

AUTOMATE **Beginner** 10 MIN · UPDATED 2026-10-01

Give Copilot in Excel standing instructions stored in the workbook.

Write persistent instructions directly into the workbook so Copilot follows your conventions automatically, instead of restating them every session.

MICROSOFT 365

Excel

WORKS WITH

Copilot

Business Outcome

Consistent Copilot behavior in a shared workbook without every user re-explaining the same conventions.

Workflow Steps

Step 1: Identify the conventions you keep repeating

Excel

Notice what you re-explain to Copilot every session — a specific date format, which column means what, how margin should be calculated — these are candidates for standing instructions.

Step 2: Write the instructions into the workbook

Excel

Open Copilot's standing-instructions panel for the workbook (not a comment or a notes cell) and write each convention as a short, specific rule — "Column C is always margin %, not margin \$" — so it persists in the file itself for anyone who opens it, not just your current session.

Step 3: Test that Copilot actually follows them without restating

Copilot in Excel

Ask a task that depends on one of the stored conventions without repeating it in your prompt, and confirm Copilot applied it correctly.

Step 4: Keep the instructions updated as conventions change

Excel

Stale stored instructions are worse than none – review them when the workbook’s structure or conventions change.

✓ Check the work

- Copilot correctly applies stored conventions without them being restated in the prompt.
- A colleague opening the same workbook gets the same consistent behavior.
- Stored instructions are reviewed whenever the workbook’s conventions change.

Expected Outcome

A workbook where Copilot automatically follows stored conventions – date formats, naming rules, calculation methods – without being told each time.

Want help rolling this out across your team? **Go to Liminals.Tech** ■