

AI With Business Central And Beyond

Quick Question?



M365 Copilot Licensing

How many of you currently have Microsoft Copilot licensing or have been exposed to it through your organization?

Show of hands →



ChatGPT, Claude, or Other LLM's?

How many of you are using are actively using ChatGPT, Claude, or another large language model in your organization?

Show of hands →

Top 10 Reasons Influencing an LLM Choice

1. Output accuracy and reasoning quality
2. Data security and privacy controls
3. Compliance and auditability
4. Integration with existing infrastructure
5. Cost structure (per-token, subscription, or included in existing licensing)
6. Latency and responsiveness
7. Ease of use for non-technical staff
8. Customization and fine-tuning capability
9. Vendor support and accountability
10. Scalability as usage grows

Source: Atomicwork, Macro4, EMA — 2024/2025

Who Is Governing Your AI?

Outside Your Walls



Data leaves your environment

When your team pastes a vendor invoice or aging report into ChatGPT, that data has left your security perimeter.



No audit trail

Consumer AI tools log nothing. No record of what was submitted, by whom, or what came back.

Inside the Microsoft Ecosystem



Your security perimeter stays intact

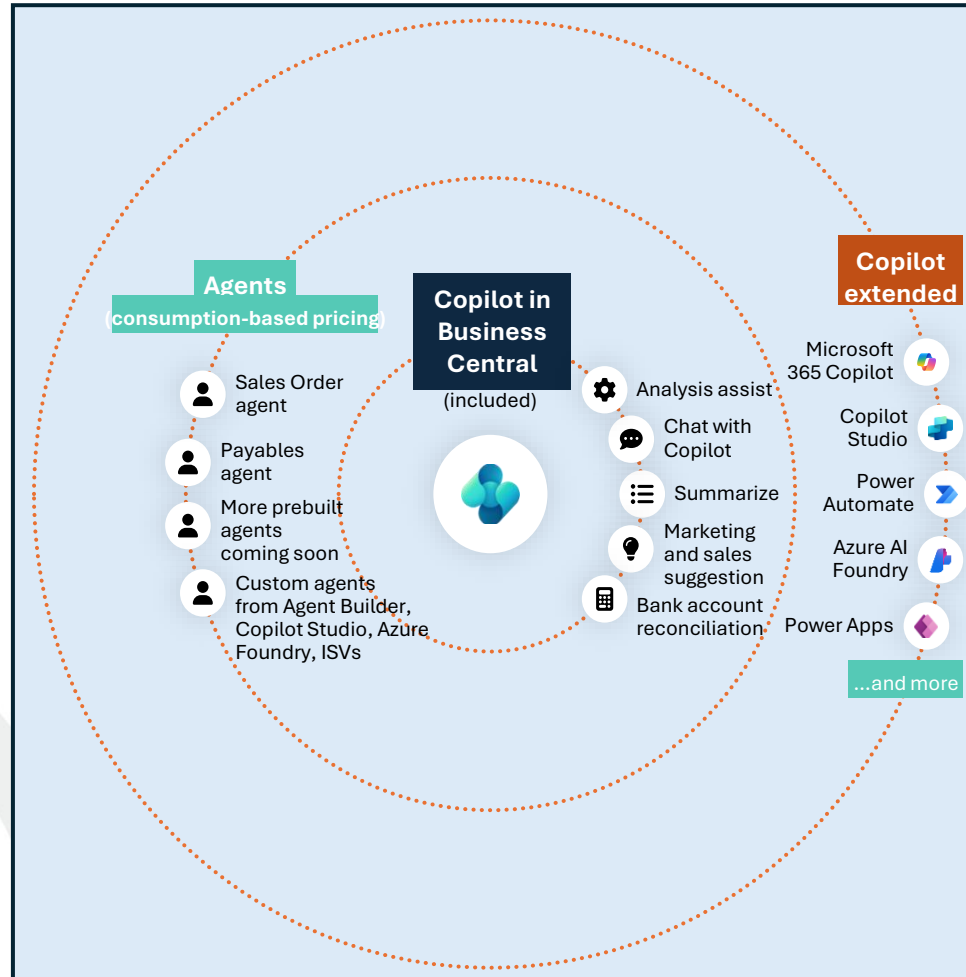
Copilot runs inside your Microsoft 365 tenant. Same governance and permissions you already manage. No new risk surface.



Finance reclaims its time

Less time producing information. More time interpreting it, advising leadership, and driving decisions that matter.

The AI Ecosystem with Business Central



- **Copilot in Business Central:** Enhance personal productivity.
- **Agents:** Improve business productivity with prebuilt and custom agents.
- **Copilot extended:** Connect to the workflows and AI tools in the applications you use every day, and build synergies to save time and uncover new insights

AI In Action

Chi Cheong Ho

The Big Shift: From quick AI helper to full task delegation

The Brain Behind It: Work IQ — your company's shared memory

Your toolkit: Chat, Cowork, Scout & Studio — quick decision guide

Live Demo: Copilot Cowork handling real finance work

Looking Ahead: Microsoft Scout — your always-on desktop helper

Traditional Copilot: (Chat)

- Like asking a smart colleague a quick question in one app.
- You still do most of the legwork — switching windows and piecing things together.

Next-Gen Agents: (Cowork & Scout)

- You give them a full goal and walk away.
- They handle the entire job across apps and deliver finished work.

Quietly connects emails, documents, spreadsheets, meetings, and processes so the AI truly “gets” how we work here

Why it matters:

- Remembers context across days (no more repeating the same explanations)
- Powers big background routines so you don't have to babysit them
- Everything stays securely inside your company — nothing leaks out

What are the 4 tools?

Copilot Chat

Quick help on the spot

Gives you answers based on your company's own files and data (not generic internet knowledge)



Copilot Cowork

Delegate full projects across apps & email

You describe the outcome you want and it handles the entire process — even if you close your laptop



Microsoft Scout

Works directly on your computer

Can run tasks in the background (including overnight) and interact with local files or external websites



Copilot Studio

Build repeatable agents for the whole team

Creates consistent, governed processes so the entire team follows the same steps



When to Use Each One?

Copilot Chat

Best for: Fast questions or summaries inside one app

- Explain accounting rules instantly
- Summarize long compliance memos
- Answer “What does this transaction code mean?”



Copilot Cowork

Best for: End-to-end tasks that span multiple tools.

- Compile quarterly variances → build deck → draft email
- Reconcile bank feeds with anomaly alerts
- Create complete month-end reporting package



Microsoft Scout

Best for: Local files, folders, external websites & scripts.

- Organize and clean Downloads folder
- Daily automated pulls from vendor portals
- Overnight three-way invoice matching



Copilot Studio

Best for: IT to create standardized processes everyone uses.

- Standardized vendor onboarding agent
- Automated expense report review process
- Monthly close checklist for the finance team



Cloud Power - Copilot Cowork

- Runs in the secure Microsoft 365 cloud
- You can hand off a big task, close your laptop, and it keeps working
- Perfect for shared files, emails, and company-wide data

Desktop Power - Microsoft Scout

- Runs right on your computer
- Handles local folders, scripts, and external browser portals
- Great when the work touches things outside pure cloud systems

The Scenario: Handling 50+ Critical Infrastructure Support Emails

- **Triage & Summary** — Cowork categorize incident emails and drafts an executive summary to Gord, grouped by severity.
- **Enrichment** — Creates an Excel tracking sheet and rewrites the summary in your personal style using skills.


Favorites


- Inbox
- Drafts [74]
- For Follow Up
- Unread Mail 11
- Notes [349]
- chi_cheng@joesoftwa...
- Archive
- Clutter
- Inbox
- LnL 2026 8**


LnL 2026 ☆		Select	Jump to	Filter	By Date
From	Subject				Received ↓
AS Alan Steiner	REQ FOR SUPPORT - 420124 - Quarterly Tax Filing Submitted Successfully	Severity: Low System: Tax Compliance Ticket: 420124 Q2 s...			2026-06-14
AS Alan Steiner	REQ FOR SUPPORT - 420123 - Cycle Count Schedule - Warehouse 1 This Week	Severity: Low System: Inventory Ticket: 420123 Remi...			2026-06-14
AS Alan Steiner	REQ FOR SUPPORT - 420122 - Scheduled Maintenance Window Completed Successfully	Severity: Low System: BC Database Ticket: 4...			2026-06-14
AS Alan Steiner	REQ FOR SUPPORT - 420121 - Expense Policy Reminder - Q2 Travel Guidelines	Severity: Low System: Expense Management Ticket: ...			2026-06-14
AS Alan Steiner	REQ FOR SUPPORT - 420120 - New Vendor Onboarding Completed - Fabrikam Logistics	Severity: Low System: Vendor Management...			2026-06-14
AS Alan Steiner	REQ FOR SUPPORT - 420119 - 3 Customer Payments Received - Auto-Applied	Severity: Low System: AR Collections Ticket: 420119 ...			2026-06-14
AS Alan Steiner	REQ FOR SUPPORT - 420118 - Monthly Financial Package Ready for Review	Severity: Low System: Reporting Ticket: 420118 The stan...			2026-06-14
<input type="checkbox"/> Alan Steiner	REQ FOR SUPPORT - 420117 - Operating Account Balance Below Target Threshold	Severity: Medium System: Cash Management Tic...			2026-06-14
AS Alan Steiner	REQ FOR SUPPORT - 420116 - 3 Assets Pending Disposal Approval	Severity: Medium System: Fixed Assets Ticket: 420116 3 fully dep...			2026-06-14
AS Alan Steiner	REQ FOR SUPPORT - 420115 - Intercompany Balances Out of Sync - 2 Entities	Severity: Medium System: Intercompany Ticket: 420...			2026-06-14
AS Alan Steiner	REQ FOR SUPPORT - 420114 - 4 Vendor W-9 Forms Expiring This Month	Severity: Medium System: Vendor Management Ticket: 42...			2026-06-14
AS Alan Steiner	REQ FOR SUPPORT - 420113 - Marketing Dept Approaching Budget Threshold	Severity: Medium System: Budget Management Tick...			2026-06-14
<input type="checkbox"/> Alan Steiner	REQ FOR SUPPORT - 420112 - Sales Tax Rate Update Required - 2 Jurisdictions	Severity: Medium System: Tax Compliance Ticket: 42...			2026-06-14
AS Alan Steiner	REQ FOR SUPPORT - 420111 - OCR Confidence Low on 6 Invoices - Manual Review Needed	Severity: Medium System: AP Invoice Pr...			2026-06-14


Chi Cheong Ho


My files > Documents > Cowork > skills > incident-summary-notification

 Home


 My files

 Shared

 Favorites

 Name ▾

Modified ↓ ▾

 SKILL.md

Monday at 03:18

- An autonomous helper that runs on your computer with its own secure login
- Keeps working in the background even without constant prompts

High-Value Finance Scenarios:

- Continuous bank feed auditing with instant anomaly alerts
- Overnight three-way invoice matching and reconciliation
- Daily automated pulls from vendor portals straight into your folders

Frees you to focus on insights instead of data chasing.

Copilot Cowork

- Requires Microsoft 365 Copilot (~\$42/user/month) AND
- As of July 1, 2026: Copilot Credits
 - Pay as you go or \$0.01 per Credit
 - Prepaid (P3)
 - Credit usage based on task complexity

Complexity	Credit Usage
Light	100 – 300
Medium	400 -

Microsoft Scout

- Currently available through Frontier / early adopter programs
- Requires Microsoft 365 Copilot(~\$42/user/month) AND Github Copilot Business (USD \$19/user/month) or Enterprise License (USD \$39/user/month).
- Monthly usage up to monthly license cost then USD \$0.04 per request afterwards
- M365 E7 Frontier Suite – includes M365 copilot license (\$136/user/month)

Key Takeaways & Your Next Step

These tools work **better together** — start with Cowork for most cross-app work

Shift from assistance to delegation = real time back in your day

Scout adds powerful local + external automation

Action Item: Pick one recurring task this week and try delegating it with Cowork

The AI Reality Check

65% of workers fear falling behind if they don't adapt to AI quickly

45% say it feels safer to focus on current goals than to redesign how they work

26% say their leadership is clearly and consistently aligned on AI

58% of AI users are producing work they couldn't have done a year ago

The gap isn't the tools. It's in whether organizations are built to use them

Source: Microsoft 2026 Work Trend Index – 20,000 workers across 10 countries

Where Is AI Getting Implemented?

MARKETING: LEAD GEN & BIZ DEV
SALES & CONVERSION
ADMIN
CUSTOMER SERVICE
HR & RECRUITING
ASSET CREATION
OPERATION OPTIMIZATION
FINANCE & ACCOUNTING
LEGAL & COMPLIANCE
IT & SECURITY
R&D & INNOVATION
LEADERSHIP & CULTURE BUILDING








What Type of AI Work Can be Done?

- AI Readiness Assessments
- AI Strategy & Roadmaps
- Data Organization & Knowledge Management
- Workflow & Process Automation
- Custom GPT Development
- AI Chatbots & Customer Service Agents
- Virtual Avatars & AI Receptionists
- Sales & Marketing Automation
- Employee Training & AI Adoption
- AI Governance & Compliance
- Dashboarding & Business Intelligence
- Team Workshops







Where Could AI Help Your Organization?

The Rule of 5: If your team does a function 5 or more times a month, it is worth considering if AI can help.

Finance & Accounting

-  Bank Reconciliation
-  Invoice Processing & Matching
-  AR Collections Follow-up
-  Variance Reporting
-  Journal Entry Creation
-  Expense Report Review
-  Cash Flow Reporting

Operations & Organization

-  Customer Inquiry Responses
-  Report Generation & Distribution
-  Data Entry & System Updates
-  Meeting Summaries & Follow-ups
-  Contract & Document Review
-  Scheduling & Resource Allocation

ASSESSMENT(S) (ABOUT 2-4 HOURS)

1. FUTURE READY ASSESSMENT

CURRENT TECH SITUATION

DATA CAPTURE SITUATION

TEAM ADOPTION CAPABILITY

2. AI OPPORTUNITY ASSESSMENT

WHERE AI CAN BENEFIT THE MOST

WHAT WORKFLOWS COULD BE AI-IFIED

WHAT AI COMPETENCIES EXIST

Ready to Future Proof Your Company



<https://tinyurl.com/Joesoftware-AI-Services>

BOOK A COMPLIMENTARY CONVERSATION