



4MINDS

Custom AI for Microsoft 365

SOLUTION BRIEF

4MINDS for Microsoft 365 Copilot

Your custom AI models, inside the tools your team already uses.

Generic AI doesn't know your business. It hasn't read your finance playbook, engineering specs, or compliance policies and it guesses at answers your team depends on.

4MINDS changes that. We train custom AI on your enterprise data and surface it inside Microsoft 365 Copilot as a first-class Declarative Agent — answers from your content, in the tools your team already uses.

SOLUTION ARCHITECTURE

Microsoft 365 Copilot

Excel · Word · Outlook · PowerPoint · Teams

4MINDS Assistant Agent

Declarative Agent · @4MINDS in Copilot Chat

4MINDS Platform

Fine-tuned Models · Knowledge Graph · RBAC & Audit

SharePoint / OneDrive Databricks / Snowflake Salesforce / HubSpot S3 · GCS · Azure Blob

Enterprise data sources — 40+ integrations supported

KEY FEATURES

- **Native M365 Copilot Integration:** first-class agent in Excel, Word, Outlook, PowerPoint & Teams.
- **Custom Fine-Tuned Models:** your org's own model — no shared knowledge base, you control retraining.
- **Knowledge Graph Reasoning:** multi-document grounding for complex enterprise questions.
- **40+ Enterprise Integrations:** SharePoint, Snowflake, Databricks, Salesforce, Slack & more.
- **Zero Infrastructure to Manage:** 4MINDS hosts training & inference — you supply data and use the agent.
- **Enterprise Identity & Audit:** Entra ID, per-user audit trail, RBAC, full tenant isolation.

WHY MICROSOFT + 4MINDS

- **Azure AI Foundry** — deploy & manage custom fine-tuned models at enterprise scale with Azure governance.
- **Microsoft Fabric** — connect OneLake, Databricks & Snowflake to ground AI in your live, governed data estate.
- **Microsoft 365 Copilot** — surface 4MINDS models inside Copilot — no extra UI, users stay in familiar apps.
- **Azure AI & Security** — Entra ID, Defender, Purview & Azure Monitor for enterprise identity and explainability.

CUSTOMER USE CASES

FINANCE

Proprietary Formulas in Excel

A financial analyst asks 4MINDS in Copilot to apply the firm's adjusted-margin formula. 4MINDS retrieves it from the finance playbook and Copilot applies it across thousands of rows in seconds.

ENGINEERING

Instant Specification Lookup

An engineer asks, "What's the max load for the XYZ beam per our latest spec?" 4MINDS returns the exact answer from internal engineering documents — no SharePoint hunting, no hallucinated values.

LEGAL / COMPLIANCE

Grounded Policy & Contract Guidance

A legal reviewer drafts a contract clause in Word with Copilot. 4MINDS supplies preferred wording, fallback positions, and precedent from the firm's own contract template library.

RETAIL / CPG

Demand Signals to Shelf-Ready Decisions

A category manager asks 4MINDS to summarize promotional lift from last quarter's trade plans and suggest replenishment targets — a grounded recommendation without leaving Excel.

PRIVATE AI | YOUR DATA, YOUR MODELS

- ◆ **Private Deployment** — models run in your 4MINDS tenant. Data never crosses tenants.
- ◆ **Custom Fine-Tuning** — you own the model and control retraining. No shared foundation model.
- ◆ **Data Sovereignty** — customer data trains only that customer's model. Zero cross-tenant leakage.
- ◆ **Reduced Hallucinations** — knowledge graph reasoning constrains outputs to verified content.

SECURITY & GOVERNANCE

Encryption

TLS 1.2+ in transit. AES-256 at rest.

Authentication

Microsoft Entra ID via OAuth 2.0 on-behalf-of. Per-user audit trail on every request.

RBAC & Permissions

Role-based access control. Tenant isolation. Admin consent via M365 Admin Center.

Compliance

SOC 2 Type II · ISO 27001 · GDPR · ISO 42001 · HIPAA-ready.

Responsible AI

Outputs constrained to customer-supplied content. No autonomous actions without user prompt.

Data Handling

User queries stored in customer tenant for audit continuity. No M365 content retained beyond session unless explicitly uploaded.

Multi-Tenant Architecture

Single 4MINDS deployment serves all customers, with complete isolation per tenant.

SUPPORTED INTEGRATIONS

Microsoft

- SharePoint
- OneDrive
- Azure Blob
- Azure SQL
- Microsoft Fabric

Cloud Data

- Snowflake
- Databricks
- BigQuery
- Redshift
- S3 / GCS

CRM & Support

- Salesforce
- HubSpot
- ServiceNow
- Zendesk

Productivity

- Slack
- Confluence
- Notion
- Google Drive
- Box / Dropbox

Developer

- GitHub
- GitLab
- Jira
- Linear
- REST / GraphQL APIs

GETTING STARTED

1

Install the Agent

IT admin deploys 4MINDS Assistant from M365 Agents Store via Admin Center → Integrated Apps. Live in minutes, no code needed.

2

Connect Your Data

Sign up at app.4minds.ai. Connect SharePoint, your data warehouse, CRM, or upload documents directly.

3

Train Your Model

The platform builds a knowledge graph and fine-tunes your model. No ML expertise required.

4

Go Live in Copilot

Users mention 4MINDS Assistant in any Copilot chat. Grounded answers appear in context — no new tools to learn.

No infrastructure. No ML team required.

app.4minds.ai

docs.4minds.ai | 4minds.ai/privacy

[Microsoft 365 Agents Store](#)

INDUSTRIES: Financial Services · Capital Markets · Insurance · Healthcare & Life Sciences · Manufacturing · Retail & CPG · Energy & Utilities

Microsoft 365 Certified Agent • Azure AI Foundry Partner • Microsoft Fabric Ready