Transforming the Microsoft Dynamics 365 Business Central Setup Questionnaire into a Self-Service Workflow with an AI Assistant



Setup starts with a spreadsheet — and depends too much on the consultant.

Today, Catapult conducts the Dynamics 365 BC discovery process in Excel. The client does not directly participate in completing it, increasing effort, waiting time, and the risk of misalignment.

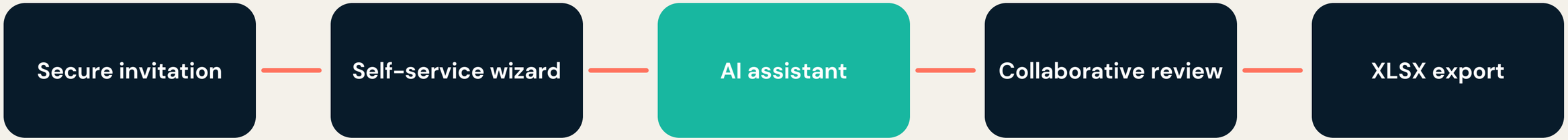
CURRENT PROCESS

Consultant → Spreadsheet → Late validation



One seamless workflow, from invitation to XLSX.

AI-guided self-service, with collaboration and compatibility preserved.



Existing automation continues to receive the same format — while the experience changes completely.

Consultant and Client Experience

A connected experience for consultants and clients.

CONSULTANT

Dashboard
Create forms, filter by status, resend, revoke access, and export XLSX.

Review
Validate by section, comment, approve, and mark Ready for Design.

Form Builder
Versioned templates, 13 field types, live preview, and a frozen snapshot.

Real time
Inbox, notification bell, and comment and submission events.

CLIENT

Access
Single-use link + password.

Wizard
Section tabs, auto-save, conditional fields, and progress bar.

Comments
Async threads with the consultant inside the question.

Submission
Strict validation by section and final questionnaire submission.

Three modes. One form state.

The preference is saved locally. In every mode, answers in English feed the same workflow and the same review process.

DIRECT

Classic form

AI-ASSISTED

Chat + side-by-side form

AI CONVERSATION

Focused chat + form overlay

Differentiator: question-by-question guidance, without creating a parallel data silo.

POC: 15 Features, 3 workstreams, 1 AI-enabled section.

15

Features in the proof of concept

- **Self-service experience**
- **Collaboration and review**
- **Platform and integration**

All other sections remain in Direct mode; future enablement is handled as a separate line item.

POC Scope and Commercial Boundaries

Included in the POC

15 modules across 3 workstreams

AI enabled for Cash Management

Consultant and client workflow

Export to the original BC XLSX format

Commercial extensions

AI enablement for additional questionnaire sections

Intermediate roles such as manager or auditor

Changes to the source spreadsheet and schema

Extensions are scoped and estimated separately.

Proposed decision: start focused, expand with evidence.



Expected outcome: less operational effort, greater autonomy, and a more predictable setup.

Proposal B — Form manager as is

Deliver the intelligence and solution developed, while opening the door to an ongoing partnership.

Scope included

- POC delivered as currently defined
- 1 spreadsheet tab Cash Management fully implemented, ready, and working with AI agent enabled
- Core engine ready for continued expansion
- Consultant and client workflow

Commercial terms

Investment: $10,000
Support/ Evolution: $500 monthly – 4 hours a month (12 months)

Terms:

1)All costs associated with AI consumption are the client's responsibility.

2) Unused hours do not roll over or qualify for refunds.

Notes

DELIVER THE POC FOUNDATION WITH ONE COMPLETED SPREADSHEET TAB AND THE ENGINE READY.
SOURCE CODE DELIVERED ON CUSTOMERS GITHUB.