

AI Assistant Capability Guide

AI Assistant – Let AI do the work, so you can focus on growth.



WHAT IF YOU COULD

Let AI handle document verification effortlessly, eliminating manual checks.

Simply describe your task in natural language



The screenshot shows the Dynamics 365 Business Central interface for Sales Orders. A context menu is open over the first row (No. 101001), showing options: Run Assistant, AI Assistant Results, AI Assistant Result Details, and Show in page. A red dashed box highlights the first row and the context menu. A red arrow points from the 'Run Assistant' option to a task input box in the foreground. The input box is titled 'Task' and contains four horizontal grey bars representing text input.

No. ↑	Sell-to Custom	External Document No.	Location Code	Assigned User ID	Document Date	Status
101001	10000				4/2/2024	Open
101002	10000				5/1/2024	Open
101003	30000				4/22/2024	Open
101004	40000				5/13/2024	Open
101005	10000	Y-3	YELLOW		6/1/2023	Open
101006	10000	Y-4	YELLOW		6/1/2023	Open
101007	10000				6/1/2023	Open
101008	10000				6/1/2023	Open
101009	10000				6/1/2023	Open



WHAT IF YOU COULD

Let AI ensure compliance with business rules and document processing regulations—automatically

Sales Order

101001 · Adatum Corporation

Document Check

General

Customer Name	Adatum Corporation	Order Date	4/2/2024
Contact	Robert Townes	Due Date	5/2/2024
Document Date	4/2/2024	Requested Delivery Date	4/3/2024
Posting Date	4/2/2024	External Document No.	
VAT Date	4/2/2024	Status	Open

Lines | Manage | Line | Order

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved
Item	1996-S		ATLANTA Whiteboard, base		12		

Rules for Document

- Horizontal bars representing rules

Subtotal Excl. VAT (GBP) 10,880.40

Inv. Discount Amount Excl. V... 2,176.08

Invoice Discount % 13,056.48

Simply describe your document processing rules in natural language—reduce errors and minimize support requests effortlessly



WHAT IF YOU COULD

Let AI provide insights in natural language, so you don't need to write complex queries or reports.

Dynamics 365 Business Central

CRONUS UK Ltd. | Finance ▾ Cash Management ▾ **Sales** ▾ Purchasing ▾

Customers Logistic Units Blanket Sales Orders Sales Return Orders Posted
< Items Sales Quotes Sales Invoices Reminders Posted
Item Charges Sales Orders Sales Credit Memos Finance Charge Memos Posted

Customers: All ▾ | [Icons] | + New [Icon] Delete Home ▾ New Document ▾

No. ↑	Name	Responsibility Center	Location Code	Geographic Zone Code	De
<u>10000</u>	: Adat				No
20000	Trey				
30000	Sch				
40000					
50000					
C00010					

- Run Assistant
- AI Assistant Results
- Result Details
- Show in page

Search Request

Show me customers who stopped purchasing from us a month ago



WHAT IF YOU COULD

Let AI eliminate costly custom development, adapting Business Central to your processes without extra coding

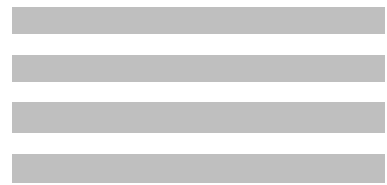
What's the smarter choice?

Extension

designed to implement your client's unique business rules

- Search for developers and manage a team
- Define complex requirements and specifications
- Handle development, debugging, maintenance, and updates
- Invest time and money in custom development

AI Assistant Task



Or simply describe your task in natural language — and let AI do the rest?



How much time do your employees spend creating documents and verifying their accuracy?

What if AI could handle it for you?

AI Assistant transforms document processing by allowing you to define business rules and compliance requirements as **simple text descriptions** directly within Business Central.

No need for manual data verification—just describe your document processing rules in natural language, and the assistant ensures they are applied automatically, reducing errors and saving valuable time.

The screenshot shows the configuration page for an AI Assistant Task named "SALESORDER-01". At the top, there is a navigation bar with a back arrow, the task name, and icons for edit, share, add, and delete. A "Saved" status and share icons are also present. Below the title, there are tabs for "Run Task", "Automate", and "Fewer options".

The "General" section contains the following fields:

- Code:** SALESORDER-01
- Description:** Sales Order Release Compliance
- Enabled:** A toggle switch that is currently turned off.
- Run in Document Card:** A toggle switch that is currently turned on.
- Documents to Process:** A dropdown menu showing "Sales Orders" with a plus icon to the right.

The "Detailed Task Description" section contains a text area with the following content:

Verify whether this sales order complies with the order processing regulations. Assign the status **OK** if the following conditions are met:

1. All items are in stock.
2. The **Manager** field is filled in.
3. If the Department is **REGIONAL**, ensure that no items have the Measurement Code **SERVERS**.
4. If the **Region** is **EUROPE**, confirm that the Currency Code is set to **EUR**.
5. Ensure that there is a prepayment from the customer (an unapplied payment covering the order amount).

At the bottom of the screenshot, a rich text editor toolbar is visible, including icons for bold, italic, underline, link, unlink, and other text formatting options.



How much time do you spend searching for the right data?

What if AI could find the answers instantly?

With AI Assistant, analyzing customers, vendors, products, sales, and purchase documents is effortless. Need to track overdue invoices, identify active suppliers, or monitor current purchases?

Simply ask in natural language—no manual searches, no complex queries—just instant, AI-powered insights.

The screenshot shows the configuration page for an AI Assistant Task named "FINDCUSTOMERS". At the top, there are navigation icons (back, edit, share, add, delete) and a "Saved" status indicator. Below the task name, there are options to "Run Task", "Automate", and "Fewer options".

General

- Code: FINDCUSTOMERS
- Run in Document Card:
- Description: Find Customers
- Documents to Process: Customers
- Enabled:

Detailed Task Description

Find customers who previously made purchases but have not bought anything from us in the last two months.

At the bottom, there is a rich text editor toolbar with various formatting options like bold, italic, underline, link, and list.



Simply describe your task in natural language, and your company will gain:

1. Reduces employee time spent on routine data validation in Business Central.
2. Save valuable employee time on routine data reviews
3. Formalizes document verification and compliance checks in a simple, structured description.
4. Smarter insights without complex queries
5. Lowers costs by eliminating the need for custom reporting systems and, in many cases, avoiding the development of Business Central extensions for business process automation and custom validations.





How It Works

Create AI Assistant Task

1. Select the documents for which the task should be executed.
2. Specify whether the task is **active** or **inactive**.
3. Determine if the task should apply to a **set of documents** or an **individual document card**.

The screenshot shows the Dynamics 365 Business Central interface. At the top, the navigation bar includes 'CRONUS UK Ltd.', 'Finance', 'Cash Management', 'Sales', 'Purchasing', 'TMS', and 'AI Assistant' (highlighted with a red dashed box). Below this, the 'Assistant Tasks' tab is selected (also highlighted with a red dashed box). The main content area displays a 'Good evening!' headline and a list of actions including 'Forwarding Order', 'Freight Order', 'Sales Quote', 'Sales Order', 'Purchase Quote', 'Purchase Order', 'Purchase Invoice', and 'Find entries'. A modal window titled 'AI Assistant Task' is open, showing configuration options for a task named 'Sales Document Compliance'. The 'General' section includes fields for 'Code' (TEST), 'Description' (Sales Document Compliance), and 'Enabled' (checked). It also has a 'Run in Document Card' toggle (unchecked) and a 'Documents to Process' dropdown set to 'Sales Orders'. The 'Detailed Task Description' section is a large empty text area, highlighted with a red dashed box, with a rich text editor toolbar below it. The background shows a sidebar with 'Activities' and a 'Sales This Month' summary of £1,237.



How It Works

Describe your request or task description in natural language

Entity type this task will apply to

Task for validating a single document

AI Assistant Task

TEST

Run Task | Automate | Fewer options

General

Code: TEST

Description: Sales Document Compliance

Enabled:

Run in Document Card:

Documents to Process: Sales Orders

Detailed Task Description

Show me all sales orders containing the item **DESK** that were created but not shipped last week.

Field for task or request description



How It Works

Let's Run

AI Assistant can be launched from any list page containing documents that may have assigned AI tasks. Execution is carried out using the standard Microsoft Copilot interface.

Microsoft Dynamics 365 Business Central

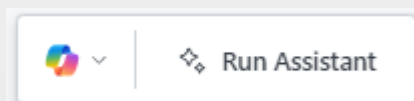
CRONUS UK Ltd. | Finance | Cash Management | Sales | Purchasing | TMS | AI Assistant

Customers | Logistic Units | Blanket Sales Orders | Sales Return Orders | Posted Sales Invoices | PO
< Items | Sales Quotes | Sales Invoices | Reminders | Posted Sales Credit Memos | PO
Item Charges | Sales Orders | Sales Credit Memos | Finance Charge Memos | Posted Sales Return Receipts | Iss

Sales Orders: All | [Link] | [Search] | [New] | Delete | Home | Release | Post... | Print/Send

No. ↑	Sell-to Custom	External Document No.	Location Code	Assigned User ID	Document Date	Sta
101001	10000				4/2/2024	Op
101002	10000				5/1/2024	Op
101003	30000				4/22/2024	Op
101004	40000				5/13/2024	Op
101005	10000	Adatum Corporation	Y-3	YELLOW	6/1/2023	Op
101006	10000	Adatum Corporation	Y-4	YELLOW	6/1/2023	Op
101007	10000	Adatum Corporation	Y-5	YELLOW	6/1/2023	Op
101008	10000	Adatum Corporation	W-1	WHITE	6/1/2023	Op
101009	10000	Adatum Corporation	SVC-1	MAIN	6/1/2023	Op

Run Assistant
AI Assistant Results
AI Assistant Result Details
Show in page

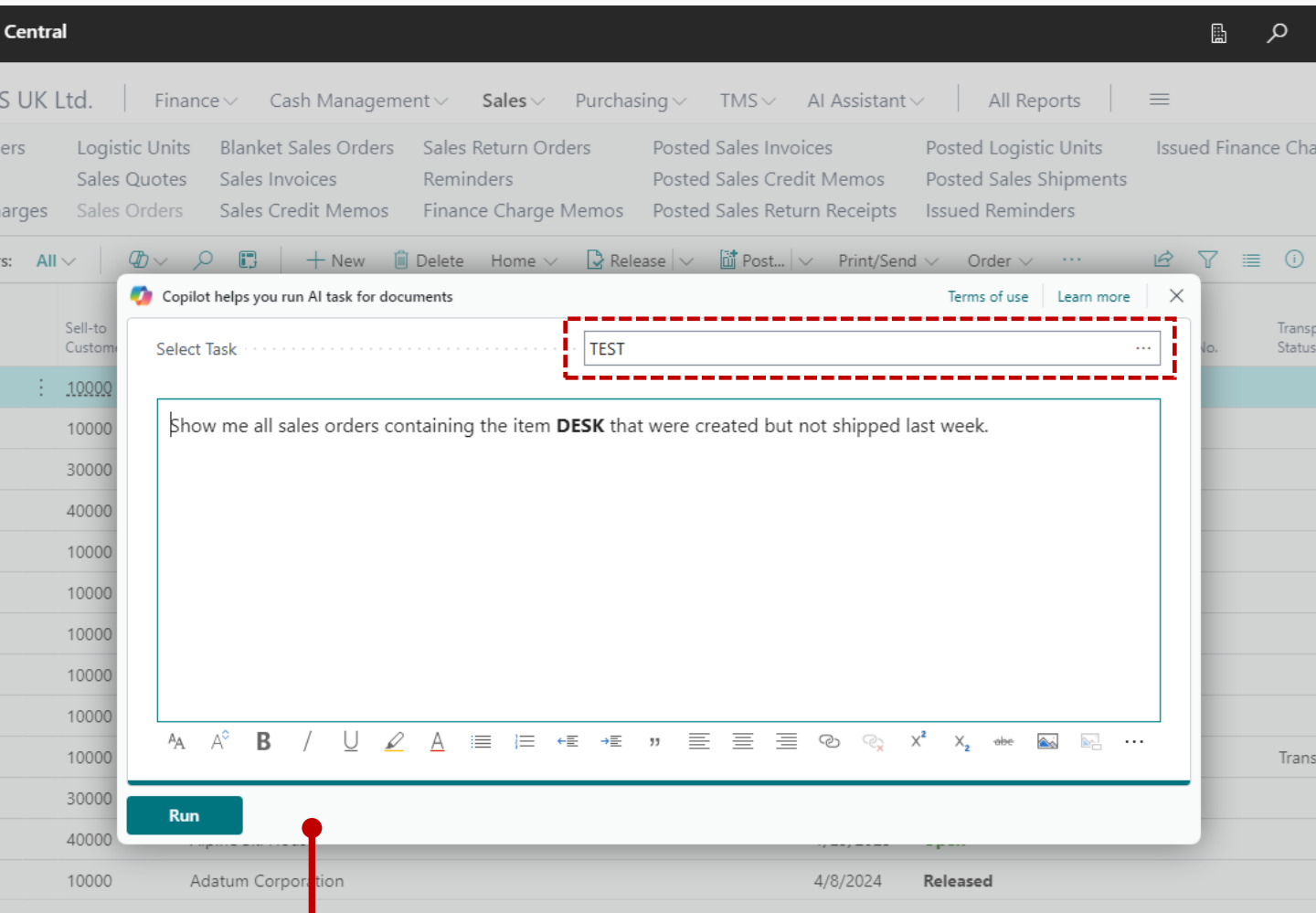




How It Works

Select Task

In the **AI Assistant** window, select the desired task. If needed, you can modify the task text directly before execution.



AI Assistant Task Execution Interface



How It Works

Results. After processing, **AI Assistant** presents results as a summary of documents grouped by status. These statuses indicate whether a document fully meets the task criteria or only partially complies.

You have full control—**customize your own status system and define the criteria directly within the task settings.**

External Document No.	Location Code	Assigned User ID	Document Date	Status	Geographic Zone Code	Route No.
Adatum Corporation			4/8/2024	Released		
School of Fine Art			1/30/2025	Open		
Alpine Ski House			1/29/2025	Open		

Copilot helps you run AI task for documents

AI-generated content may be incorrect

Duration: 1 minute 10 seconds 667 milliseconds

Processed Documents: 13

Success	1
Warning	0
No Status	0

Ok Repeat Cancel

Statuses assigned to documents during AI processing.

Document count for each status.



How It Works

Results.

The **statuses** helps categorize processed documents efficiently. Expanding the **document count** for any status reveals **AI Assistant's** actions for each document.

For every processed document, **AI Assistant** assigns a status and provides a detailed explanation, highlighting why the status was applied—or not—and what needs attention based on the user's task.

The Cost of Processing Your Request

Entry No. ↓	Source ID	Task	Status	Message	Date	Token Quantity	Duration	Task Code ↓	Token Cost
695	101012	Show me al...	OK	The sales order 101012 contains the item DESK and was create...	2/18/2025	4435	1 second 725 ...	TEST	0.0111

The sales order 101012 contains the item DESK and was created last week but not shipped.

Source Document

Task Description
«Show me all sales orders containing the item DESK that were created but not shipped last week»

AI Assistant provides a detailed explanation of why a specific status was assigned, highlighting any discrepancies or issues within the document—so you always know what needs attention.



How It Works

Tasks execution history is never deleted and remains accessible on the list page. You can always track who initiated a task and when.

Dynamics 365 Business Central

CRONUS UK Ltd. | Finance ▾ Cash Management ▾ Sales ▾ Purchasing ▾ TMS ▾ AI ▾

Customers Logistic Units Blanket Sales Orders Sales Return Orders Posted Sales Invoice
Items Sales Quotes Sales Invoices Reminders Posted Sales Credit Memo
Item Charges Sales Orders Sales Credit Memos Finance Charge Memos Posted Sales Return

Sales Orders: All ▾ | [Icons] | + New [Icon] Delete Home ▾ Release ▾ Post... ▾

No. ↑	Sell-to Customer		External Document No.	Location Code	Assigned User ID	D
101001	10000					4
101002	10000					5
101003	30000	SCHOOL OF FINE ART				4
101004	40000	Alpine Ski House				5
101005	10000	Adatum Corporation	Y-3	YELLOW		6
101006	10000	Adatum Corporation	Y-4	YELLOW		6
101007	10000	Adatum Corporation	Y-5	YELLOW		6
101008	10000	Adatum Corporation	W-1	WHITE		6

- Run Assistant
- AI Assistant Results
- AI Assistant Result Details
- Show in page

AI Task Entries ✓ Saved [Icons]

[Icons] | Manage [Icons]

Started At	Task Code	Description	Processed Documents	Success	Warning	No Status	User
→ 2/18/2025 10:04...	TEST	Show me all sales orders contain...	13	1	0	0	ADMIN
2/6/2025 2:15 PM	LASWEEKE	Last Week	12	1	0	0	ADMIN
2/6/2025 1:26 AM	DESK ITEM	Orders with DESK	10	3	0	0	ADMIN



How It Works

Easily access the task execution history for a specific document.

History of the previous runs always available in list page.

Dynamics 365 Business Central

CRONUS UK Ltd. | Finance ▾ Cash Management ▾ **Sales** ▾ Purchasing ▾ TMS ▾ AI ▾

Customers Logistic Units Blanket Sales Orders Sales Return Orders Posted Sales Invoice
Items Sales Quotes Sales Invoices Reminders Posted Sales Credit I
Item Charges Sales Orders Sales Credit Memos Finance Charge Memos Posted Sales Return

Sales Orders: All ▾ | [Link] ▾ [Search] [Print] | + New [Delete] Home ▾ [Release] ▾ [Post...] ▾

No. ↑	Sell-to Custom	External Document No.	Location Code	Assigned User ID	D
101001	10000				4
101002	10000				5
101003	30000				4
101004	40000				5
101005	10000	Adatum Corporation	Y-3	YELLOW	6
101006	10000	Adatum Corporation	Y-4	YELLOW	6
101007	10000	Adatum Corporation	Y-5	YELLOW	6

- Run Assistant
- AI Assistant Results
- AI Assistant Result Details
- Show in page

← AI Task Detailed Entries [Filter] [Print]

[Search] [Print] | Manage [Link] [Filter]

Entry No. ↓	Source ID ▾	Task	Stat...	Message	Date	Token Quantity	Du
684	101001	Show me al...		The request is not applicable to the provided sales document ...	2/18/2025	3004	3
174	101001	Warni...		The order was not placed last week. The order date is 2024-04...		0	7
164	101001	OK		The order meets the criteria: it is related to April-May 2024, is ...		0	3



Security & Scalability

The security and scalability of the solution are ensured by Microsoft's infrastructure. Key points:

- Data from **Business Central** remains within the company's Microsoft tenant and does not leave its boundaries.
- Only GPT models deployed within the customer's Azure tenant are used.
- The solution supports configuring primary and backup Azure services, enabling seamless failover and automatic switching between them.
- Your Business Central data is not transmitted anywhere outside the scope of your Microsoft tenant.

Company Tenant

Business Central



AI Assistant

Azure OpenAI Service

Azure OpenAI Service

Azure OpenAI Service

Azure OpenAI Service

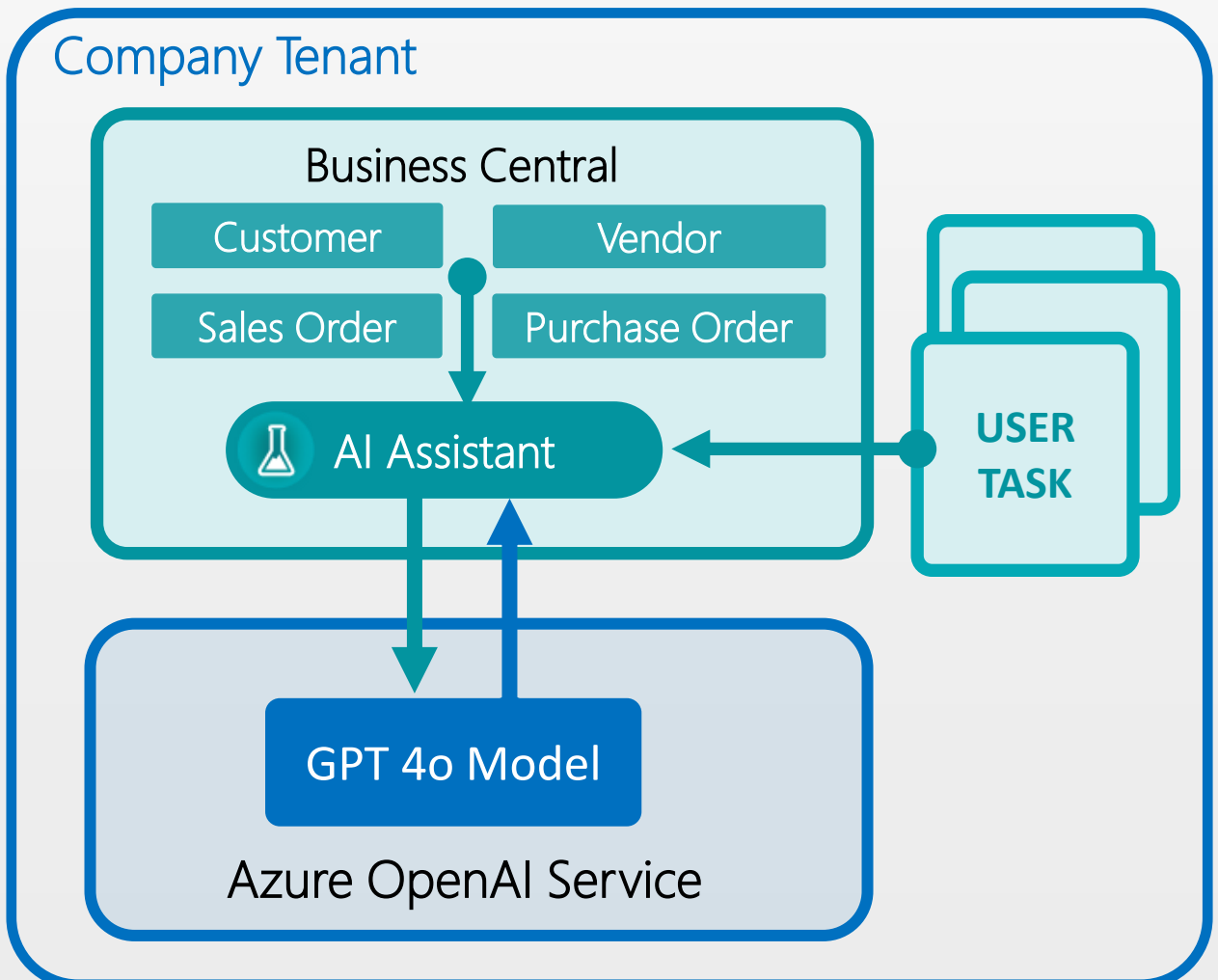


Security & Data

AI Assistant seamlessly integrates with your Business Central data, providing direct access to master records, documents, and field values.

It prepares the relevant data and, along with your request, sends it to **GPT**, ensuring accurate and context-aware responses.

AI Assistant **does not execute actions or modify any data** in the system—it simply provides insights and recommendations, keeping you in full control.





Deployment & Support

The deployment process consists of several key steps:

1. Installing the AI Assistant extension in Business Central from **AppSource**.
2. Purchasing AI Assistant licenses only for users who will be actively using the solution.
3. Deploying **Azure OpenAI** services and GPT models in the Azure Portal.
4. Extensions-Lab provides integration support, enabling AI Assistant to work seamlessly with data from other extensions.

A detailed guide on this process can be found in the document **AI.Assistant.SetupAndSettings.pdf**.



Thank You

AI Assistant on AppSource