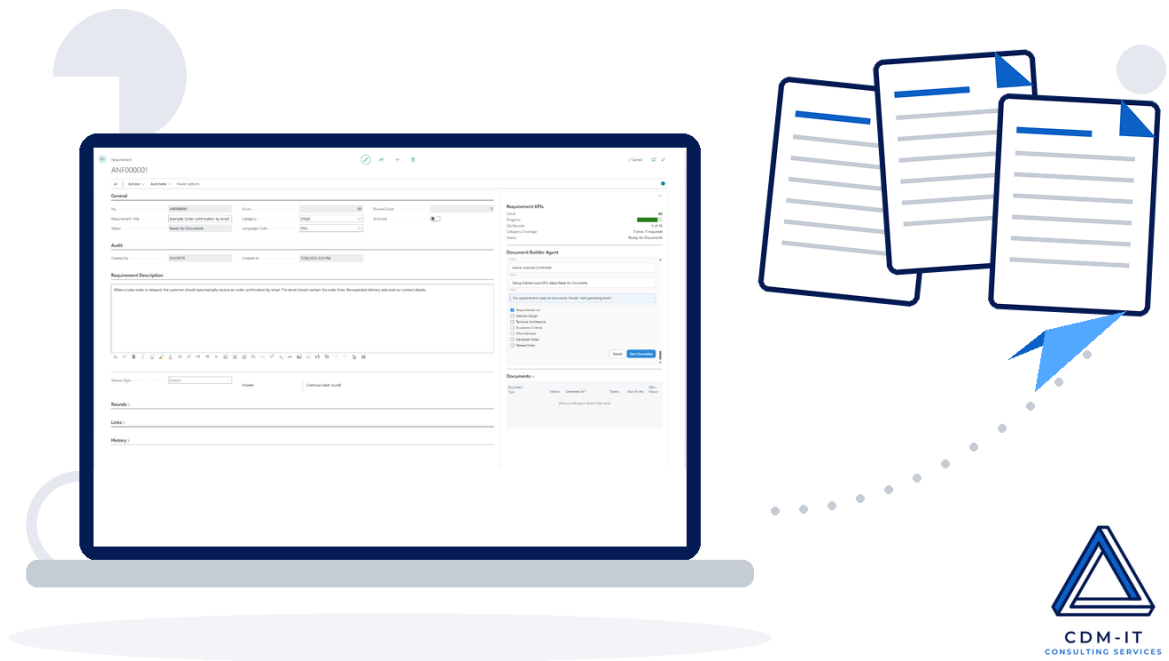




AI Requirements Bridge – Key Usage Scenario Guide

From requirement idea to a complete, AI-generated specification package – an end-to-end walkthrough in Microsoft Dynamics 365 Business Central.

Table of Contents

Introduction	3
Getting Started	4
Initial Setup	4
Choosing the AI Billing Mode	8
Configuring Your Own AI Provider	9
Provider Types at a Glance	11
Troubleshooting the Provider Setup	11
User Settings	12
Working with Requirements	14
The Role Center	14
The Requirements List	14
The Requirement Card	14
The AI Q&A Dialog	16
Starting the Dialog	16
Question & Answer Rounds	16
Answer Options and Their Effect	18
Category Coverage	19
Reaching the Score Threshold	19
Document Generation	21
Generating the First Document	21
Markdown and PDF Views	22
Generating Additional Documents	23
Tracking Rounds and History	24
Editing Generated Documents	25
Completing the Document Set	26
Sending the Quote Request	27
Email Scenario Assignment	27
Send Documents by Email	28
The Quote Request Email	29
AI Transparency	30
Summary	32

Introduction

AI Requirements Bridge is an extension for Microsoft Dynamics 365 Business Central that turns short requirement descriptions into complete, developer-ready specification packages. A built-in Copilot agent – the Document Builder Agent – sharpens each requirement in a structured Q&A dialog, measures its quality with a score, generates up to seven specification documents, and sends them as a quote request by email – all without leaving Business Central.

This guide walks through the key usage scenario step by step, using original screenshots from a complete walkthrough. The example requirement used throughout is ANF000001 “Example: Order confirmation by email” – when a sales order is released, the customer should automatically receive an order confirmation email containing the order lines, the expected delivery date and contact details.

Key Benefits

- Structured AI dialog that turns rough ideas into precise, testable requirements
- Quality gate: documents are only generated once the requirement reaches a configurable score threshold
- One click generates a complete specification package – seven document types as Markdown and PDF
- Full audit trail: every Q&A round, status change and document version is logged
- Seamless quote request by email using the standard Business Central email infrastructure
- Your choice of AI: run on the Microsoft-billed Business Central AI resources, or on your own Azure OpenAI, OpenAI or Anthropic subscription – on-premises included

Actors in this Scenario

- Consultant / Requirements Engineer – captures and refines requirements, triggers document generation and sends the quote request
- Document Builder Agent – the Copilot-based AI that asks clarifying questions, scores the requirement and generates the documents
- Recipient – receives the quote request with the complete specification package as PDF attachments

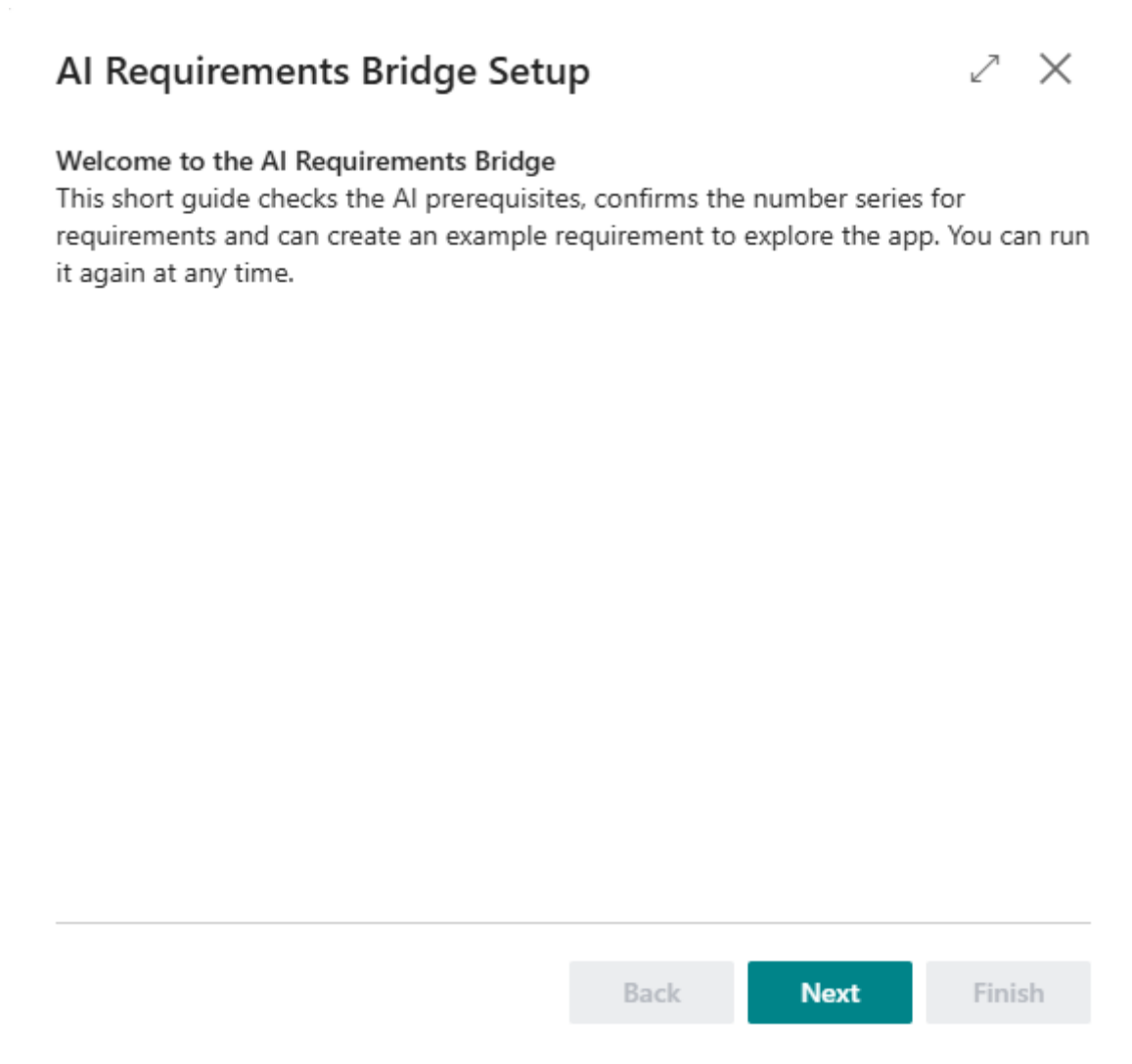
Status Flow

A requirement passes through the following statuses during the scenario: New → In Q&A → Ready for Documents → Documents Generated.

Getting Started

Initial Setup

The assisted setup guide "AI Requirements Bridge Setup" checks the AI prerequisites, confirms the number series for requirements and can create an example requirement to explore the app. It can be run again at any time.



Setup Steps:

1. Open the assisted setup guide and choose Next on the welcome page.
2. Confirm the number series for requirements. The series ANF is created during installation – keep it or choose your own.
3. AI activation page: this page checks the Copilot capability but does not activate it itself – use the linked action to open the Copilot & agent capabilities page.
4. On the Copilot & agent capabilities page, locate "CDM Requirements Bridge" and choose Activate. The capability must be active in every billing mode – it is the gate the AI dialog and the document generation pass through, no matter whose subscription pays for the call. With

the billing mode Microsoft Billed the feature is Microsoft billed, so confirm the consumption billing consent as well (Copilot consumption billing must be set up in the admin center). Then return to the setup guide – the toggle “Copilot capability is active” is now switched on, and the read-only field AI Billing Mode shows which subscription the environment currently uses. Set the Score Threshold (the walkthrough uses 85).

5. Optionally create an example requirement so you can try the AI dialog right away. It behaves like any other requirement and can be deleted at any time.
6. Choose Finish to save the configuration. Every setting can be changed later on the AI Requirements Bridge Setup page.

Note – The setup guide only shows the billing mode; it is chosen on the AI Requirements Bridge Setup page. If you want to run the app on your own AI subscription, follow “Choosing the AI Billing Mode” below before you start the first AI dialog.

AI Requirements Bridge Setup

↗ ✕

Requirements are numbered from this number series. The series ANF was created during installation - keep it or choose your own.

Requirement Nos. ANF

Back

Next

Finish

AI Requirements Bridge Setup



The AI dialog and the document generation require the Copilot capability "CDM Requirements Bridge" to be active and Copilot consumption billing to be set up in the admin center. Use the action below to review the capability, then return here.

Copilot capability is active



Score Threshold

Back

Next

Finish

AI Requirements Bridge Setup



Optionally create an example requirement so you can try the AI dialog right away. It behaves like any other requirement and can be deleted at any time.

Create an example requirement ☒

Back

Next

Finish

AI Requirements Bridge Setup



That's it

Choose Finish to save the configuration. You can change every setting later on the AI Requirements Bridge Setup page.

Back

Next

Finish

Choosing the AI Billing Mode

AI Requirements Bridge can run on two completely different AI back ends, and the choice is a single setting. It decides which subscription pays for every question round and every generated document, and it registers the matching billing type of the Copilot capability for the whole environment.

- **Microsoft Billed** – the AI calls run on the Business Central AI resources operated by Microsoft and are billed through your Copilot consumption billing in the admin center. Nothing else has to be configured. This is the default in a cloud environment and the mode used in the walkthrough of this guide.
- **Custom Billed** – the AI calls run against an AI subscription you own: Azure OpenAI, OpenAI or Anthropic. You configure the service on the AI Providers page, the app talks to it directly, and the provider bills you. Business Central still shows the token consumption of every document.

Steps:

1. Open the AI Requirements Bridge Setup page (Setup in the navigation bar of the Role Center).
2. In the AI Billing section, set AI Billing Mode.
3. Read the AI Provider Status field underneath. It answers, in one line, which service will actually serve the next AI call (see the readings below).
4. With Custom Billed, choose AI Providers in the action bar and configure at least one provider as described in the next section.

The AI Provider Status readings:

- **Business Central AI resources billed by Microsoft** – Microsoft Billed, nothing to do.
- **Default provider: AZURE-OPENAI (Azure OpenAI)** – Custom Billed with a ready provider.
- **Custom Billed without a ready provider** – shown in red: the mode is set but no enabled default provider exists yet. The AI dialog cannot run until you finish the provider setup.

The screenshot shows the 'AI Providers' setup page in Dynamics 365 Business Central. The 'AI Billing' section is highlighted, showing 'AI Billing Mode' set to 'Custom Billed' and 'AI Provider Status' set to 'Default provider: CLAUDE (Anthropic (Claude))'. The 'AI Dialog' section shows 'Score Threshold' set to '85'. The 'General' section shows 'Requirement Nos.' set to 'ANP' and 'Price Factor' set to '1'. The 'Data Retention' section shows 'Retention Period' set to an empty field.

Good to know

- The setup order is free: you may switch the mode first and configure the provider afterwards. The setup page states the gap instead of blocking the change.
- The billing type is registered per environment, not per company. In an environment with several companies the company that saves the setting last determines the billing type for all of them – so use the same mode in every company.
- **On-premises installations always use Custom Billed.** The Microsoft-billed Business Central AI resources exist only in the cloud, so the app selects Custom Billed during installation and refuses Microsoft Billed with an explanatory message. Configuring your own provider is therefore the only way to run the AI dialog on-premises.
- Switching the mode takes effect immediately, and the change is recorded in the audit log together with its old and new value.

- Configuring the AI setup does not require an assigned app license: a tenant administrator with the permission set CDM Setup Admin (or CDM Bridge Admin) can set the app up without a purchased seat.

Configuring Your Own AI Provider

The AI Providers page holds the AI services this installation may use. You can configure as many as you like side by side – one default, many warm spares – but exactly one enabled provider carries the Default flag, and that one serves every AI task: the Q&A dialog, the scoring and all seven document types.

Code	Description	Provider Type	Enabled	Default	Last Test At	Last Test Result	Last Test Succeeded
AZUREOPENAI		Azure OpenAI	☐	☐	8/21/2026 11:38 AM	The connection to Azure OpenAI works.	☐
CHATGPT		OpenAI (ChatGPT)	☐	☐	8/21/2026 2:09 PM	The connection to OpenAI works (model gpt-5.5-luna, HTTP 200).	☐
CLAUDE		Anthropic (Claude)	☒	☒	8/21/2026 1:38 PM	The connection to Anthropic works (model claude-opus-4.6, HTTP 200).	☒

Steps:

1. Open AI Providers – from the AI Requirements Bridge Setup page or by searching for the page.
2. Choose New and fill in the General section: Code – a short identifier of your choice, for example AZURE-OPENAI or CLAUDE-EU; Description – free text, for example the region or the purpose the provider serves; Provider Type – Azure OpenAI, OpenAI (ChatGPT) or Anthropic (Claude). The type decides which connection fields the card shows; see “Provider Types at a Glance”.
3. Fill in the connection fields of the chosen type – endpoint and deployment, or the model. For OpenAI and Anthropic you can choose the lookup on the Model field to fetch the current model list straight from your account instead of typing the identifier from memory.
4. Enter the API Key in the masked field and choose Save API Key. The key is stored securely and is never displayed again – the card only reports API Key Stored: Yes.
5. Choose Test Connection. The app sends one minimal request to the service and records the outcome in Last Test At, Last Test Result and Last Test Succeeded.
6. Set Enabled. This is only accepted once the required fields are filled, a key is stored and the connection test has succeeded.
7. Set Default. The flag moves the AI traffic to this provider and is cleared automatically on every other provider.

The screenshot shows the 'AI Provider' configuration page in Dynamics 365 Business Central. The provider is named 'AZUREOPENAI'. The 'General' section includes fields for 'Code' (AZUREOPENAI), 'Description', 'Provider Type' (Azure OpenAI), and an 'Enabled' toggle. The 'Azure OpenAI' section includes 'Endpoint' (https://cdm-acai-dev.openai.azure.com/), 'Deployment' (gpt-5-mini), and 'Max Output Tokens' (0). The 'API Key' section has an 'API Key' field and an 'API Key Stored' status (Yes). The 'Connection Test' section shows the last test result as 'The connection to Azure OpenAI works.'

Rules the card enforces

These guard rails exist so a broken configuration is found while you are still on the setup page, and not by the first user in the middle of a Q&A round.

- **Enabling requires proof.** A provider can only be enabled with its required fields filled, an API key stored and a successful connection test.
- **Every change invalidates the test.** Changing the endpoint, the deployment, the model, the API version or the stored key clears the "Last Test Succeeded" flag – the previous test proved the old combination. Enabled providers are not switched off by this, but the list highlights them in red until you test again.
- **Changing the provider type deletes the key,** together with the type-specific fields and the Enabled/Default flags, so a key issued for one service can never be sent to another one.
- **Endpoints must use https.** An API key travels in the header of that very request; a plain-http endpoint would put it on the wire in clear text and is refused.
- **Identifiers must not contain spaces.** Model and deployment names are trimmed automatically and refused when they carry an inner space – the typo (gpt-5.6 luna instead of gpt-5.6-luna) that is invisible in the client and fatal on the wire.
- **A disabled provider is never the default one.** Clearing Enabled clears Default with it.
- **Leaving the key field blank keeps the stored key,** so you can correct an endpoint without re-typing the key.
- **Deleting a provider deletes its key,** so no orphaned secret is left behind.

Note – Model lookup without cost – the lookup on the Model field only reads the model list your account publishes. It runs no completion, sends no requirement data and consumes no tokens.

Provider Types at a Glance

	Azure OpenAI	OpenAI (ChatGPT)	Anthropic (Claude)
Endpoint	Required – the resource URL, e.g. https://myresource.openai.azure.com/	Optional – blank uses the official API; fill in for a proxy or gateway (complete chat-completions URL)	Optional – blank uses the official API; fill in for a proxy or gateway (complete messages URL)
Deployment	Required – the deployed chat-completion model	–	–
Model	– (derived from the deployment)	Required, e.g. gpt-5, gpt-5-mini, gpt-4o	Required, e.g. claude-opus-5, claude-sonnet-5, claude-haiku-4-5
Model lookup	–	Yes	Yes
API Key	Required	Required	Required

Max Output Tokens – the same field, three meanings

Max Output Tokens caps what a single answer may return and is your cost guard. What the value 0 means, however, depends on the provider type – the one setting worth reading twice:

- **Azure OpenAI** – 0 sends no output limit at all. That is required for newer deployments such as the GPT-5 and o-series, which reject the legacy max_tokens parameter with an HTTP 400. A value above 0 is only supported by models that accept max_tokens, for example gpt-4o and gpt-4.1.
- **OpenAI** – 0 sends no output limit; a value above 0 is sent as the modern max_completion_tokens parameter, which every current OpenAI model accepts, GPT-5 included.
- **Anthropic** – an output limit is mandatory on every request, so 0 does not mean “no limit” but “use the built-in default of 8,192 tokens”. A value above 0 wins over that default.

Note – Documents such as the Solution Design or the Technical Architecture are long. If a generated document ends abruptly, the output limit is the first thing to check.

Troubleshooting the Provider Setup

Symptom	Cause	Remedy
The AI dialog does not start, AI Provider Status reads “Custom Billed without a ready provider”	No enabled default provider	Configure a provider, test it, set Enabled and Default
“Usage not authorized”, or a call that fails before any request leaves Business Central	The registered Copilot billing type does not match the mode in use	Save the AI Billing Mode again on the setup page, or choose Save API Key on the provider – both re-register the billing type

HTTP 400 "Unsupported parameter: 'max_tokens' is not supported with this model"	An Azure OpenAI deployment of the GPT-5/o-series with Max Output Tokens above 0	Set Max Output Tokens to 0
HTTP 401, or a connection test that fails after it worked before	The API key was rotated or revoked at the provider	Store the new key, test again
Enabled cannot be set	A required field, the key or a successful connection test is missing – the message names which	Complete the setup and run the connection test
Microsoft Billed cannot be selected	On-premises installation; the managed AI resources do not exist there	Keep Custom Billed and configure your own provider
A document ends mid-sentence	The output limit is too low	Raise Max Output Tokens, or set it to 0 where that means "no limit"

Note – Upgrading from an earlier version – if you used the development AI setup of an earlier release to store an Azure OpenAI subscription, the upgrade moved it to the provider AZURE-OPENAI, enabled and set as default. The old page still exists but only points to the AI Providers page.

User Settings

The extension ships with its own role: "AI Requirements Bridge User". Select it in My Settings to work in the dedicated Role Center.

My Settings -



Role	AI Requirements Bridge User	...
Company	CRONUS DE	...
Work Date	7/1/2027	
Region	English (United States)	...
Language	English (United States)	...
Time Zone	(UTC+01:00) Amsterdam, Berlin, Bern, ...	...
Notifications	Change when I receive notifications.	
Teaching Tips	☒	
Legacy Action Bar	☐	

Files

Cloud Storage  files on OneDrive

Security

Your last sign in was on 07/30/26 12:38 PM.

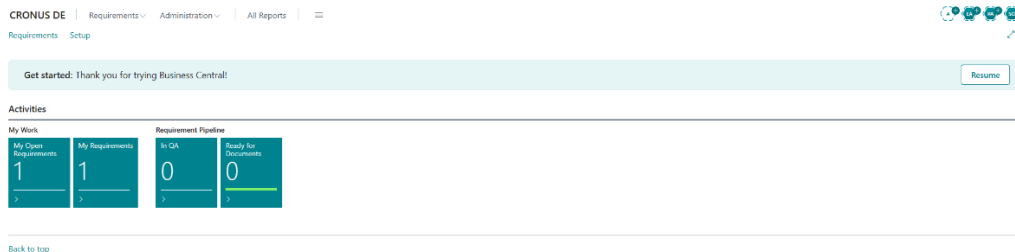
OK

Cancel

Working with Requirements

The Role Center

The Role Center is the daily entry point. The activity cues show your personal workload ("My Open Requirements", "My Requirements") and the requirement pipeline ("In Q&A", "Ready for Documents"). The navigation bar provides direct access to Requirements and Setup.



The Requirements List

The list shows all requirements with number, title, status, AI score, category, creator and creation time. Use New to create a requirement or Duplicate as Template to reuse an existing one.

No.	Requirement Title	Status	Score	Category	Created By	Created At
1	Example Order confirmation by email	New	0	SALES	DMODER	7/20/2024 2:23 PM

The Requirement Card

The requirement card is the central workspace. The General section contains number, title, status, score, round count, category and language code, followed by audit information and the rich-text Requirement Description.

Requirement: ANF000001

AI | More options

General

No.: ANF000001 Score: 0 Round Count: 0

Requirement Title: Example Order confirmation by email Category: SALES Archived: ☐

Status: New Language Code: ENU

Audit

Created By: DHOEFER Created At: 7/30/2025 2:33 PM

Requirement Description

When a sales order is released, the customer should automatically receive an order confirmation by email. The email should contain the order lines, the expected delivery date and our contact details.

Antwortstyp: Stimmt Answer: Continue (next round)

Rounds >

Links >

History >

Summary

Requirement KPIs

Score: 0

Progress: 0 of 10

Q&A Rounds: 0 of 10

Category Coverage: 0 (min. 5 required)

Status: New

Document Builder Agent

No agent activity yet. Start the AI dialog to watch the agent work.

Documents

Document Type	Version	Generated At	Tokens
(There is nothing to show in this view)			

The FactBox pane on the right accompanies the entire workflow:

- Requirement KPIs – score, progress bar, Q&A rounds, category coverage and status at a glance
- Document Builder Agent – the AI conversation with questions, confirmations and generation progress
- Documents – all generated documents with version, timestamp and token consumption

Requirement: ANF000001

AI | Actions | Automate | Fewer options

Start AI Dialog | Generate Documents...

No.: ANF000001 Score: 0 Round Count: 0

Requirement Title: Example Order confirmation by email Category: SALES Archived: ☐

Status: New Language Code: ENU

Audit

Created By: DHOEFER Created At: 7/30/2025 2:33 PM

Requirement Description

When a sales order is released, the customer should automatically receive an order confirmation by email. The email should contain the order lines, the expected delivery date and our contact details.

Antwortstyp: Stimmt Answer: Continue (next round)

Rounds >

Links >

History >

Summary

Requirement KPIs

Score: 0

Progress: 0 of 10

Q&A Rounds: 0 of 10

Category Coverage: 0 (min. 5 required)

Status: New

Document Builder Agent

No agent activity yet. Start the AI dialog to watch the agent work.

Documents

Document Type	Version	Generated At	Tokens
(There is nothing to show in this view)			

The AI Q&A Dialog

Starting the Dialog

The AI action group on the card offers “Start AI Dialog”. The agent analyzes the requirement description and opens the first question round; the status changes to In Q&A.

The screenshot displays the AI Q&A Dialog interface for requirement ANF000001. The interface is divided into several sections:

- General:** Contains fields for No. (ANF000001), Score (30), Round Count (1), Requirement Title (Example: Order confirmation by email), Category (SALES), Status (In Q&A), and Language Code (ENU).
- Audit:** Shows Created By (DHKEFER) and Created At (7/30/2026 2:33 PM).
- Requirement Description:** A text area containing the requirement description: "When a sales order is released, the customer should automatically receive an order confirmation by email. The email should contain the order lines, the expected delivery date and our contact details."
- Current Question:** A section for the current question round, showing Answer Type (Correct) and buttons for Answer and Continue (next round).
- Rounds:** A section for previous question rounds.
- Links:** A section for links.
- History:** A section for history.
- Requirement KPIs:** A sidebar on the right showing Score (30), Progress (1 of 10), Category Coverage (0 (min, 5 required)), and Status (In Q&A).
- Document Builder Agent:** A sidebar on the right showing a sample question and answer, with buttons for Correct, Not quite, and Add detail.
- Documents:** A table showing document details, including Document Type, Version, Generated At T, and Tokens.

Question & Answer Rounds

In each round the agent states its current understanding as an assumption and asks one focused clarification question – in the example, topics include the exact trigger (status change to Released), the recipient email and language handling, the PDF attachment of the order confirmation report, suppression and consent rules, and the required UI controls for preview, resend and error handling.

Requirement ANF000001

AI Actions Automate Fewer options

General

No. ANF000001 Score 20 Round Count 1

Requirement Title Example Order confirmation by email Category SALES Archived

Status In QA Language Code ENU

Audit

Created By DHOEFER Created At 7/20/2026 2:33 PM

Requirement Description

When a sales order is released, the customer should automatically receive an order confirmation by email. The email should contain the order lines, the expected delivery date and our contact details.

Current Question

Answer Type Correct Answer Continue (next round)

Links

History

Requirement KPIs

Score 30

Progress 1 of 10

QA Rounds 0 (min. 5 required)

Category Coverage In QA

Document Builder Agent

customer language if available

Should Sales Central send the confirmation automatically using the system's configured mail provider (SMTP/Office 365) immediately on Release, and should the email include a PDF attachment of the Order Confirmation report (rather than just embedding details in the email body)?

Answer received (Confirmed)

Round 1 started. Input title, description, 1 answer round, 0 linked objects (ondate grounding), 1 question category covered.

Compose prompt

Generate question (round 2)

Documents

Document Type Version Generated At Tokens

(There is nothing to show in this view)

How to Answer:

1. Read the assumption and question in the Document Builder Agent FactBox or in the Current Question section of the card.
2. Choose an answer type – Correct, Not quite ... or Add detail ... – or type a free-text answer.
3. Send the answer; the agent confirms it and prepares the next round.
4. Repeat until the score threshold is reached. The score and progress bar in the Requirement KPIs update after every round; up to ten rounds are available.

Requirement ANF000001

AI Actions Automate Fewer options

General

No. ANF000001 Score 45 Round Count 5

Requirement Title Example Order confirmation by email Category SALES Archived

Status In QA Language Code ENU

Audit

Created By DHOEFER Created At 7/20/2026 2:33 PM

Requirement Description

When a sales order is released, the customer should automatically receive an order confirmation by email. The email should contain the order lines, the expected delivery date and our contact details.

Current Question

Assumption / Question

The implementation will automatically send a localized PDF Order Confirmation via the system SMTP/Office365 provider to the Customer card Primary Email immediately when a Sales Order's Status changes to Released, honoring the suppression/alteration rules already discussed (Do-Not-Email, missing/invalid email, credit hold, automated vs manual release, customer opt-out).

Which specific UI elements and user actions do you require so users can preview, override, audit and re-send confirmations (for example a global admin setting to enable/disable auto-send, a per-customer 'Send on Release' default, a per-round 'Send Confirmation' checkbox that can be changed before release, a 'Preview PDF' action on the Sales Order, a 'Resend Confirmation' action, an 'Email History Log' subpage showing status and delivery attempts, and a UI for viewing/resolving failed sends)?

Requirement KPIs

Score 45

Progress 3 of 10

QA Rounds 2 (min. 5 required)

Category Coverage In QA

Document Builder Agent

The implementation will automatically send a localized PDF Order Confirmation via the system SMTP/Office365 provider to the Customer card Primary Email immediately when a Sales Order's Status changes to Released, honoring the suppression/alteration rules already discussed (Do-Not-Email, missing/invalid email, credit hold, automated vs manual release, customer opt-out).

Which specific UI elements and user actions do you require so users can preview, override, audit and re-send confirmations (for example a global admin setting to enable/disable auto-send, a per-customer 'Send on Release' default, a per-round 'Send Confirmation' checkbox that can be changed before release, a 'Preview PDF' action on the Sales Order, a 'Resend Confirmation' action, an 'Email History Log' subpage showing status and delivery attempts, and a UI for viewing/resolving failed sends)?

Correct Not quite ... Add detail ...

Your answer ...

Documents

Document Type Version Generated At Tokens

(There is nothing to show in this view)

Requirement
ANF000001

AI | Actions | Automate | Fewer options

General

No. ANF000001 Score 85 Round Count 5

Requirement Title Example Order confirmation by email Category SALES Archived

Status Ready for Documents Language Code ENU

Audit

Created By DHODEFER Created At 7/30/2025 2:33 PM

Requirement Description

When a sales order is released, the customer should automatically receive an order confirmation by email. The email should contain the order lines, the expected delivery date and our contact details.

Answer Type Correct Answer Continue (next round)

Requirement KPIs

Score 85
Progress 5 of 10
QA Rounds 5 (min. 5 required)
Category Coverage Ready for Documents
Status

Document Builder Agent

Answer received (Confirmed):

Dialog finished: score 85%, status Ready for Documents.

The requirement is ready for documents. Should I start generating them?

☒ Requirements List
☐ Solution Design
☐ Technical Architecture
☐ Acceptance Criteria
☐ Short Statement
☐ Developer Notes
☐ Release Notes

Cancel Start Generation

Documents

Document Type	Version	Generated At	Tokens	Story Points	Man...	Initial
(There is nothing to show in this view)						

Answer Options and Their Effect

Every question round ends with the same answer bar: three buttons and a free-text field. The choice does more than record an answer – it steers how the agent continues the dialog and how the score develops:

completeness score now 30%

14:56

The email should be sent automatically and immediately when a Sales Order's Status changes to Released, to the customer's primary email on the Customer card, containing the order lines, expected delivery date and our contact details (localized to customer language if available).

Should Business Central send the confirmation automatically using the system's configured mail provider (SMTP/Office 365) immediately on Release, and should the email include a PDF attachment of the Order Confirmation report (rather than just embedding details in the email body)?

14:56

Correct Not quite ... Add detail ...

Your answer ...

Send

- **Correct** – confirms the agent's assumption exactly as stated. The topic is treated as settled, the question category counts as covered, the score increases, and the next round moves on to the next open category.

- Not quite ... – tells the agent that its assumption is wrong in at least one point. Describe in the free-text field what is different; the agent revises its understanding and asks a corrected follow-up on the same topic before moving on – the score only rises once the corrected assumption is confirmed.
- Add detail ... – the assumption is correct but incomplete. The added free text (for example an additional business rule or an extra field on the report) is merged into the requirement; the agent may ask a deeper follow-up question on this aspect in the next round.
- Free text & Send – whichever button is chosen, everything entered in the answer field becomes part of the requirement's grounding: subsequent questions build on it, and it flows into the generated documents later on (chaining context).

In the round shown above, the agent's assumption summarizes trigger, recipient and content, and its question targets the transport (system SMTP / Office 365 provider) and the PDF attachment of the Order Confirmation report. Confirming with Correct settles both points in one step and lets the following round focus on the next category – the business rules.

Category Coverage

The agent does not ask arbitrary questions – like an experienced consultant it works through defined question categories and tracks the result as Category Coverage in the Requirement KPIs. At least five categories must be covered before a requirement can become Ready for Documents. The question categories include, for example:

- Process & Trigger – what exactly starts the process: the status change to Released, manual versus automated release, timing of the send
- Content & Data – what the email must contain: order lines, expected delivery date, company contact details, localized message body in the customer's language
- Integration & Transport – how the email is delivered: the system SMTP / Office 365 provider, the PDF attachment of the Order Confirmation report, asynchronous background processing
- Business Rules & Exceptions – suppression and alteration rules: Do-Not-Email flags, missing or invalid email addresses, credit hold, customer opt-outs
- UI & User Actions – which controls users need: a global admin switch, per-customer defaults, a per-order override, Preview PDF, Resend Confirmation and an Email History/Log
- Security & Compliance – consent recording, PII handling, encryption in transit and at rest, retention periods, audit logging and applicable regulations such as GDPR/CCPA

In the walkthrough the five answered rounds covered five categories – visible in the KPIs as “Category Coverage: 5 (min. 5 required)”.

Reaching the Score Threshold

The dialog is limited to a maximum of ten Q&A rounds. If the requirement has not reached the score threshold after round ten, the dialog ends automatically. In that case, refine the requirement description with the insights gained and start a new AI dialog – the completed rounds remain documented in the Rounds section.

Once the score reaches the configured threshold (85 in the walkthrough, after five rounds), the agent reports “Dialog finished” and the status changes to Ready for Documents. The agent immediately offers to generate documents and presents the seven available document types as a checklist: Requirements List, Solution Design, Technical Architecture, Acceptance Criteria, Effort Estimate, Developer Notes and Release Notes.

Requirement

ANF000001

AI Actions Automate Fewer options

General

No. ANF000001 Score 85 Round Count 5

Requirement Title Example Order confirmation by email Category SALES Archived

Status Ready for Documents Language Code ENU

Audit

Created By DHOBER Created At 7/30/2026 2:33 PM

Requirement Description

When a sales order is released, the customer should automatically receive an order confirmation by email. The email should contain the order lines, the expected delivery date and our contact details.

Answer Type Correct Answer Continue (next round)

Rounds

Links

History

Requirement KPIs

Score 85

Progress 5 of 10

QA Round 5 (min, 5 required)

Status Ready for Documents

Document Builder Agent

What specific security and legal/compliance controls must be enforced for automatic Order Confirmation emails — including whether customer consent opt-in must be recorded (and where), how customer opt-outs/Do-Not-Email interact with legal consent, what PI is permitted in the email body/body, encryption requirements (in transit and at rest for attachments), retention and audit-log retention periods for emails and delivery attempts, permissions/roles required to enable/override/invest, any jurisdictional rules to apply (e.g. GDPR/CCPA), and how data-subject requests (support/feedback) should be handled for sent confirmations?

Answer received (Confirmed)

Dialog finished: score 85%, status Ready for Documents

1 documents selected: Requirements List. Input the requirement, its answered QA rounds and the documents already generated as chaining context.

Generate Requirements List (7 of 11)

Documents

Document Type	Version	Generated At 1	Tokens	Story Points	Man... Refined
(There is nothing to show in this view)					

Document Generation

Generating the First Document

Select the desired document types and choose Start Generation. The agent generates each document from the requirement, the answered Q&A rounds and any documents already generated (chaining context), reports its progress in the conversation and stores the result in the Documents FactBox. The status changes to Documents Generated.

Requirement: ANF000001

AI | Actions | Automate | Fewer options

General

No. ANF000001 Score 85 Round Count 5

Requirement Title Example Order confirmation by Category SALES Archived

Status Documents Generated Language Code ENU

Audit

Created By DHOEFER Created At 7/30/2026 2:33 PM

Requirement Description

When a sales order is released, the customer should automatically receive an order confirmation by email. The email should contain the order lines, the expected delivery date and our contact details.

Answer Type Correct Answer Continue (next round)

Requirement KPIs

Score 85

Progress 5 of 10

Q&A Rounds 5 (min. 5 required)

Category Coverage

Status Documents Generated

Document Builder Agent

content

Generate Requirements List (1 of 1)

Document generation finished: 1 documents created.

Not all document types have been generated yet. Should I generate the remaining ones?

☒ Solution Design

☐ Technical Architecture

☐ Acceptance Criteria

☐ Effort Estimate

☐ Developer Notes

☐ Release Notes

Cancel Start Generation

Documents

Document Type	Version	Generated At	Tokens	Story Points	Manually Edited
Requirements List	1	7/30/2026 3:04 PM	205	0	☐

Each document entry offers a full set of actions: Open Markdown, Open PDF, Edit Markdown, Regenerate and Select More.

Requirement: ANF000001

AI | Actions | Automate | Fewer options

General

No. ANF000001 Score 85 Round Count 5

Requirement Title Example Order confirmation by Category SALES Archived

Status Documents Generated Language Code ENU

Audit

Created By DHOEFER Created At 7/30/2026 2:33 PM

Requirement Description

When a sales order is released, the customer should automatically receive an order confirmation by email. The email should contain the order lines, the expected delivery date and our contact details.

Answer Type Correct Answer Continue (next round)

Requirement KPIs

Score 85

Progress 5 of 10

Q&A Rounds 5 (min. 5 required)

Category Coverage

Status Documents Generated

Document Builder Agent

content

Dialog finished: score 85%, status Ready for Documents.

1 documents selected: Requirements List. Input the requirement, its answered Q&A rounds and the documents already generated as chaining context.

Generate Requirements List (1 of 1)

Document generation finished: 1 documents created.

1 documents selected: Solution Design. Input the requirement, its answered Q&A rounds and the documents already generated as chaining context.

Generate Solution Design (1 of 1)

Documents

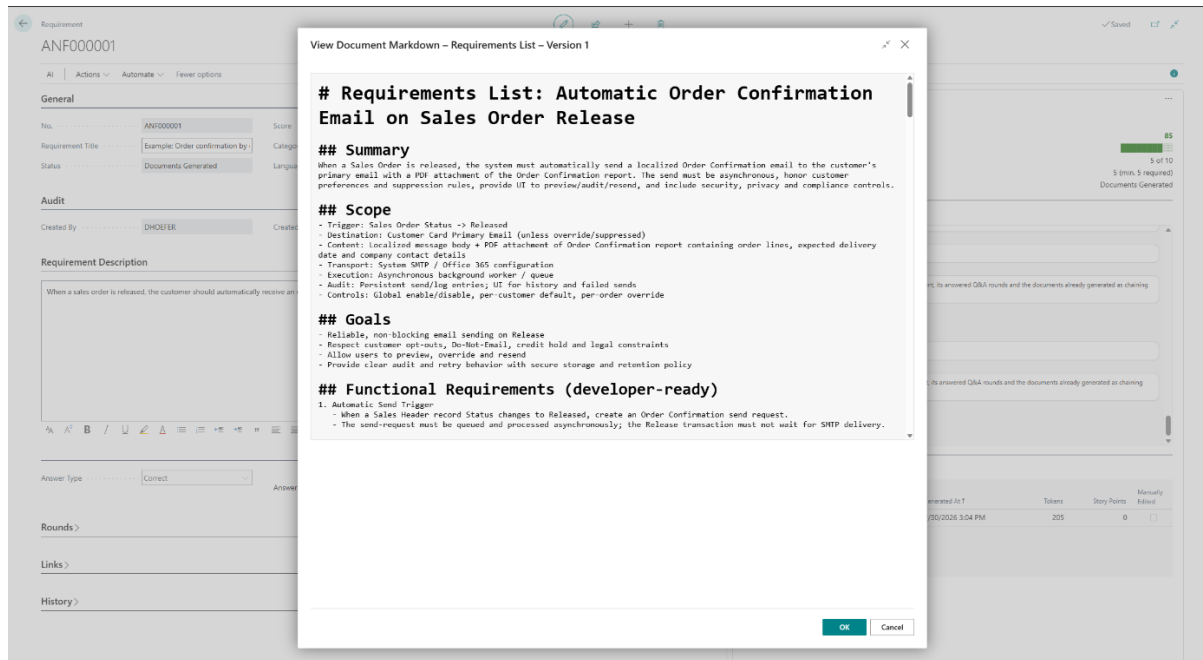
Document Type	Version	Generated At	Tokens	Story Points	Manually Edited
Requirements List	1	7/30/2026 3:04 PM	205	0	☐

Actions

- Open Markdown
- Open PDF
- Edit Markdown
- Regenerate
- Select More

Markdown and PDF Views

The Markdown view shows the generated document in a structured, developer-ready format – for the Requirements List this includes Summary, Scope, Goals and numbered Functional Requirements.



The PDF view renders the same content in the company letterhead, including a metadata line with requirement number, document type, version and generation timestamp, plus an AI transparency note.

Requirements List: Automatic Order Confirmation Email on Sales Order Release

Summary

When a Sales Order is released, the system must automatically send a localized Order Confirmation email to the customer's primary email with a PDF attachment of the Order Confirmation report. The send must be asynchronous, honor customer preferences and suppression rules, provide UI to preview/audit/resend, and include security, privacy and compliance controls.

Scope

- Trigger: Sales Order Status -> Released
- Destination: Customer Card Primary Email (unless override/suppressed)
- Content: Localized message body + PDF attachment of Order Confirmation report containing order lines, expected delivery date and company contact details
- Transport: System SMTP / Office 365 configuration
- Execution: Asynchronous background worker / queue
- Audit: Persistent send/log entries; UI for history and failed sends
- Controls: Global enable/disable, per-customer default, per-order override

Goals

- Reliable, non-blocking email sending on Release
- Respect customer opt-outs, Do-Not-Email, credit hold and legal constraints
- Allow users to preview, override and resend
- Provide clear audit and retry behavior with secure storage and retention policy

Functional Requirements (developer-ready)

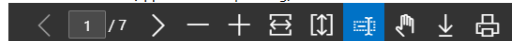
1. Automatic Send Trigger

- When a Sales Header record Status changes to Released, create an Order Confirmation send request.
- The send-request must be queued and processed asynchronously; the Release transaction must not wait for SMTP delivery.

2. Content and Attachment

- Send a localized email body in the customer's language if available (fallback to company language).
- Attach a PDF of the Order Confirmation report containing:
 - Order header (order no, date)
 - Order lines (item, description, qty, unit, price)
 - Expected delivery date per line or header
 - Company contact details (Sales contact, email, phone, return address)
- Use system SMTP/Office 365 configuration for delivery.

3. Suppression and Alteration Rules (applied before queueing)



Generating Additional Documents

After each run the agent asks whether the remaining document types should be generated. Repeat the selection until the package is complete – in the walkthrough: Solution Design, then Technical Architecture and Acceptance Criteria together, and finally Effort Estimate, Developer Notes and Release Notes.

Requirement

ANF000001

AI

Actions

Automate

Feeder options

General

No.

ANF000001

Score

85

Round Count

5

Requirement Title

Example Order confirmation by

Category

SALES

Archived

Status

Documents Generated

Language Code

ENU

Audit

Created By

DHOEFER

Created At

7/30/2026 2:33 PM

Requirement Description

When a sales order is released, the customer should automatically receive an order confirmation by email. The email should contain the order lines, the expected delivery date and our contact details.

Answer Type

Correct

Answer

Continue (next round)

Rounds

Links

History

Requirement KPIs

Score

85

Progress

QA Rounds

5 of 10

Category Coverage

5 (min, 5 required)

Status

Documents Generated

Document Builder Agent

1 documents selected: Solution Design. Input the requirement, its answered Q&A rounds and the documents already generated as chaining context.

Generate Solution Design (1 of 1)

Document generation finished: 1 documents created.

Not all document types have been generated yet. Should I generate the remaining ones?

☒ Technical Architecture
 ☒ Acceptance Criteria
 ☐ User Interface
 ☐ Developer Notes
 ☐ Release Notes

Cancel Start Generation

Documents

Document Type	Version	Generated At	Tokens	Story Points	Manually Edited
Requirements List	1	7/30/2026 3:04 PM	205	0	☐
Solution Design	1	7/30/2026 3:38 PM	205	0	☐

Requirement

ANF000001

AI

Actions

Automate

Feeder options

General

No.

ANF000001

Score

85

Round Count

5

Requirement Title

Example Order confirmation by

Category

SALES

Archived

Status

Documents Generated

Language Code

ENU

Audit

Created By

DHOEFER

Created At

7/30/2026 2:33 PM

Requirement Description

Answer Type

Correct

Answer

Continue (next round)

Rounds

Round No.	Result	Question	Score After Round
5	Confirmed	The feature will send localized PDF Order Confirmation emails asynchronously...	85
4	Confirmed	Automatic order-confirmation emails (PDF attachment via system SMTP/Office365...	60
3	Confirmed	The implementation will automatically send a localized PDF Order Confirmation...	45
2	Confirmed	When a Sales Order's Status changes to Released the system will automatically...	40
1	Confirmed	The email should be sent automatically and immediately when a Sales Order's S...	30

Links

History

Requirement KPIs

Score

85

Progress

QA Rounds

5 of 10

Category Coverage

5 (min, 5 required)

Status

Documents Generated

Document Builder Agent

1 documents selected: Requirements List. Input the requirement, its answered Q&A rounds and the documents already generated as chaining context.

Generate Solution Design (1 of 1)

Document generation finished: 1 documents created.

2 documents selected: Technical Architecture, Acceptance Criteria. Input the requirement, its answered Q&A rounds and the documents already generated as chaining context.

Generate Technical Architecture (1 of 2)

Documents

Document Type	Version	Generated At	Tokens	Story Points	Manually Edited
Requirements List	1	7/30/2026 3:04 PM	205	0	☐
Solution Design	1	7/30/2026 3:38 PM	205	0	☐

Tracking Rounds and History

The Rounds section documents every Q&A round with its result, the full question text and the score after the round. The History section logs every action – status changes, description updates, Q&A rounds and each generated document version – with timestamp and user.

Requirement
ANF000001

AI | Actions | Automate | Fewer options

General

No. ANF000001 Score 85 Round Count 5
 Requirement Title Example Order confirmation by email Category SALES Archived
 Status Documents Generated Language Code EN

Audit

Created By DHOEFER Created At 7/30/2026 2:33 PM

Requirement Description

Answer Type Correct Answer Continue (next round)

Links

History

Logged At	User ID	Entry Type	Field Caption	Old Value	New Value
7/30/2026 3:42	DHOEFER	Document			Document generated: Acceptance Criteria version 1.
7/30/2026 3:41	DHOEFER	Document			Document generated: Technical Architecture version 1.
7/30/2026 3:38	DHOEFER	Document			Document generated: Solution Design version 1.
7/30/2026 3:34	DHOEFER	Status	Status	Ready for Documents	Documents Generated
7/30/2026 3:34	DHOEFER	Document			Document generated: Requirements List version 1.
7/30/2026 2:42	DHOEFER	Status	Status	In QA	Ready for Documents
7/30/2026 3:42	DHOEFER	Field Change	Requirement Description	(previous description)	(updated description)
7/30/2026 3:42	DHOEFER	Q&A Round			Q&A round 5 answered: Confirmed.
7/30/2026 3:42	DHOEFER	Q&A Round			Q&A round 5: question generated (score 85).
7/30/2026 3:41	DHOEFER	Q&A Round			Q&A round 4 answered: Confirmed.
7/30/2026 3:40	DHOEFER	Q&A Round			Q&A round 4: question generated (score 65).

Requirement KPIs

Score 85
 Progress 5 of 10
 QA Rounds 5 (min. 5 required)
 Category Coverage
 Status Documents Generated

Document Builder Agent

2 documents selected: Technical Architecture, Acceptance Criteria. Input the requirement, its answered QA rounds and the documents already generated as chaining context.

15:43
 ✓ Generate Technical Architecture (1 of 2)
 ✓ Generate Acceptance Criteria (2 of 2)
 15:41
 Document generation finished: 2 documents created.

15:42
 Not all document types have been generated yet. Should I generate the remaining ones?

☒ Visit Release
☐ Developer Notes
☐ Release Notes

Cancel Start Generation

Documents

Document Type	Version	Generated At	Tokens	Story Points	Manu...
Requirements List	1	7/30/2026 3:04 PM	205	0	
Solution Design	1	7/30/2026 3:38 PM	205	0	
Technical Architecture	1	7/30/2026 3:41 PM	205	0	
Acceptance Criteria	1	7/30/2026 3:42 PM	234	0	

CRONUS International Ltd.

Requirement ANF000001 | Acceptance Criteria | Version 1 | Generated 07/30/26 03:42 PM

Note: This text was created with the help of artificial intelligence. Despite automated checks, factual errors, incomplete information or ambiguous wording cannot be fully ruled out. Please verify the content for correctness, completeness and accuracy before further use.

Acceptance Criteria: Example: Order confirmation by email

Context

This Acceptance Criteria document validates the Automatic Order Confirmation Email feature described in the Requirements and Solution Design. References to Business Central objects use the IDs defined in the Solution Design and Technical Architecture: Table 50000 (Order Confirmation Log), Table 50001 (Order Confirmation Setup), Table 50002 (Order Confirmation Attachment), TableExtension 50000 (Customer ext), TableExtension 50001 (Sales Header ext), Codeunit 50000-50004, Report 50000, Page objects 50000-50006.

Scenario: Enqueue on Sales Order Release (normal case)

Given Business Central Setup Order Confirmation (Table 50001) EnableAutoSendOnRelease = true
 And a Sales Order exists with Sales Header SendConfirmation = true (TableExtension 50001)
 And the Customer has SendOnRelease = true and EmailConsent = Withdrawn and DoNotEmail = false (TableExtension 50000)
 And Customer.Primary Email is present and valid
 When the Sales Order Status is changed to Released by a user (TriggerSource = Manual)
 Then a new Order Confirmation Log record (Table 50000) SHALL be created with Status = Queued, SalesOrderNo populated, CustomerNo populated, EmailTo populated, BodyLanguage set to the customer locale, Attempts = 0 and CreatedTimestamp set
 And the Release transaction SHALL complete without waiting for SMTP delivery (no outbound SMTP call inside the release transaction)

Scenario: Asynchronous processing and SLA for first attempt

Given an Order Confirmation Log (Table 50000) was created with Status = Queued
 When the Order Confirmation Queue Processor (Codeunit 50001) picks the queued entry
 Then the processor SHALL attempt the first send (Processing -> Sent or Failed) asynchronously
 And under normal load the first processing attempt SHALL start within 2 minutes of the Queued CreatedTimestamp

Scenario: Email contains localized PDF attachment with order lines, expected delivery and contact details

Given an Order Confirmation Log entry is being processed for a Sales Order whose Customer locale = fr-FR
 When the Queue Processor generates the email
 Then the email sent via the configured SMTP/Office365 provider (Codeunit 50003) SHALL include a PDF attachment produced by Report 50000 and Codeunit 50002
 And the PDF SHALL be localized to fr-FR and SHALL include: order header (order no and date), all order lines (item, description, qty, unit, price), expected delivery date (per line or header), and company contact details (sales contact, email, phone, return address)
 And the PDF file SHALL be saved to Order Confirmation Attachment (Table 50002).Data (BLOB) encrypted at rest and Attached to the email

Edit Document Markdown - Acceptance Criteria ...

Acceptance Criteria: Example Order confirmation by email

Context

This Acceptance Criteria document validates the Automatic Order Confirmation Email feature described in the Requirements and Solution Design. References to Business Central objects use the IDs defined in the Solution Design and Technical Architecture: Table 50000 (Order Confirmation Log), Table 50001 (Order Confirmation Setup), Table 50002 (Order Confirmation Attachment), TableExtension 50000 (Customer ext), TableExtension 50001 (Sales Header ext), Codeunit 50000-50004, Report 50000, Page objects 50000-50006.

Scenario: Enqueue on Sales Order (normal case)

Given Business Central Setup Order Confirmation (Table 50001) EnableAutoSendOnRelease = true
 And a Sales Order exists with Sales Header SendConfirmation = true (TableExtension 50001)
 And the Customer has SendOnRelease = true and EmailConsent = Withdrawn and DoNotEmail = false (TableExtension 50000)
 And Customer.Primary Email is present and valid
 When the Sales Order Status is changed to Released by a user (TriggerSource = Manual)
 Then a new Order Confirmation Log record (Table 50000) SHALL be created with Status = Queued, SalesOrderNo populated, CustomerNo populated, EmailTo set to the customer locale, Attempts = 0 and CreatedTimestamp set
 And the Release transaction SHALL complete without waiting for outbound SMTP call inside the release transaction

OK Cancel

Editing Generated Documents

Every document can be fine-tuned manually: Edit Document Markdown opens an editor with formatting toolbar. Saving creates a new version and flags it as manually edited. The Acceptance Criteria are generated as Gherkin-style scenarios (Given/When/Then), ready for test automation.

Requirement

ANF000001

AI

Actions

Automate

Fewer options

General

No.

ANF000001

Score

85

Round Count

5

Requirement Title

Example: Order confirmation by em

Category

SALES

Archived

Status

Documents Generated

Language Code

ENU

Audit

Created By

DHOEFER

Created At

7/30/2026 2:33 PM

Requirement Description

When a sales order is released, the customer should automatically receive an order confirmation by email. The email should contain the order lines, the expected delivery date and our contact details.

Answer Type

Correct

Answer

Continue (next round)

Rounds

Links

History

Requirement KPIs

Score

85

Progress

5 of 10

QA Rounds

5 (min. 5 required)

Category Coverage

Documents Generated

Document Builder Agent

2 documents selected: Technical Architecture, Acceptance Criteria. Input the requirement, its answered Q&A rounds and the documents already generated as chaining context.

Generate Technical Architecture (1 of 2)

Generate Acceptance Criteria (2 of 2)

Document generation finished: 2 documents created.

Not all document types have been generated yet. Should I generate the remaining ones?

What Estimate

Developer Notes

Release Notes

Cancel Start Generation

Documents

Document Type	Version	Generated At	Tokens	Story Points	Manual Edited
Requirements List	1	7/30/2026 3:04 PM	205	0	
Solution Design	1	7/30/2026 3:38 PM	205	0	
Technical Architecture	1	7/30/2026 3:41 PM	205	0	
Acceptance Criteria	1	7/30/2026 3:42 PM	234	0	

Completing the Document Set

After the final generation run, all seven documents are available in version 1, each with its token consumption; the Effort Estimate additionally carries the estimated story points.

Requirement

ANF000001

AI

Actions

Automate

Fewer options

General

No.

ANF000001

Score

85

Round Count

5

Requirement Title

Example: Order confirmation by em

Category

SALES

Archived

Status

Documents Generated

Language Code

ENU

Audit

Created By

DHOEFER

Created At

7/30/2026 2:33 PM

Requirement Description

When a sales order is released, the customer should automatically receive an order confirmation by email. The email should contain the order lines, the expected delivery date and our contact details.

Answer Type

Correct

Answer

Continue (next round)

Rounds

Links

History

Requirement KPIs

Score

85

Progress

5 of 10

QA Rounds

5 (min. 5 required)

Category Coverage

Documents Generated

Document Builder Agent

Document generation finished: 2 documents created.

2 documents selected: Technical Architecture, Acceptance Criteria. Input the requirement, its answered Q&A rounds and the documents already generated as chaining context.

Generate Technical Architecture (1 of 2)

Generate Acceptance Criteria (2 of 2)

Document generation finished: 2 documents created.

3 documents selected: Effort Estimate, Developer Notes, Release Notes. Input the requirement, its answered Q&A rounds and the documents already generated as chaining context.

Generate Effort Estimate (1 of 3)

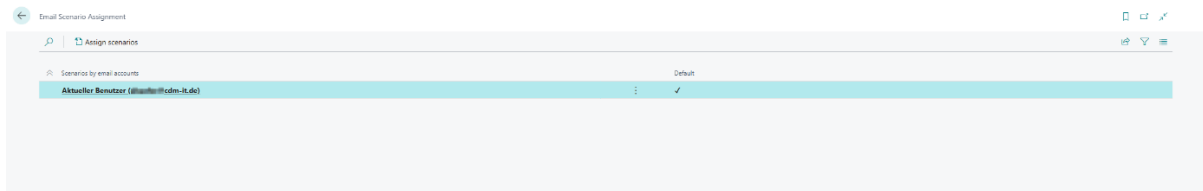
Documents

Document Type	Version	Generated At	Tokens	Story Points	Manual Edited
Requirements List	1	7/30/2026 3:04 PM	205	0	
Solution Design	1	7/30/2026 3:38 PM	205	0	
Technical Architecture	1	7/30/2026 3:41 PM	205	0	
Acceptance Criteria	1	7/30/2026 3:42 PM	234	0	

Sending the Quote Request

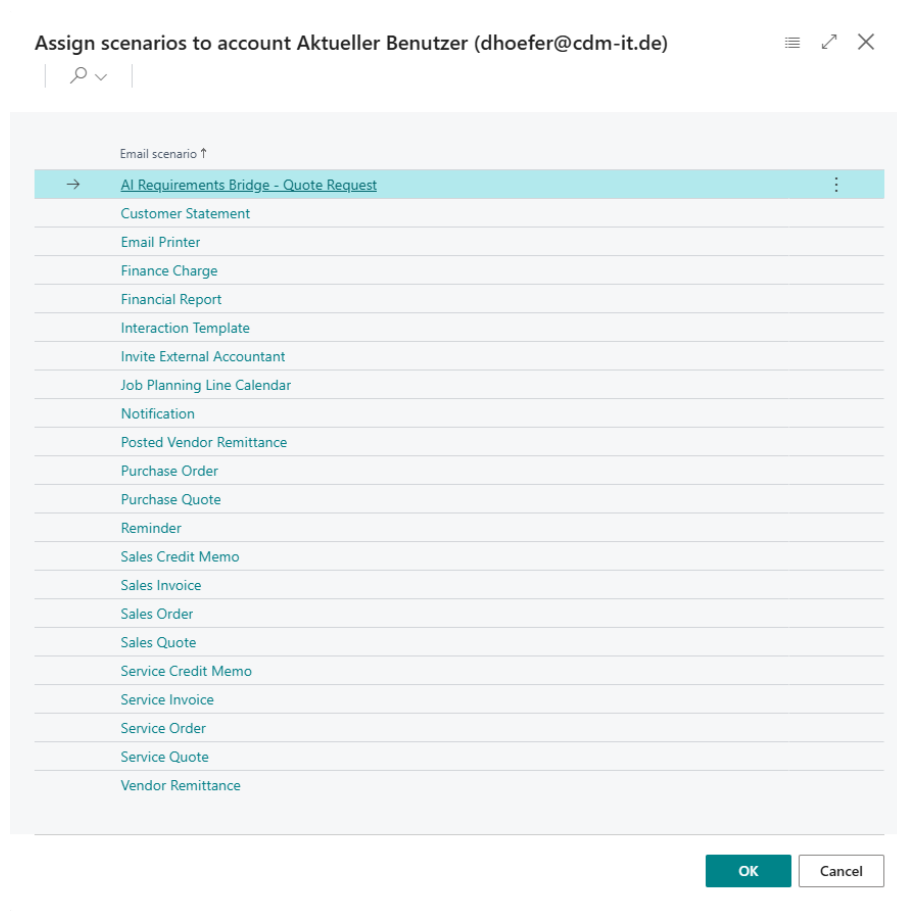
Email Scenario Assignment

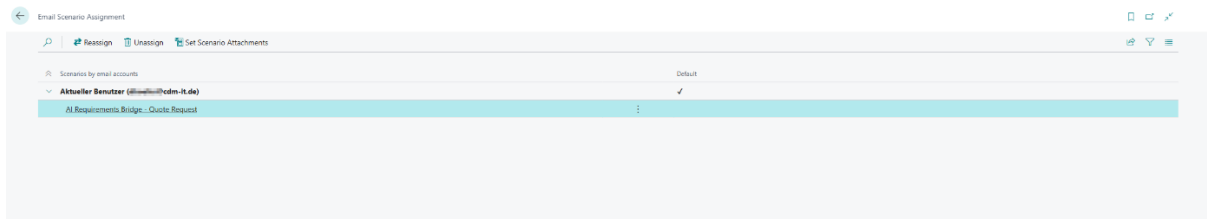
The extension registers its own email scenario "AI Requirements Bridge – Quote Request". Assign it once to the email account that should send quote requests – the standard Business Central email setup applies.



Assignment Steps:

1. Open Email Scenario Assignment and choose Assign scenarios on the desired email account.
2. Select the scenario "AI Requirements Bridge – Quote Request" and confirm with OK.
3. The scenario now appears beneath the account and is used automatically for all quote request emails.





Send Documents by Email

The card action “Send by Email ...” opens the Send Documents by Email page. Choose the recipients via the prepared toggles (cdm-IT and/or partner, plus additional recipients as free text) and review the document selection – all seven documents are preselected with their latest version. With the option “Review in email editor before sending” enabled, the draft opens for a final check.

Requirement ANF000001

Actions: Automate, Fewer options

Start AI Dialog, Generate Documents, **Send by Email...**

General

No.: ANF000001, Score: 85, Round Count: 5

Requirement Title: Example Order confirmation by em, Category: SALES, Archived: ☐

Status: Documents Generated, Language Code: ENJ

Audit

Created By: DHOFER, Created At: 7/30/2025 2:33 PM

Requirement Description

When a sales order is released, the customer should automatically receive an order confirmation by email. The email should contain the order lines, the expected delivery date and our contact details.

Answer Type: Correct, Answer: , Continue (next round)

Rounds

Links

History

Summary

Requirement KPIs

Score: 85, Progress: 100%, QA Rounds: 5 of 10, Category Coverage: 5 (min. 5 required), Status: Documents Generated

Document Builder Agent

Generate Acceptance Criteria (2 of 3), Generate Effort Estimate (1 of 3), Generate Developer Notes (2 of 3), Generate Release Notes (2 of 3)

Documents

Document Type	Version	Generated At	Tokens	Story Points	Status
Requirements List	1	7/30/2025 3:04 PM	205	0	☐
Solution Design	1	7/30/2025 3:38 PM	205	0	☐
Technical Architecture	1	7/30/2025 3:41 PM	205	0	☐
Acceptance Criteria	1	7/30/2025 3:42 PM	234	0	☐
Effort Estimate	1	7/30/2025 3:45 PM	284	21	☐
Developer Notes	1	7/30/2025 3:46 PM	205	0	☐

Send Documents by Email

Edit List, **Send**

Recipients: ☐ To cdm-IT, ☐ To Partner, Additional Recipients:

cdm-IT Email: info@cdm-it.de, Partner Email:

Document Type	Selected	Version (latest)
Requirements List	☒	1
Solution Design	☒	1
Technical Architecture	☒	1
Acceptance Criteria	☒	1
Effort Estimate	☒	1
Developer Notes	☒	1
Release Notes	☒	1

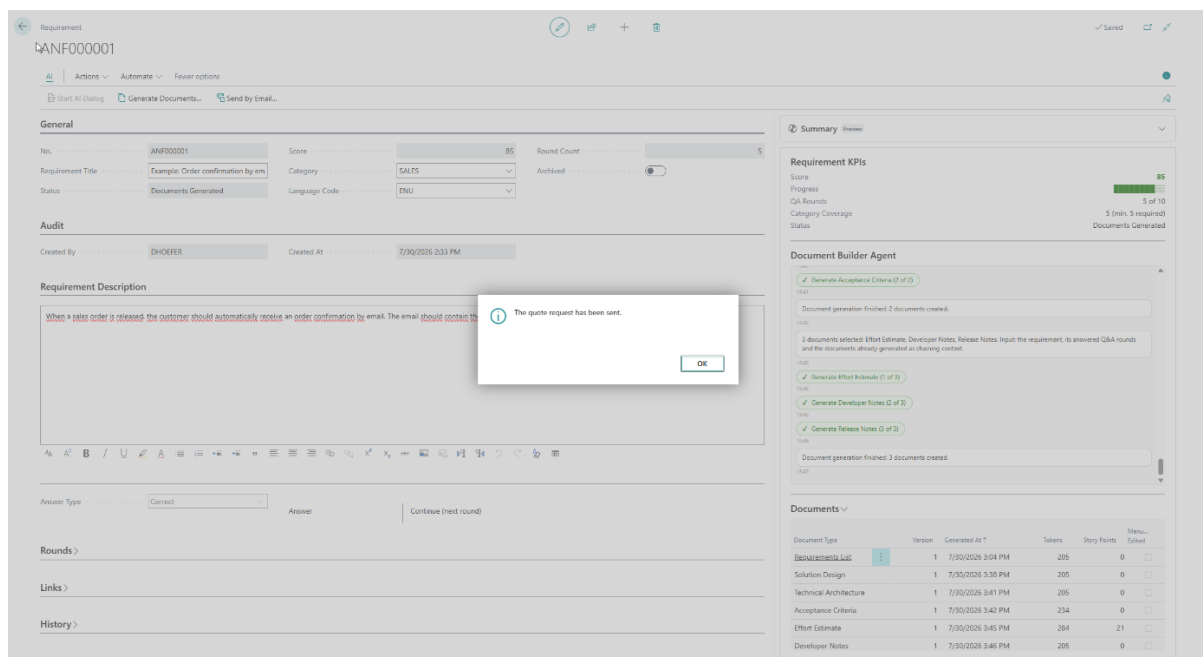
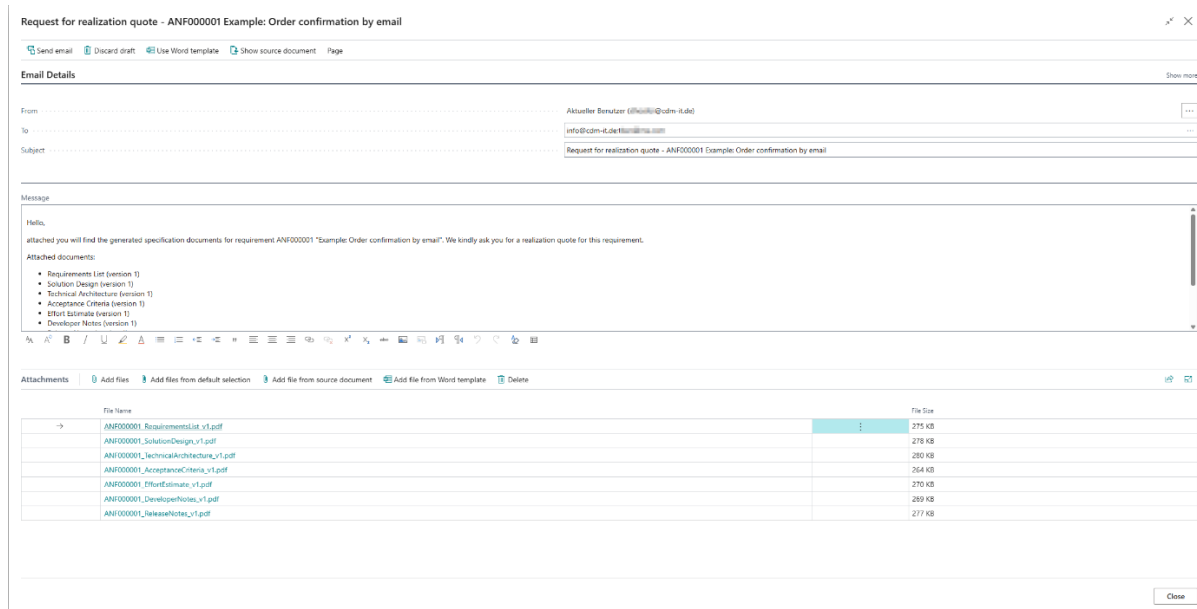
Options

Review in email editor before sending: ☒

Close

The Quote Request Email

The email is generated automatically: the subject "Request for realization quote – ANF000001
Example: Order confirmation by email", a message body listing all attached documents with their versions, and the seven PDFs as attachments (e.g. ANF000001_RequirementsList_v1.pdf). Send email dispatches the request; Business Central confirms with "The quote request has been sent." and the event is recorded in the requirement history.



AI Transparency

AI Requirements Bridge uses generative AI. In line with Microsoft's requirements for Copilot features on AppSource, this section explains what the AI does, how you stay in control, and how your data is handled.

How AI is used

- The Document Builder Agent is powered by the Copilot capability "CDM Requirements Bridge" and runs on the Microsoft Copilot infrastructure of Dynamics 365 Business Central.
- The AI generates the clarification questions of the Q&A dialog, calculates the requirement score, and generates the seven specification document types from the requirement, its answered rounds and previously generated documents.
- With the billing mode Custom Billed, the Document Builder Agent does not use the Microsoft-billed Business Central AI resources but the AI service you configured yourself – Azure OpenAI, OpenAI or Anthropic – under your own contract with that provider.

You stay in control

- The Copilot capability must be explicitly activated by an administrator (assisted setup or the Copilot & agent capabilities page) and can be deactivated at any time.
- The AI never acts on its own: every question requires a human answer, document generation only starts after an explicit user action (Start Generation), and every document can be reviewed, edited and regenerated.
- Nothing is sent automatically – the quote request opens in the email editor for review and is only dispatched when the user chooses Send email.

AI-generated content is marked

- Every generated PDF carries a visible transparency note stating that the text was created with the help of artificial intelligence and should be verified for correctness, completeness and currency before further use.

Limitations

- Generative AI can produce incomplete, ambiguous or incorrect content. Generated documents are drafts that require professional review before they are used as a contractual or implementation basis.
- The requirement score is a quality indicator calculated by the AI – it supports, but does not replace, human judgement.

Data handling and billing

- Prompts contain the requirement data entered by the user, the answered Q&A rounds and already generated documents (chaining context).
- Which of the two paths a prompt takes is decided solely by the AI Billing Mode setting, and the AI Provider Status field on the setup page states the current path at any time.

- With Microsoft Billed, processing takes place within the Business Central Copilot service infrastructure and Microsoft's data commitments for Copilot in Dynamics 365 Business Central apply – customer data is not used to train the underlying foundation models.
- With Custom Billed, the prompts are sent to the provider you configured. The data-protection terms, the data location and the model-training commitments of that provider apply, not Microsoft's – review them before you switch, and choose a region and a contract that match your data-protection requirements.
- API keys are stored encrypted in the isolated storage of the extension, are never displayed again after they are saved and never appear in a document, a log entry or an error message.
- With Microsoft Billed, AI usage is billed through Microsoft Copilot consumption billing configured in the admin center; with Custom Billed, your provider bills you directly. The token consumption per generated document is displayed in the Documents list in both modes.

Summary

In a single, uninterrupted flow inside Business Central, a one-paragraph requirement idea became a complete specification package and a dispatched quote request:

1. Setup in minutes – assisted setup with number series, Copilot activation and score threshold.
2. Score-driven Q&A dialog – the number of rounds is not fixed: the Document Builder Agent keeps asking until the configured score threshold is reached, covering at least five question categories within a maximum of ten rounds. In this walkthrough five rounds were sufficient, raising the score step by step from 0 over 30, 40, 45 and 60 to the threshold of 85.
3. Seven documents – Requirements List, Solution Design, Technical Architecture, Acceptance Criteria, Effort Estimate, Developer Notes and Release Notes, each as Markdown and letterhead PDF, versioned and editable.
4. One quote request – all documents sent as PDF attachments via the standard Business Central email scenario, fully logged in the requirement history.

The result: consistent, high-quality specifications with full traceability – and a quote request in the recipient's inbox without a single media break.

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AI Requirements Bridge is a product of cdm IT & Consulting Services GmbH. This guide describes a prototype walkthrough; features and screens are subject to change.

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