

Introducing: Bank account reconciliation assistance with Copilot



Agenda

- Copilot in action
- Getting started
- Tips and tricks

Dynamics 365 Copilot

Dynamics 365 Copilot

In Business Central:
Marketing text suggestions

**Introducing:
Bank account reconciliation
assistance with Copilot**



Introducing: Bank account reconciliation assistance with Copilot

Public Preview



What is bank account reconciliation?

Demo

Good to know

Preview availability

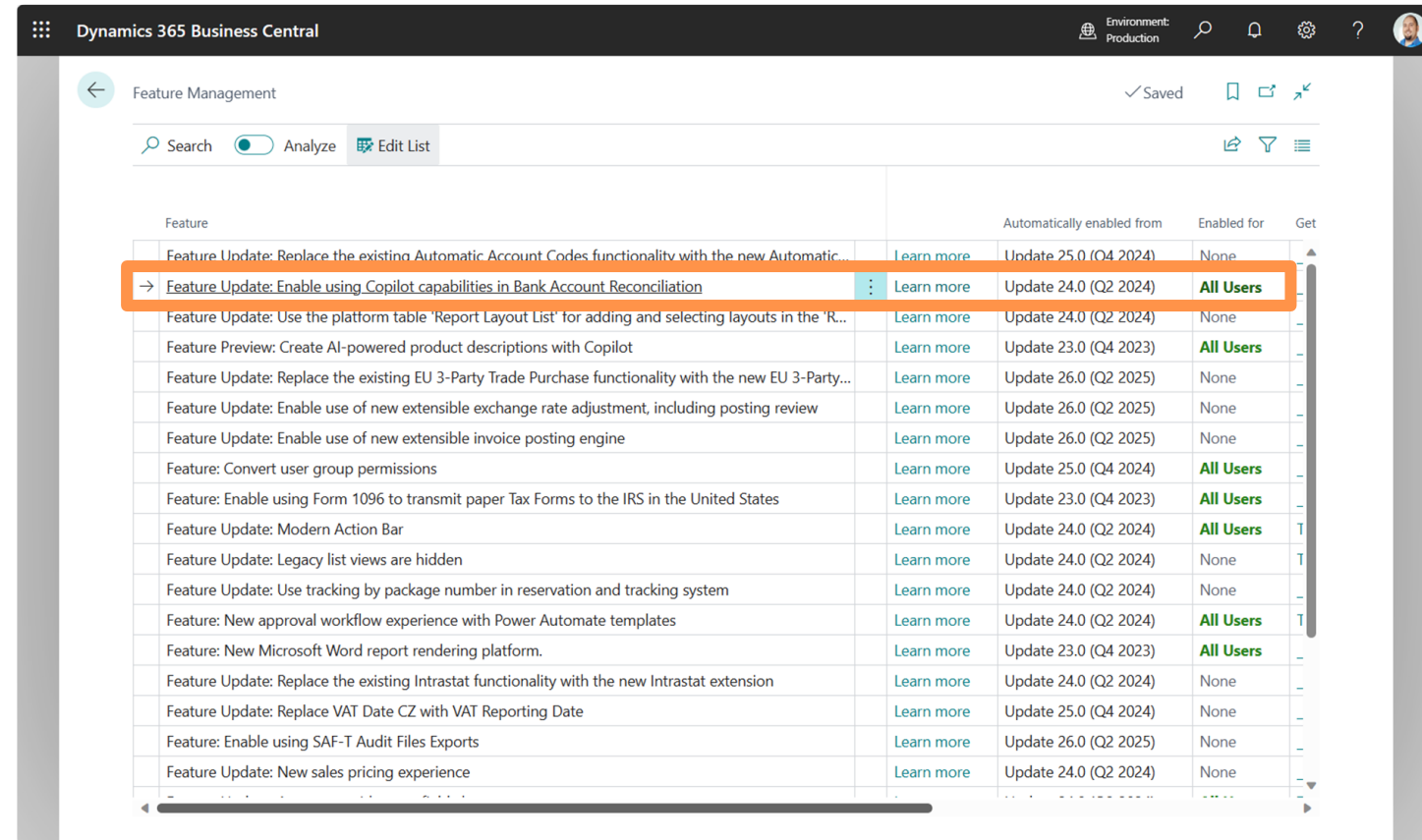
Release	Rolling out with minor updates in Wave 2 (November 2023 – March 2024)
Deployment types	Business Central online
Country/Region	All country localizations
Language	All Business Central languages*

Easier to demo

Upgrading from an earlier version?

Enable for all users from Feature Management page

Feature will be automatically enabled from Update 24.0



Dynamics 365 Business Central

Environment: Production

Feature Management

Search Analyze Edit List

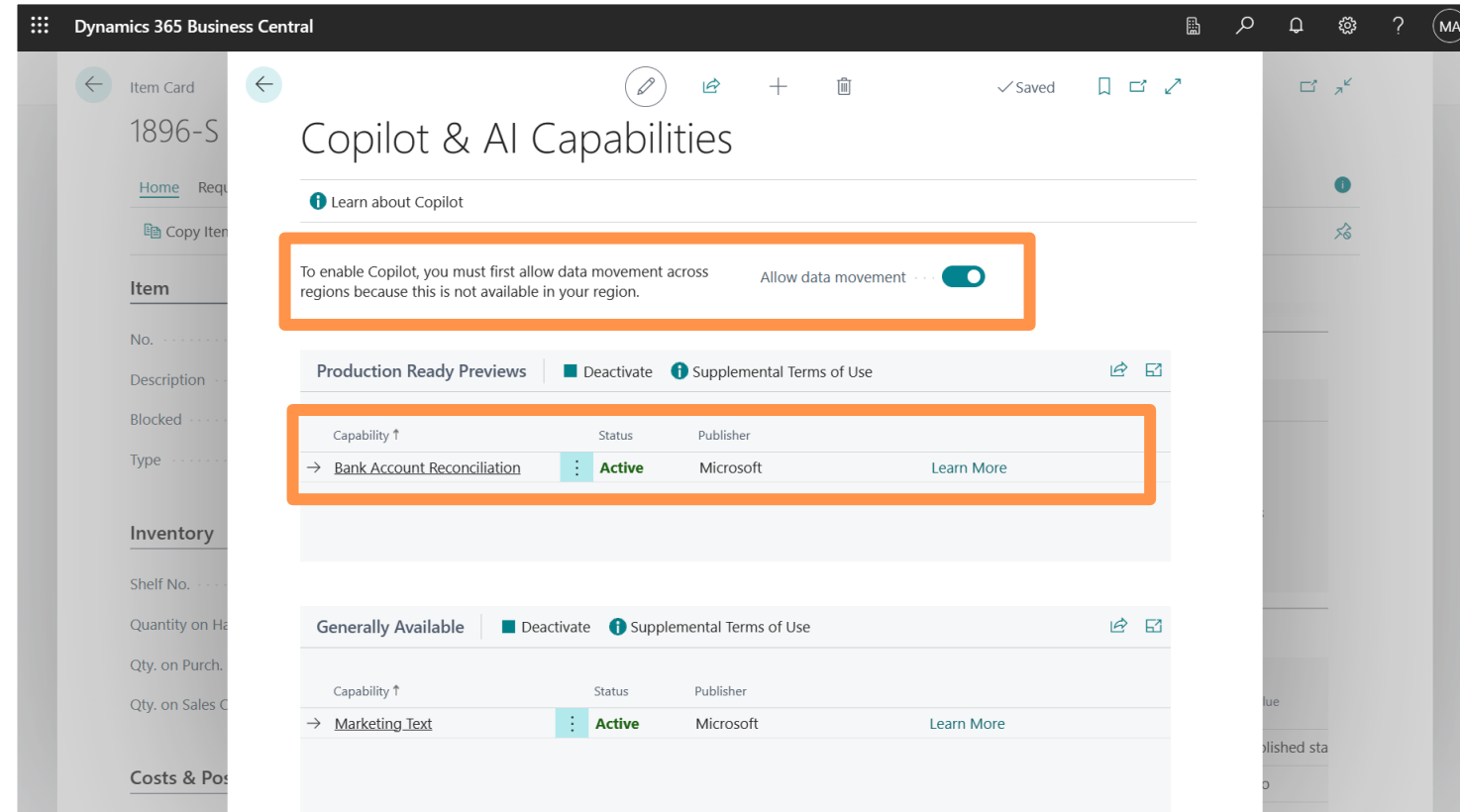
Feature		Automatically enabled from	Enabled for	Get
Feature Update: Replace the existing Automatic Account Codes functionality with the new Automatic...	Learn more	Update 25.0 (Q4 2024)	None	
→ Feature Update: Enable using Copilot capabilities in Bank Account Reconciliation	Learn more	Update 24.0 (Q2 2024)	All Users	
Feature Update: Use the platform table 'Report Layout List' for adding and selecting layouts in the 'R...	Learn more	Update 24.0 (Q2 2024)	None	
Feature Preview: Create AI-powered product descriptions with Copilot	Learn more	Update 23.0 (Q4 2023)	All Users	
Feature Update: Replace the existing EU 3-Party Trade Purchase functionality with the new EU 3-Party...	Learn more	Update 26.0 (Q2 2025)	None	
Feature Update: Enable use of new extensible exchange rate adjustment, including posting review	Learn more	Update 26.0 (Q2 2025)	None	
Feature Update: Enable use of new extensible invoice posting engine	Learn more	Update 26.0 (Q2 2025)	None	
Feature: Convert user group permissions	Learn more	Update 25.0 (Q4 2024)	All Users	
Feature: Enable using Form 1096 to transmit paper Tax Forms to the IRS in the United States	Learn more	Update 23.0 (Q4 2023)	All Users	
Feature Update: Modern Action Bar	Learn more	Update 24.0 (Q2 2024)	All Users	T
Feature Update: Legacy list views are hidden	Learn more	Update 24.0 (Q2 2024)	None	T
Feature Update: Use tracking by package number in reservation and tracking system	Learn more	Update 24.0 (Q2 2024)	None	
Feature: New approval workflow experience with Power Automate templates	Learn more	Update 24.0 (Q2 2024)	All Users	T
Feature: New Microsoft Word report rendering platform.	Learn more	Update 23.0 (Q4 2023)	All Users	
Feature Update: Replace the existing Intrastat functionality with the new Intrastat extension	Learn more	Update 24.0 (Q2 2024)	None	
Feature Update: Replace VAT Date CZ with VAT Reporting Date	Learn more	Update 25.0 (Q4 2024)	None	
Feature: Enable using SAF-T Audit Files Exports	Learn more	Update 26.0 (Q2 2025)	None	
Feature Update: New sales pricing experience	Learn more	Update 24.0 (Q2 2024)	None	

Make sure you're connected

New *Copilot and AI Capabilities* page for administration

Bank Account Reconciliation must be Active

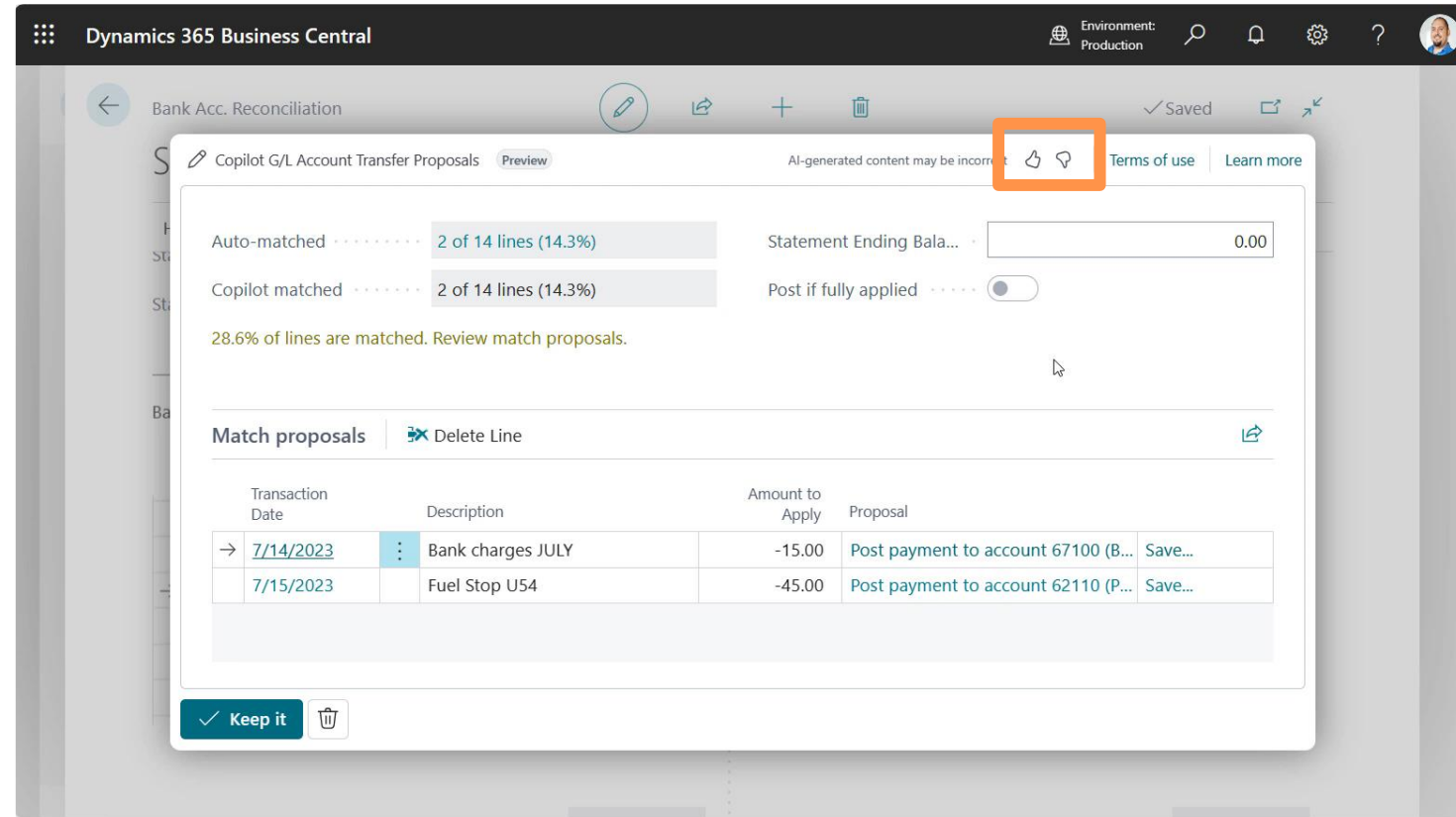
In some countries, admins must consent to Business Central connecting to Azure OpenAI Service outside their region



Providing feedback

Like or dislike any suggestions

Thanks for helping to improve Business Central!



Summary

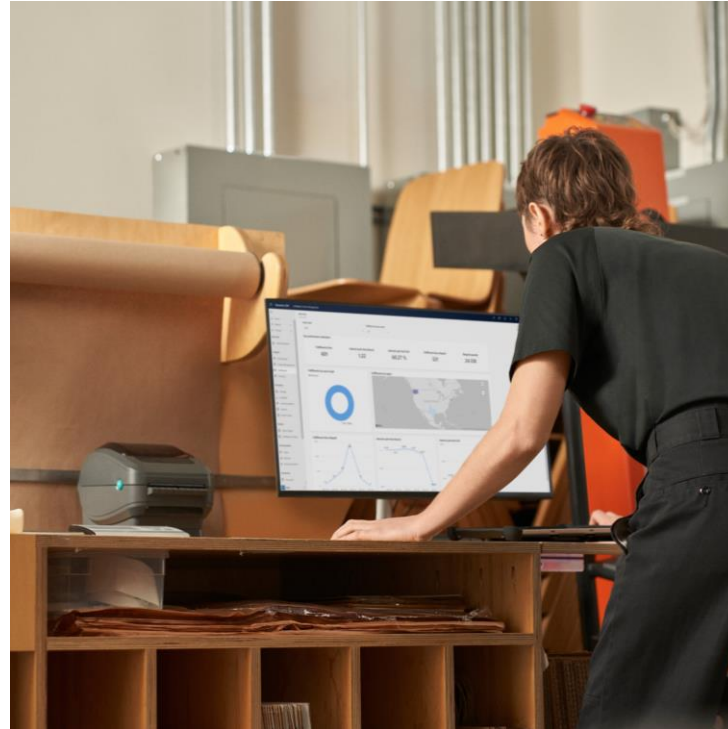
- New capability, in Preview
- Available with wave 2 minor updates
- May require one-time opt-in from Copilot admin page
- Upgraders enable from Feature Management



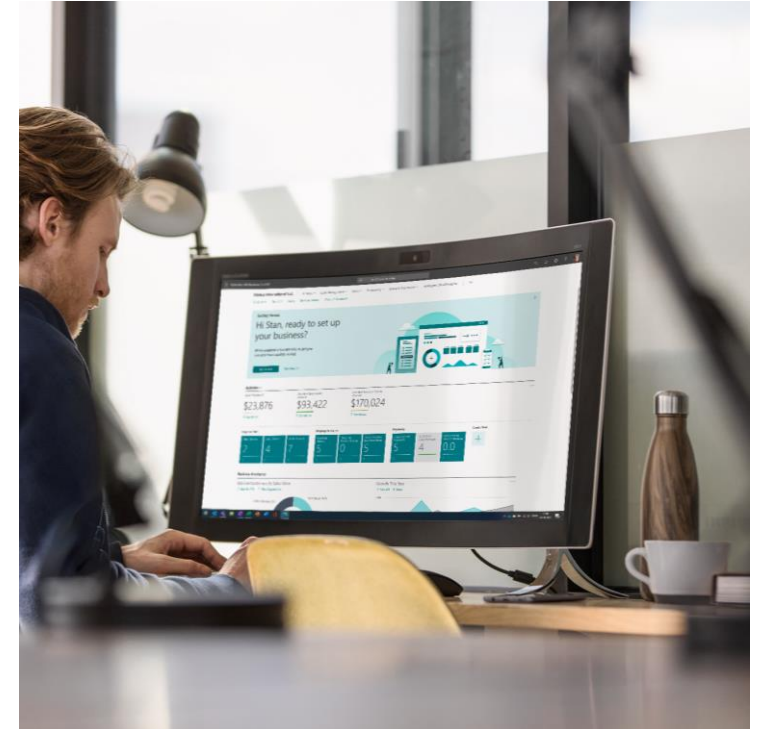
Watch other relevant launch event sessions



Designing and developing
generative AI experiences for
your extensions



What's new:
Marketing text suggestions



What's new:
Fixed & variable G/L allocations

General Business Central resources, **learn more!**



Have a question?
aka.ms/BCYammer



Join the conversation
twitter.com/MSDyn365BC



Looking for resources?
aka.ms/BCAll



Submit your ideas
aka.ms/BCIdeas



Join the office hours
aka.ms/BCOfficeHours

Copilot and AI discussion
<https://go.microsoft.com/fwlink/?linkid=2229283>

Thank you