

# 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**

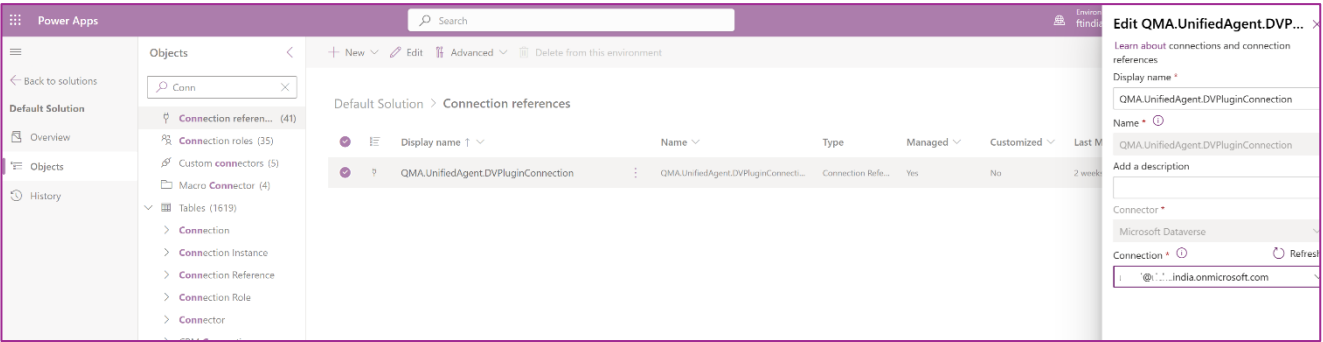
**Step 1** Assign the **Quality Manager**, **Quality Evaluator**, and **Quality Administrator** roles to the users responsible for configuring the Quality Evaluation Agent (QEA).

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.

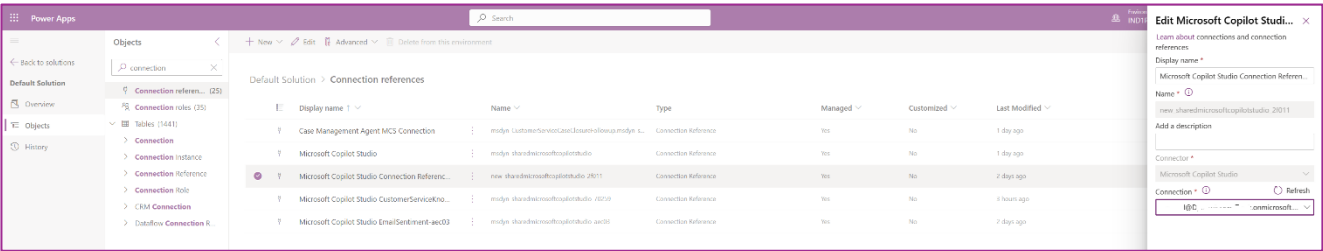
For detailed steps refer to link [Set connection references for AI agent flow](#)

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**”

70



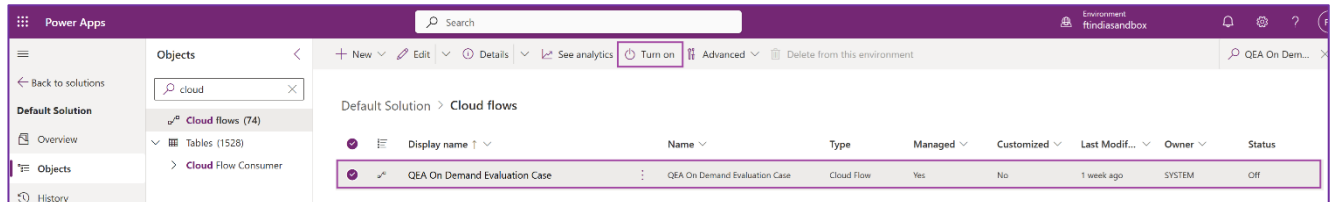
Do the similar steps to associate connection to all the below Connection references –

- 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

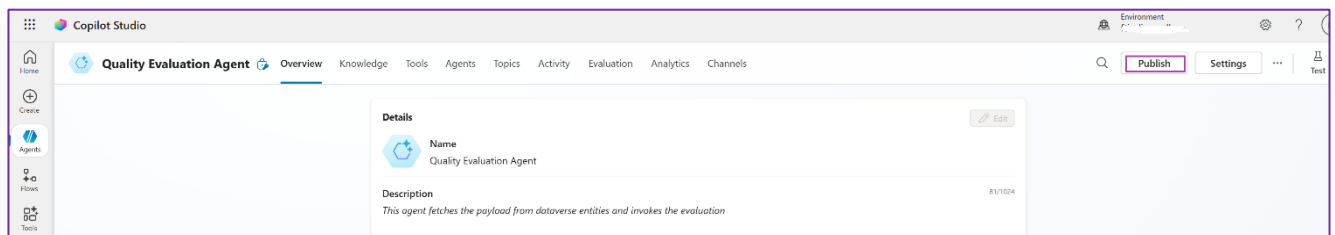
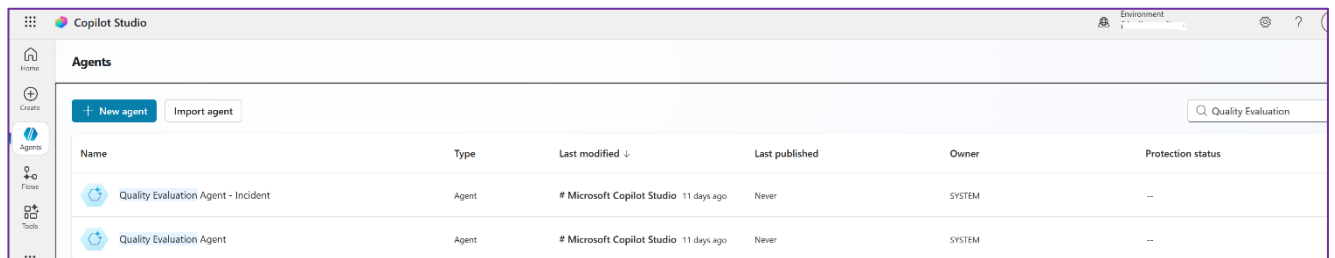
For detailed steps refer to link [Turn on the Power Automate Flows](#)

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



### 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.](#)

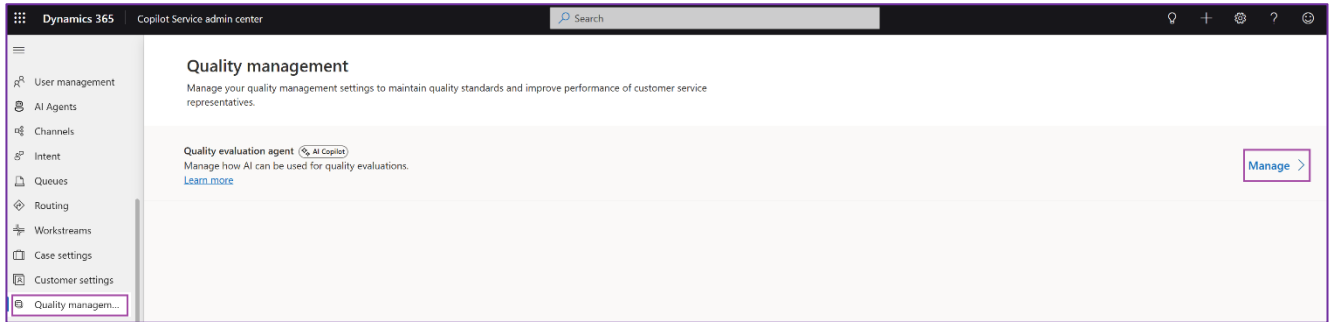


## Task 2 – Enable Quality Evaluation Agent

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

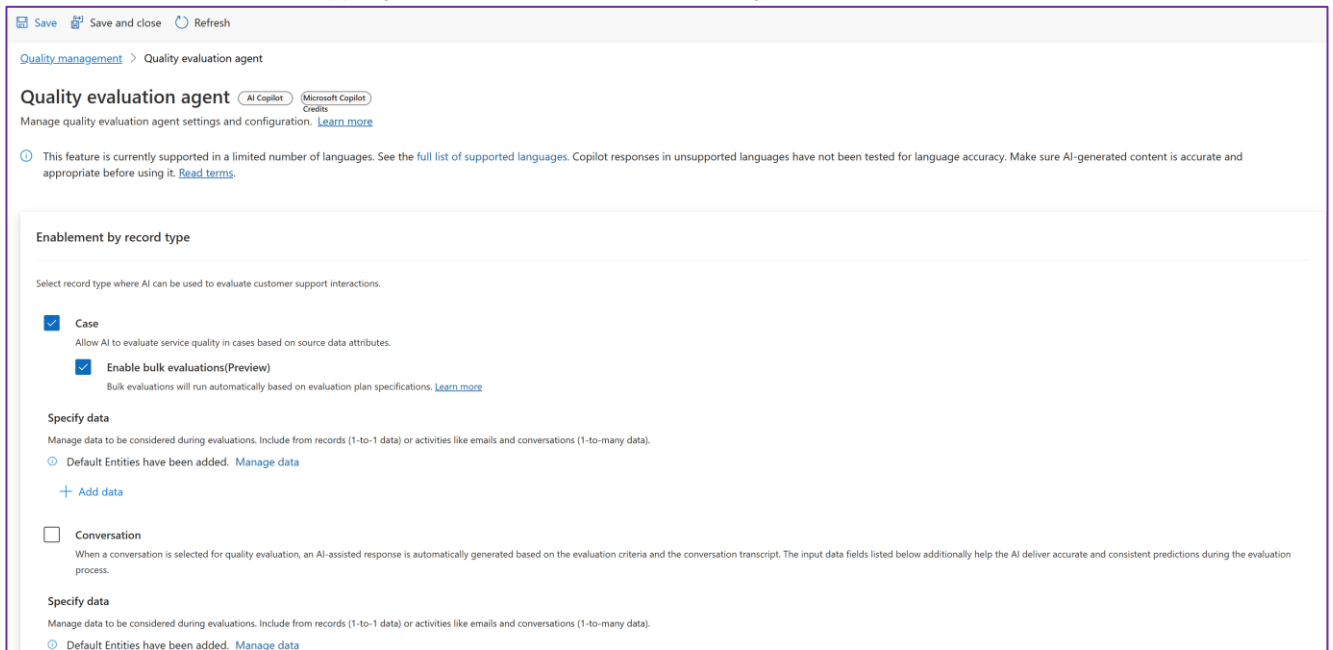
### Step 1

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



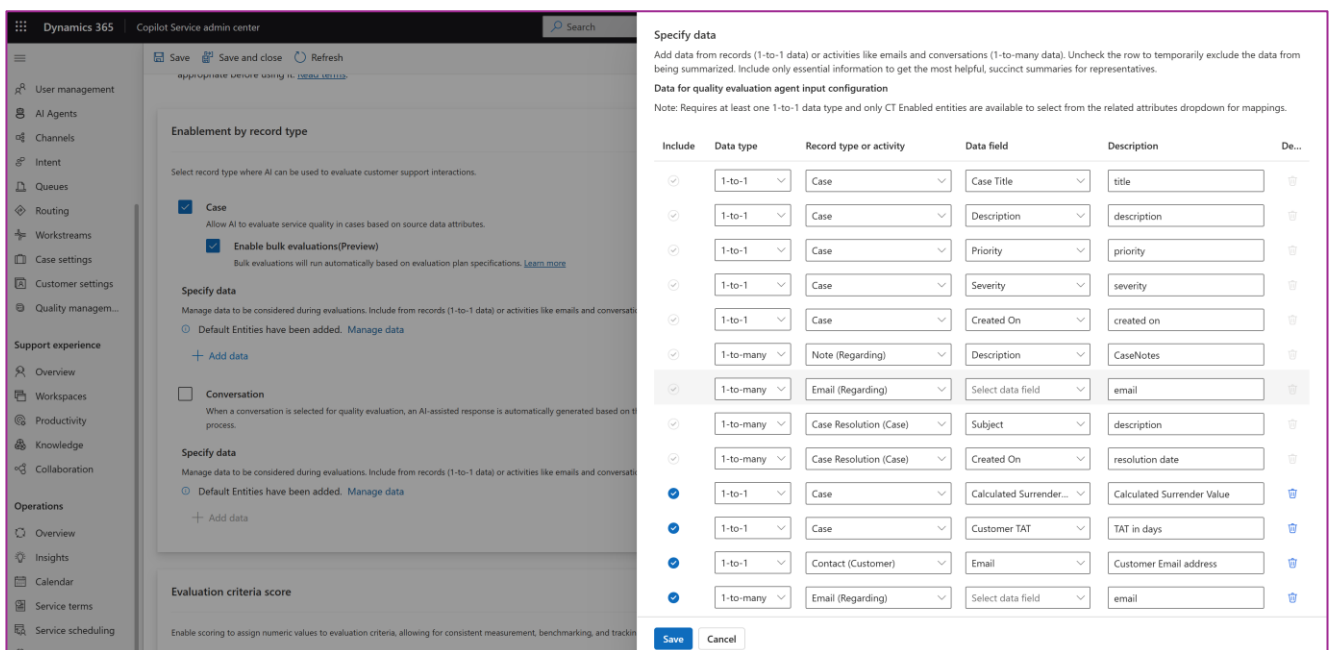
## Step 2

- Enable Record Type (Cases Conversations or both)



## Step 3

- Manage data to be considered during evaluation



## 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.

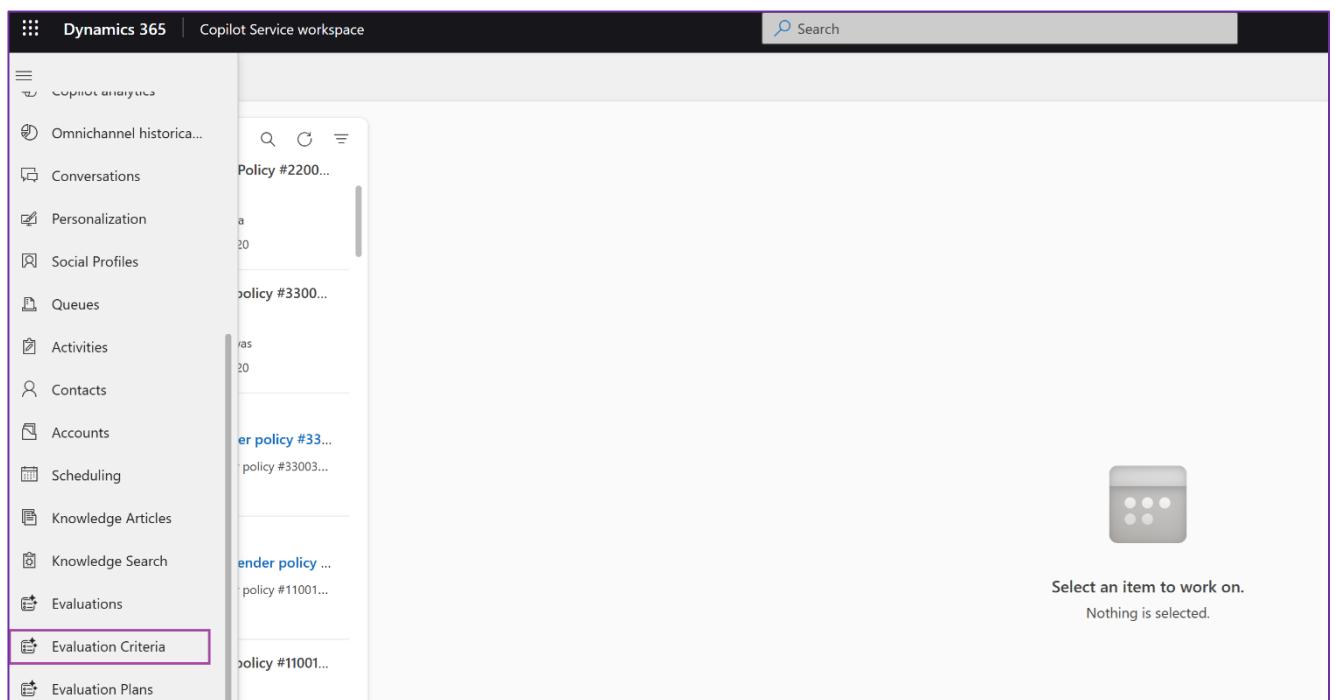
**Set threshold value out of 100 \***

## 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

Inbox

New Evaluation criteria

Save

Save & Close

New evaluation criteria - Saved

Criteria details

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

Criteria name \*

Enter criteria name

Description

Add description

Add form level instructions

Criteria scoring

Section 1

Section name \*

Enter section name

Description

Enter 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

☐

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

Add question level instructions ^

Instructions

Verify whether the email was received from a valid email address.

66 / 1000 maximum characters

Question score

100

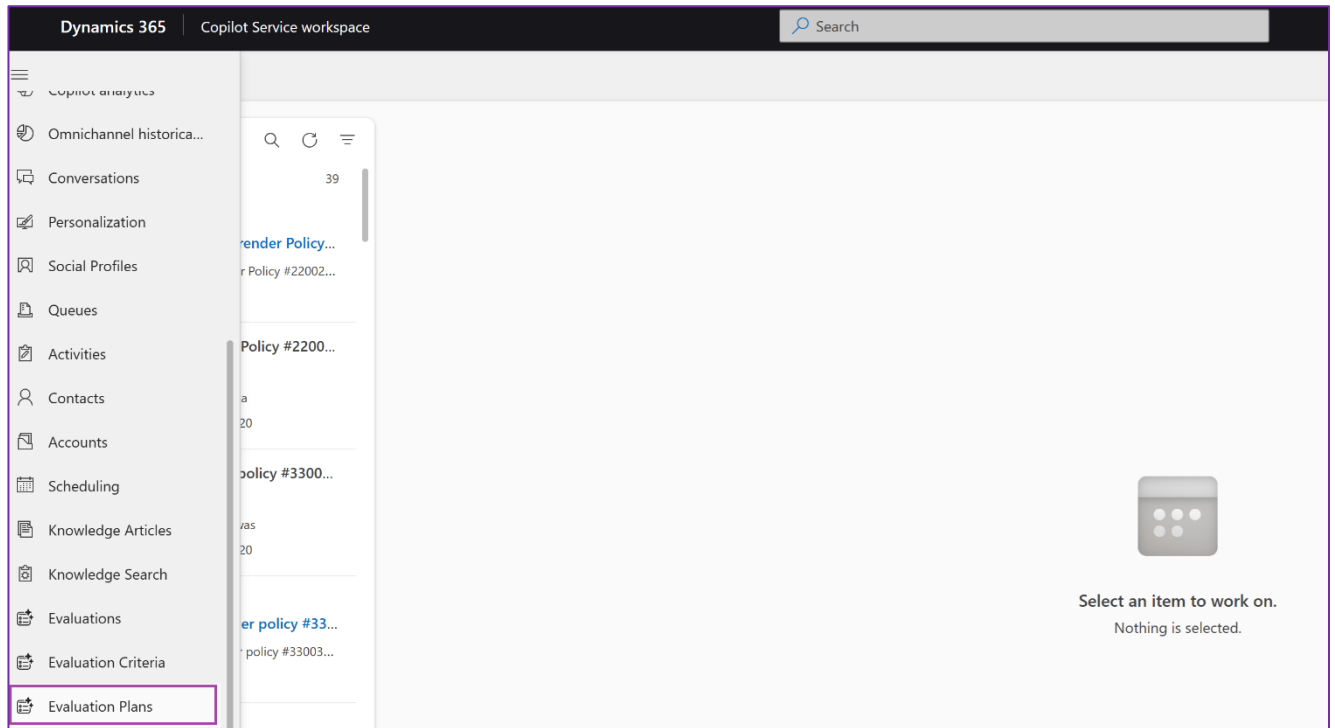
☒ AI response enabled
☒ Scoring enabled

## 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.

**Case Evaluation Plan** - Saved  
Evaluation Plan

**General**

**Evaluation plan details**

Plan name \*

Description

Record type \*

**Frequency**

Frequency type \*

Occurrence

Start date \*

End date \*

**Conditions**

And	Field	Operator	Value
	Status	Equals	Active

**Assign Evaluation**

Evaluation criteria \*

Evaluation method \*

Owner \*

Evaluation expiration date \*



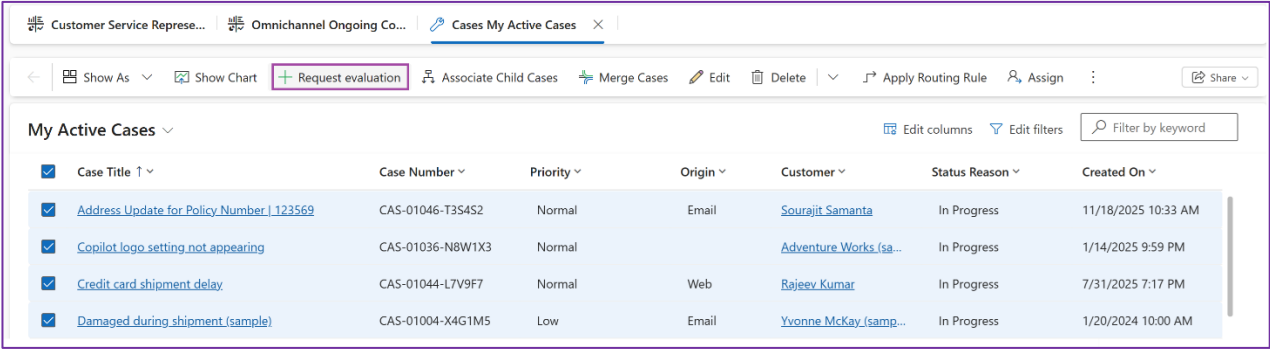
Task 5 – Use on-demand evaluation

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

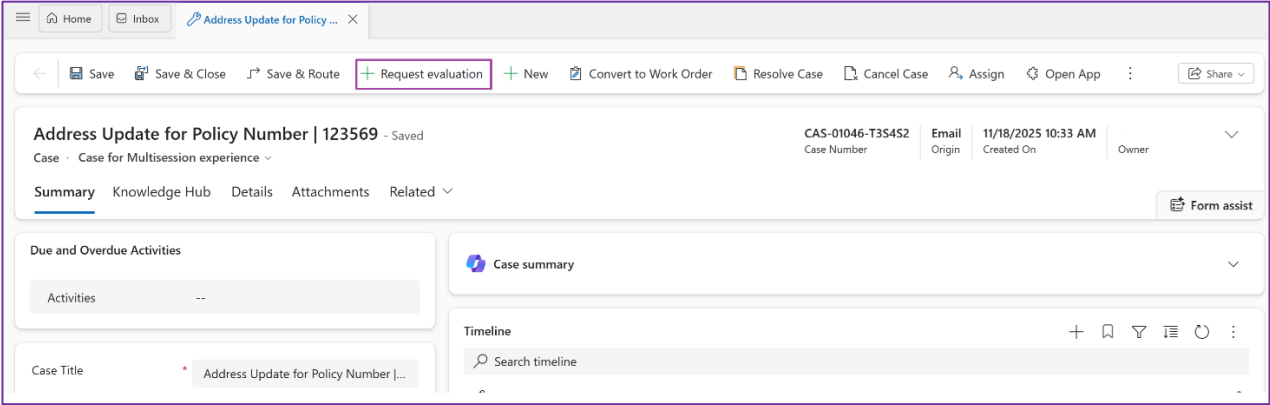
Refer link [On-demand-evaluation-for-cases](#) , [On-demand-evaluation-for-conversations](#) for detailed steps.

Step 1

- Evaluation from Case sub grid (20 records max)



- Evaluation for a single record



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

Record ID	Related Record	Score	Evaluation Method	AI Agent Status	Evaluator Status	Evaluator Experience	Evaluator Completion	Owner	Requested	Evaluation Criteria
ase	Surrender...	3	AI agent	Completed	Completed	11/27/2025	11/20/2025 10:35 AM	FA FT India Admin	FA FT India Admin	Sample Criteria
ase	Surrender...	15	AI agent	Completed	Completed	11/27/2025	11/20/2025 10:54 AM	FA FT India Admin	FA FT India Admin	Sample Criteria
ase	Surrender...	15	AI agent	Completed	Completed	11/27/2025	11/20/2025 10:39 AM	FA FT India Admin	FA FT India Admin	Sample Criteria
ase	Surrender...	11	AI assisted	Completed	Completed	11/27/2025	11/20/2025 10:51 AM	FA FT India Admin	FA FT India Admin	Sample Criteria
ase	Surrender...	15	AI agent	Completed	Completed	11/27/2025	11/20/2025 10:58 AM	FA FT India Admin	FA FT India Admin	Sample Criteria
ase	Surrender...	15	AI agent	Completed	Completed	11/27/2025	11/20/2025 11:03 AM	FA FT India Admin	FA FT India Admin	Sample Criteria
ase	Surrender...	15	AI agent	Completed	Completed	11/27/2025	11/20/2025 11:13 AM	FA FT India Admin	FA FT India Admin	Sample Criteria
ase	Request t...	1	AI agent	Completed	Completed	11/27/2025	11/20/2025 2:28 PM	FA FT India Admin	FA FT India Admin	Sample Criteria
ase	Request t...	2	AI agent	Completed	Completed	11/27/2025	11/20/2025 2:32 PM	FA FT India Admin	FA FT India Admin	Sample Criteria
ase	Request t...	5	AI agent	Completed	Completed	11/27/2025	11/20/2025 2:37 PM	FA FT India Admin	FA FT India Admin	Sample Criteria

**Step 2** Click the record name to open the evaluation

Below is a screenshot showing a sample evaluation

**Evaluation-1076**

Evaluation updated from case details. Fields were completed using AI.

**Evaluation summary**

The case involved a customer requesting information on how to surrender a policy. The initial customer email 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 information on the steps to surrender the policy, including a process flow.

**Sample Criteria v1.0**

Overall Score 3/100

**Opening (1/12)**

Email recipient check

Yes

**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.