

# 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

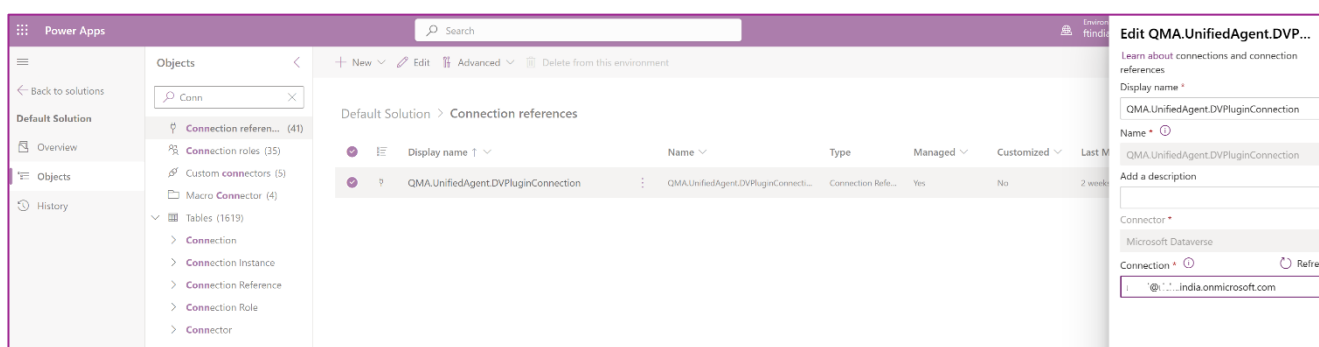
**Step 1** Assign the **Quality Manager**, **Quality Evaluator**, and **Quality Administrator** roles to the users responsible for configuring the Quality Evaluation Agent (QEA).

Persona	Role	Privileges
Administrator	Quality Administrator	<ul style="list-style-type: none"> <li>- Configure Quality Evaluation Agent.</li> <li>- Create evaluation criteria and evaluation plan.</li> <li>- Complete or assign an evaluation.</li> </ul>
Supervisor	Quality Manager	<ul style="list-style-type: none"> <li>- Create evaluation criteria and evaluation plan.</li> <li>- Complete or assign an evaluation.</li> </ul>
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"**

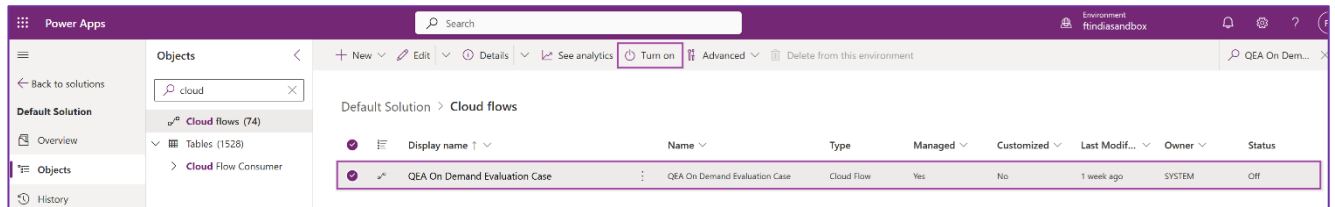
**Step 4** Repeat these steps to associate a connection for all the following connection references:

- 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

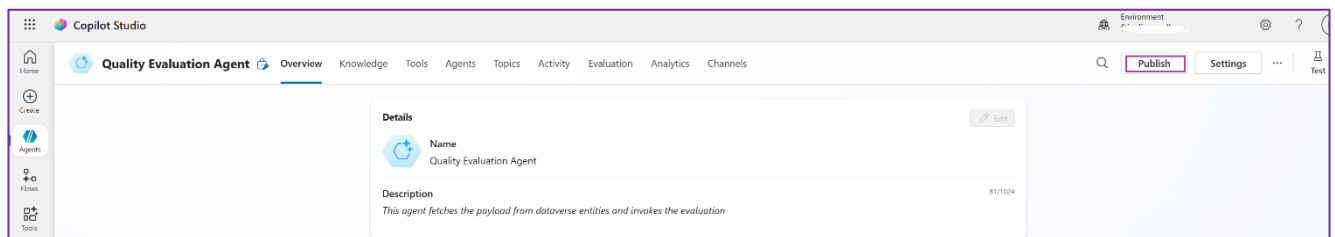
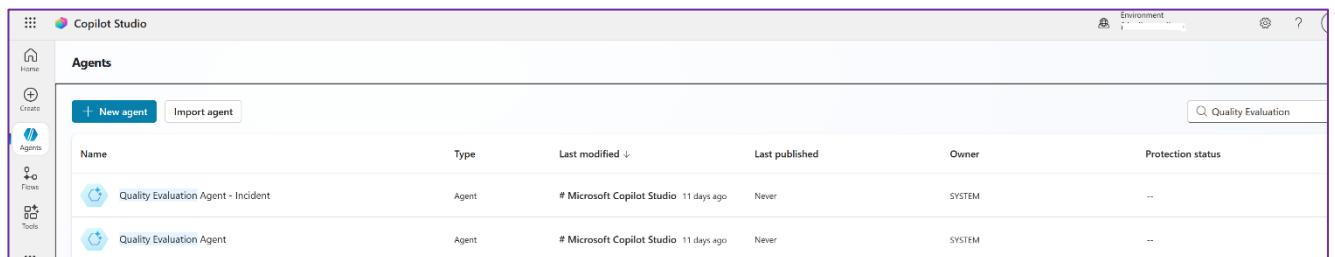
**Step 6** For detailed steps, see [Turn on the Power Automate flows.](#)

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.](#)

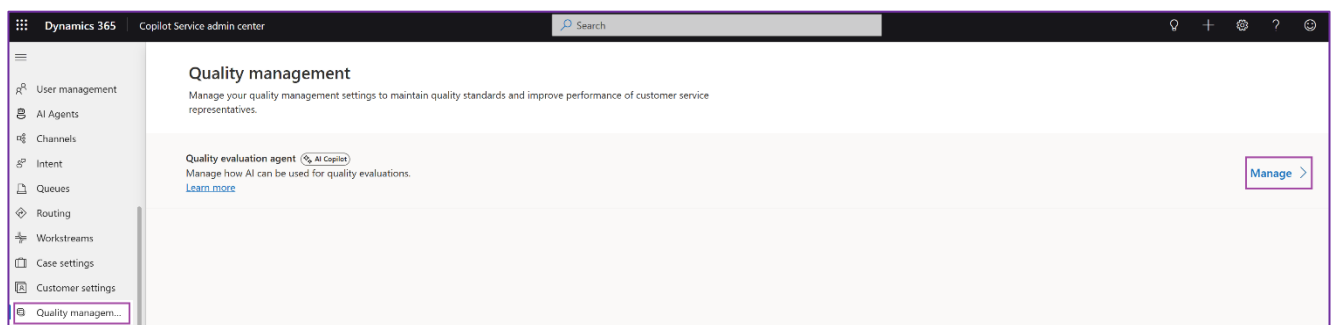


## Task 2 – Enable Quality Evaluation Agent

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)

SaveSave and closeRefresh

Quality management > Quality evaluation agent

Quality evaluation agent

AI CopilotMicrosoft 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 2

- Manage data to be considered during evaluation

Copilot Service admin center

SANDBOX

SaveSave and closeRefresh

Quality management > Quality evaluation agent

Quality evaluation agent

AI CopilotMicrosoft Copilot Credits

Manage quality evaluation agent settings and configuration. [Learn more](#)

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Specify Record 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

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 performed in the [Evaluation criteria configuration](#) page.

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

Set threshold value out of 100 \*

Specify Record 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. Only entities with change tracking and entity analytics configuration enabled are available for enhanced evaluation features

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

+ Add Data

Save

Cancel

Step 3

- Enable Evaluation Criteria Scoring

4

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**

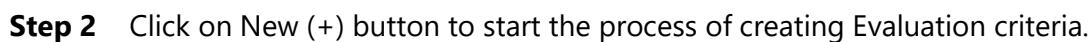
When enabled, this setting allows you to define scoring logic for a criterion, with each criterion evaluated on a scale of 0 to 100. This configuration is permanent and cannot be changed later.

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

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

**Step 4** For step-by-step instructions to create and manage evaluation criteria, see [Create evaluation criteria](#).

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

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.

Paste the Instruction under the [Add instructions for AI agen](#)

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.

Source criteria

New evaluation criteria - Unsaved

Criteria details

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

Criteria name \*

Description

[Add instructions for AI agent](#) ^

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 ☒

Language

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

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

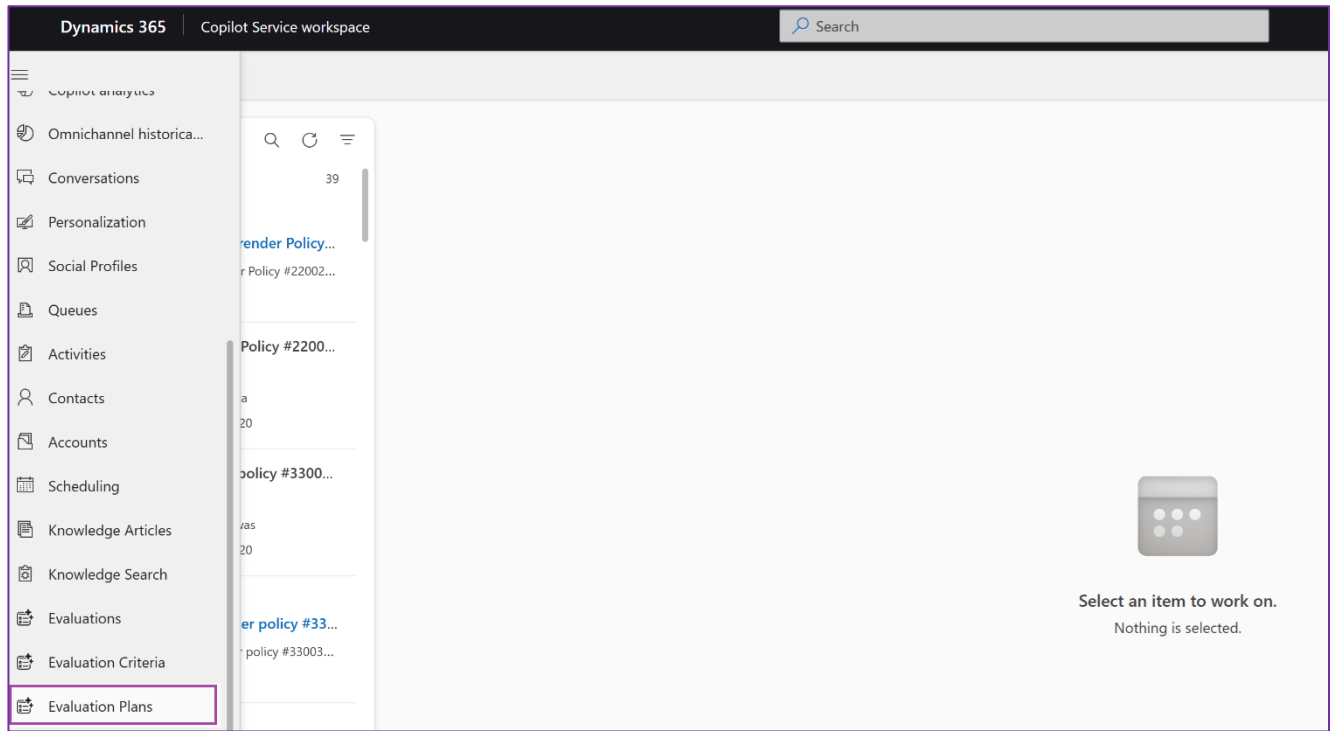
## Task 4 – Use Evaluation Plan

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

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## 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

Case Evaluation Plan

Description

Evaluation Plan as per audit sheet

Record type

Case

Frequency

Frequency type

Recurring

Occurrence

Daily

Start date

11/10/2025

11:00 AM

End date

11/11/2025

12:00 PM

Conditions

And

Field

Operator

Value

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

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.

**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)

Customer Service Represe... | Omnichannel Ongoing Co... | Cases My Active Cases

Show As

Show Chart

Request evaluation

Associate Child Cases

Merge Cases

Edit

Delete

Apply Routing Rule

Assign

Share

My Active Cases

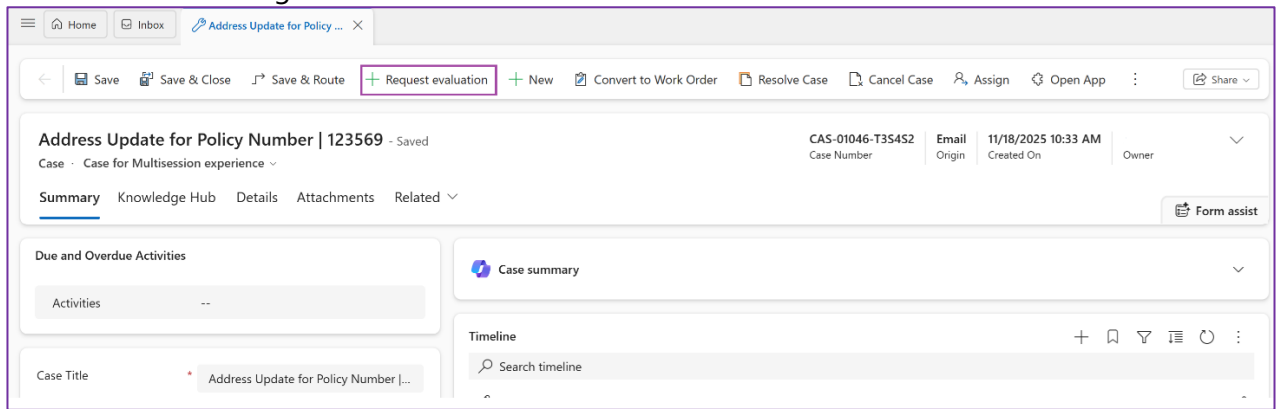
Edit columns

Edit filters

Filter by keyword

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

- 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**

Case ID	Related Case	Score	Evaluation method	AI agent status	Evaluator status	Evaluator experience	Evaluator completion	Owner	Requested by	Evaluation criteria
ase	Surrender...	3	AI agent	Completed	Completed	11/27/2025	11/20/2025 10:35 AM	PA	FT	Sample Crite
ase	Surrender...	15	AI agent	Completed	Completed	11/27/2025	11/20/2025 10:54 AM	PA	FT	Sample Crite
ase	Surrender...	15	AI agent	Completed	Completed	11/27/2025	11/20/2025 10:39 AM	PA	FT	Sample Crite
ase	Surrender...	11	AI assisted	Completed	Completed	11/27/2025	11/20/2025 10:51 AM	PA	FT	Sample Crite
ase	Surrender...	15	AI agent	Completed	Completed	11/27/2025	11/20/2025 10:58 AM	PA	FT	Sample Crite
ase	Surrender...	15	AI agent	Completed	Completed	11/27/2025	11/20/2025 11:03 AM	PA	FT	Sample Crite
ase	Surrender...	15	AI agent	Completed	Completed	11/27/2025	11/20/2025 11:13 AM	PA	FT	Sample Crite
ase	Request t...	1	AI agent	Completed	Completed	11/27/2025	11/20/2025 2:28 PM	PA	FT	Sample Crite
ase	Request t...	2	AI agent	Completed	Completed	11/27/2025	11/20/2025 2:32 PM	PA	FT	Sample Crite
ase	Request t...	5	AI agent	Completed	Completed	11/27/2025	11/20/2025 2:37 PM	PA	FT	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

CAS-01056-B188X3 Case Number | Email Origin | 11/20/2025 10:33 AM Created On | FT India Admin Owner

**Summary** | Knowledge Hub | Details | Attachments | Related

**Due and Overdue Activities**

Activities: No activities due today

**Case summary**

**Timeline**

Search timeline

Enter a note...

**Highlights**

- The surrender process for policy #9876662 has been initiated, with an estimated surrender amount of \$500,000 after deducting a surrender charge of \$3,250 as per policy terms.
- To complete the surrender, submission of a signed surrender request form, original policy bond, valid ID proof, and cancelled cheque or bank proof is required.
- The expected turnaround time for processing the surrender amount is 5 working days from receipt of all required documents, with the amount credited to the registered bank account.

**Recent**

Modified on: 11/20/2025 10:59 AM

Email from: R. [redacted] (Closed)

RE: Surrender Policy | Policy #9876662/Case Number: CAS-01056-B188X3/ CRM0001015

Why you are asking frequently for updates.

View more

Modified on: 11/20/2025 10:57 AM

**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

**Sample Criteria v1.0**

Overall Score 3/100

**Opening (1/12)**

Email recipient check

Yes

About this answer

Standard Opening Line / Acknowledgement

Yes

## 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.