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User Manual - Suggest Document Lines with AI

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User Manual

Suggest Document Lines with AI

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1 PREMISE

This document contains a guide to setting up and using the Suggest Document Lines with AI app. This app uses the capabilities of AI, and in particular the Copilot assistant, to allow you to create lines for your documents in natural language.

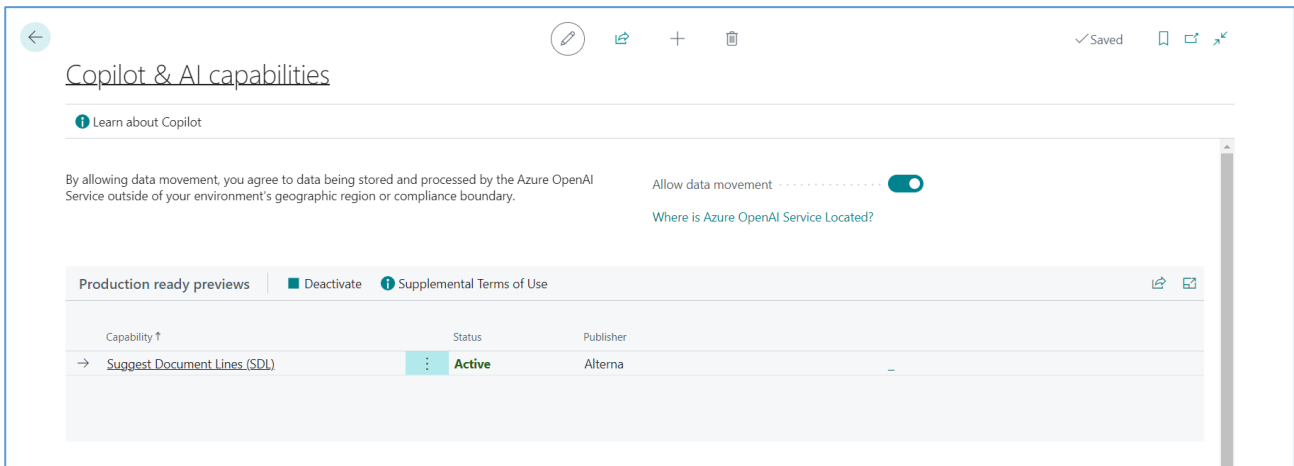
The functionality is supported on the following documents:

- **Sales:** quotes, orders, invoices, credit memos, return orders, blanket orders
- **Purchase:** quotes, orders, invoices, credit memos, return orders, blanket orders
- **Transfer:** orders

2 PREREQUISITES

In order for you to communicate with Copilot to get suggestions and insert new lines into your documents, you will first need to enable this capability in your Business Central environment.

In the search bar, enter “**Copilot & AI capabilities**” and open the corresponding page.



Enable the “**Allow data movement**” field and make sure that in the “**Production ready previews**” section there is the “**Suggest Document Lines (SDL)**” capability in the Active state.

If the capability is inactive, you will need to activate it by pressing the “**Activate**” button that will appear at the top.

The “**Suggest Document Lines (SDL)**” functionality is supported only for SaaS environments.

3 SETUP

The “**Suggest Document Lines (SDL)**” functionality integrated into the app allows communication with a GPT model created on Azure, and by sending instructions and a request from the user, it allows you to obtain a suggestion on the lines to add to your documents.

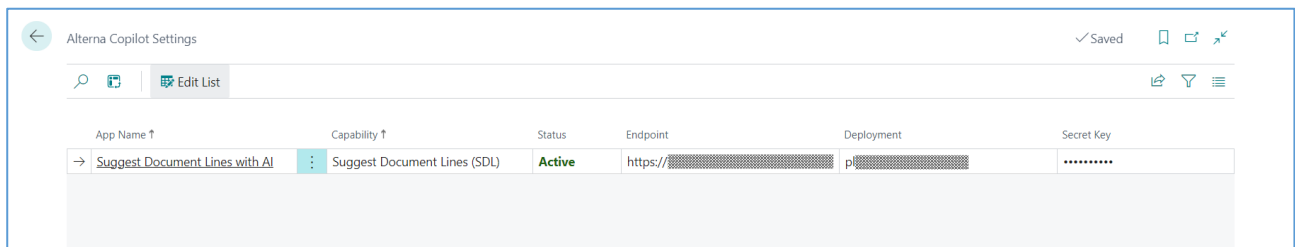
The choice of the model to use is not easy, and subject to management/use costs that vary based on the power of the model itself, its geographical position, and the maximum workload supported (measured in number of requests per minute).

For this reason, each customer may need to create their own model, or use a particular one, at their own discretion.

Each GPT model created on Azure is characterized by 3 values:

- **Endpoint:** Specifies the URL of the subscription where the model was created.
- **Deployment:** Specifies the model name.
- **Secret Key:** Specifies a secret string required to obtain output from the model.

Through the “**Alterna Copilot Settings**” page it is possible to specify, for each Copilot capability developed by Alterna, the GPT data to be used.



For each **App-Capability** pair it will be necessary to fill in the fields mentioned above taking them from your own GPT model.

When all fields are filled in, the functionality will be ready to be used on your environment.

4 FEATURES

The app supports line suggestion equally for all supported documents. Let's see an example of use on a new sales order.

After creating a new order from the "**Sales Orders**" page and specifying a customer, in the "**Lines**" section you will be able to get suggestions from Copilot on creating the lines for the new order.

To start the conversation process with the GPT model and get suggestions on the lines to create, click on "**Suggest Lines (SDL)**".

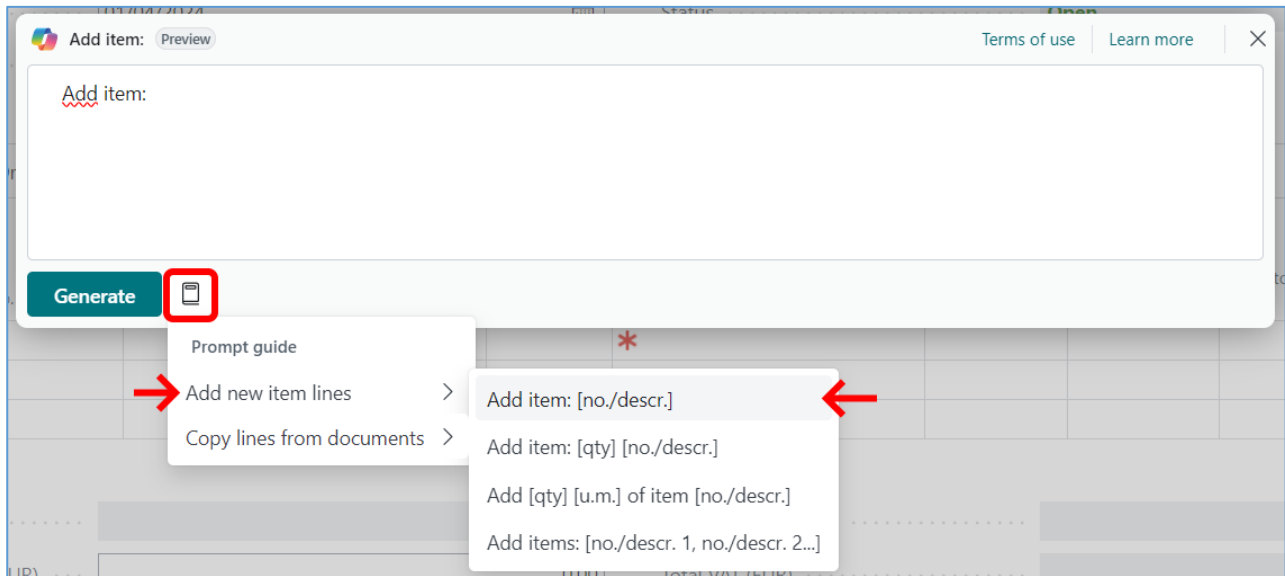
4.1 User prompt

The procedure for creating lines with Copilot begins with the window below, where you can use natural language and instruct the model on *which lines you want to add to the document*.

In the text box can be entered instructions about:

- **New lines to be created using the available records:** for example "add 3 pieces of article 1896-S", or "create a line with the Transport charge".
 - You can choose from all the line types supported by your document. For further details on the data that Copilot can interpret see the section 0.
- **Existing lines on other documents to copy:** for example "copy the lines of the sales quote 1001", or "add the content purchased with order 106007".
 - You can choose from all document types supported by the app, in addition to posted sales and purchase invoices/credit memos.

Using the guide button you can view a list of prompts with the most common suggestions. By clicking one of the available ones, the message will be overwritten with the selected one.



Once you have entered the instructions necessary to create the lines of the document, by pressing "**Generate**" the user input will be sent to Copilot, which will process the message and generate a list of lines to add to the document.

Attention! The content generated by AI is not to be considered "exact": GPT models are not deterministic, so the content of the response could be incorrect, or not correspond to the user's expectations.

4.1.1 Create new lines

When instructing Copilot with data relating to new lines to be created, you will need to specify "keywords" that allow the model to recognize which entity of the environment corresponds to the one desired.

Below is a list of entities that can be searched by Copilot to be inserted as new lines, or as properties of added rows, along with a list of entity fields that the model will use to search for it.

The fields will be used in the order they are entered here, the first one that produces a match with the user string will be used by the model in the suggested line.

Business Central entity	Entity's fields used for searching
Item	- No. - Description - Search description
Resource	- No. - Name - Search name
G/L account	- No. - Name - Search name
Fixed asset	- No. - Description - Search description
Item charge	- No. - Description - Search description
Item variant	- Code - Description
Dimension value	- Code - Name
Job	No.

	• Description • Search description
Job task	• Job task no. • Description
Unit of measure	• Description

4.1.2 Advice about prompt wording

Sometimes the instructions provided may seem clear to the user, but be difficult for the model to interpret. This happens when the user takes for granted (and does not write) some things in their prompt, leaving the model too much room for "improvisation", and increasing the probability that it returns incorrect results.

Here are some of the problems that the most common models have when interpreting the prompt, along with two versions of the message, respectively with a high and a low probability of being misinterpreted by the model.

Problematic	Bad Prompt	Good Prompt
Searched entity is not clear	"Add a big table on J01"	"Add line: item table, variant big, job J01"
Entity description is vague	"Add 2 red beans"	"Add 2 cans of 'red beans'"

4.2 Generated content

When the model has finished processing the user input, a list will be visible on the page with Copilot's proposal of the lines to add.

Below you can view an example of AI-generated content, using the following message as a prompt: "Add the content purchased with order 106007. Also add 2 drawers and a charge for shipping.".

✎ Add the content purchased with order 106007. Also add 2 drawers and... Preview AI-generated content may be incorrect 👍 👎 [Terms of use](#) [Learn more](#)

Suggested lines ✕ Delete Line 🔗

Type	No.	Description	Quantity	Unit of Measure Code	Source Document Caption
Item	1964-S	Guest chair TOKYO, blue	14	PZ	Purchase Order 106007
→ <u>Item</u>	1906-S	Drawer ATENE	2	PZ	—
Charge (Ite...	V-TRASP	Shipping costs (sales)	1		—

Document Header Sales Order 101016

✓ Save
🔄 Regenerate
🗑 Discard

The **"Suggested lines"** section contains the lines generated by the model. These lines are to be interpreted as a draft of those that can be saved in the document. It is possible to modify the field values of the newly generated rows, or delete those that are not of interest.

The lines that originate from the copy of another document (in our case the purchase order 106007) cannot be modified, and have the link to the original document available in the **"Source Document Caption"** field. By clicking on the no. of the source document you can view its tab.

If the result proposed by Copilot is not similar to the one you are looking for, or if you want to add more to the prompt, by clicking on the pencil icon at the top left you can modify your message and obtain a different suggestion from the model.

Three actions are available at the bottom of the window:

- **Save:** validates all the lines present on the page, inserts them as definitive lines of the document and closes the window.
- **Regenerate:** update the suggested lines by sending the same prompt to Copilot. Sometimes the model responds differently for the same message, the use of this function is recommended if you are sure of the correctness and clarity of the instructions sent to the GPT.
- **Discard:** Close the window without saving the Copilot suggestion.

By clicking on “**Save**” in our example, we can see how the sales order has been updated with the suggested lines.

Lines											
Manage Line Functions Order											
Type	No.	Service Tariff No.	Item Reference No.	Incl... in VAT Tran... Rep.	Prepmt. CM Refers to Period	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantit	
→ Item	1964-S			☐		Guest chair TOKYO, blue		14			
Item	1906-S			☐		Drawer ATENE		2			
Charge (Item)	V-TRASP			☐		Shipping costs (sales)		1			

5 APP SUBSCRIPTION

Every feature of the app requires a valid subscription.

When first installed, the system automatically activates a test plan.

After this period, you can subscribe for a product level (feature) using the Alterna Apps page or directly from the system notifications by clicking on the link which opens the product activation wizard.