

# Copilot for Sales Extensibility

Dynamics 365 FastTrack architecture  
insights

Amira Beldjilali – D365 FastTrack solution  
architect



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# Agenda

- 
- Copilot for Sales Overview
  - Extensibility Overview
  - Building Extensions
  - Partner extensions available in the marketplace



# Copilot for sales Overview



# Copilot for Sales Overview



## Microsoft Copilot for Sales

**Copilot for Sales** is an AI-driven sales assistant that empowers sellers with insights, recommendations, actions, and up-to-date CRM data across all M365 apps.



## Microsoft Copilot for Microsoft 365

**Copilot for Microsoft 365** is a personal AI-powered productivity tool that combines the power of large language models (LLMs) with your data in the Microsoft Graph



## Copilot for Sales makes Microsoft 365 speak Sales

**Copilot for Sales** is a role-based Copilot that meets sellers where they do their work.

## Copilot for Microsoft 365 is included in Copilot for Sales

If you purchase Copilot for Sales, you get **Copilot for Microsoft 365**.

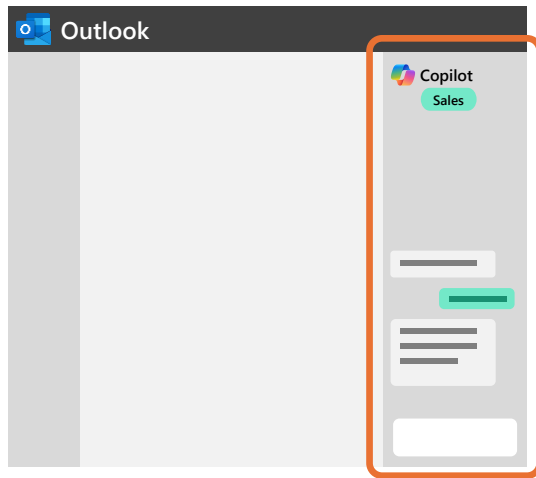
## Connects with Your CRM

Natively connects to **Salesforce** and **Dynamics 365 Sales**.



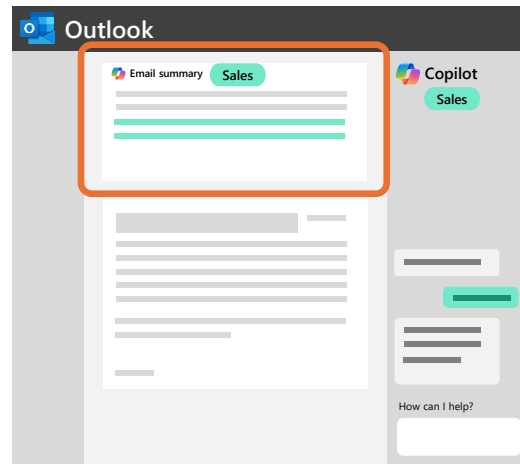
# Copilot for Sales Experiences

## App Chat



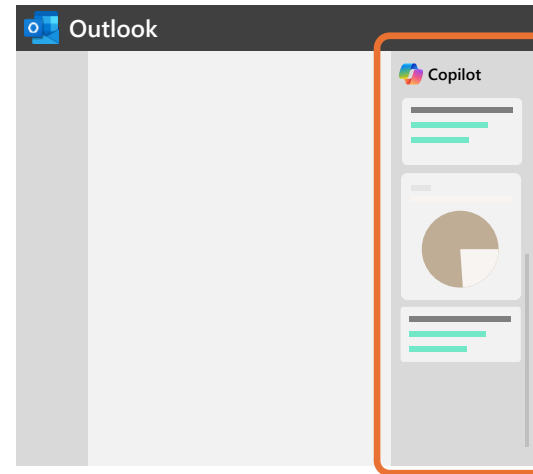
Ask questions of your CRM data in the context of customer emails and appointments.

## Embedded AI



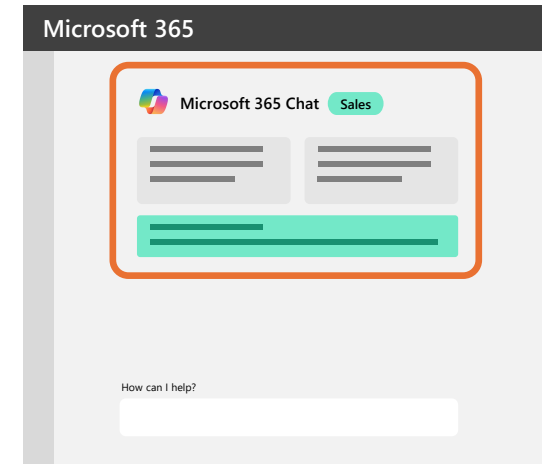
Write better emails with AI-generated content infused with enrichments from your CRM.

## Contextual Side Car



Blend CRM data with your Microsoft 365 data using natural language right from the home for Microsoft 365.

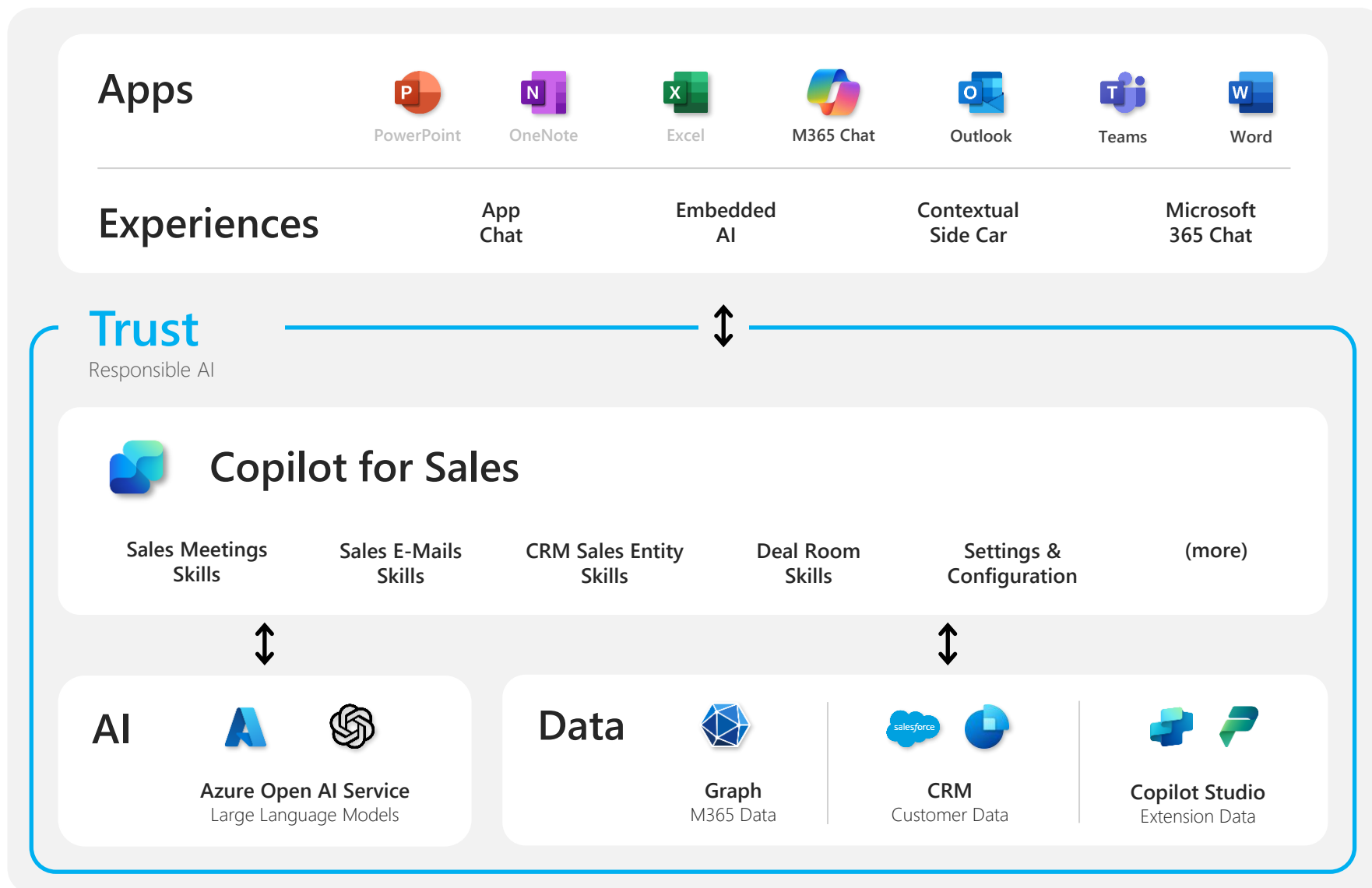
## Microsoft 365 Chat



Curated CRM data, insights, and suggested actions in the context of the email you're reading/writing\*



# Copilot for Sales Architecture



The **Copilot experiences across all surfaces** are driven by a shared set of skills. This unified foundation ensures both consistency and accuracy in delivering powerful, AI-driven insights.



# Extensibility Overview



# Bring your own data to Copilot for Sales



## Configuration

### Connect your CRM Data

**CRM Admins** can bring **custom fields and entities** from the CRM to be included into existing Copilot for Sales experiences **via point and click configuration page**.



## Extensions

### Build your Own Extension

**Makers** can build their own Copilot for Sales **Power Platform Connectors** and connect it to Copilot for Sales via **Copilot Studio Plugins** to bring additional data into Copilot for Sales.

### Use Third-Party Extensions

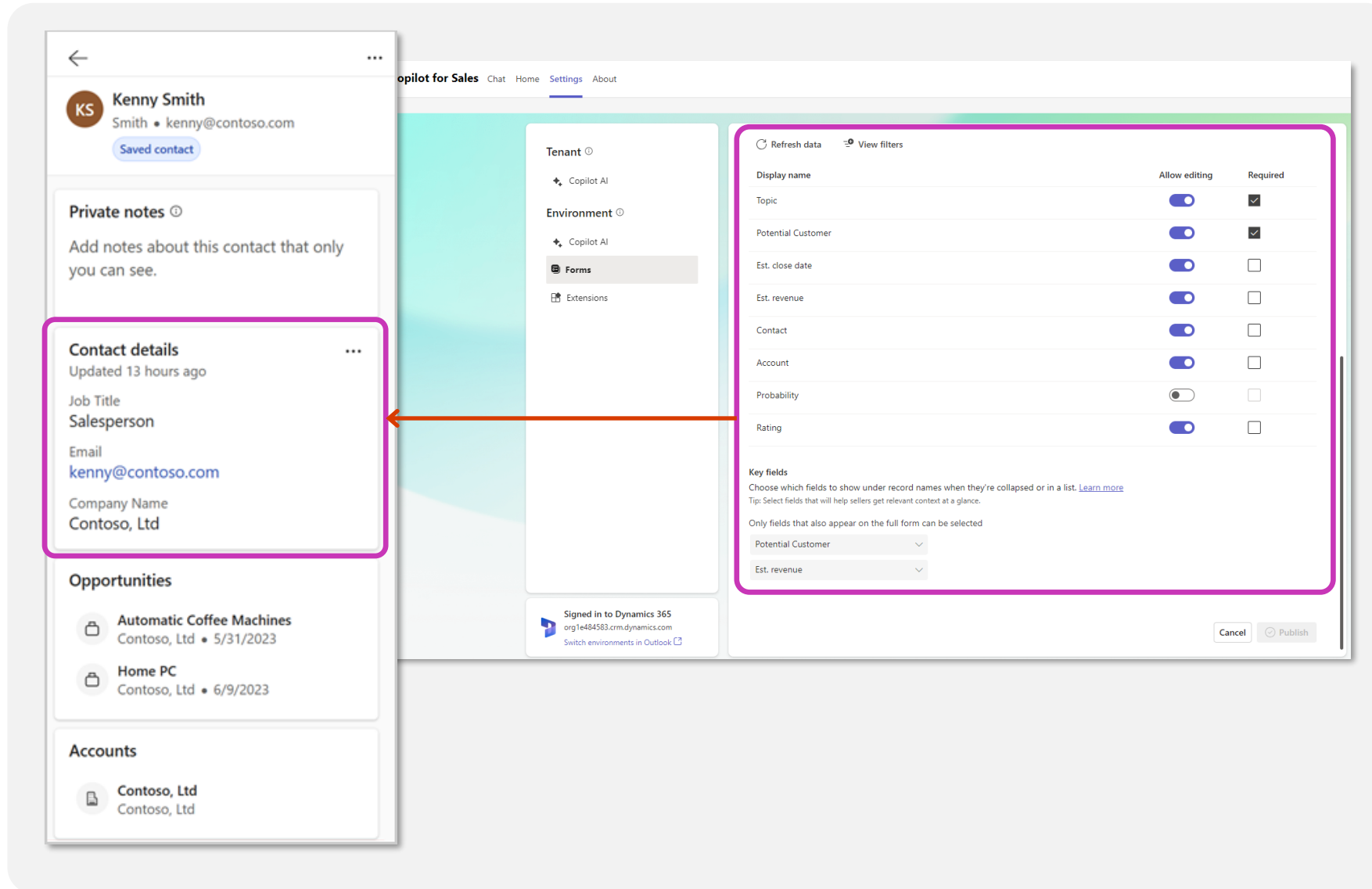
**Admins** can enable existing third-party **Power Platform Connectors** and connect it to Copilot for Sales via **Copilot Studio Plugins** to bring additional data into Copilot for Sales.

Extensions can either **enrich existing Copilot for Sales skills** (existing) or **introduce net new skills** that can surface in Microsoft 365 Copilot Chat or App Chat (coming soon).





# Copilot for Sales Extension Architecture



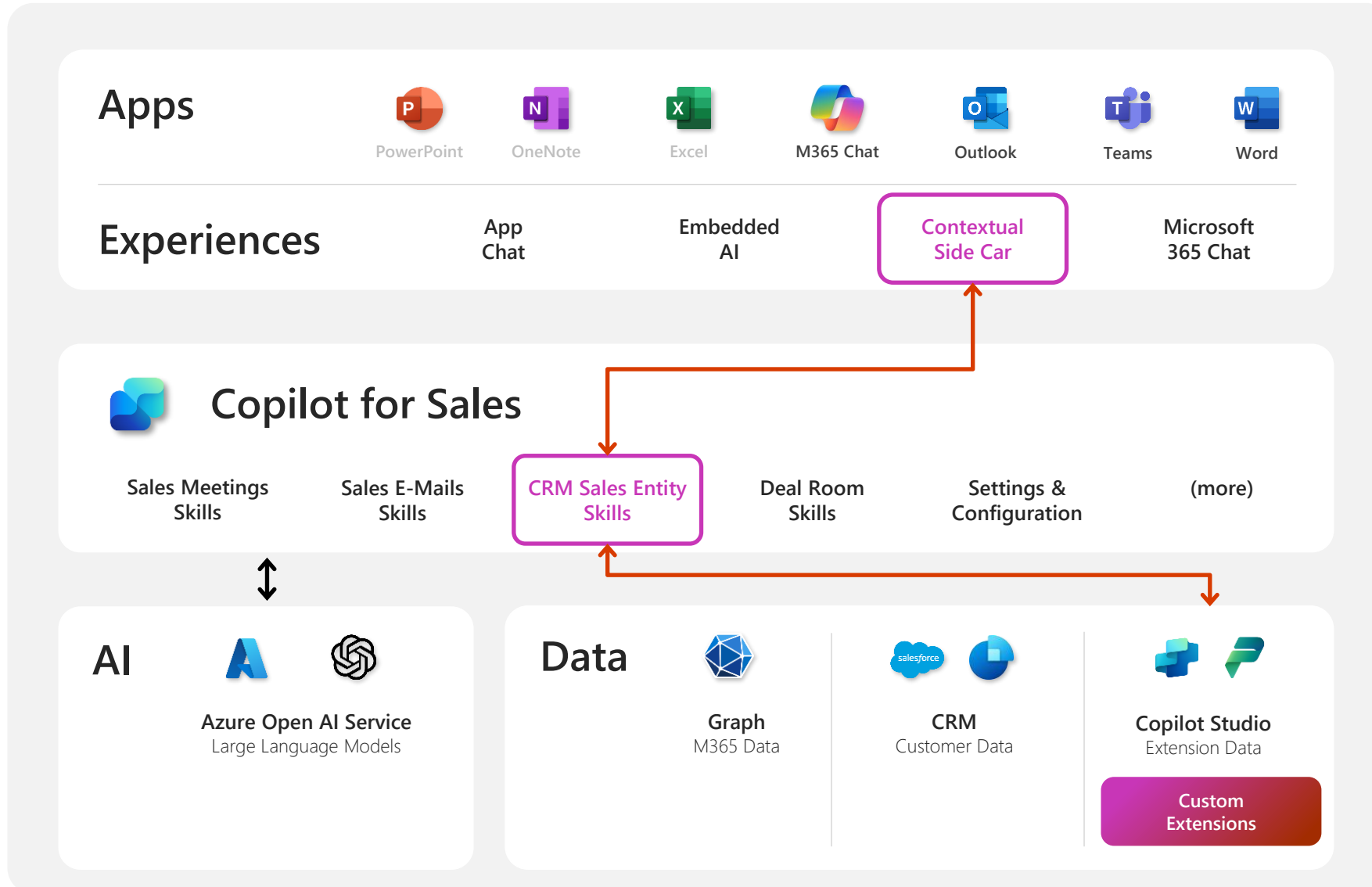
## Configuration

Once a **custom CRM field or entity** is configured, it will surface across all Copilot for Sales Skills and end-user experiences.

This is done by an **admin** via a **point and click configuration page**.



# Copilot for Sales Extension Architecture



## Extensions

Customers can build their own or use existing third-party extensions to **enrich existing out-of-box Copilot for Sales Skills** with their own data.

For example, an extension can be provided to surface relevant sales agreement documents for a specific opportunity summary or add a reference to a product catalog when using AI to generate an e-mail reply to a customer inquiry.



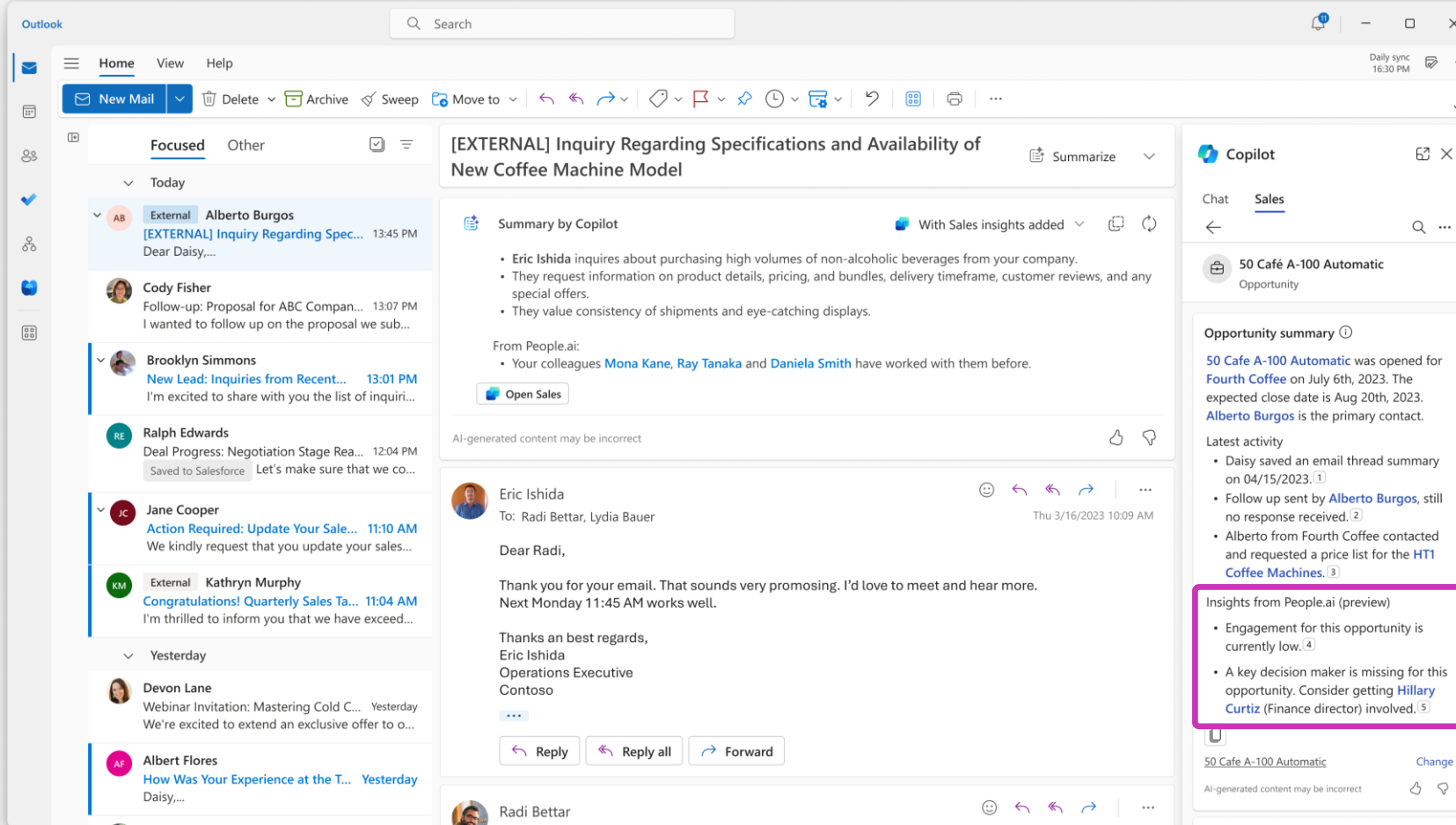
# Copilot for Sales Extension Architecture

Preview

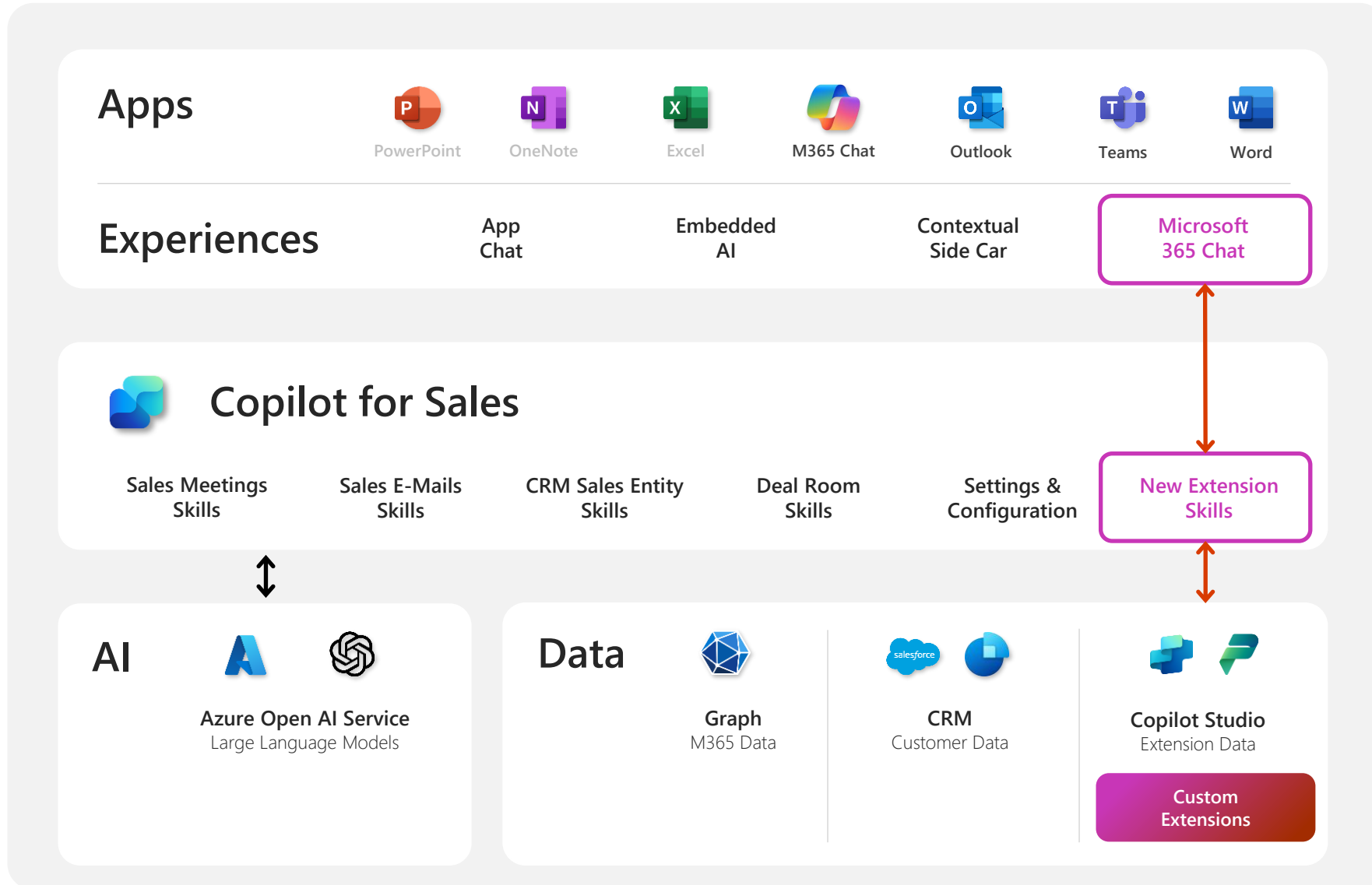
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# Copilot for Sales Extension Architecture



## Extensions

Customers can build their own or use existing third-party extensions to **introduce net new skills into Microsoft 365 Chat.**

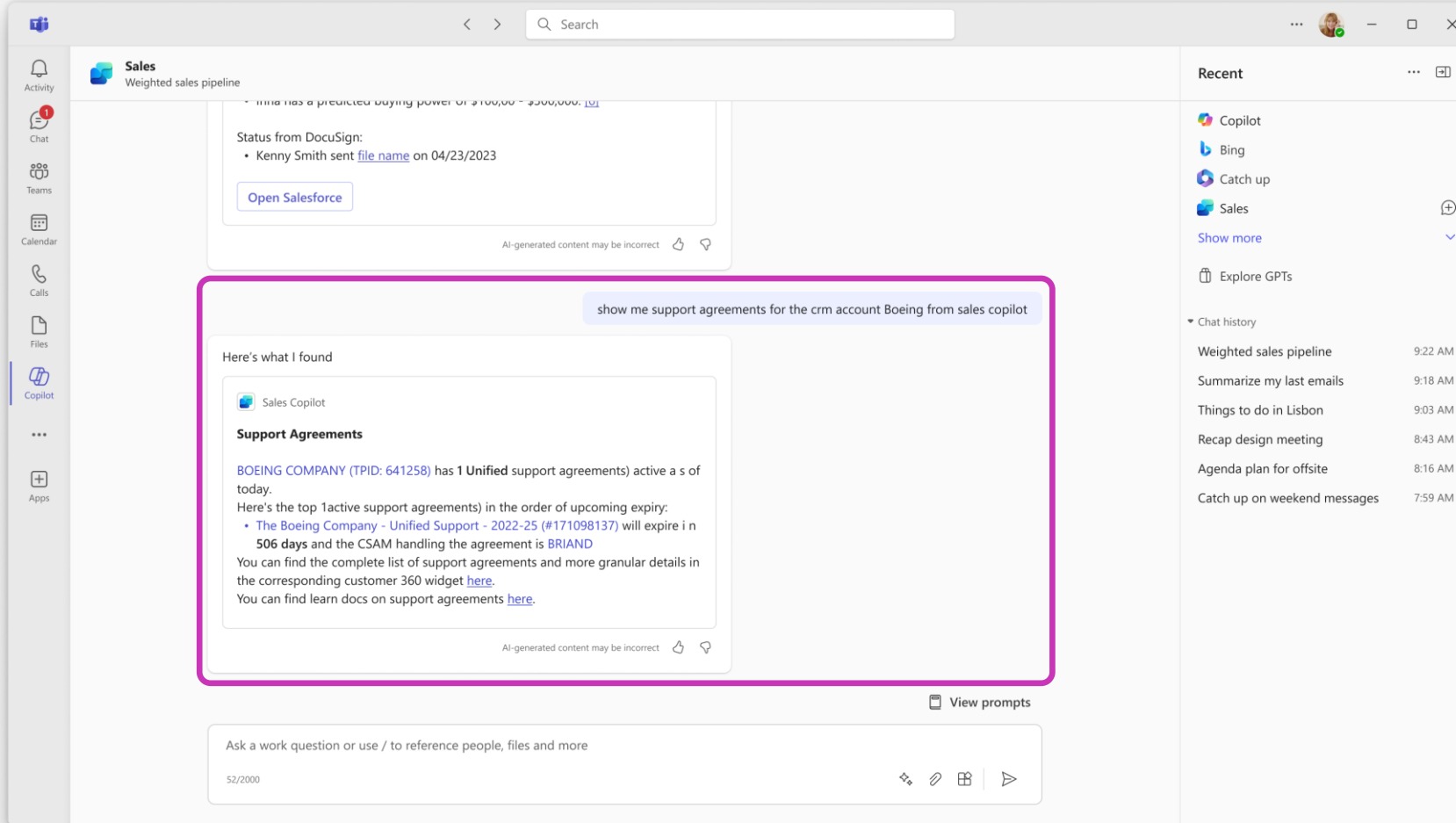


# Copilot for Sales Extension Architecture

Roadmap

## Extensions

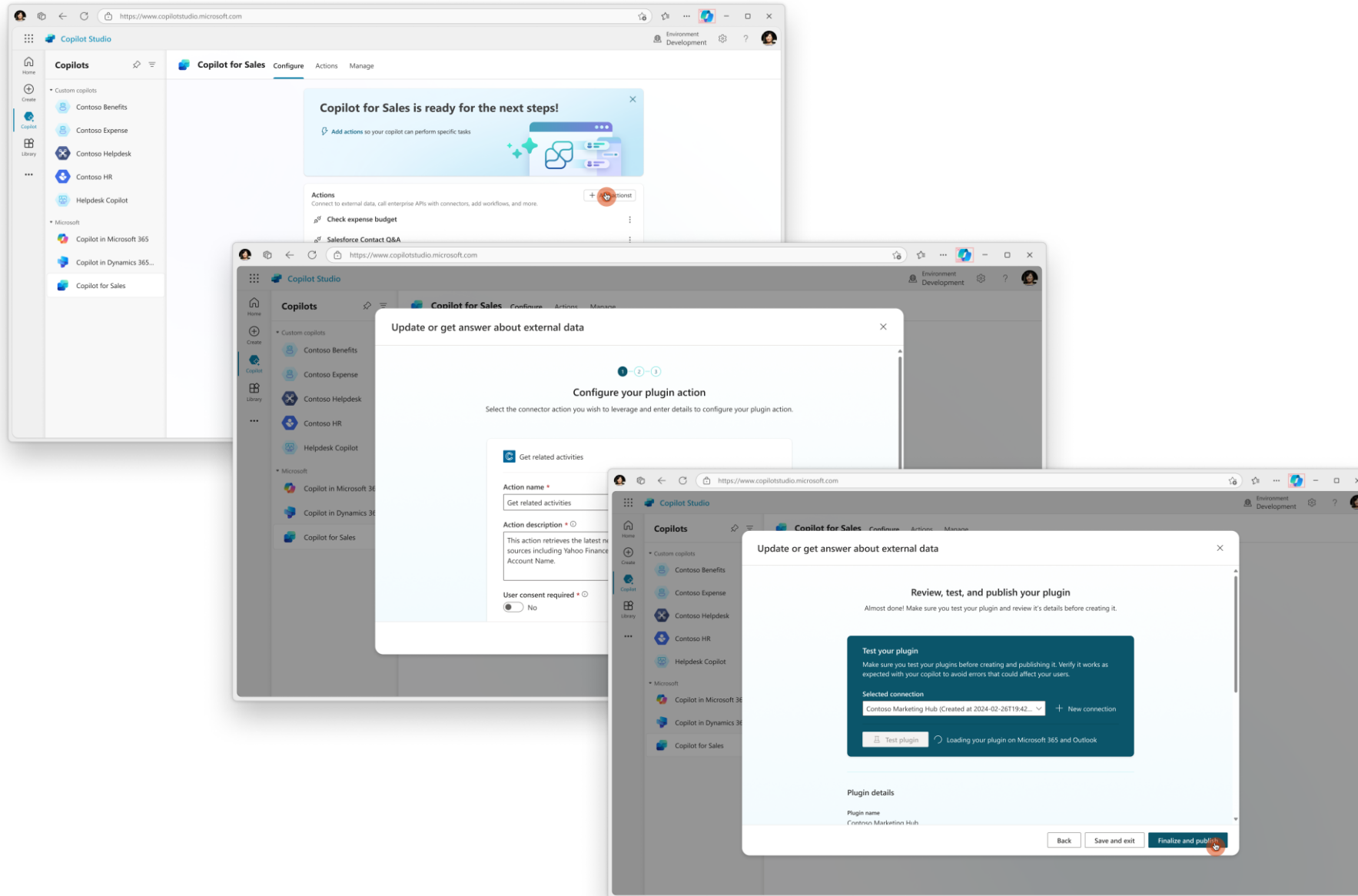
Customers can build their own or use existing third-party extensions to **introduce net new skills into Microsoft 365 Chat.**



# Building Extensions



# Building Extensions for Copilot for Sales



## 2. Add a Plugin

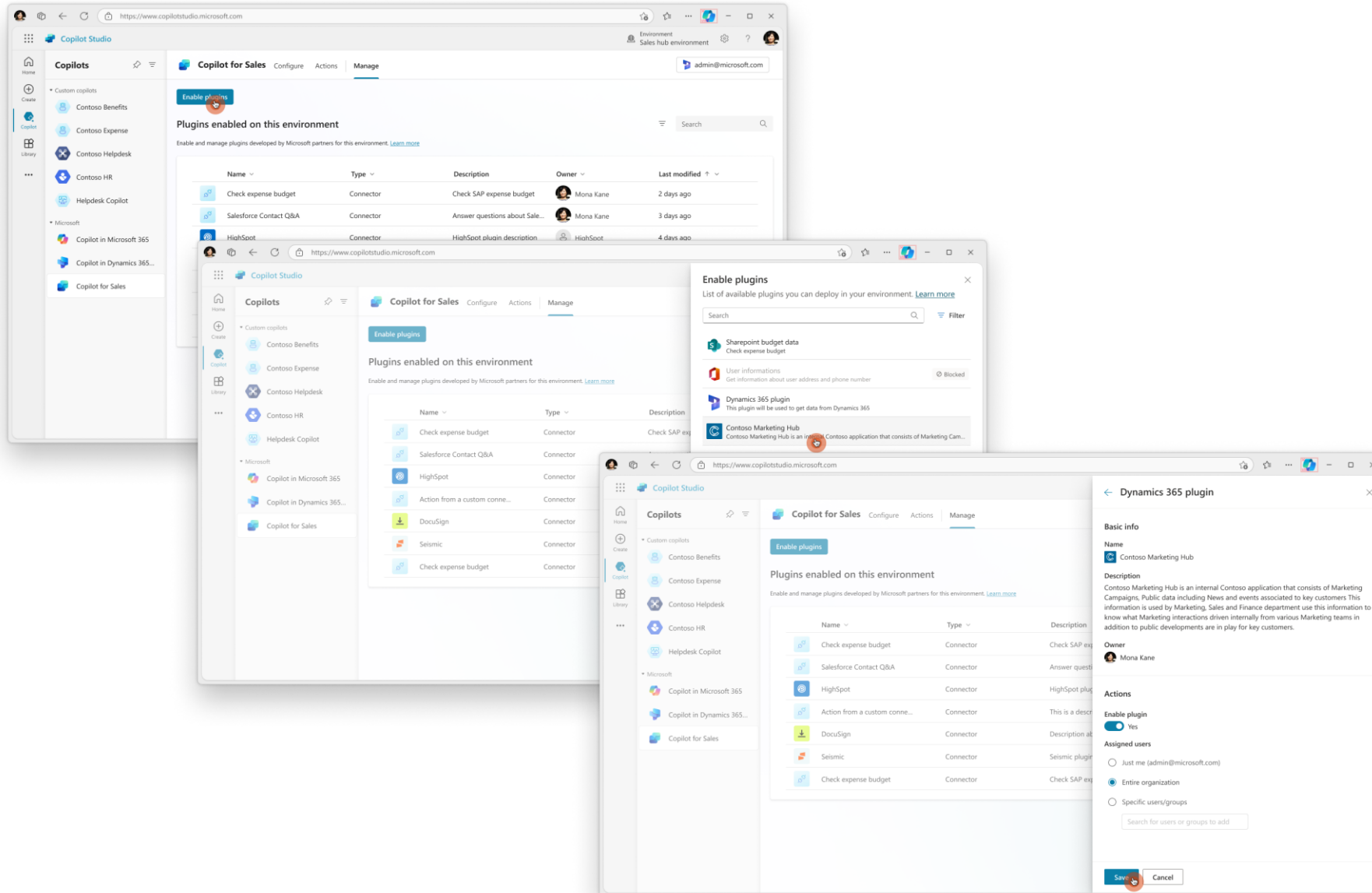
Plugins allow you to add semantic meaning to the data provided by connectors.

## 1. Build or Add Connector

Connectors allow you to bring your own or other third-party data to the Copilot ecosystem.



# Enabling extensions for Copilot for Sales



## Add a Plugin

Microsoft Copilot Studio now has **native support to extend Copilot for Sales** through power platform connectors.

Customers and partners can now build their own plugins by either bring data and insights through their own custom built power platform connector or from one of the published third-party power platform connectors into the various Copilot experiences.





# Available Extension Points



## Microsoft 365 Chat

Introduce net new chat skills  
Microsoft 365 Chat (Future)



## Microsoft Outlook

Enrich E-Mail Summaries  
Embedded AI

Enrich Key Sales Info  
Contextual Side Car

Enrich CRM Details

Content suggestions in email  
responses



## Microsoft Teams

Enrich Entity Summaries

Shared

## App specific skills

We are quickly introducing extensibility for all our app surface areas.


## Shared skills

Shared skills appear across multiple surface areas. Once extended, **your data will appear everywhere the skills is surfaced.**



Update on Café Grande Espresso Machines Opportunity with A. Datum

Tracked To Dyna... X

 Summary by Copilot

With Sales insights added X

**Amira Beldjilali**, a Senior FastTrack Solution Architect, provided an update on the ongoing opportunity with A. Datum for the procurement of 3 Café Grande Espresso Machines.

The close date for this opportunity has been shifted to January 2025 to ensure thorough consideration of the deal's aspects and preparedness for successful collaboration.

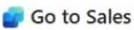
**Amira Beldjilali** expressed optimism about the financial prospects, anticipating a 20% revenue increase from the partnership.

They are committed to working closely with you to ensure a smooth process and are confident in the mutual benefits of the opportunity.


**Amira Beldjilali** thanked you for your continued trust and looked forward to a prosperous partnership with positive outcomes.

Info from From Contoso Customer Insights

Your colleagues Mona Kane, Ray Tanaka, and Daniela Smith have worked with them before.

 Go to Sales

AI-generated content may be incorrect



AB

Amira Beldjilali <abeldjilali@DynamicsFastTrack.onmicrosoft.com>

To: Hayley Bass

Sat 6/22/2024 10:45 AM

Hello,

I trust this email finds you in good spirits.

I am reaching out to provide an update on the ongoing opportunity with A. Datum concerning the procurement of 3 Café Grande Espresso Machines. We have been diligently working on finalizing the details and are excited about the prospects this partnership holds.

The screenshot displays a Microsoft Dynamics 365 interface. On the left, an email from Amira Beldjilali is open, showing a summary by Copilot and the original email content. The Copilot summary includes key sales information and contract details, which are highlighted in a red box. The email content is as follows:

**Summary by Copilot**

Amira Beldjilali, a Senior FastTrack Solution Architect, provided an update on the ongoing opportunity with A. Datum for the procurement of 3 Café Grande Espresso Machines.

The close date for this opportunity has been shifted to January 2025 to ensure thorough consideration of the deal's aspects and preparedness for successful collaboration.

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**Go to Sales**

AI-generated content may be incorrect

**Email from: Amira Beldjilali**  
Received 06/22/24, 7:45 PM  
Saved email

**Key sales info**

- You are the owner of **Microsoft France**, with **Amira Beldjilali** as the primary contact, who is a Senior FastTrack Solution Architect. [1] [2]
- There is an **opportunity** with A. Datum Corporation for 3 Cafe Grande Espresso Machines, estimated to bring in \$44,700.00 in revenue by January 2025. [3]
- Amira Beldjilali** provided an update on the **opportunity**, expressing optimism about a projected 20% increase in revenue and emphasizing a commitment to ensuring a successful collaboration.

**Info from Contract signed**

- Kenny Smith sent Renewal Contract on 04/23/2023 related to 50 Cafe A-100 Automatic. [4]

AI-generated content may be incorrect

4 references

**Original Email:**

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To: Hayley Bass  
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# Enrich CRM records details

Enrich CRM Details

The screenshot displays a Microsoft Dynamics CRM interface. The main window shows an email from Amira Beldjilali to Hayley Bass, dated Saturday, 6/22/2024 at 10:45 AM. The email content includes a summary of an update on the '3 Café Grande Espresso Machines Opportunity' and a 'Go to Sales' button. The sidebar on the right, titled 'Copilot', provides additional insights for the selected opportunity. It includes sections for 'Datum' (Est. revenue: \$44,700.00, Est. close date: 4/16/2024, Account: A. Datum Corporation, Owner: Walter White 2), 'Opportunity Products' (Café Grande, 3.00000), and 'Opportunity Sales Process' (Sales Process: qualify, Active). A red box highlights the 'Contoso Hub' section, which lists 'Automatic Renewal Contract' and 'Purchase Contract' for Logan Edwards and Kenny Smith.

Update on Café Grande Espresso Machines Opportunity with A. Datum Tracked To Dyna...

**Summary by Copilot** With Sales insights added

Amira Beldjilali, a Senior FastTrack Solution Architect, provided an update on the ongoing opportunity with A. Datum for the procurement of 3 Café Grande Espresso Machines.

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[Go to Sales](#)

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**Copilot**

**Sales**

3 Café Grande Espresso Machines f...  
Opportunity

**Datum**

Est. revenue  
\$44,700.00

Est. close date  
4/16/2024

Account  
A. Datum Corporation

Owner  
Walter White 2

**Opportunity Products**

Café Grande  
Café Grande • 3.00000

**Opportunity Sales Process**

Sales Process  
qualify • Active

**Contoso Hub**

**Automatic Renewal Contract**  
Logan Edwards • Kenny Smith

**Purchase Contract**  
Logan Edwards • Kenny Smith

[Enrich CRM record details with insights from your application \(preview\) | Microsoft Learn](#)



The screenshot displays a Microsoft Dynamics 365 email interface. The main email content is an update from Amira Beldjilali regarding the procurement of 3 Café Grande Espresso Machines. A Copilot summary is provided on the left, and a sidebar on the right offers additional context and insights.

**Update on Café Grande Espresso Machines Opportunity with A. Datum** Tracked To Dyna...

**Summary by Copilot** With Sales insights added

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[Go to Sales](#)

AI-generated content may be incorrect

**3 Café Grande Espresso Machines f...**  
Opportunity

Est. close date seems to have changed to 1/31/2025.  
[Update opportunity](#)

**Opportunity info**

The contact for this opportunity is Walter White 2 from A. Datum Corporation. The estimated revenue for this deal is \$44,700.00. The estimated close date for this opportunity is 04/16/24. The other details include acquiring 3 Café Grande Espresso Machines for A. Datum.

**Status from Contoso Hub (preview)**

- You have 5 connections in Fourth Coffee Inc <sup>1</sup>
- Multiple stakeholders from Fourth Coffee have visited the Contoso website four times in the last four months <sup>2</sup>

AI-generated content may be incorrect

[3 Café Grande Espresso Machines for A. Datum](#)

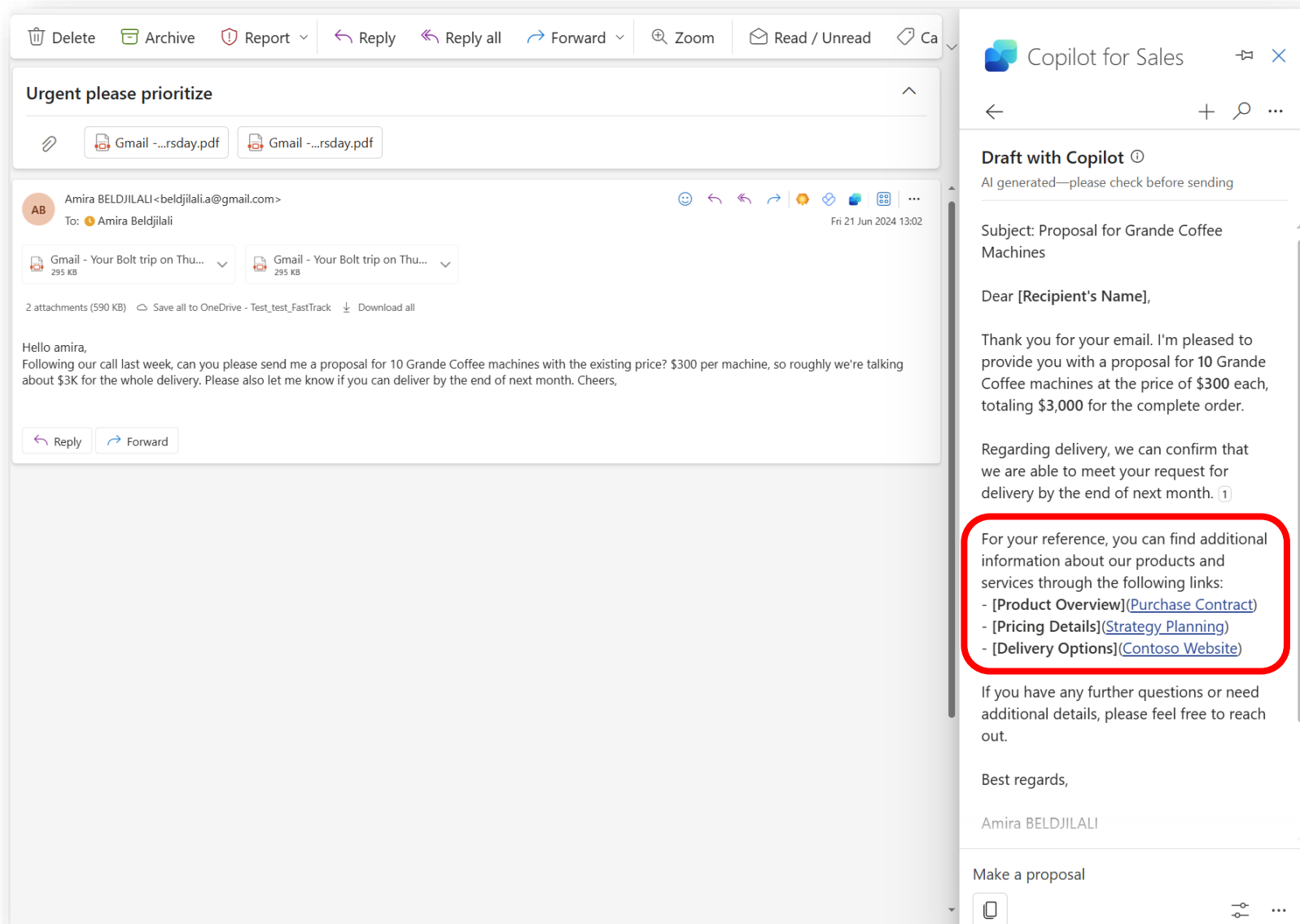
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Here's what I found

 Sales



**Kenny Smith**  
Contact

Title	Coffee Store Manager
Email	kenny@fourthcoffee.com
Company	Fourth Coffee
Account owner	Daisy Phillips

[Open in Dynamics 365](#)

 Copy

AI-generated content may be incorrect



Partner extensions  
available in the  
marketplace





## Copilot for Sales

Top sales application vendors in the world are extending Copilot for Sales to bring insights to your sales teams in the flow of work via Copilot for Sales – across the deal cycle from prospecting to close



Demo



Thank you



