100 Tips to Master Procurement with Copilot

Copilot Setup

1. **Check which Copilot you actually have.** Free Chat, Copilot Basic and the paid M365 Copilot licence behave completely differently.
2. **Only the paid licence grounds on your work data automatically.** Without it, Copilot cannot see your SharePoint contracts.
3. **Check today's per-seat price before you budget.** Microsoft has changed Copilot pricing repeatedly; it is a material add-on to your M365 cost.
4. **Use the desktop apps, not just the browser.** Copilot inside Word, Excel and Outlook is where procurement work actually happens.
5. **Pin the Microsoft 365 Copilot app.** Chat, Notebooks, Pages, Researcher and Analyst all live in one hub.
6. **Put your files in OneDrive or SharePoint.** You can upload a local file to chat, but only indexed files show up in the / picker.
7. **Save Excel files as .xlsx.** Strict Open XML Spreadsheet is not supported and Copilot will refuse to work.
8. **Set Excel calculation to Automatic.** Copilot cannot edit a workbook that is in manual calculation mode.
9. **Libraries that require check-out block Copilot in Excel.** Check this before your contract library kills the workflow.
10. **Pilot with five people for 30 days before buying fifty seats.** Measure hours saved on one repeatable task.

Pick the Right Copilot

11. **"Copilot" is six different products.** M365 Copilot, Copilot Chat, Copilot Studio, Security Copilot, Dynamics Copilot and GitHub Copilot.
12. **M365 Copilot for daily work:** contracts in Word, spend in Excel, supplier threads in Outlook.
13. **Copilot Studio** when you need to reach an external system such as your P2P platform or ERP.
14. **Free Copilot Chat for public market research only.** No grounding on your organisation's data.
15. **Copilot in Dynamics 365 if sourcing and supplier records live there.** Licensing is workload-specific, so check before you assume.
16. Pay-as-you-go bills Copilot Chat and SharePoint agents at $0.01 per message. **No full licence required.**
17. **Copilot Studio bills in Credits:** 2 for a generative answer, 5 for an agent action, 10 more for tenant grounding.
18. **Licensed users pay nothing extra for most employee-facing agents.** Unlicensed colleagues and some agent actions still consume credits.
19. **Keep an AI tool logbook.** One month of notes tells you which tool won each procurement task.
20. **Run the same supplier evaluation in two tools.** The gap in structure shows you immediately which one fits.

Prompting

21. **Use Microsoft's own four-part prompt:** Goal, Context, Expectations, Source. Only Goal is required, the rest add precision.
22. **Goal: name the deliverable, not the topic.** "Draft a 10-point RFP scoring matrix" beats "help with my RFP".
23. **Context: who it is for and why.** "For a CFO approving a three-year logistics contract" changes the entire output.
24. **Expectations: name the format.** Table, five bullets, executive summary first, red/amber/green flags.
25. **Source: point at the file with /.** Ungrounded prompts are where invented clause numbers come from.
26. **Stack multi-step instructions in one prompt.** "Review, flag deviations, list force majeure gaps, then summarise."
27. **First draft missed? Iterate in the same chat.** Copilot keeps the context; a new chat throws it away.
28. **Give Copilot your templates.** Paste your RFP structure and scoring model so the output matches your process.
29. **Ask for the deliverable, not text:** "Put this in a table" or "Create a Word summary".
30. **Save your best prompts in the Prompt Gallery.** The team reuses what works instead of reinventing it.

Grounding & Your Data Kit

31. **Type / in Copilot chat** to reference a specific file, person, meeting, email or SharePoint site.
32. You can reference up to 10 files or pages per SharePoint site at once. **Plan your chunks accordingly.**
33. **SharePoint lists ground up to 20,000 items.** Big enough for most supplier masters.
34. **Layer 1:** last year's spend overview, supplier list, top contracts, category strategy. Most teams have these within an hour.
35. **Layer 2:** performance scorecards. OTD, rejection rates, lead-time variance. Copilot tracks trends and preps QBR talking points.
36. **Layer 3:** negotiation history. Feed it what actually worked with each supplier, not textbook tactics.
37. **Upload your standard T&Cs.** Copilot then flags what is unusual for your company, not what is unusual in general.
38. **Long documents lose the middle.** Copilot prioritises the start and end, so split a 200-page contract into parts.
39. **Switch the scope from web to work before asking about internal files.** The difference in answer quality is not subtle.
40. **Structure your Excel data before asking.** Clean headers, one table, no merged cells. Messy input, messy analysis.

Memory & Personalization

41. **Copilot personalization is on by default.** It builds a profile from your chats without you asking for it.
42. **Settings → Personalization shows every memory.** Review it before you trust the output.
43. Custom instructions carry your role, categories and KPI thresholds into every chat. **Set them once.**
44. **Write instructions like a brief:** "I manage 40 suppliers across logistics. My KPIs are savings, OTD and quality."
45. **Save memories explicitly** for supplier quirks, relationship history and known red flags.
46. **Store your standard contract requirements.** Copilot then flags deviations automatically every time.
47. **Outdated memory produces outdated advice.** Delete stale items when categories or suppliers change.
48. **Deleting a chat does not delete its memories.** Remove those separately.
49. **Chat-derived details** auto-prune within 7 days if you delete the source chats, 30 days if the feature is switched off.
50. **Compliance gap worth knowing:** memory sits outside Purview retention and logs no audit entries, but is still eDiscoverable.

Word: Contracts & RFPs

51. **Open the contract, then ask.** Copilot in Word reads the open document with no upload needed.
52. "Summarise obligations, payment terms and termination rights in a table." **A 40-minute task in one prompt.**
53. **Ask for deviations** against your standard T&Cs, not a general summary. That is where the risk hides.
54. **Force Copilot to cite clause numbers.** An unsourced claim about a contract is worthless in a negotiation.
55. **Let Copilot draft the RFP scaffolding.** Spend your time on the requirements only you know.
56. Turn a messy stakeholder email chain into a clean requirements list, then **confirm it back to them.**
57. **Reference an existing contract with /** to draft the next one in the same structure.
58. **Ask for the counterparty's likely pushback** on each clause before you send your redlines.
59. **Agentic editing in Word went GA in April 2026.** Copilot now works through a document, it does not just answer about it.
60. **Never let Copilot decide legal wording alone.** It drafts, and your legal team approves every time.

Excel: Spend & Scorecards

61. **Copilot in Excel writes formulas,** builds PivotTables and creates charts straight from your spend data.
62. **Ask for insight, not just formulas:** "Show spend concentration and flag suppliers above 20% of category spend."
63. **Format your data as a table first.** Structured input is the single biggest quality lever in Excel.
64. **Have it build the scorecard template once,** then reuse the same structure every month.
65. **The =COPILOT() function** classifies, tags and summarises text inside cells. Ideal for cleaning supplier categories.
66. Microsoft says do not use =COPILOT() for calculations, lookups or compliance work. **Use XLOOKUP and native formulas.**
67. **=COPILOT() is capped at 100 calls per 10 minutes** and will not run in workbooks labelled Confidential.
68. **Results can vary between runs on identical input.** Always spot-check before a sourcing decision.
69. **Split a 200,000-row spend extract by category.** Smaller files give sharper answers.
70. **Let Copilot write the commentary** on your spend cube, then you verify the numbers. Never the reverse.

Outlook & Teams

71. "Summarise the last 10 emails from Supplier X and list open action items." **A 20-minute search becomes seconds.**
72. **Draft supplier replies in Outlook** with your tone and negotiating position already set in custom instructions.
73. **Before a negotiation,** ask Copilot to recap every prior thread with that supplier.
74. **Teams meeting recaps give you the action items** without anyone having to take notes.
75. **Ask "what did we commit to?" after a supplier call.** Commitments get lost, recaps do not.
76. **Build the QBR agenda** from the scorecard and last quarter's meeting notes in one prompt.
77. Turn a supplier call recap into a follow-up email in one step, then **edit and send.**
78. **Ask Copilot to flag emails** where a supplier changed a previously agreed term. Drift shows up in writing.
79. **Draft the escalation email,** then have it stress-test the tone before it reaches a critical supplier.
80. **In Outlook, Copilot drafts and you press send.** Agentic modes can send after one approval, so check what you have authorised.

Agents & Automation

81. **Create a SharePoint agent scoped to your procurement site.** Right-click your files, choose Create an agent. No code.
82. **A contract-review agent** that checks the same eight points gives you consistent output on every run.
83. **Agent Builder in the Copilot app needs no code** and is included in your licence. Start there, not in Copilot Studio.
84. **Agents respect SharePoint permissions exactly.** Nobody sees anything they could not already see.
85. **Sharing an agent does not share the files behind it.** Grant your team permission on the source library separately.
86. **Use Copilot Studio for anything touching your P2P or ERP.** That is where the credits get spent.
87. **Copilot Notebooks pin a fixed set of sources.** One notebook per sourcing project keeps every answer grounded.
88. **Scheduled prompts run on a recurring basis:** "Every Monday at 8am, flag suppliers below 90% OTD."
89. **Schedule the monthly spend report.** It runs whether the app is open or not.
90. **Start with one agent and one scheduled prompt.** Add more once you see them working.

Security & Mastery

91. **Your prompts and files are not used to train the models.** That is the answer your IT team is looking for.
92. **Copilot only surfaces what you already have permission to see.** It creates no new access.
93. **It exposes permission debt instantly.** Overshared SharePoint sites become searchable summaries overnight.
94. **Ask IT about Restricted Content Discovery before rollout.** It hides a site from Copilot without touching permissions.
95. **Restricted SharePoint Search** is retired for new setups since 31 July 2026. Restricted Content Discovery replaces it.
96. **Copilot interactions are discoverable** via Purview and Content Search. Write prompts you would be comfortable exporting.
97. **EU users stay inside the EU Data Boundary,** with documented exceptions. Confirm with IT for sensitive categories.
98. **For highly sensitive sourcing,** describe the situation without naming parties, or use anonymised figures.
99. **Copilot does not replace your judgment** or your supplier relationships. It frees up time for both.
100. **Tomorrow morning, open a real task, not a demo prompt.** That is when it stops being a tool and becomes your workflow.

PT Procurement Tactics