



# Copilot for SAP Business One

## Meet your AI-powered assistant.

Harness the power of AI with Copilot, an intelligent productivity assistant that helps you work smarter, gain clearer insights, and unlock more value from SAP Business One. Available exclusively from Vision33.

# Harness the Power of AI With Copilot for SAP Business One

AI is reshaping how people work—making data more accessible, driving deeper insights, and boosting productivity.

Now, SAP Business One users can tap into this potential with Copilot, an AI-powered productivity assistant that simplifies complex operations through a friendly chat interface, intuitive natural language prompts, agentic AI, and automation.

**Powerful digital assistants called Smart Agents work behind the scenes to answer questions and perform tasks, such as:**

- Getting data in and out of SAP Business One and third-party apps
- Creating new queries, reports, documents, or tasks instantly
- Executing multi-step processes and automation

Each Smart Agent specialises in a functional area (e.g., sales, purchasing, projects, or third-party applications).



# Better Together: SAP Business One + Copilot

SAP Business One is already a powerhouse ERP solution. Copilot takes it to the next level.

- **Work faster and smarter**

Ask questions and initiate tasks using conversational language in your native tongue

- **Unlock deeper insights**

Generate or modify query reports to drive powerful insights when you need them most

- **Work with no training**

Skip complicated menus and navigation and use a single chat-style interface to complete tasks

- **Do more with SAP Business One**

Copilot's tight integration with SAP Business One lets you do more and maximise your ERP solution's value

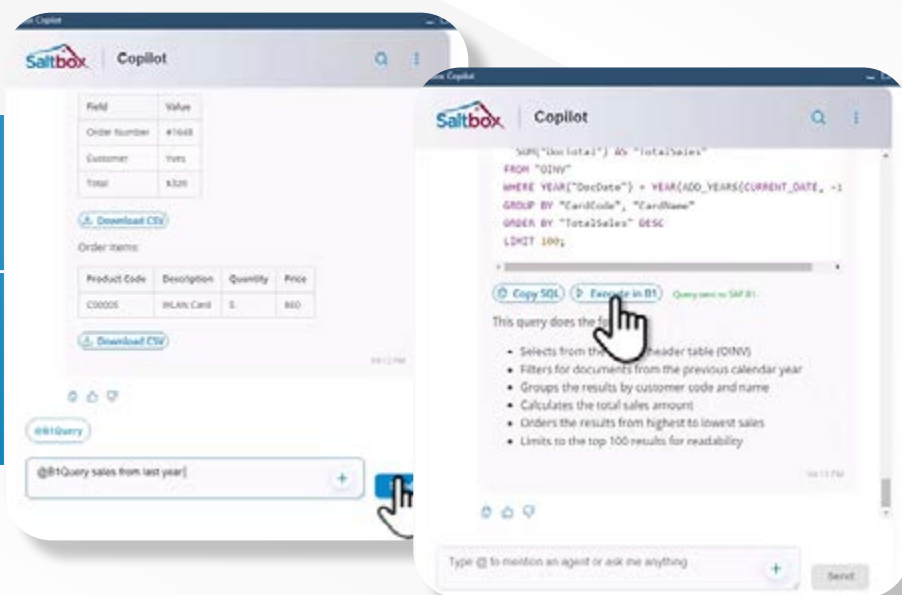
- **Work across applications**

Access data and execute processes in third-party apps, such as Shopify, Salesforce, and ShipStation—all from Copilot

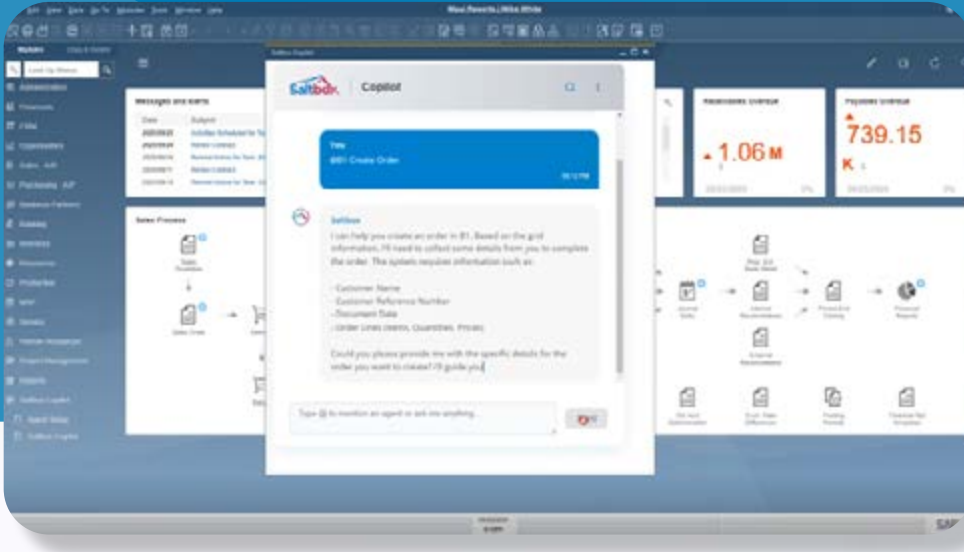
- **Avoid missed steps**

Guided workflows eliminate missed steps and reduce data entry mistakes

Ask Copilot to create a query



Open query from Copilot interface



By removing barriers between users and their data, Copilot helps organisations move from reactive decision-making to proactive insight.

## Unlock a Smarter Way to Work

How can Copilot for SAP Business One assist you?



Generate query reports on the fly



Create sales orders from copied email content



Import eCommerce orders from Shopify



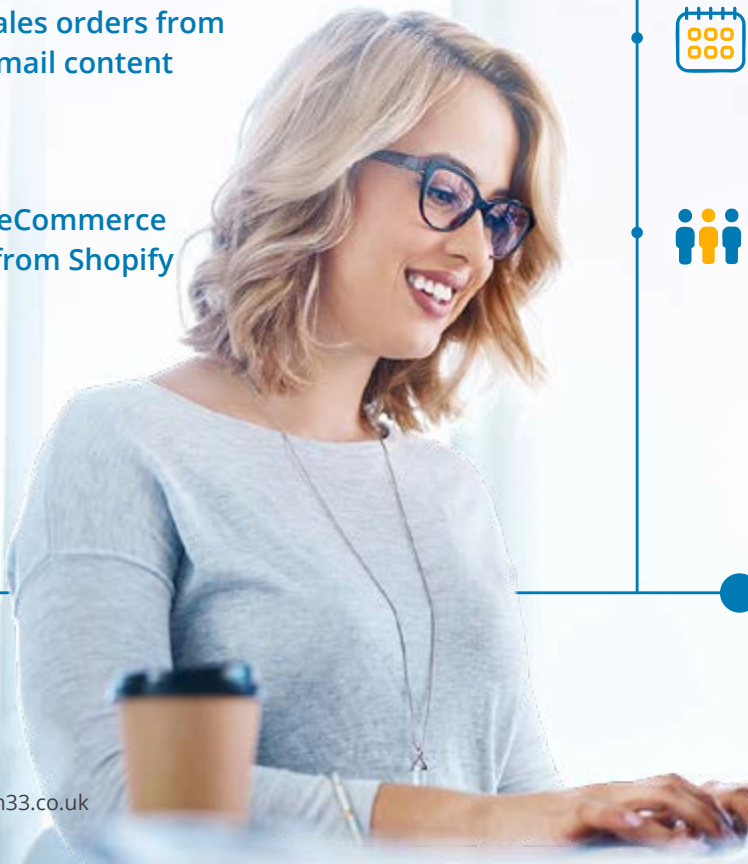
Check orders' shipment status



Schedule follow-up sales activities



Produce a list of overdue customer accounts



# Key Features & Functionality

## Smart Agents

- Start quickly with pre-built Smart Agents and tasks—or build bespoke ones
- Agentic AI and large language models (LLMs) understand natural language and autonomously translate requests into actions
- Agents request missing information to complete tasks accurately

## Intelligent, familiar interface

- Chat-style interface understands everyday language, such as “How many printers do we have in stock?”
- Supports multilingual use
- Displays financial data in any currency

## Easy to deploy

- Works on-premises or in the cloud
- Doesn't require any code changes to SAP Business One, so it won't interfere with software upgrades

## Rich integration

- Launch directly from the SAP Business One menu
- Access multiple data sources from within Copilot
- Chain Smart Agents together to execute multi-step workflows across applications and operational areas

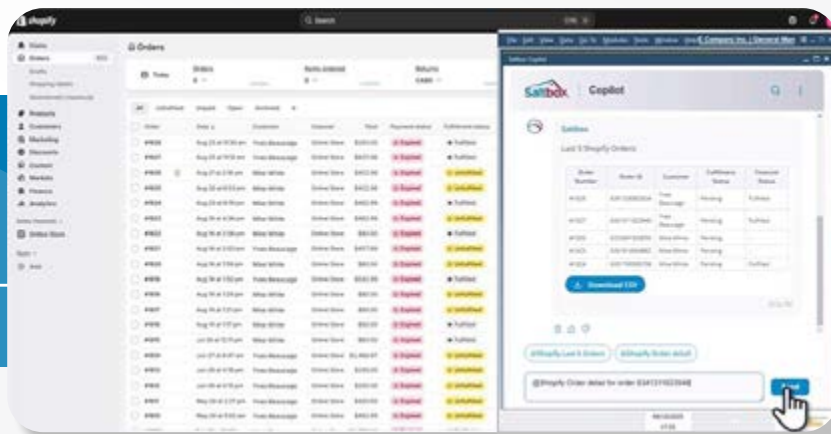
## Data import, export, and sharing

- Export chats to HTML
- Share chat transcripts via email
- Export data sets as CSV files
- Import data with copy/paste or file upload

## Low-/no-code

- Build custom Copilot tasks without heavy coding skills

Interact with data from other systems, like Shopify, right from SAP Business One.



Copilot for SAP Business One is powered by Saltbox Integration Platform, Vision33's integration and automation solution. Robust workflows drive the automations that make functionality in Copilot for SAP Business One possible.

**Contact [sales@vision33.co.uk](mailto:sales@vision33.co.uk) for more information.**