps



AI Prompt Framework: The GCSE Method

Goal

Clearly state what you want to achieve with the AI response.
Be specific about your desired outcome.

Specifics

Include precise details, parameters, or formatting requirements that will shape the output effectively.

Context

Provide relevant background information and constraints the AI should consider when generating a response.

Examples

Share sample outputs or references that illustrate the style, tone, or quality you're seeking.

Structure your AI prompts using this framework to receive more relevant, accurate and useful responses across all ERP and CRM implementation activities.

G.C.S.E. Example

Goal/Context/Specifics/Example.

Example Prompt for above:

Create a 10-slide PowerPoint presentation to help junior sales reps understand the core modules of Dynamics 365 Business Central. They're new to ERP systems, so avoid jargon. Focus on the essentials: finance, sales, purchasing, and inventory. Use simple visuals and short bullet points, similar in tone to our "ERP 101 for Sales Reps" deck.

Thank you.

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connect

18th & 19th NOVEMBER 2025

