



CHECKLIST

"Go-Live" with Copilot in Business Central

Here's a quick checklist you can use to ensure you've covered the essentials before rolling out:

- ☐ Confirm Business Central Online deployment and licensing.
- ☐ Verify admin user has necessary permissions.
- ☐ Check region/geography compatibility (Azure OpenAI vs Business Central).
- ☐ Go to "Copilot & agent capabilities" page and enable desired features.
- ☐ Grant access/permissions to initial user group.
- ☐ Define data governance and review process for AI outputs.
- ☐ Train initial users on how to use and prompt Copilot.
- ☐ Set up monitoring/telemetry for usage and outcomes.
- ☐ Review early feedback and iterate prompts/capabilities.
- ☐ Plan phased rollout to wider user base.
- ☐ Keep track of Microsoft release wave updates for Copilot and plan adoption.

Ready to empower your teams with Copilot in Business Central?

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