

LAB Configure Quality Evaluation agent

Configure Quality Evaluation Agent in Dynamics 365 Customer Service or Contact center to meet your quality specific business needs.

Lab Details

Prerequisites

- You need to have access to Microsoft Copilot Studio using <https://copilotstudio.microsoft.com/>.
- Available Copilot credits.
- A computer with internet access.
- Sample data should be installed in the environment

Documentation and additional training links

- [Manage Quality Evaluation Agent | Dynamics 365 Contact Center](#)

Use Case: The Quality Evaluation Agent helps insurance organizations review and improve the quality of customer interactions using AI. Supervisors define the evaluation framework, which includes the evaluation criteria, evaluation plan, and scoring model. Using this framework, the agent automatically evaluates customer conversation or cases such as policy inquiries, surrender or other service requests—to ensure accuracy, compliance, and consistent service delivery.

Task 1 – Prerequisites

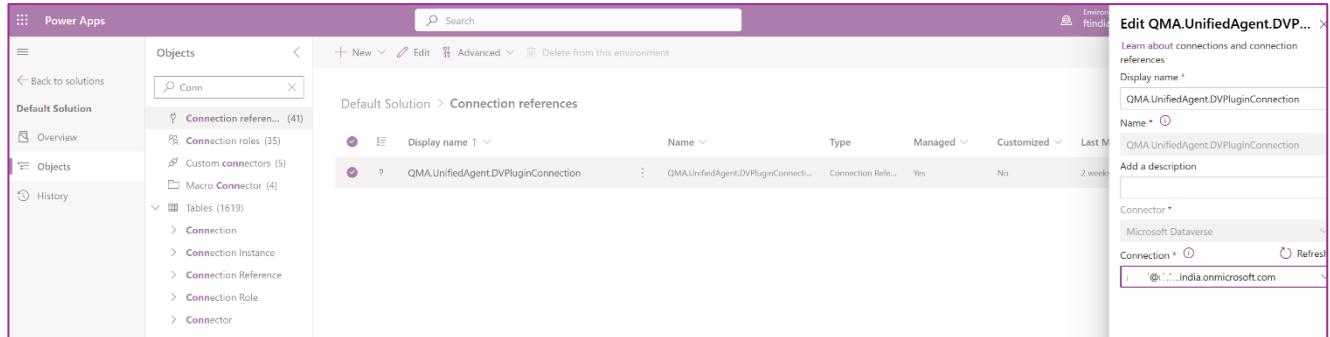
Step 1 Assign the **Quality Manager**, **Quality Evaluator**, and **Quality Administrator** roles to the users responsible for configuring the Quality Evaluation Agent (QEA).

Persona	Role	Privileges
Administrator	Quality Administrator	- Configure Quality Evaluation Agent. - Create evaluation criteria and evaluation plan. - Complete or assign an evaluation.
Supervisor	Quality Manager	- Create evaluation criteria and evaluation plan. - Complete or assign an evaluation.
Supervisor	Quality Evaluator	Complete or assign an evaluation.

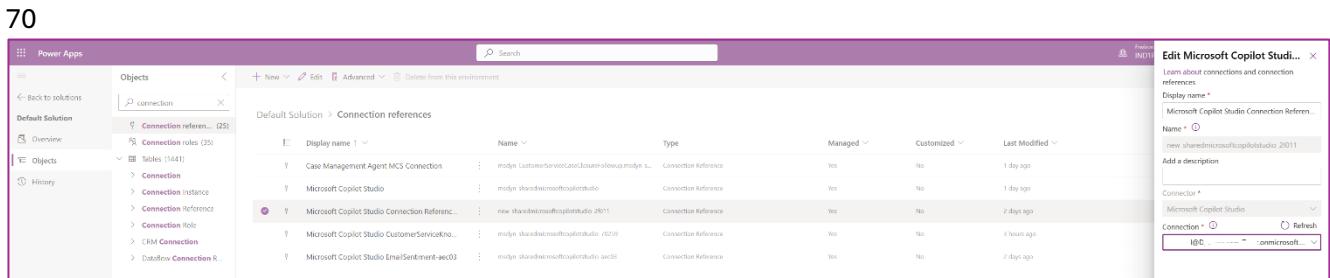
Step 2 Configure the connection references required for the Quality Evaluation Agent flow.

For detailed steps refer to link [Set connection references for AI agent flow](#)

Below example screenshot for setting up Connection Reference for “**QMA.UnifiedAgent.DVPluginConnection**”



Below is the screenshot for setting up Connection Reference for “**Microsoft Copilot Studio Connection Reference for QEA**”



Do the similar steps to associate connection to all the below Connection references –

- Microsoft Copilot Studio Connection Reference for QEA
- Microsoft Dataverse Connection Reference for QEA
- QMA.Incident.DVPluginConnection
- QMA.UnifiedAgent.DVPluginConnection

Step 3 Turn on the Power Automate flow

For detailed steps refer to link [Turn on the Power Automate Flows](#)

Below example screenshot for turning on Power Automate “**QEA On Demand Evaluation Case**”

Display name ↑	Name	Type	Managed	Customized	Last Modif...	Owner	Status
QEA On Demand Evaluation Case	QEA On Demand Evaluation Case	Cloud Flow	Yes	No	1 week ago	SYSTEM	Off

Step 4 Publish the Microsoft Copilot Studio Agent

In [Microsoft Copilot Studio](#), select your environment, and then search for the agent, for example, **Quality Evaluation Agent** agent.

[Publish the agent.](#)

Name	Type	Last modified ↓	Last published	Owner	Protection status
Quality Evaluation Agent - Incident	Agent	# Microsoft Copilot Studio 11 days ago	Never	SYSTEM	--
Quality Evaluation Agent	Agent	# Microsoft Copilot Studio 11 days ago	Never	SYSTEM	--

Task 2 – Enable Quality Evaluation Agent

For step-by-step details refer link [Enable Quality Evaluation Agent](#) to enable QEA.

Step 1

- Open Environment.
- Open Copilot Service admin center app.
- Navigate to Quality Management -> Click on Manage

Quality management
Manage your quality management settings to maintain quality standards and improve performance of customer service representatives.

Quality evaluation agent (AI Copilot)
Manage how AI can be used for quality evaluations.
[Learn more](#)

Manage >

Step 2

- Enable Record Type (Cases Conversations or both)

Quality evaluation agent AI Copilot Microsoft Copilot Credits
Manage quality evaluation agent settings and configuration. [Learn more](#)

This feature is currently supported in a limited number of languages. See the [full list of supported languages](#). Copilot responses in unsupported languages have not been tested for language accuracy. Make sure AI-generated content is accurate and appropriate before using it. [Read terms](#).

Enablement by record type

Select record type where AI can be used to evaluate customer support interactions.

Case
Allow AI to evaluate service quality in cases based on source data attributes.

Enable bulk evaluations(Preview)
Bulk evaluations will run automatically based on evaluation plan specifications. [Learn more](#)

Specify data

Manage data to be considered during evaluations. Include from records (1-to-1 data) or activities like emails and conversations (1-to-many data).

Default Entities have been added. [Manage data](#)

[+ Add data](#)

Conversation
When a conversation is selected for quality evaluation, an AI-assisted response is automatically generated based on the evaluation criteria and the conversation transcript. The input data fields listed below additionally help the AI deliver accurate and consistent predictions during the evaluation process.

Specify data

Manage data to be considered during evaluations. Include from records (1-to-1 data) or activities like emails and conversations (1-to-many data).

Default Entities have been added. [Manage data](#)

Step 3

- Manage data to be considered during evaluation

Specify data

Add data from records (1-to-1 data) or activities like emails and conversations (1-to-many data). Uncheck the row to temporarily exclude the data from being summarized. Include only essential information to get the most helpful, succinct summaries for representatives.

Data for quality evaluation agent input configuration

Note: Requires at least one 1-to-1 data type and only CT Enabled entities are available to select from the related attributes dropdown for mappings.

Include	Data type	Record type or activity	Data field	Description	De...
<input checked="" type="checkbox"/>	1-to-1	Case	Case Title	title	Delete
<input checked="" type="checkbox"/>	1-to-1	Case	Description	description	Delete
<input checked="" type="checkbox"/>	1-to-1	Case	Priority	priority	Delete
<input checked="" type="checkbox"/>	1-to-1	Case	Severity	severity	Delete
<input checked="" type="checkbox"/>	1-to-1	Case	Created On	created on	Delete
<input checked="" type="checkbox"/>	1-to-many	Note (Regarding)	Description	CaseNotes	Delete
<input checked="" type="checkbox"/>	1-to-many	Email (Regarding)	Select data field	email	Delete
<input checked="" type="checkbox"/>	1-to-many	Case Resolution (Case)	Subject	description	Delete
<input checked="" type="checkbox"/>	1-to-many	Case Resolution (Case)	Created On	resolution date	Delete
<input checked="" type="checkbox"/>	1-to-1	Case	Calculated Surrender...	Calculated Surrender Value	Delete
<input checked="" type="checkbox"/>	1-to-1	Case	Customer TAT	TAT in days	Delete
<input checked="" type="checkbox"/>	1-to-1	Contact (Customer)	Email	Customer Email address	Delete
<input checked="" type="checkbox"/>	1-to-many	Email (Regarding)	Select data field	email	Delete

Evaluation criteria score

Enable scoring to assign numeric values to evaluation criteria, allowing for consistent measurement, benchmarking, and tracking.

[Save](#) [Cancel](#)

Step 4

- Enable Evaluation Criteria Scoring

Evaluation criteria score

Enable scoring to assign numeric values to evaluation criteria, allowing for consistent measurement, benchmarking, and tracking of quality performance over time.

[Enable scoring for criteria](#)

When enabled, this setting allows you to define scoring logic for a criterion, with each criterion evaluated on a scale of 0 to 100. This configuration is permanent and cannot be changed later.

Configure the minimum score required to meet performance expectations for each evaluation criterion.

Set threshold value out of 100 *

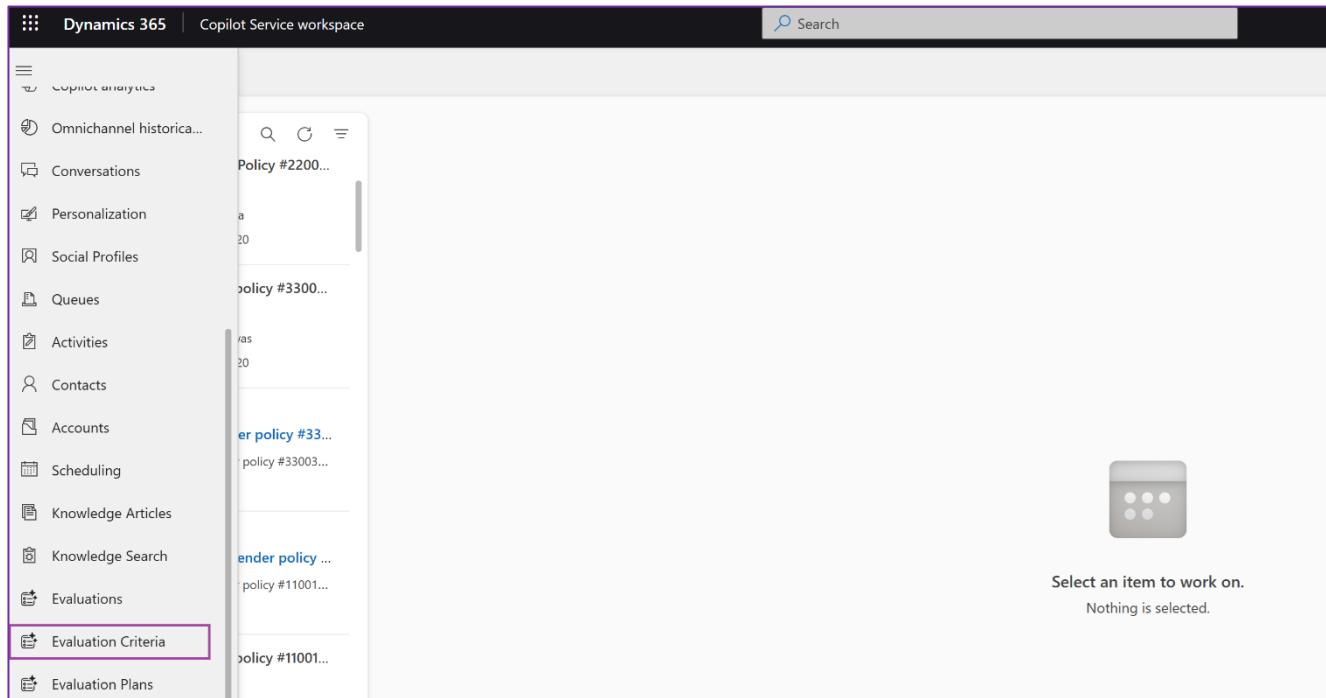
70

Task 3 – Use Evaluation Criteria

For step-by-step details to create and manage Evaluation Criteria refer link [Create Evaluation Criteria](#)

Step 1

- Open Copilot Service workspace. Ensure the user has the required security roles assigned in [Task 1](#).
- Click on left Navigation Pane -> click Evaluation Criteria.



- Step 2** Click on New (+) button to start the process of creating Evaluation criteria.

Dynamics 365 | Copilot Service workspace

Search

Home | New Evaluation criteria | X

Save | Save & Close

New evaluation criteria - Saved

Criteria details

Add criteria details which helps you better organise your evaluation criteria. [Learn more](#)

Criteria name *

Description
[Add form level instructions](#)

Criteria scoring

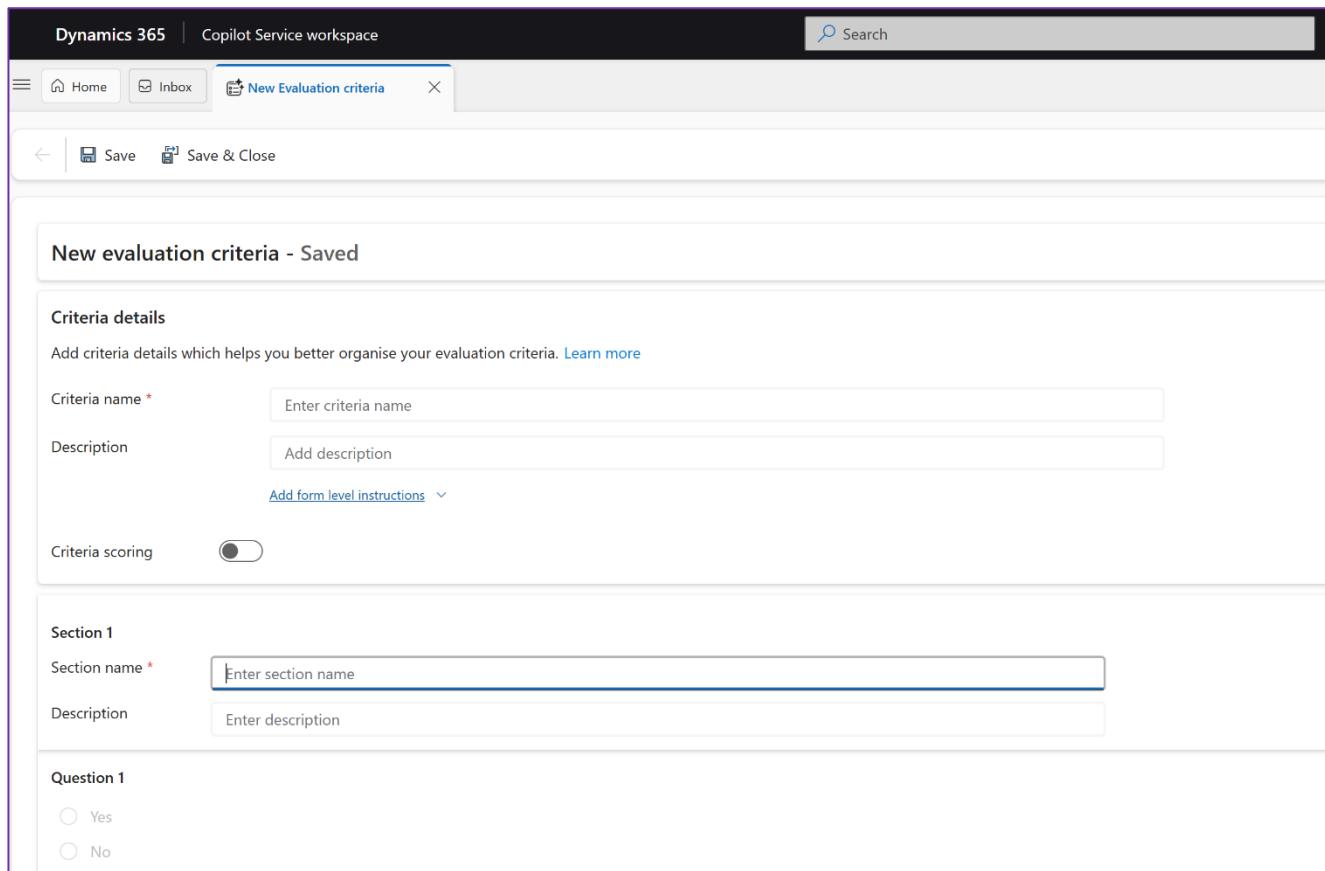
Section 1

Section name *

Description

Question 1

Yes
 No



Step 3 Define instructions that apply to the evaluation criteria.

Refer link for the best practices to [create evaluation criteria](#).

Below sample screenshot of evaluation criteria

Sample Criteria v1.0 - Published

Published Criteria This criteria has been published and is now view-only.

Criteria details

Add criteria details which helps you better organise your evaluation criteria. [Learn more](#)

Criteria name *	Sample Criteria v1.0
Description	Add description
Add form level instructions ^ Instructions The Quality Evaluation Agent must assess how well the response meets communication, accuracy, and process standards. The objective is to judge whether the interaction is customer-focused, correct, complete, and compliant. Follow this approach: Review every section and evaluate each question using the corresponding answer instructions. Assign scores exactly as defined. Ensure strict compliance with all guidance specified at the section, question, and answer levels.	
468 / 1000 maximum characters	
Criteria scoring	<input checked="" type="checkbox"/>

Section 1: Opening * Section weight (%): 12

Question 1

Select answer type * Yes/No Multiple choice Choose from list Text selection

Form question text *	Email recipient check	Question score	100
Add question level instructions ^ Instructions Verify whether the email was received from a valid email address.			
66 / 1000 maximum characters			

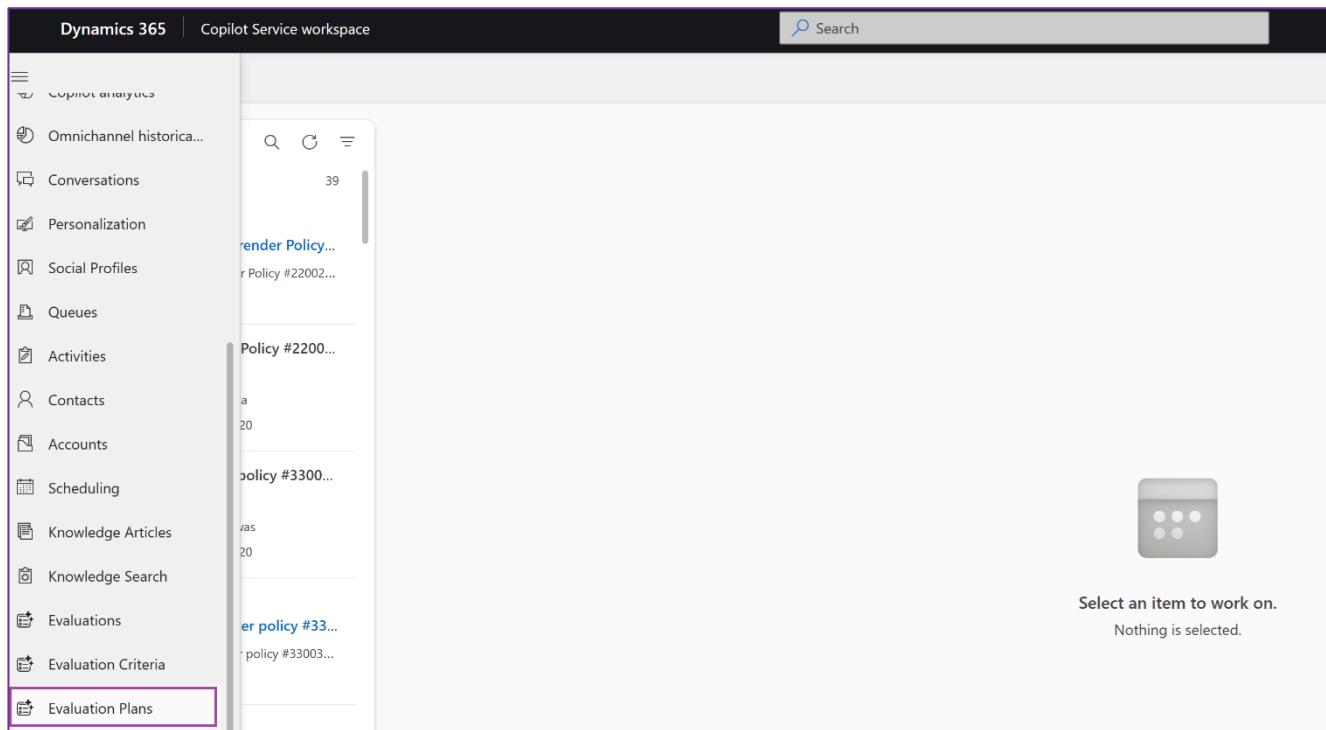
AI response enabled Scoring enabled

Task 4 – Use Evaluation Plan

This section describes how to create, activate, and manage evaluation plans, and enable bulk evaluations to streamline your review process.

Refer link for more details [Create and Activate evaluation-plan-for-cases-and-closed-conversations](#)

Step 1 Open Copilot Service workspace -> Click on Evaluation Plans



Step 2 Create an evaluation plan

Below is an example screenshot showing what an evaluation plan looks like.

The screenshot shows the 'Case Evaluation Plan - Saved' form. The form has several sections:

- Evaluation plan details:** Plan name: Case Evaluation Plan, Description: Evaluation Plan as per audit sheet, Record type: Case.
- Frequency:** Frequency type: Recurring, Occurrence: Daily, Start date: 11/10/2025, End date: 11/11/2025.
- Conditions:** A table with columns: And, Field, Operator, Value. One row is shown: Status Equals Active.
- Assign Evaluation:** Evaluation criteria: Case Evaluation Criteria, Evaluation method: AI assisted, Owner: FT India Admin (Offline), Evaluation expiration date: 11/30/2025, Evaluation start time: 8:00 AM.

Task 5 – Use on-demand evaluation

Use on-demand evaluation to check cases and conversations. Request evaluations with AI-assisted, manual, or AI agent methods for flexible quality management.

Refer link [On-demand-evaluation-for-cases](#), [On-demand-evaluation-for-conversations](#) for detailed steps.

Step 1

- Evaluation from Case sub grid (20 records max)

The screenshot shows a sub-grid titled 'My Active Cases' with four rows of data. The columns are: Case Title, Case Number, Priority, Origin, Customer, Status Reason, and Created On. The first row is selected. The 'Request evaluation' button is highlighted with a purple border.

Case Title	Case Number	Priority	Origin	Customer	Status Reason	Created On
Address Update for Policy Number 123569	CAS-01046-T3S4S2	Normal	Email	Sourajit Samanta	In Progress	11/18/2025 10:33 AM
Copilot logo setting not appearing	CAS-01036-N8W1X3	Normal		Adventure Works (sa...)	In Progress	1/14/2025 9:59 PM
Credit card shipment delay	CAS-01044-L7V9F7	Normal	Web	Rajeev Kumar	In Progress	7/31/2025 7:17 PM
Damaged during shipment (sample)	CAS-01004-X4G1M5	Low	Email	Yvonne McKay (sampl...)	In Progress	1/20/2024 10:00 AM

- Evaluation for a single record

The screenshot shows a single case record for 'Address Update for Policy Number | 123569'. The top navigation bar includes 'Save', 'Save & Close', 'Save & Route', 'Request evaluation' (highlighted), 'New', 'Convert to Work Order', 'Resolve Case', 'Cancel Case', 'Assign', 'Open App', and 'Share'. The main area displays the case details: Case Number (CAS-01046-T3S4S2), Email Origin (Email), and Created On (11/18/2025 10:33 AM). Below this are sections for 'Due and Overdue Activities' and 'Case summary'. A search bar at the bottom says 'Search timeline'.

Task 6 – Use Evaluations

Use evaluations to assess and improve the quality of cases and conversations. This article explains how to access evaluation results, understand scoring and compliance details, and interpret evaluation states.

Refer link [Use-evaluations](#) for detailed steps

Step 1 Open Copilot Service workspace -> Click Evaluations

Dynamics 365 Copilot Service workspace

cord ...	Related ...	Score	Evaluation met...	AI agent status	Evaluator status	Evaluator expi...	Evaluator completion ...	Owner	Requested ...	Evaluation crit...
ase	Surrender...	3	AI agent	Completed	Completed	11/27/2025	11/20/2025 10:35 AM	FA FT India Adm...	Sample Crite	
ase	Surrender...	15	AI agent	Completed	Completed	11/27/2025	11/20/2025 10:54 AM	FA FT India Adm...	Sample Crite	
ase	Surrender...	15	AI agent	Completed	Completed	11/27/2025	11/20/2025 10:59 AM	FA FT India Adm...	Sample Crite	
ase	Surrender...	11	AI assisted	Completed	Completed	11/27/2025	11/20/2025 10:51 AM	FA FT India Adm...	Sample Crite	
ase	Surrender...	15	AI agent	Completed	Completed	11/27/2025	11/20/2025 10:58 AM	FA FT India Adm...	Sample Crite	
ase	Surrender...	15	AI agent	Completed	Completed	11/27/2025	11/20/2025 11:03 AM	FA FT India Adm...	Sample Crite	
ase	Surrender...	15	AI agent	Completed	Completed	11/27/2025	11/20/2025 11:13 AM	FA FT India Adm...	Sample Crite	
ase	Request t...	1	AI agent	Completed	Completed	11/27/2025	11/20/2025 2:28 PM	FA FT India Adm...	Sample Crite	
ase	Request t...	2	AI agent	Completed	Completed	11/27/2025	11/20/2025 2:32 PM	FA FT India Adm...	Sample Crite	
ase	Request t...	5	AI agent	Completed	Completed	11/27/2025	11/20/2025 2:37 PM	FA FT India Adm...	Sample Crite	

Step 2 Click the record name to open the evaluation

Below is a screenshot showing a sample evaluation

Surrender Policy | Policy #9876662 Saved
Case - Case for Multisession experience

Summary Knowledge Hub Details Attachments Related

Case summary

Timeline

AI-generated content may be incorrect. Make sure AI-generated content is accurate and appropriate before using. See terms

Evaluation-1076

Evaluation updated from case details Fields were completed using AI.

Evaluation summary

The customer received a message from AI asking for information on how to surrender a policy. The message was promptly acknowledged with an outbound message confirming case creation and providing a reference number. The communication demonstrated proper grammar, punctuation, and a professional tone, including appropriate salutations and closing lines. However, the response did not address the customer's specific request for the steps to surrender the policy, nor did it provide any process information. Additionally, there is no evidence of a separate case note being created. The main shortcoming is the lack of substantive information in response to the customer's query.

Suggested actions

- The case handler should follow up with the customer by providing detailed steps to surrender the policy.

Copy

All generated content may be incorrect. Make sure AI-generated content is accurate and appropriate before using. See terms

Sample Criteria v1.0

Overall Score 3/100

Opening (1/12)

Email recipient check

Yes

About this answer

Standard Opening Line / Acknowledgement

Yes

Glossary

Speak the language, bridge the world—unlock hearts, opportunities, and the true essence of every land.

Customer Representatives: A human representative helping resolve customer issues

Agent: A digital assistant powered by AI, capable of understanding and responding to user inputs. In Copilot Studio, agents can be customized to for conversational experiences and/or can act autonomously based on pre-configured triggers and instructions.

Testing Scenario (Appendix) -

Step 1 - Customer sends an email to surrender a case

Sub – Request to surrender policy #101010

Dear Customer Care Team,

I would like to surrender my policy #33003300. Please share the surrender value, applicable charges (if any), and the process/required documents to complete this request.

Kindly confirm the expected TAT for processing.

Regards,

Customer Name

Step 2 - A case gets created. Perform a on-demand evaluation by clicking on “Request evaluate” on the specific case by choosing the evaluation criteria which you have created. Notice the evaluation score and recommendation for each of the questions present in the evaluation criteria.

Step 3 – Lets add a note which you as a customer service representative acted on the case.

“Note Title - Activities done for Surrender of Policy

1. Verified Customer Identity

Confirmed policyholder details using KYC checks (Policy No., DOB/PAN, OTP verification).

2. Checked Eligibility for Surrender

Verified if the policy has acquired surrender value.

Confirmed lock-in completion (e.g., 5 years for ULIPs).

Informed customer if surrender is not permissible.

3. Shared Estimated Surrender Value

Retrieved/computed surrender value (GSV/SSV/Fund Value).

Communicated deductions and impact clearly.

4. Explained Implications

Informed customer of:

Loss of benefits and bonuses

Charges/penalties

Tax or coverage impact

5. Collected Required Documents

Surrendered request form (signed)

Original policy bond

ID proof

Bank proof (cancelled cheque/statement)

Any additional documents as per guidelines

6. Registered the Request

Logged a surrender service request in the system.

Uploaded documents and initiate the workflow.

7. Processed Surrender

Triggered surrender computation in the system.

Validated charges, approvals, and system checks.

8. Confirmed TAT to Customer

Informed customer of the processing time (typically 4–10 days).

Shared the payout value and bank account details where the amount will be credited.

9. Complete Payout

Forwarded the case to finance for NEFT payout.

Updated policy status to "Surrendered" once payment is released.

10. Close the Request

Notify the customer of successful completion.

Close the service ticket with all supporting details.”

Step 4 – Perform the on-demand evaluation and notice the score and the recommendations.
Observe that the score is improving as more criteria are being met.