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 Overview

This lab walks you through enabling and configuring the Quality Evaluation Agent (QEA) in Dynamics 365 Customer Service or Dynamics 365 Contact Center, including required roles, connection references, flow enablement, and validation via on-demand evaluations.

- Audience: Quality managers, administrators, and evaluators configuring QEA
- Estimated time: 45–60 minutes
- Outcome: QEA enabled, connected, and ready to run evaluations for cases and/or conversations

Lab Details

Prerequisites

- Access to Microsoft Copilot Studio at https://copilotstudio.microsoft.com/.
- Available Copilot credits.
- A computer with internet access.

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, including evaluation criteria, an evaluation plan, and a scoring model. Using this framework, the agent automatically evaluates customer conversations or cases (such as policy inquiries, surrender requests, or other service requests) to help ensure accuracy, compliance, and consistent service delivery.

Task 1 – Prerequisites

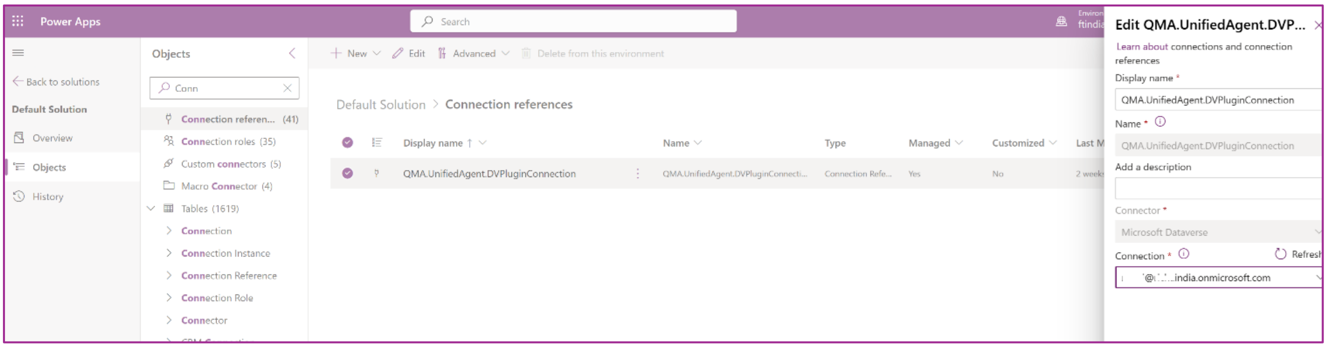
Step 1 Assign the **Quality Manager**, **Quality Evaluator**, and **Quality Administrator** roles to the users responsible for configuring the Quality Evaluation Agent (QEA).

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.

Step 3 For detailed steps, see [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**"

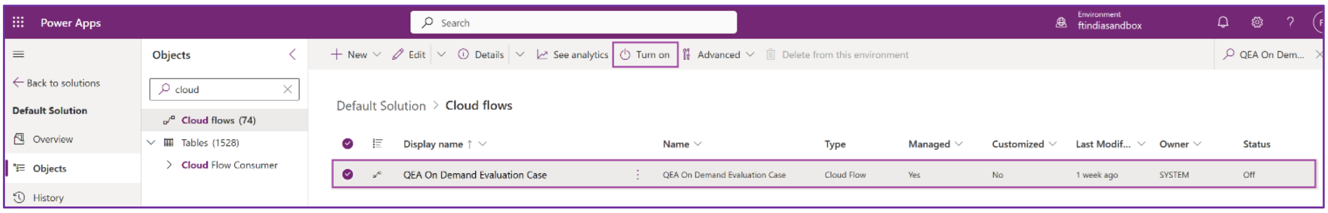
Step 4 Repeat these steps to associate a connection for all the following connection references:

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

Step 5 Turn on the Power Automate flow

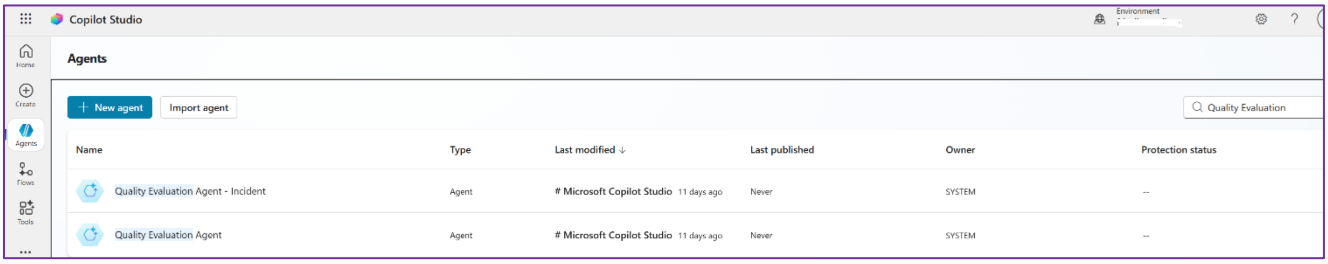
Step 6 For detailed steps, see [Turn on the Power Automate flows](#).

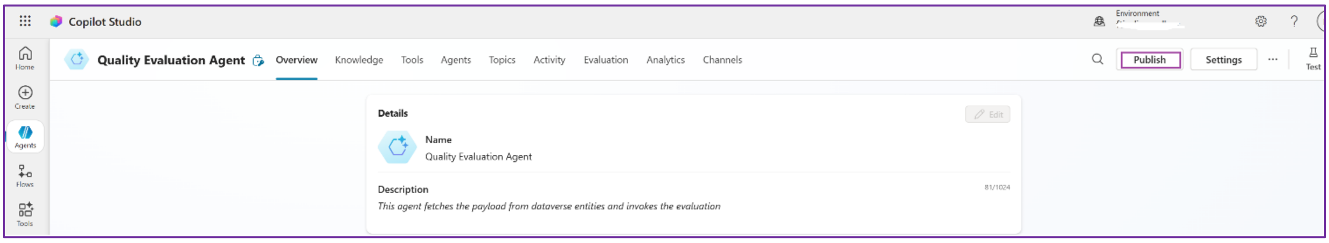
Below example screenshot for turning on Power Automate "**QEA On Demand Evaluation Case**"



Step 7 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.



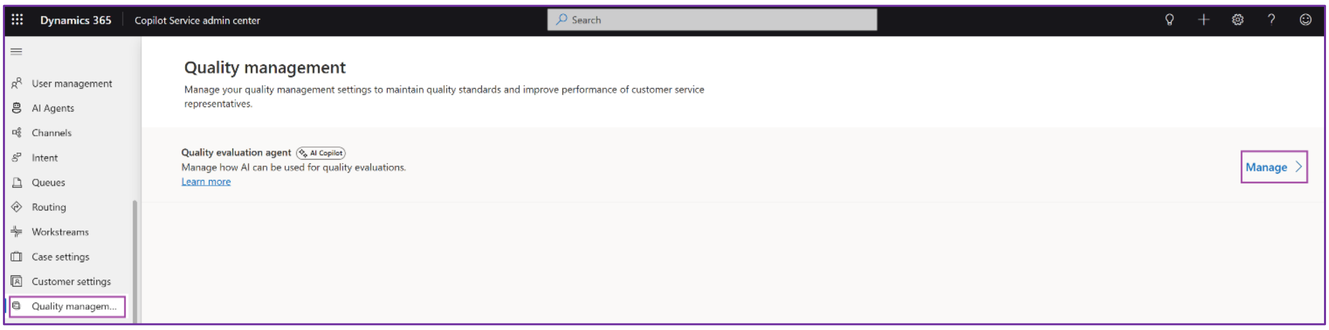


Task 2 – Enable Quality Evaluation Agent

For step-by-step instructions, see Enable Quality Evaluation Agent.

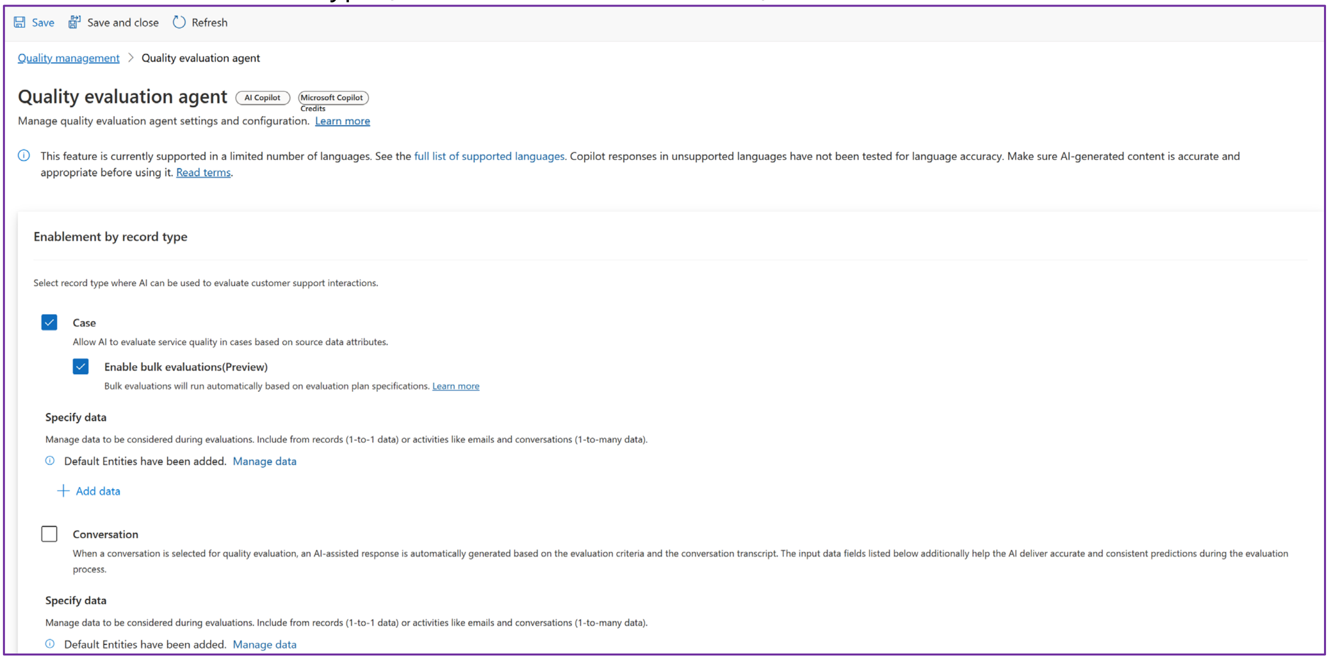
Step 1 Open the environment and navigate to the Quality Management experience.

- Open the environment.
- Open the Copilot Service admin center app.
- Navigate to **Quality Management** > select **Manage**.



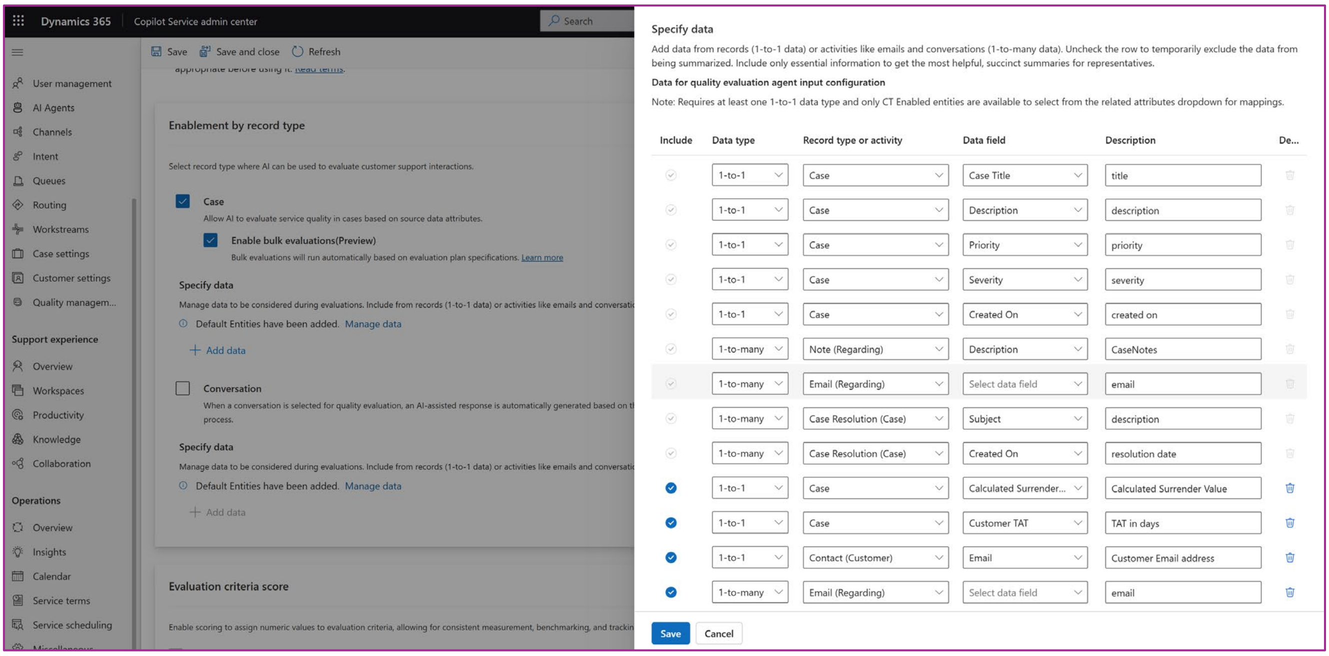
Step 1

- Enable Record Type (Cases Conversations or both)

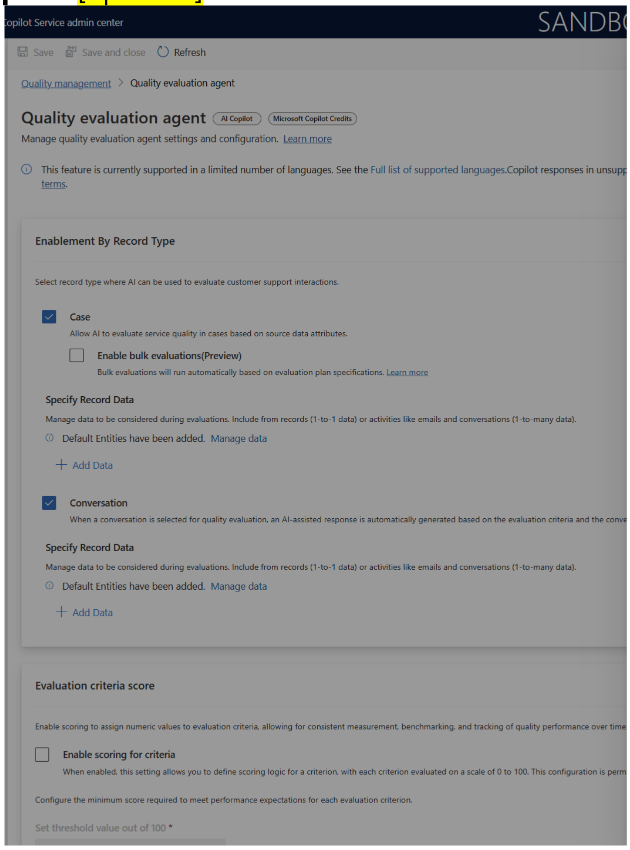


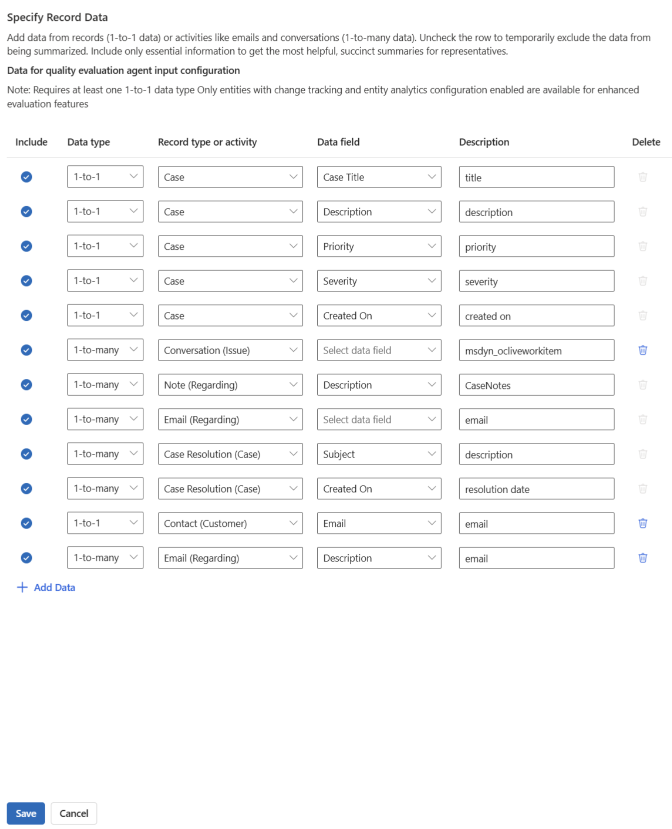
Step 2

- Manage data to be considered during evaluation



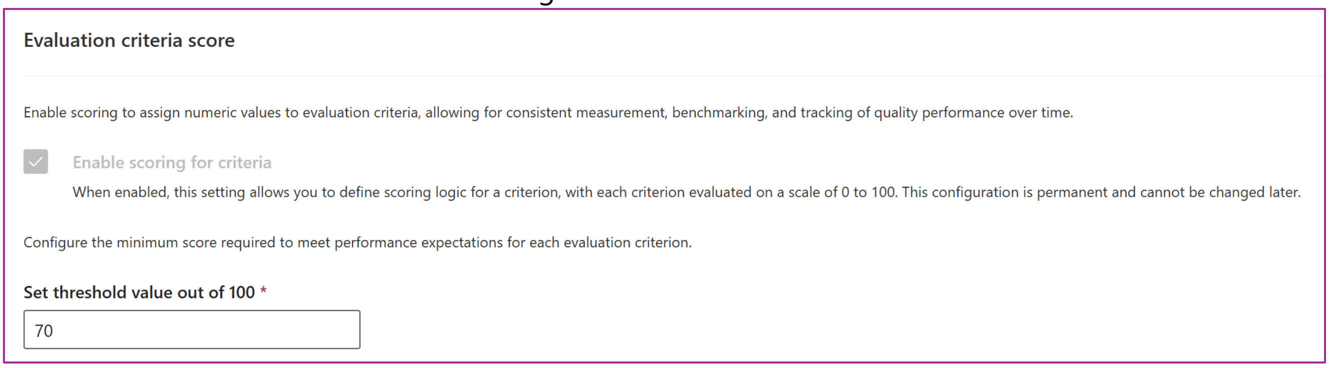
Step 3 [updated]





Step 4

- Enable Evaluation Criteria Scoring

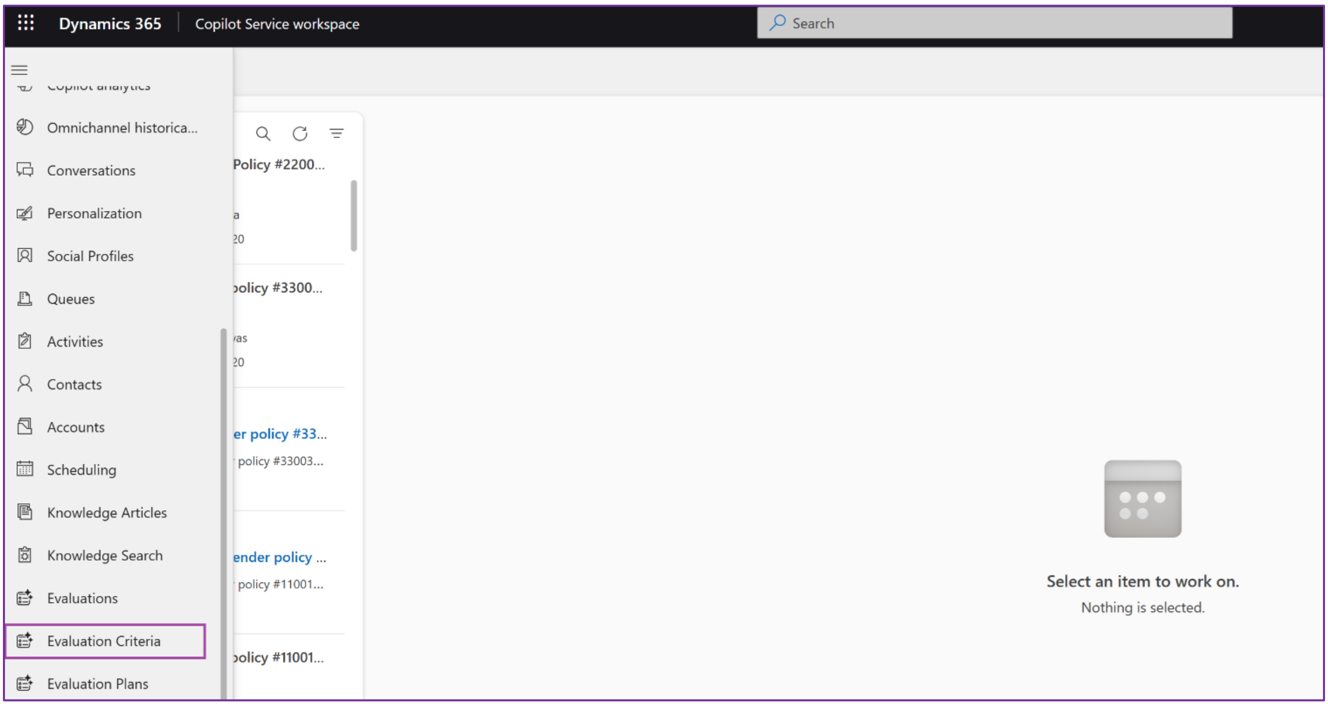


Task 3 – Use Evaluation Criteria

Step 5 For step-by-step instructions to create and manage evaluation criteria, see Create evaluation criteria.

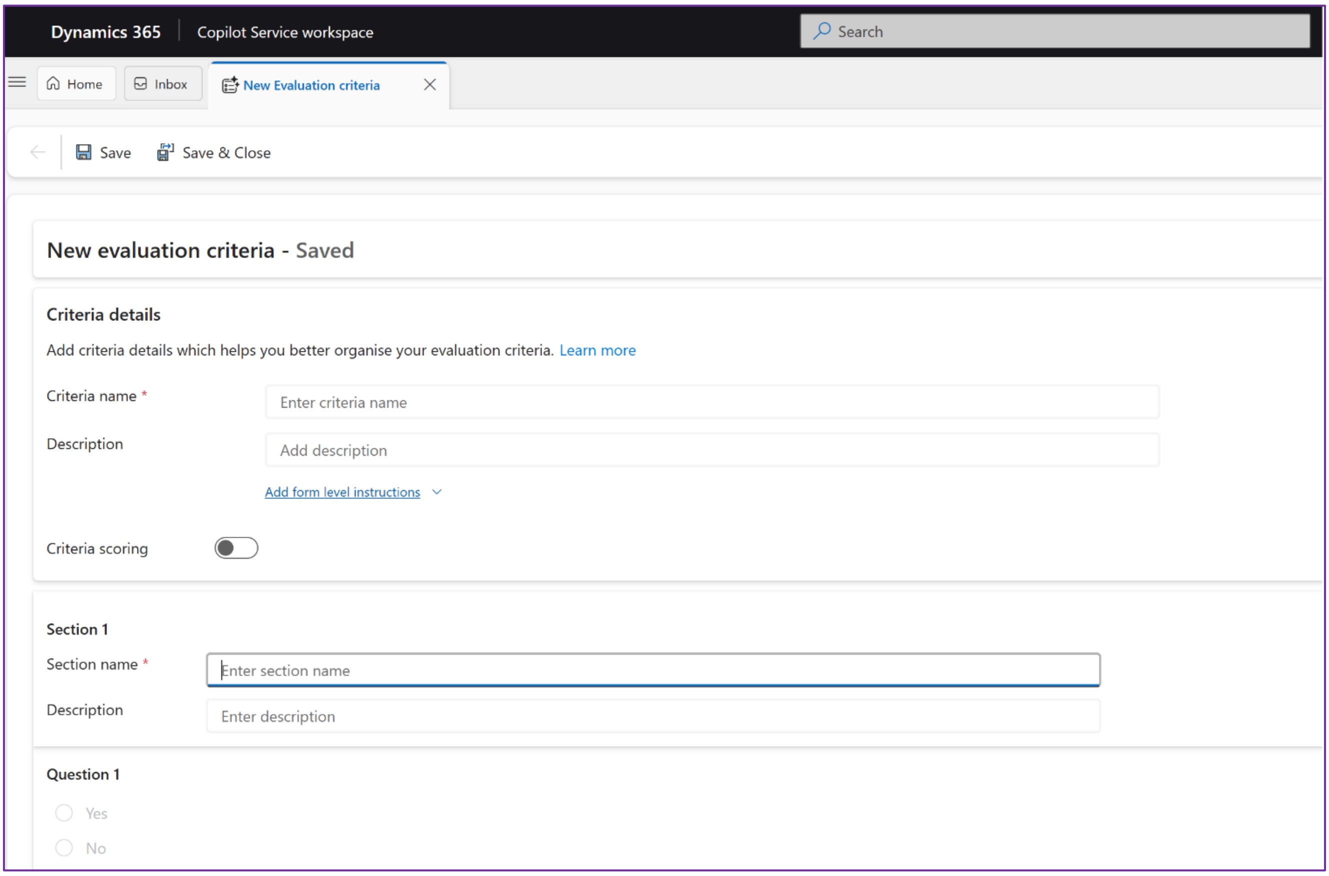
Step 1

- 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.

[update] Note: Enabling scoring during evaluation criteria creation is optional. However, if you wish to use scoring, be sure to enable it before saving, as this setting cannot be changed after creation.

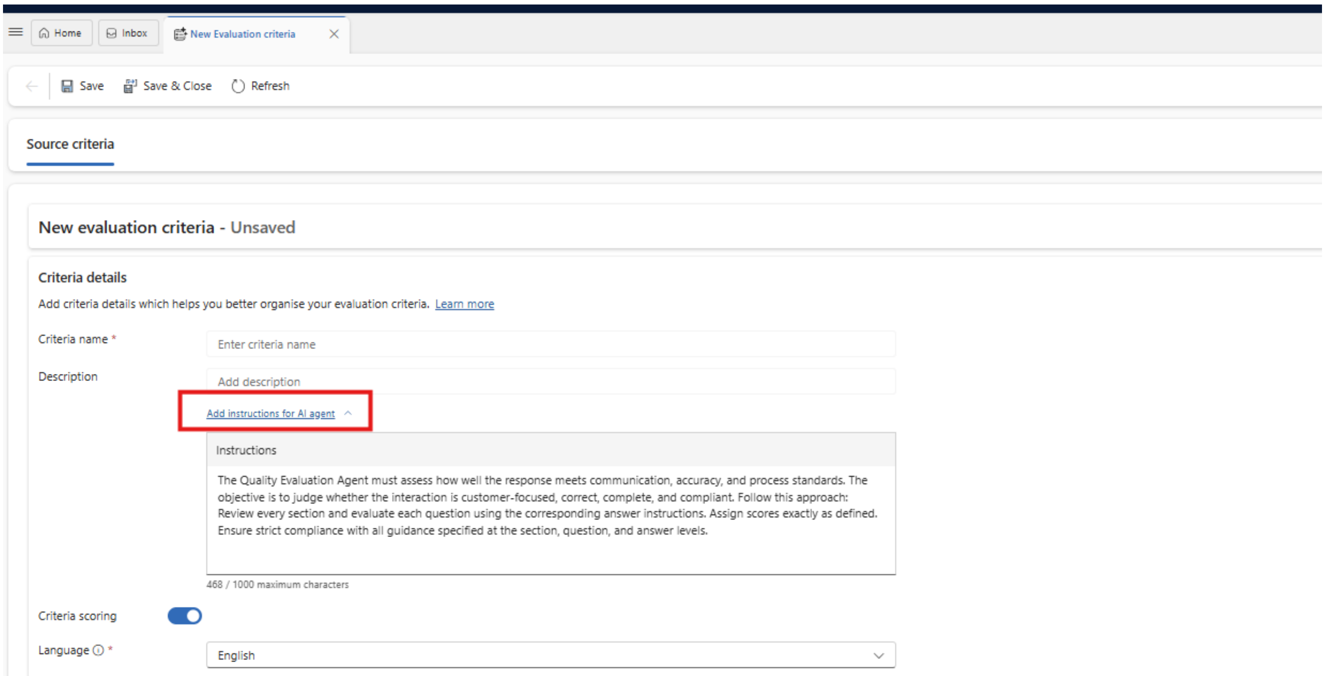


Step 3 Define instructions that apply to the evaluation criteria.

[updated]

Paste the Instruction under the Add instructions for AI agent

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.



Section 1: Paste the Instruction under the Add instructions for AI agent

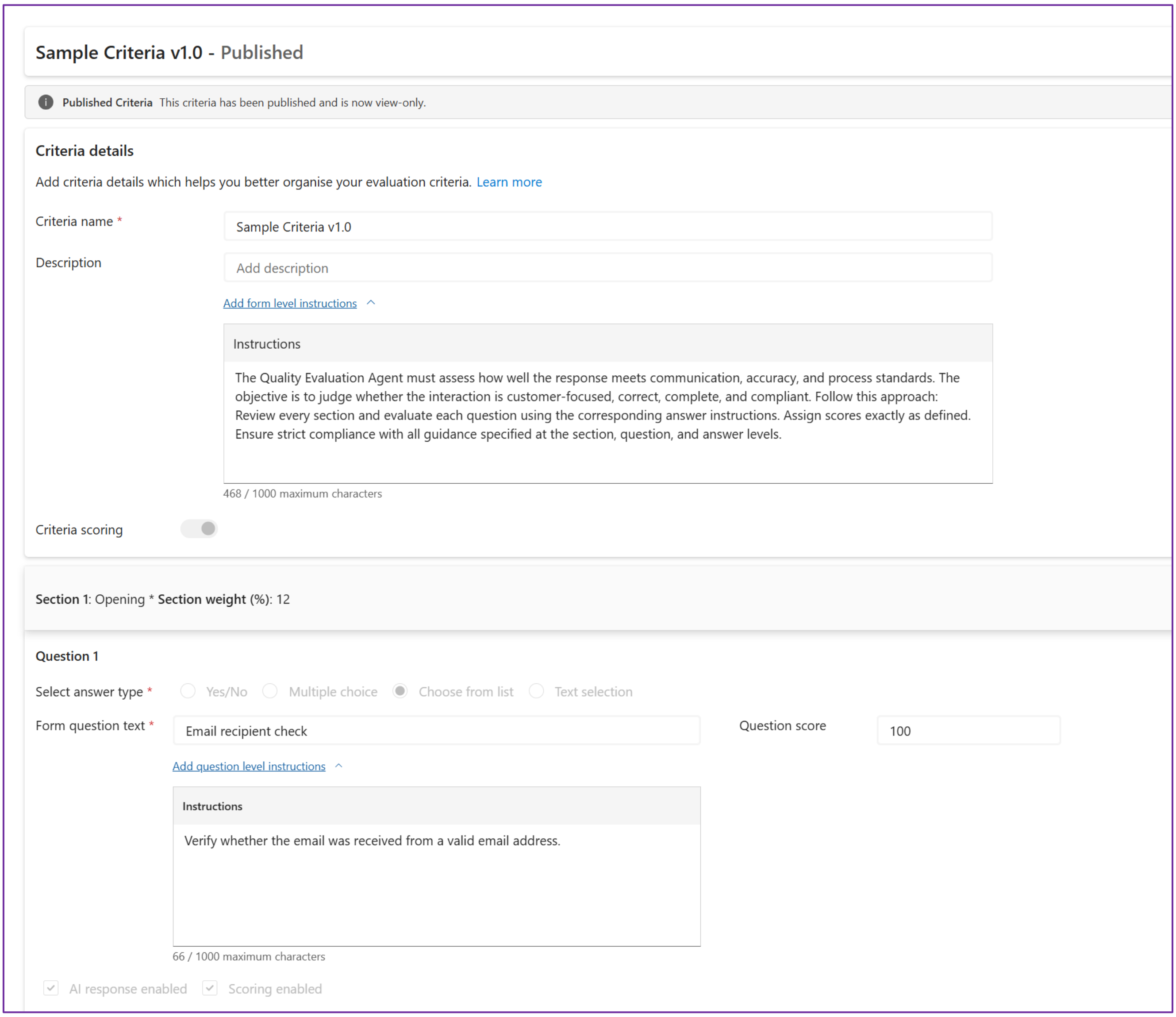
Verify whether the email was received from a valid email address.

Step 4

If you want to add more sections refer here: [Evaluation Criteria Data.xlsx]

After you save, you can review best practices for creating evaluation criteria: [Best practices to create evaluation criteria].

Below sample screenshot of evaluation criteria

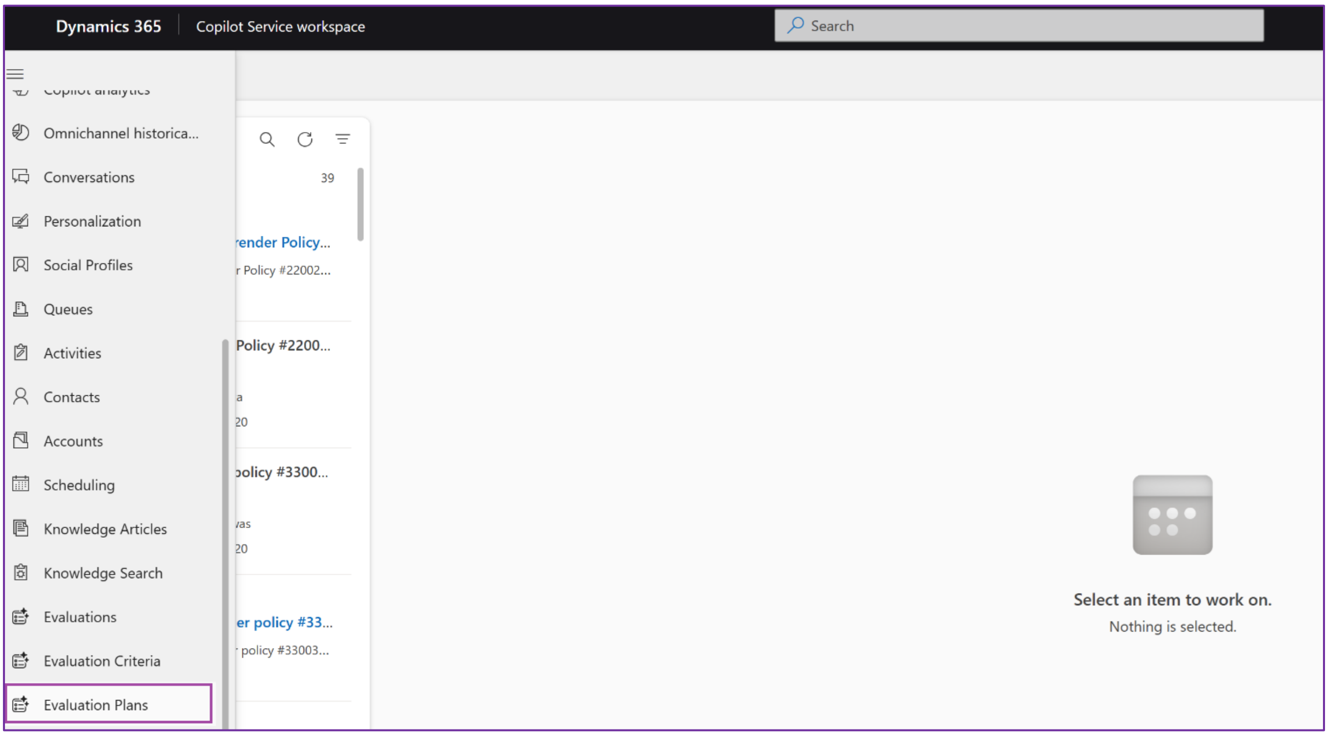


Task 4 – Use Evaluation Plan

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

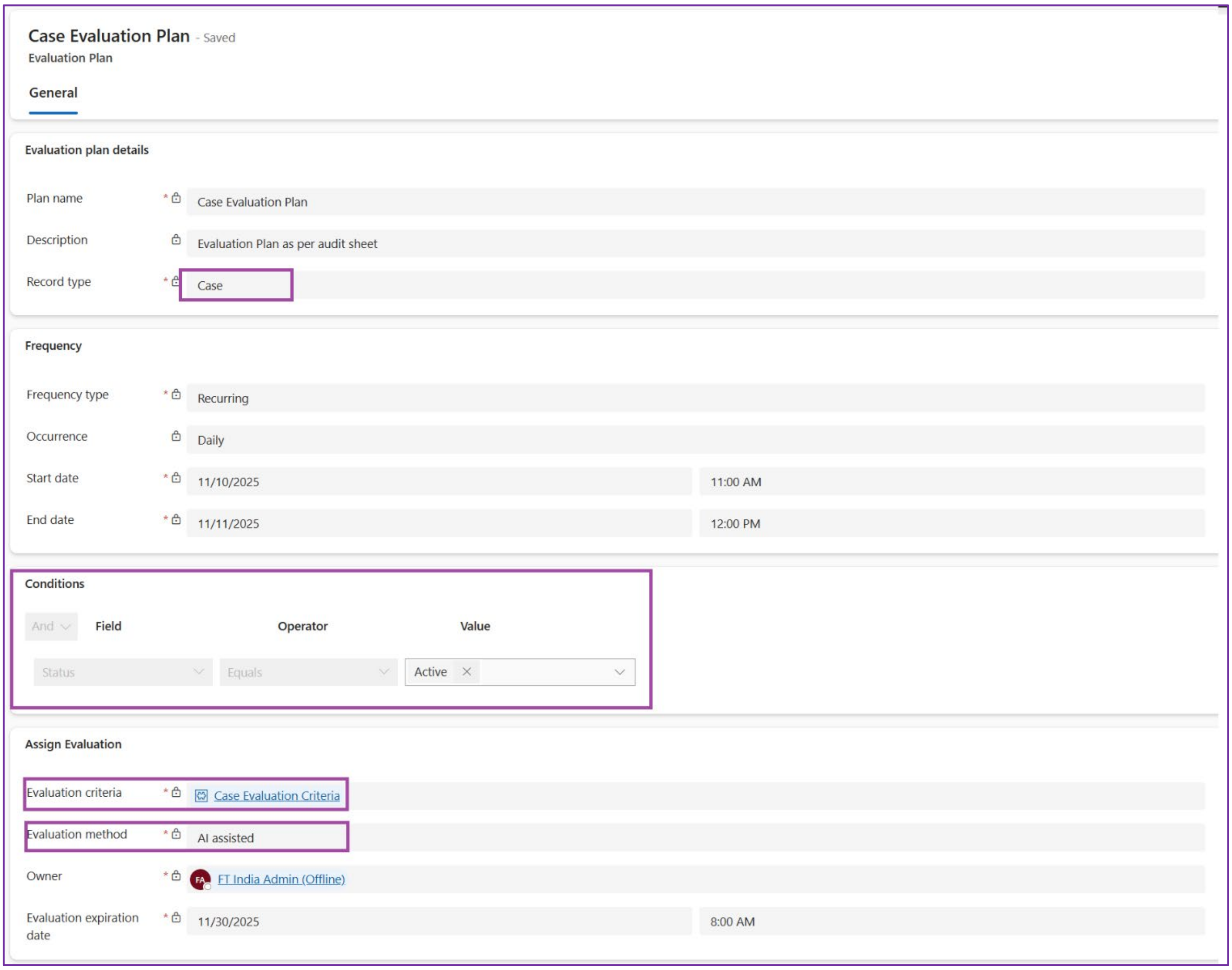
Refer link for more details [Create and Activate evaluation-plan-for-cases-and-closed-conversations]

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.



Task 5 – Use on-demand evaluation

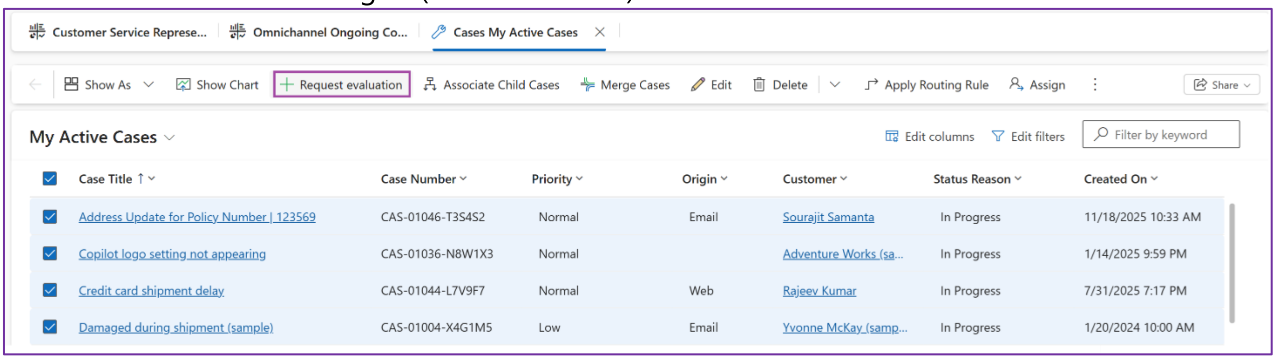
Use on-demand evaluation to check cases and conversations. Request evaluations with AI-assisted, manual, or AI agent methods for flexible quality management.

[update] Note: To view the "Request evaluation" option, you must select at least one case.

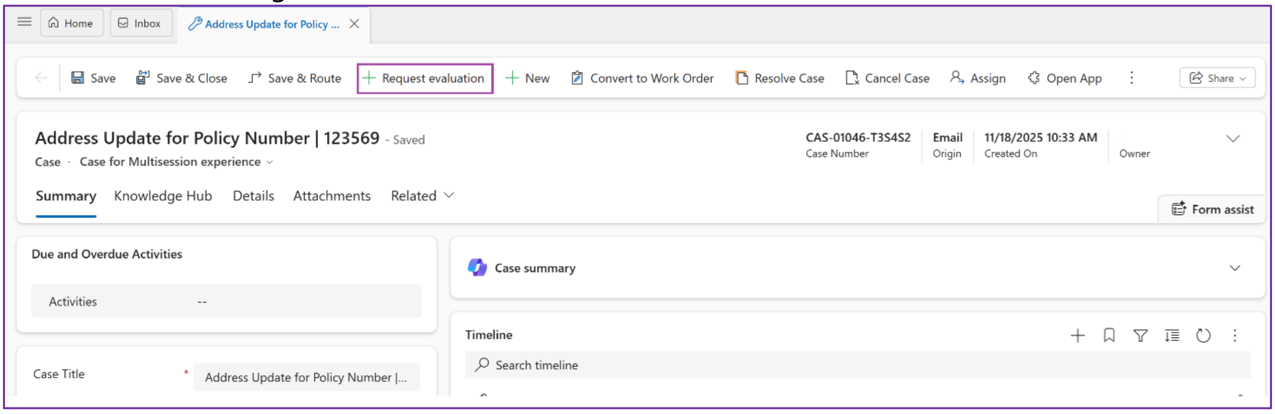
For detailed steps, see On-demand evaluation for cases and On-demand evaluation for conversations.

Step 1

- Evaluation from Case sub grid (20 records max)



- Evaluation for a single record

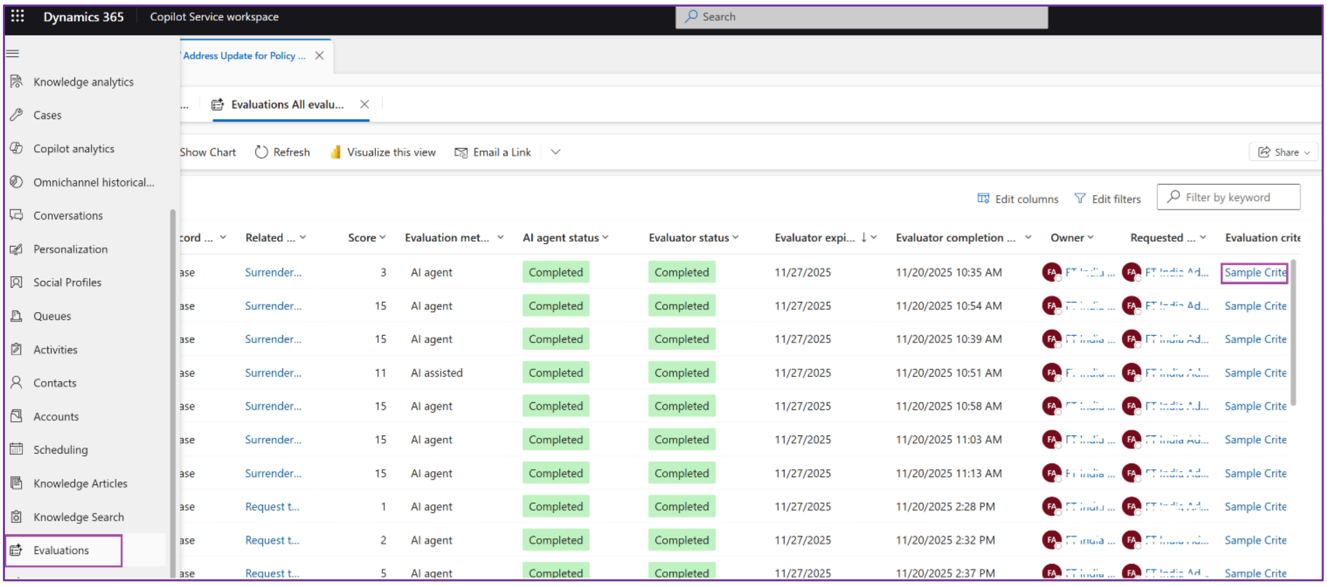


Task 6 – Use Evaluations

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.

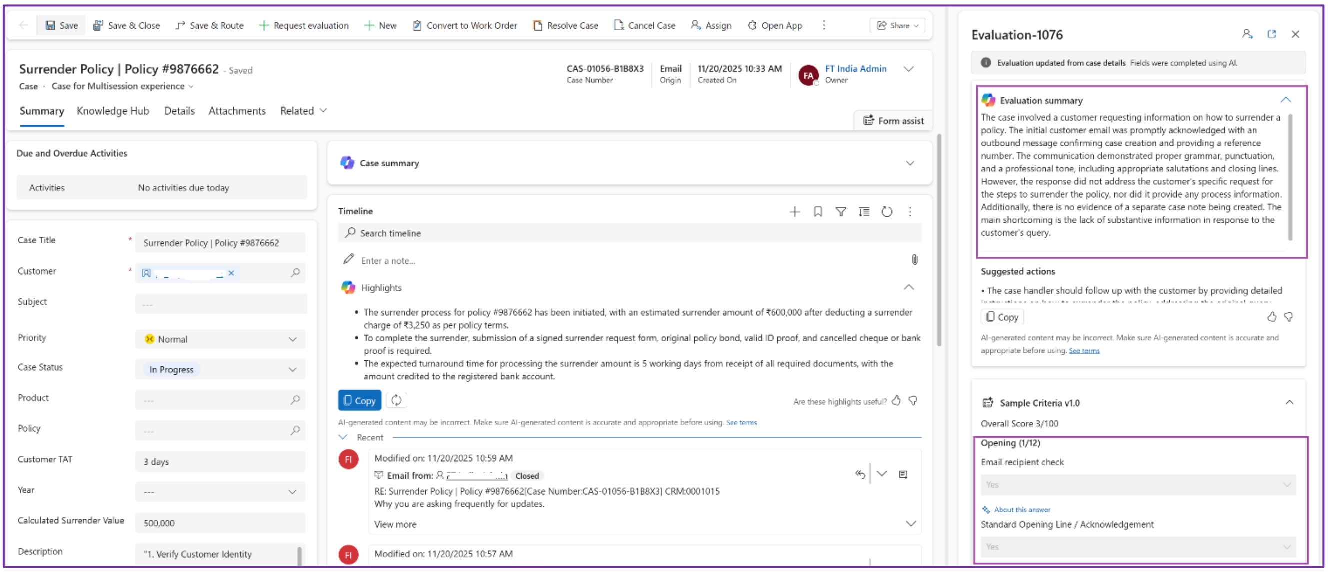
Refer link Use-evaluations for detailed steps

Step 1 Open Copilot Service workspace -> Click Evaluations



Step 2 Click the record name to open the evaluation

Below is a screenshot showing a sample evaluation



Troubleshooting

[internal draft] Use this section to quickly unblock common setup issues encountered during this lab.

Symptom	Likely cause	What to check / fix
"Request evaluation" option is missing	No record selected; QEA not enabled for that record type; insufficient permissions	• Select at least one case/conversation first ([update] note in Task 5). • In **Quality Management** > **Manage**, confirm the record type (Cases/Conversations) is enabled (Task 2). • Verify user has appropriate quality role(s) (Task 1 Step 1).
Evaluation fails immediately or stays in a pending/running state	Required Power Automate flow is turned off, or connection references are broken	• Confirm QEA flows are enabled (Task 1 Step 5–6). • Open the flow run history to view the first failing action. • Re-check all connection references listed in Task 1 Step 4 and ensure they point to valid connections.
Connection reference errors (cannot authenticate / cannot find connection)	Connection not created in the environment, wrong owner, or lacks access	• Create/repair the required connections (Dataverse + Copilot Studio) in the target environment. • Ensure the connection is owned by or shared with the account running the flows. • Rebind the connection references for: **Microsoft Copilot Studio Connection Reference for QEA**, **Microsoft Dataverse Connection Reference for QEA**, **QMA.Incident.DVPluginConnection**, **QMA.UnifiedAgent.DVPluginConnection**.
QEA-related actions/features not visible in the admin experience	Feature not enabled, wrong app, or missing license/entitlement	• Make sure you are in the correct environment and the **Copilot Service admin center** app (Task 2 Step 1).

		• Confirm the feature is enabled under **Quality Management**. • Confirm Copilot credits/entitlement are available (Prerequisites).
Scoring is not available for evaluation criteria	Scoring was not enabled when the evaluation criteria was created	• See the [update] note in Task 3: scoring must be enabled before saving and cannot be changed later. • If scoring is required, create a new evaluation criteria with scoring enabled.
Copilot Studio changes don't seem to take effect	Agent is not published	• Publish the Quality Evaluation Agent in Copilot Studio (Task 1 Step 7). • If changes still don't appear, wait a few minutes and re-test, then re-publish if needed.
You can't see evaluation records or results	Missing read permissions on evaluation entities or insufficient role assignment	• Verify the user has the appropriate quality role(s) and can access **Evaluations** (Task 6). • If using a custom role, ensure it has read access to the relevant evaluation tables and related case/conversation data.

If you need to escalate: capture the environment URL, the record type (case vs conversation), the evaluation criteria name, the time of the run, and (if applicable) the failing flow run ID from Power Automate.

Glossary

- **Agent**: A digital assistant powered by AI that can understand and respond to user inputs. In Microsoft Copilot Studio, agents can be configured for conversational experiences and/or to act autonomously based on triggers and instructions.
- **Case**: A record representing a customer issue or request (for example, a policy inquiry or surrender request).
- **Connection reference**: A stored pointer used by Power Automate flows to use a specific connection (for example, Dataverse or Copilot Studio) at runtime.
- **Conversation**: A customer interaction (for example, chat or messaging) that can be evaluated for quality.
- **Dataverse**: Microsoft Dataverse is the data platform used by Dynamics 365 apps to store and manage data.
- **Evaluation**: The outcome produced when the Quality Evaluation Agent assesses a case or conversation against defined criteria.
- **Evaluation criteria**: The set of questions and instructions used to evaluate quality and compliance.
- **Evaluation plan**: A configuration that defines how evaluations are created and managed (including when to run evaluations and at what scale, such as bulk evaluations).
- **Evaluation scoring**: Numeric scoring enabled on evaluation criteria to produce a score (when configured at creation time).
- **On-demand evaluation**: A user-initiated evaluation request for selected cases or conversations.
- **Power Automate flow**: The workflow automation used to run QEA processes such as evaluation execution.

- **QEA (Quality Evaluation Agent)**: An AI-assisted capability that evaluates cases or conversations based on defined evaluation criteria and provides feedback and (optionally) scores.
- **Quality Administrator**: Security role that typically manages configuration and access related to quality management features.
- **Quality Evaluator**: Security role that typically reviews evaluations and performs quality assessments.
- **Quality Manager**: Security role that typically defines evaluation strategy, criteria, and plans.

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 an on-demand evaluation by selecting the case and choosing **Request evaluation**. Select the evaluation criteria you created. Review the evaluation score and recommendations for each question in the evaluation criteria.

Step 3 – Let's add a note showing the actions you (as a customer service representative) took 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 again and review the score and recommendations. Observe whether the score improves as more criteria are met.