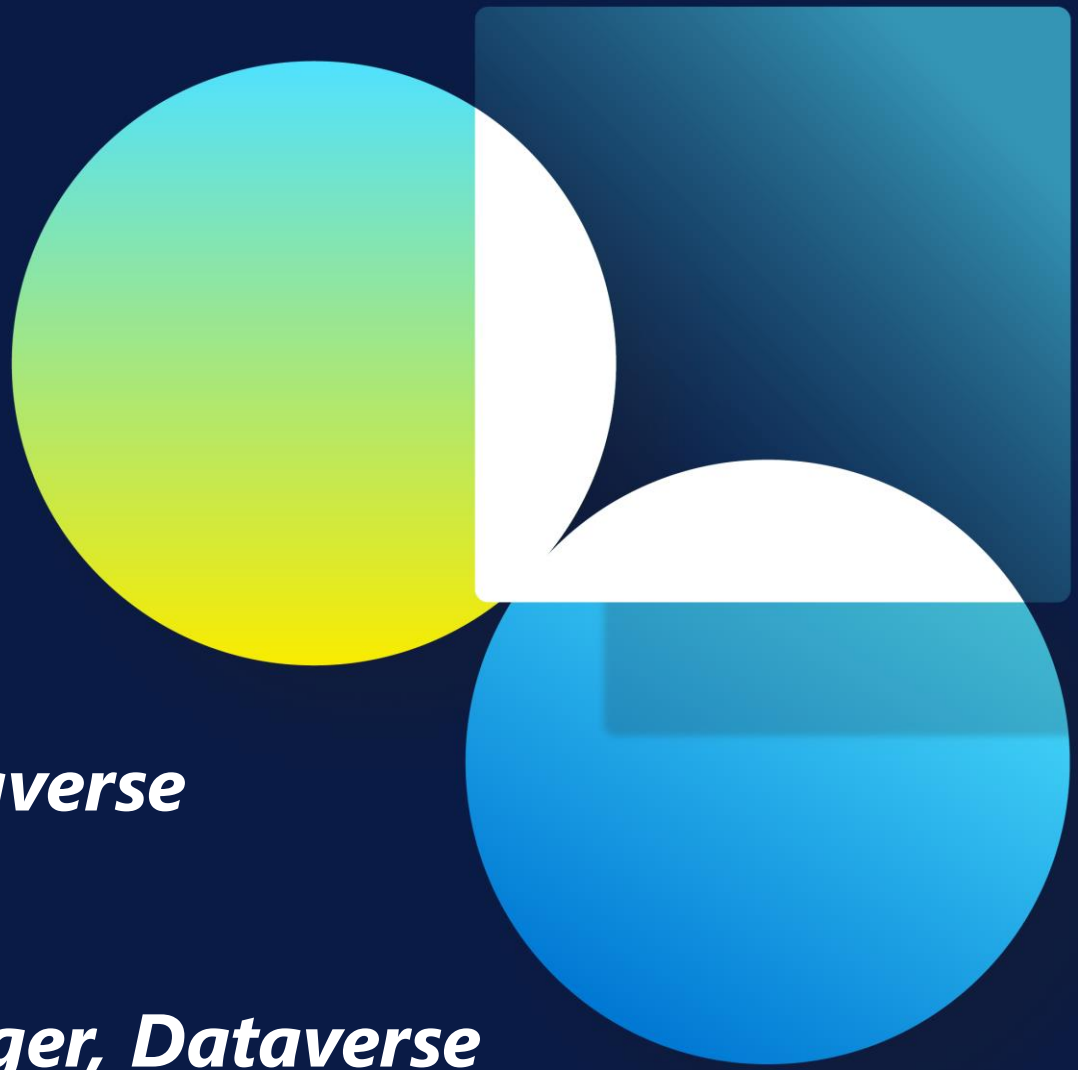
Microsoft Dynamics 365

Dynamics 365 Copilot Extensibility



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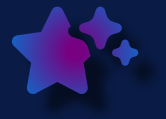
Agenda

- What are Dynamics Copilots?
  - Copilot patterns
  - Copilot extensibility patterns
  - What's coming in extensibility?
- Extensibility in action
  - Microsoft 365 Copilot
  - Power Apps Copilot
  - Sales Copilot
  - Custom Copilots using Power Virtual Agents
- Call to action
- Q&A

Dynamics 365 AI Copilots for everyone

AI as a real-time collaborator

that generates content



that sparks creativity

that automates cognitive tasks

that creates user experiences

Copilots for every line of business

Sales

Recap sales meetings

Craft customer emails

Marketing

Generate content ideas

Create audience segments

Simplify customer insights

Service

Create customer responses

Enhance self-service bots

Supply Chain

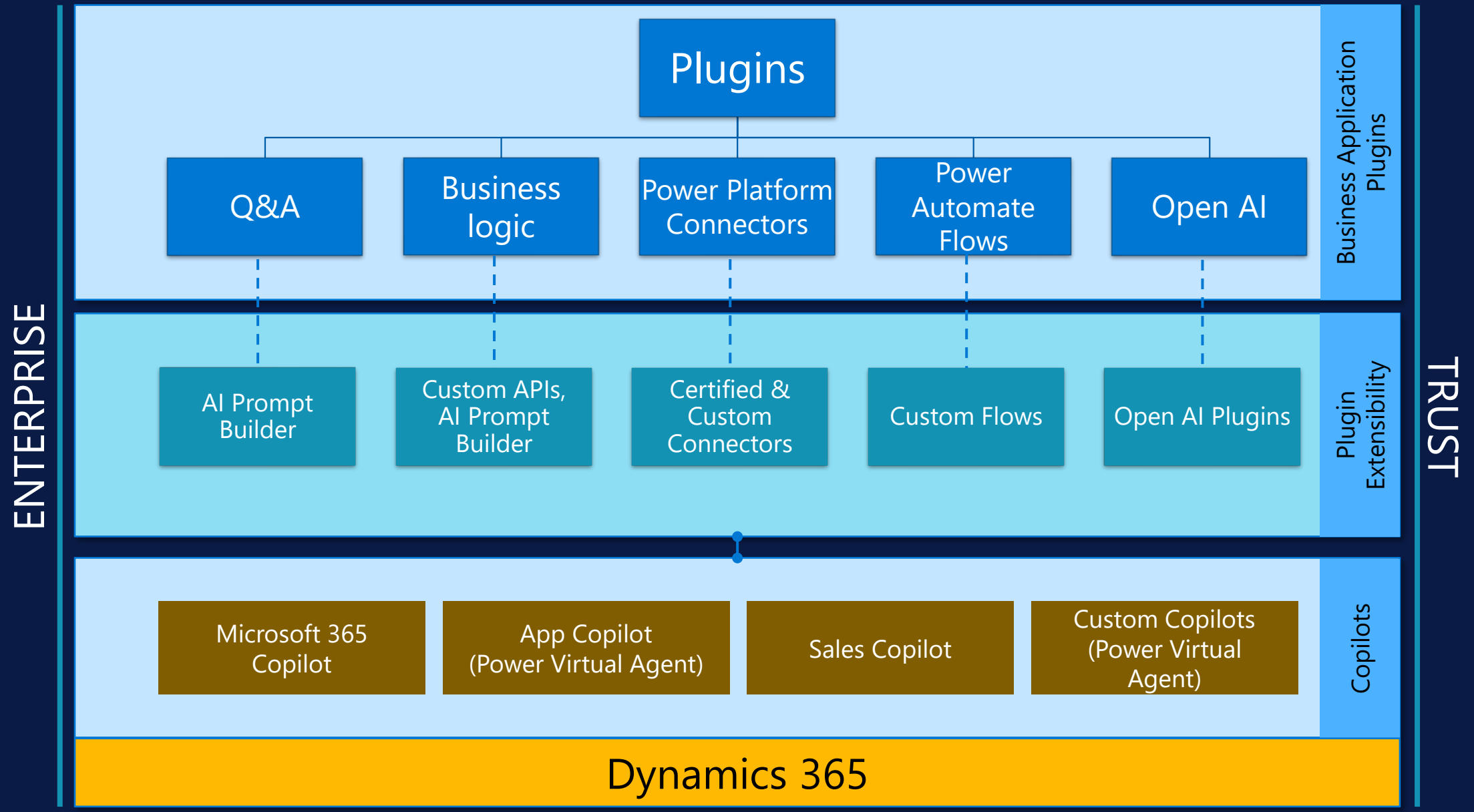
Predict disruptions

Operations

Create product descriptions

Dynamics 365 Copilot

Copilot Extensibility Patterns



What's coming in extensibility?

Takeaways:

- ✓ Direction -> Multiple options for building plugins driven by scenarios
- ✓ Direction -> Power Platform Connector for extending external apps to Copilots

- ✓ Email & calendar management
- ✓ Customer engagement
- ✓ Project management
- ✓ Document & file management
- ✓ Campaign management
- ✓ Customer service
- ✓ Not-for-profit / educational services
- ✓ Location services

Q&A Prompt Plugins	Power Automate Flow Plugins	Power Platform Connector Plugins
Available in M365 and App Copilots ✓ Dynamics 365 Sales – Leads ✓ Dynamics 365 Sales – Opportunity ✓ Dynamics 365 Sales – Contacts ✓ Dynamics 365 Customer Service – Cases **Available in M365 Copilot** ✓ Dynamics 365 Supply Chain – On hand inventory	**Available in M365 Copilot** ✓List my approvals ✓List my planner tasks	**Available in M365 Copilot** Freshdesk, Gmail, MSN Weather, Google Calendar, Intuit mailchimp, Dropbox, Shifts for Microsoft Teams, box, Google Drive File storage service, Office 365 Planner, Atlassian Trello, twilio, Azure DevOps, OneDrive File hosting service, Jira Software, redmine.org, salesforce, Outlook, servicenow, blackbaud, GitHub, SharePoint, Marketo, Bing Maps, SurveyMonkey, Plumsail, PagerDuty, Desk365.io, asana **Available in M365 & Sales Copilot** Adobe, DocuSign, people.ai

What's coming in extensibility?

Takeaways:

- ✓ Direction -> Multiple options for building plugins driven by scenarios
- ✓ Direction -> build a plugin once; use in *any* Copilots.
- ✓ Direction -> Power Platform Connectors for extending external apps to Copilots

- ✓ Email & calendar management
- ✓ Customer engagement
- ✓ Project management
- ✓ Document & file management
- ✓ Campaign management
- ✓ Customer service
- ✓ Not-for-profit / educational services
- ✓ Location services

Q&A Prompt Plugins

Available in M365 and App Copilots

- ✓ Dynamics 365 Sales – Leads
- ✓ Dynamics 365 Sales – Opportunity
- ✓ Dynamics 365 Sales – Contacts
- ✓ Dynamics 365 Customer Service – Cases

Available in M365 Copilot

- ✓ Dynamics 365 Supply Chain – On hand inventory

Power Automate Flow Plugins

Available in M365 Copilot

- ✓ List my approvals
- ✓ List my planner tasks

Power Platform Connector Plugins

Available in M365 Copilot

Freshdesk, Gmail, MSN Weather, Google Calendar, mailchimp, Dropbox, Shifts for Microsoft Teams, box, Google Drive File storage service, Office 365 Planner, Trello, twilio, Azure DevOps, OneDrive File hosting service, Jira Software, redmine.org, salesforce, Outlook, servicenow, blackbaud, GitHub, SharePoint, Marketo, Bing Maps, SurveyMonkey, Plumsail, PagerDuty, Desk365.io, asana

Available in M365 & Sales Copilot

Adobe, DocuSign, people.ai

Dynamics 365 Copilot extensibility in action

Extending Dynamics 365 with Microsoft 365 Copilot

Microsoft 365 Copilot

Microsoft 365 Copilot combines the power of large language models (LLMs) with your organization's data – all in the flow of work – to turn your words into one of the most powerful productivity tools on the planet. It works alongside popular Microsoft 365 Apps such as Word, Excel, PowerPoint, Outlook, Teams, and more

Scenario

During lead to support process, different personas work together and individually to make the customer experience seamless. Each persona toggle between productivity apps and Dynamics apps to reconcile data spread across different applications to derive a meaningful action.

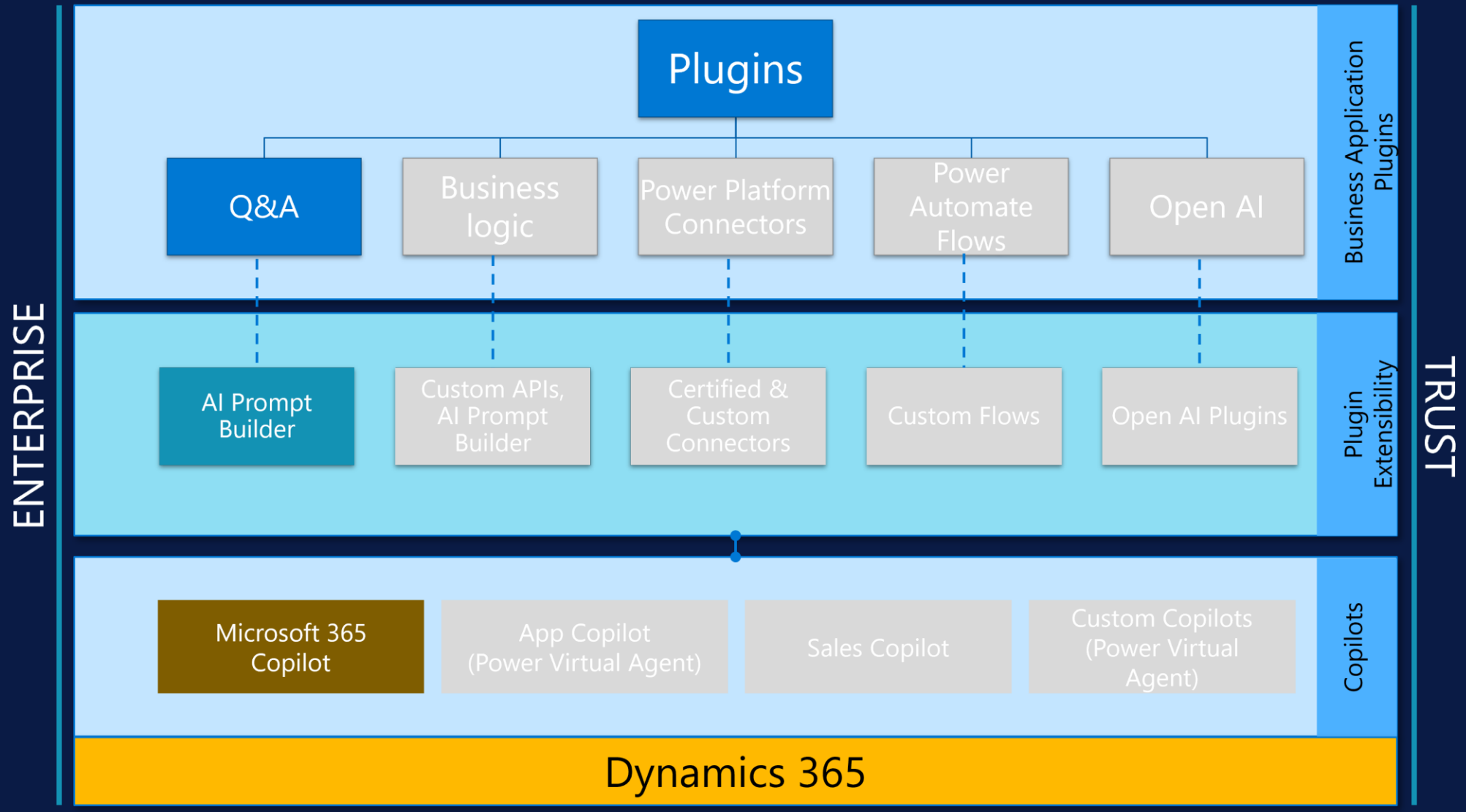
A sales agent typically handle 50+ ad-hoc inquiries every day and majority of inquiries are on current and future stock availability accruing to productivity loses over time.

Some stats:

- ✓ 2719 on-hand inquiries per customer per day
- ✓ Each inquiry takes 5-15 mins to serve
- ✓ Serves 8-9 on-hand inquiries a day
- ✓ Spends 30 hours on on-hand inquiries per month

Dynamics 365 Copilot extensibility in action

Prompts in Microsoft 365 Copilot



Extending Dynamics 365 Sales with Microsoft 365 Copilot

DAVID
MARKETING EXECUTIVE

Copy
1 reference
5/20 AI-generated content may be incorrect

12:51 PM
new topic

Copilot (Dogfood) 12:51 PM

OK, let's start over. What can I help you with now?
For some ideas, try one of the suggestions below...

Catch Up
Summarize emails where I was mentioned recently

Create
Propose a new introduction to file

Ask
When's my next meeting with person

You can always use the prompt guide for suggestions by selecting this button

12:51 PM
new topic

Copilot (Dogfood) 12:51 PM

OK, let's start over. What can I help you with now?
For some ideas, try one of the suggestions below...

Catch Up
What's the latest from person

Create
Propose a new introduction to file

Ask
What are the action items from meeting

You can always use the prompt guide for suggestions by selecting this button

12:52 PM
How many leads for Adventure Works in Dataverse CRM

Ask a work question or use / to reference people, files, and more

Extending Dynamics 365 Sales with Microsoft 365 Copilot

DAVID
MARKETING EXECUTIVE

- *How many leads are there for Adventure Works?*
- *What are the names for the leads for Adventure Works?*

Plugin Used

✓ *Dataverse Q&A Prompts*

Extensibility

✓ *Leads, Opportunities, Contacts and Cases enabled out of the box.*
✓ *Custom columns & tables will be supported.*

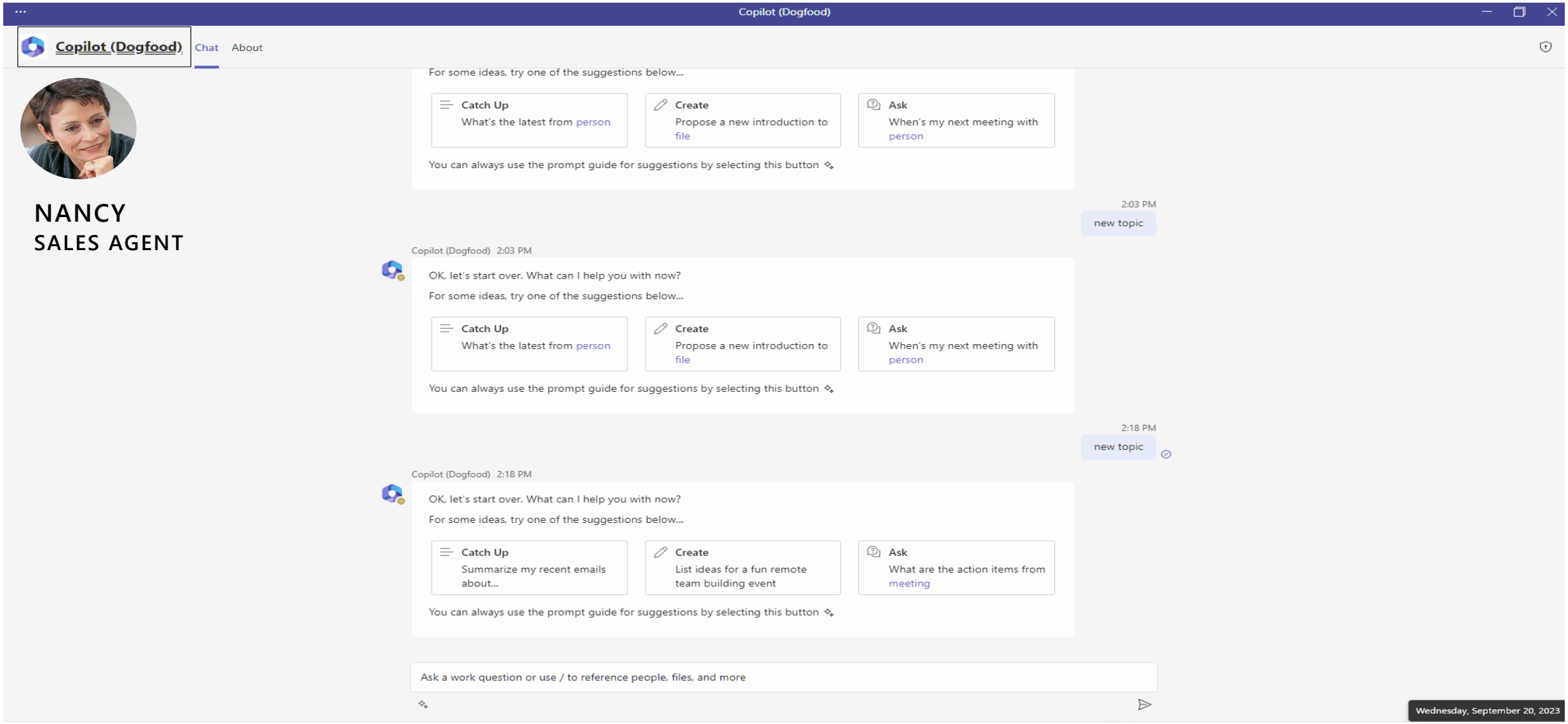
Takeaways

✓ *References can open the record in the backing system..*

Availability

✓ *Microsoft 365 Copilot Early Access Preview*

Extending Dynamics 365 Supply Chain with Microsoft 365 Copilot



Extending Dynamics 365 Supply Chain with Microsoft 365 Copilot

NANCY
SALES AGENT

- *What is the on-hand inventory for computer mouse in company BOH?*

Plugin Used

✓ *Dataverse Q&A Prompts*

Extensibility Options

✓ *Custom virtual tables in F&O can be enabled*

Takeaways

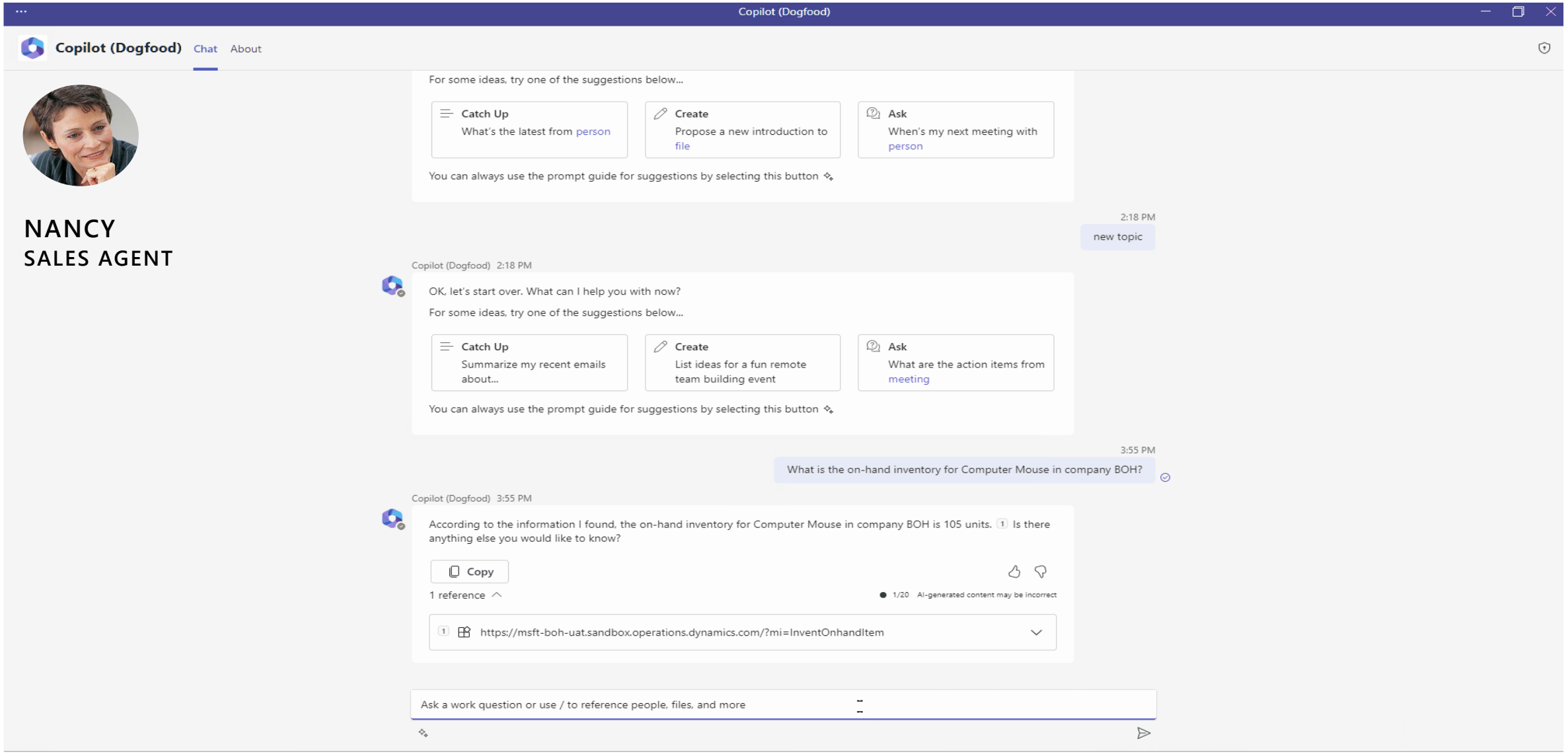
✓ *On-hand inventory is aggregated by site, warehouse and color to a total of 105.*

✓ *Reference link can navigate to corresponding record inside F&O.*

Availability

✓ *Microsoft 365 Copilot Early Access Preview*

Extending Dynamics 365 Supply Chain with Microsoft 365 Copilot



Extending Dynamics 365 Supply Chain with Microsoft 365 Copilot

NANCY
SALES AGENT

I need 5 computer mice in silver color. Can you check the availability in site BOH, warehouse BOH WMS? Give me the details by product name, site, warehouse, color, available quantity.

Plugin Used

- ✓ *Dataverse Q&A Prompts*

Extensibility Options

- ✓ *Custom virtual tables in F&O can be enabled*

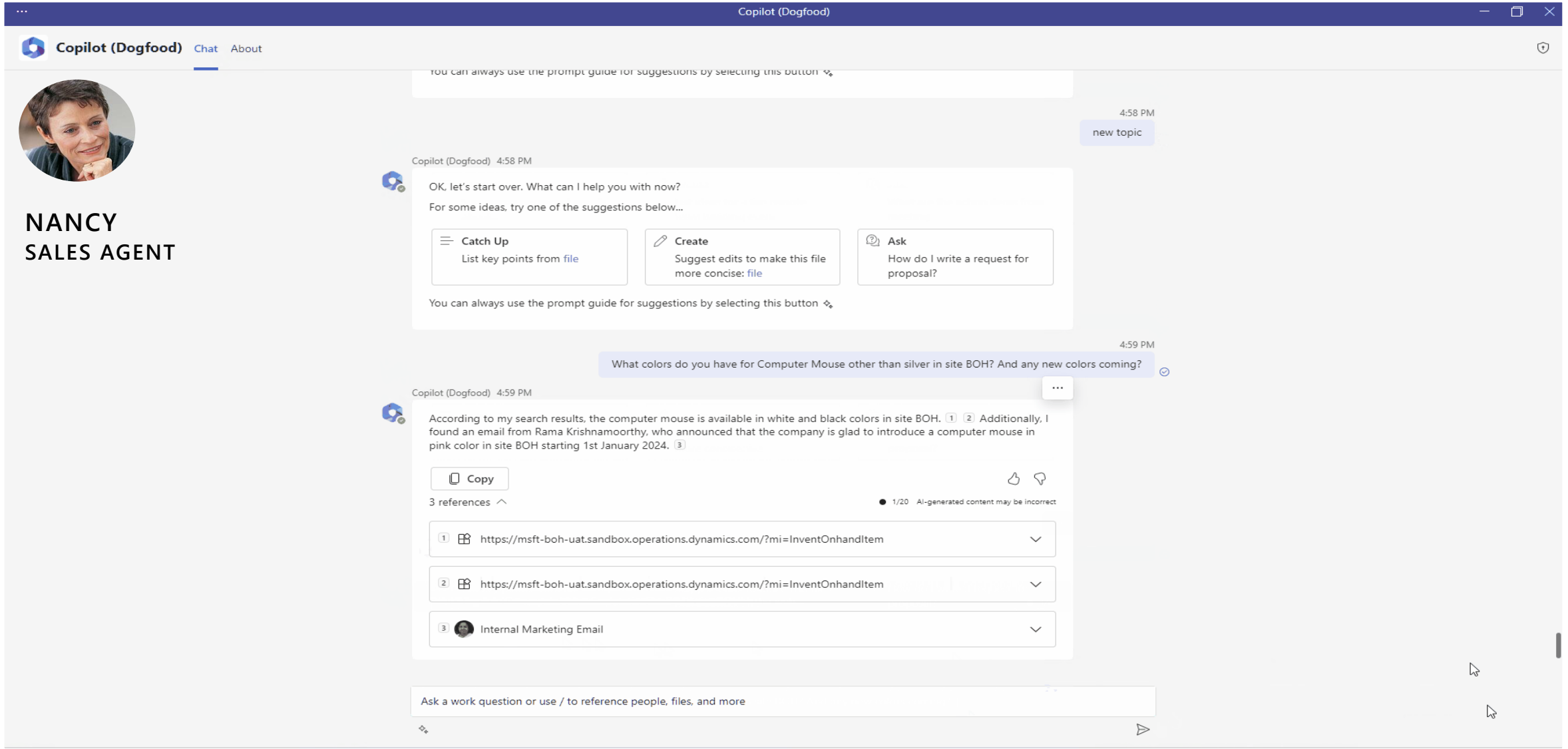
Takeaways

- ✓ *Questions can be scoped to granular levels like site, warehouse and color for accuracy.*
- ✓ *Results are printed as per the given instructions like table format.*
- ✓ *Context is preserved for upto 20 questions*

Availability

- ✓ *Microsoft 365 Copilot Early Access Preview*

Extending Dynamics 365 Supply Chain with Microsoft 365 Copilot



Extending Dynamics 365 Supply Chain with Microsoft 365 Copilot

NANCY
SALES AGENT

What colors do you have for Computer Mouse other than silver in site BOH? And any new colors coming?

Plugin Used

- ✓ *Dataverse Q&A Prompts*

Extensibility Options

- ✓ *Custom virtual tables in F&O can be enabled*

Takeaways

- ✓ *Related information from Microsoft exchange is consolidated with data from F&O to provide full context to Nancy.*

Availability

- ✓ *Microsoft 365 Early Access Preview*

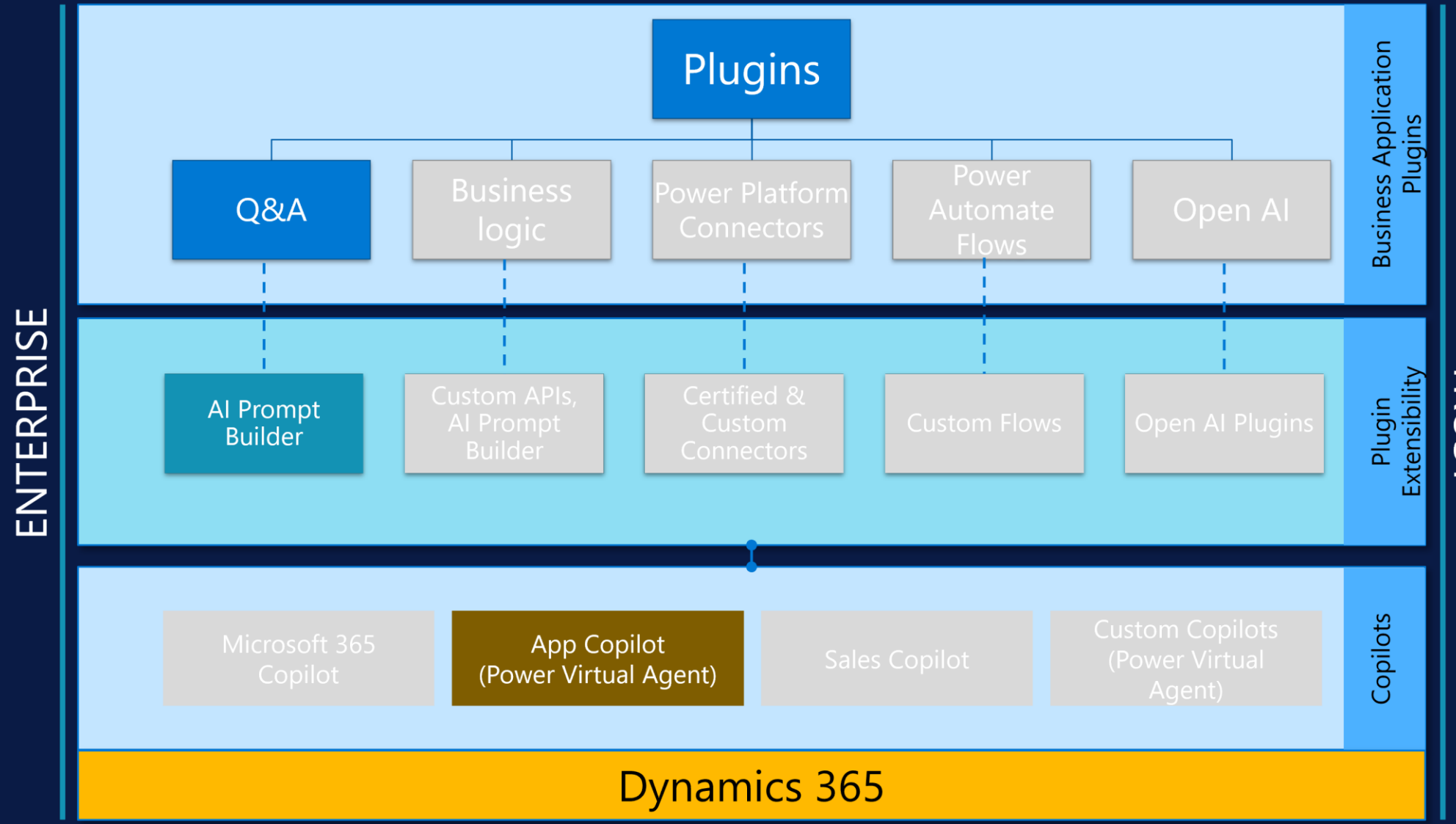
Summary – Prompt plugins in M365 Copilot

Variety of functional behaviors

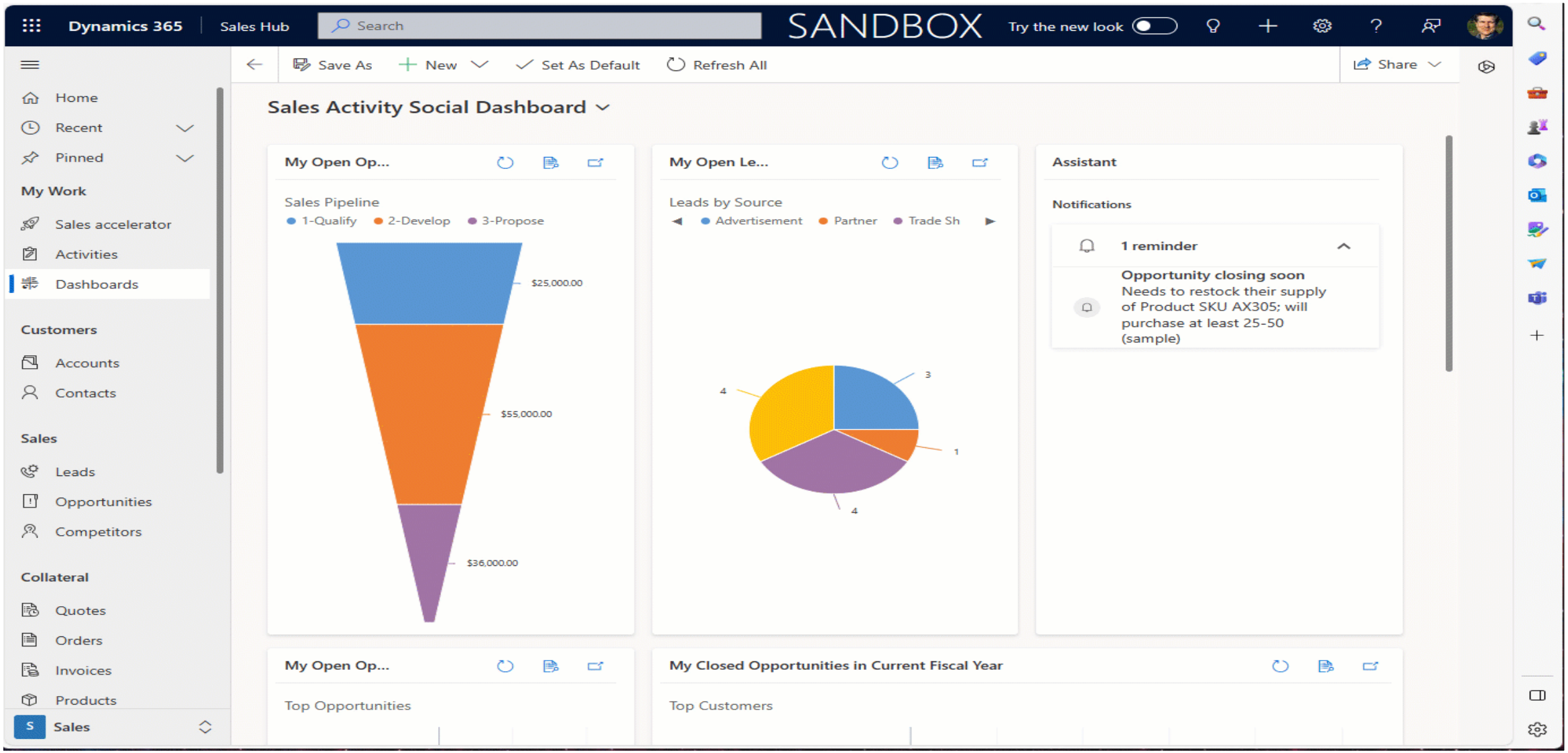
- ✓ Scoping
- ✓ Semantic matching
- ✓ Aggregation
- ✓ Consolidation across productivity & business data
- ✓ Formatting results
- ✓ References

What are the extensibility patterns?

Prompts in App Copilot



Extending Dynamics 365 Sales with App Copilot



Extending Dynamics 365 Sales with App Copilot

DAVID
MARKETING EXECUTIVE

- *What are the open leads for Adventure Works?*

Plugin Used

✓ *Dataverse Q&A Prompts*

Extensibility Options

✓ *Leads, Opportunities and Contacts enabled out of the box.*
✓ *Custom related tables tables will be supported.*

Takeaways

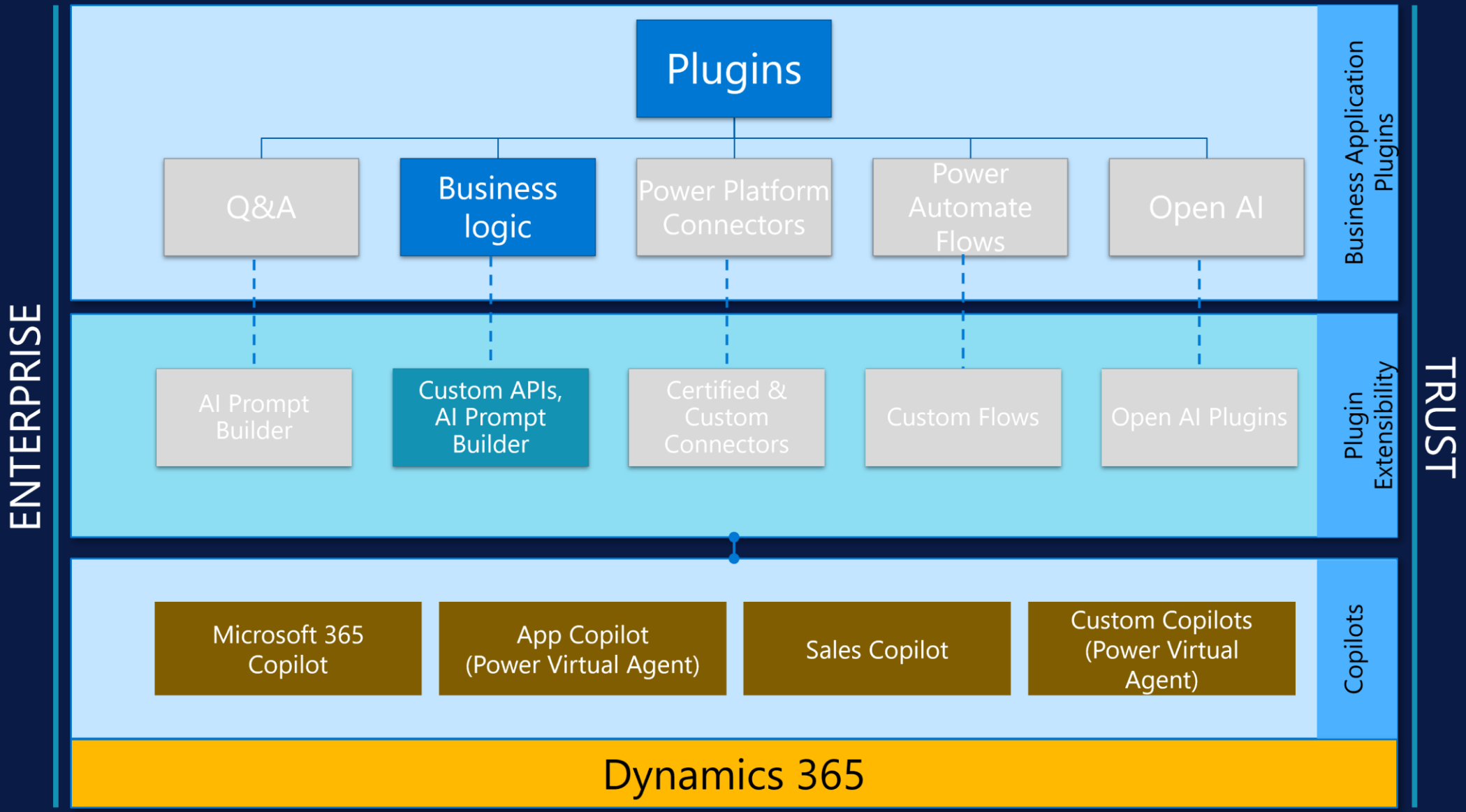
✓ *The same plugin works across M365 Copilot and App Copilot (and others).*

Availability

Available now In preview

What are the extensibility patterns?

AI Prompt Builder



AI Builder Prompt Builder

Ignite

Use NL to extract insights from conversations and data

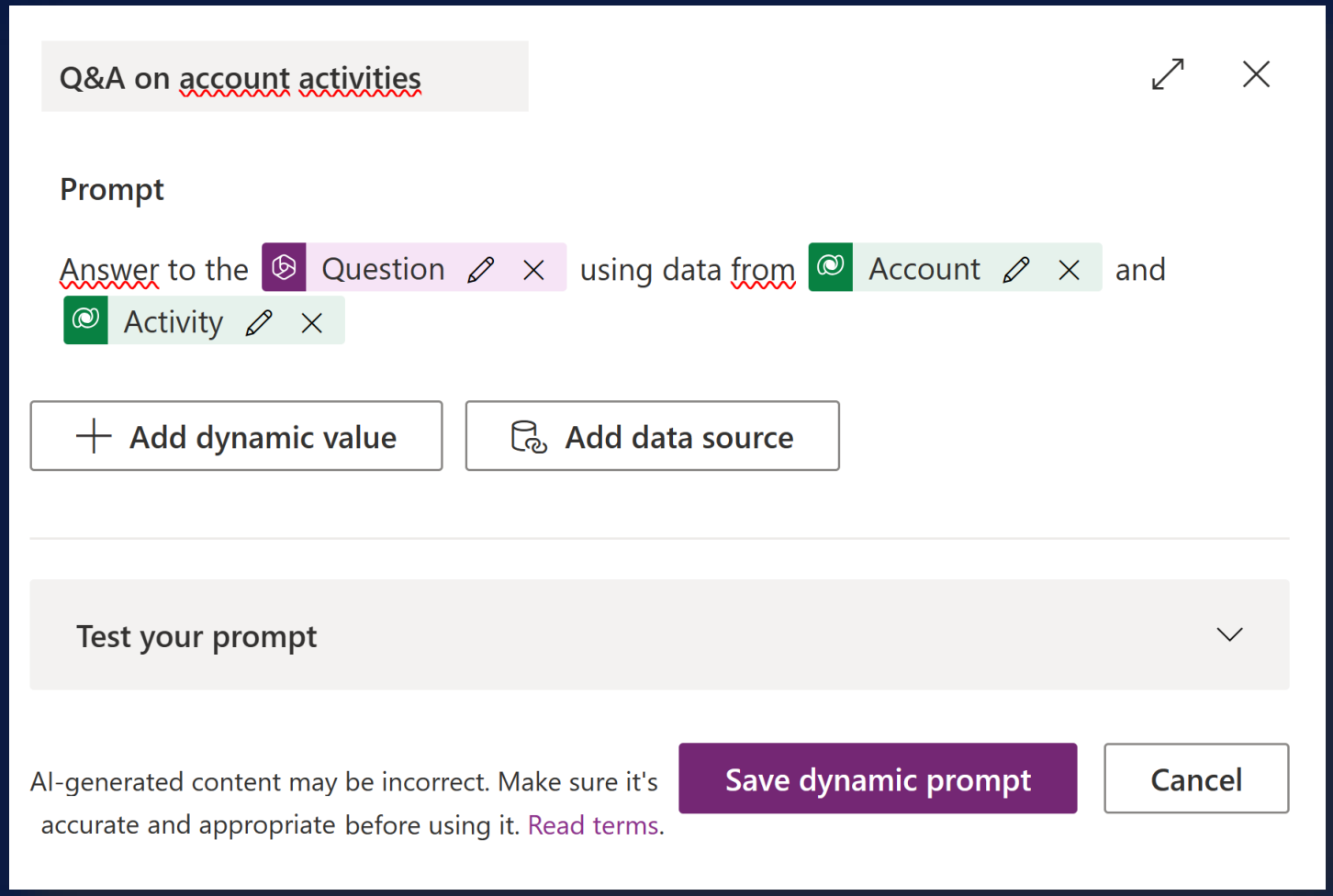
- Summarize
- Extract specific information
- Classify into categories
- Identify opportunities or actions
- Draft responses
- Normalize dates or addresses
- and much more…

Build powerful Copilot plugins in seconds

Make your controls intelligent using PowerFx

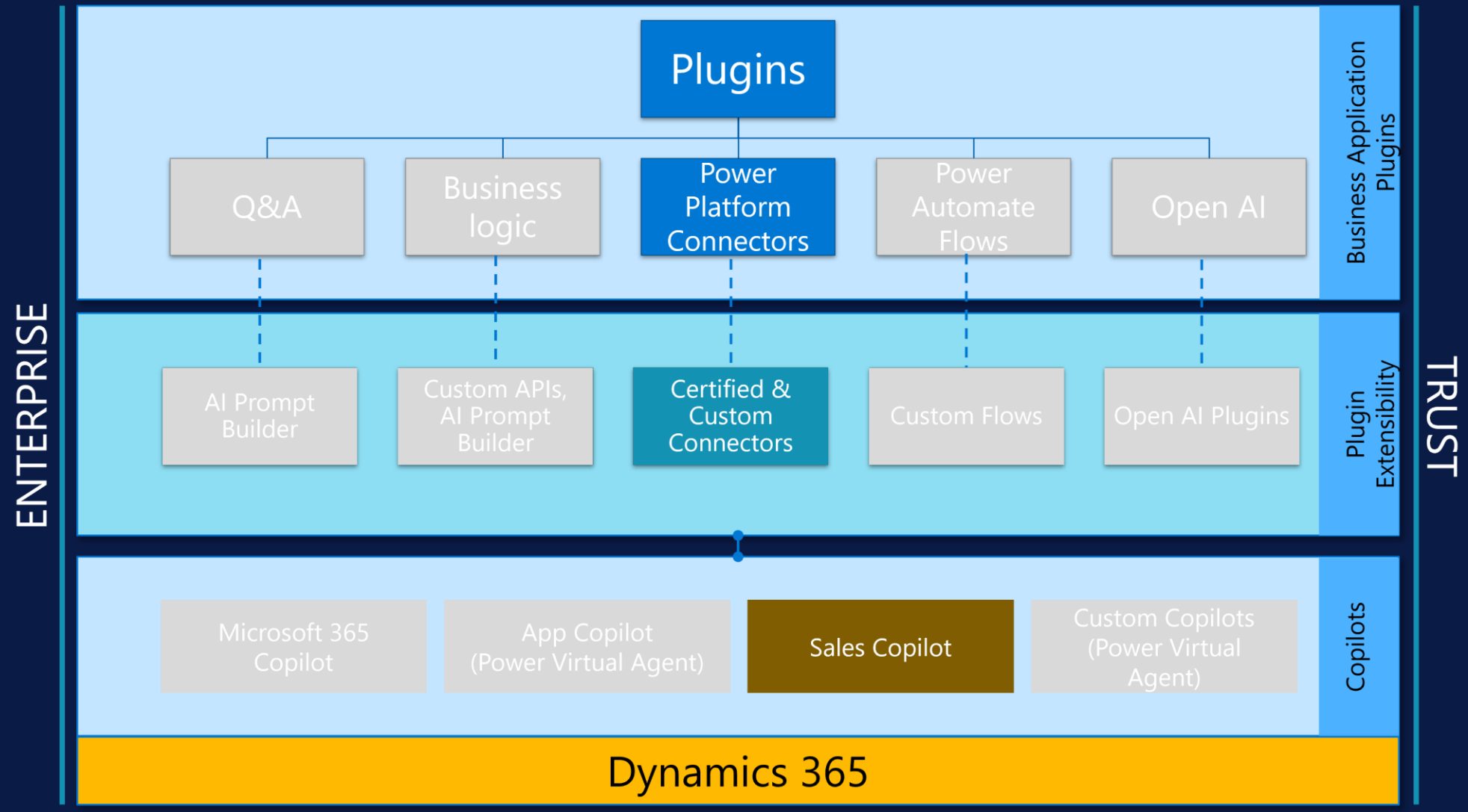
Infuse GPT behaviors in your automations

Augment your data with Dataverse Accelerator



What are the extensibility patterns?

Power Platform Connectors in Sales Copilot



Extending Dynamics 365 with Sales Copilot using Power Platform Connectors

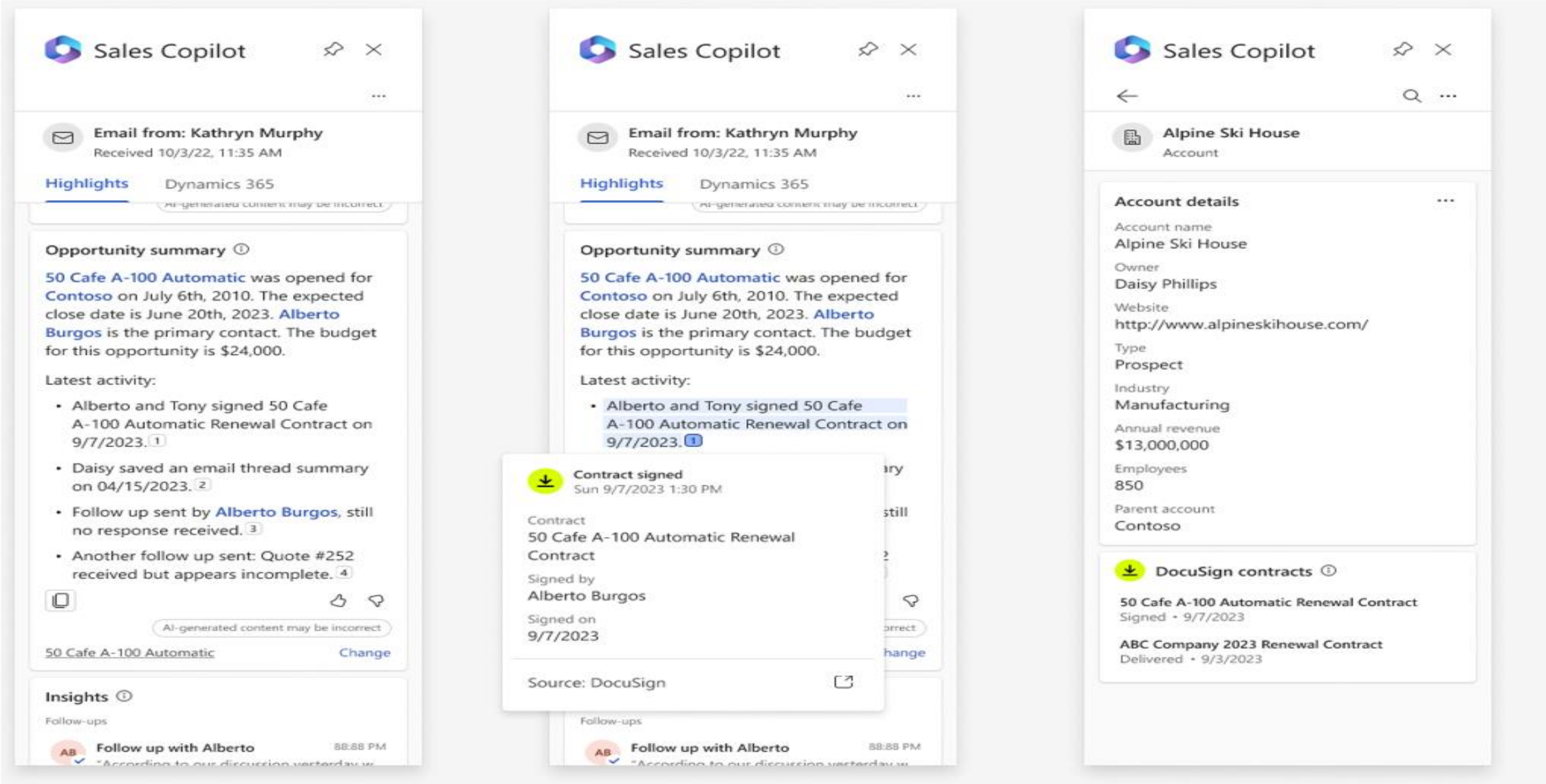
Sales Copilot

Microsoft Sales Copilot is an AI assistant designed for sellers to increase productivity and personalize customer interactions in their app of choice. Connect Sales Copilot to CRM systems like Salesforce or Microsoft Dynamics 365 Sales, and access Sales Copilot in the tools you already use, including Microsoft Outlook and Microsoft Teams.

Scenario

Sellers use many applications besides their CRM to engage with customers. Requiring sellers to move to different applications will increase context switch and reduce productivity. Now, Sales Copilot brings relevant data and insights from all your favorite partner applications through Power Connectors and makes them available contextually allowing sellers to focus on engaging with their customers.

Extending Dynamics 365 with Sales Copilot using DocuSign Connector



Extending Dynamics 365 with Sales Copilot using DocuSign Connector

NANCY
SALES AGENT

- *Stay on top of latest activities on contracts related to Dynamics 365 opportunity or account record summary in Sales Copilot.*

Plugin Used

✓ *DocuSign Power Platform Connector*

Extensibility Options

✓ *Opportunity Summary in Sales Copilot is extensible via Power Platform Connector Plugins.*

Key Takeaways

✓ *Extend CRM record summary in Sales Copilot with non-CRM data*

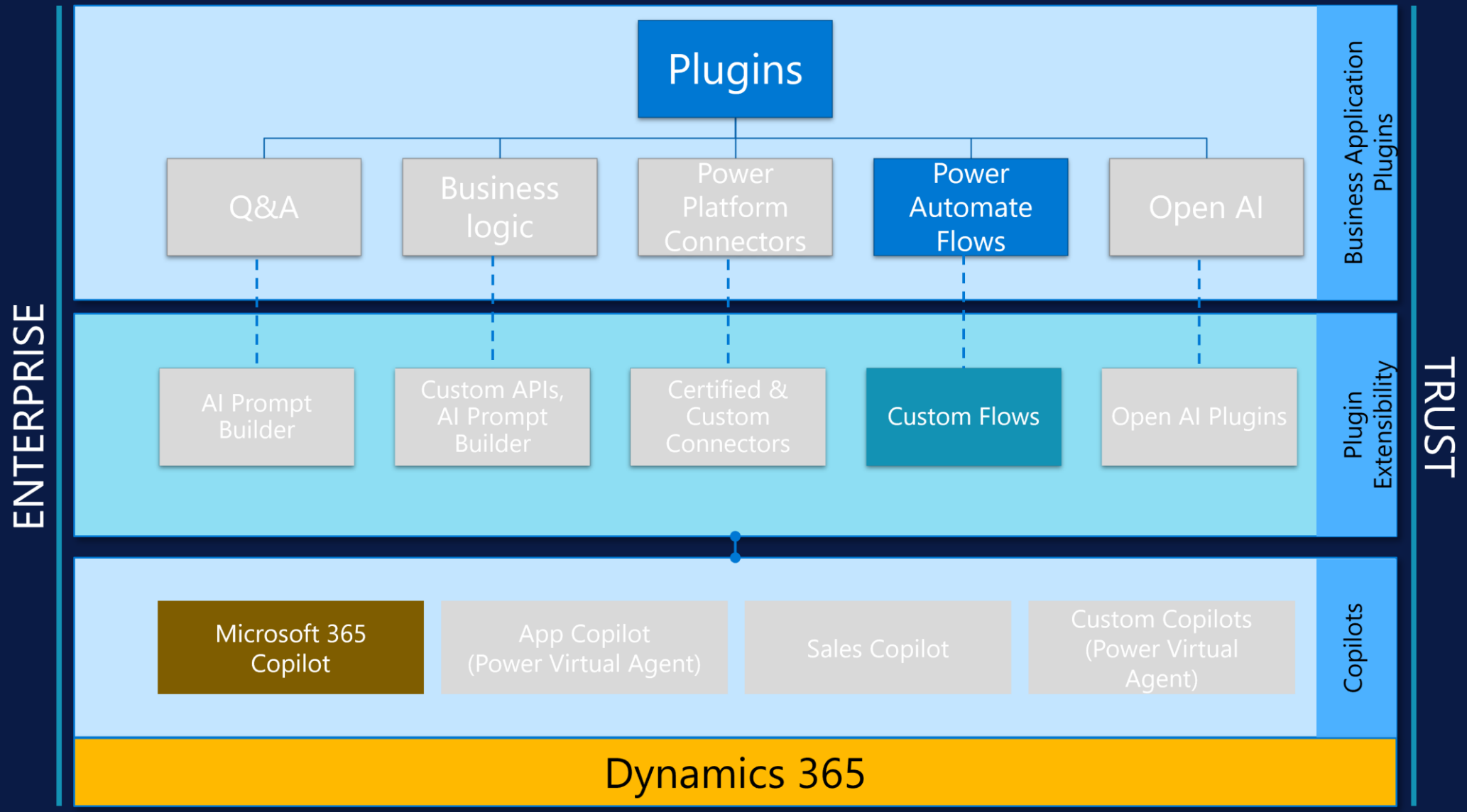
✓ *Sellers can follow a link for additional details in the non-CRM application.*

Availability

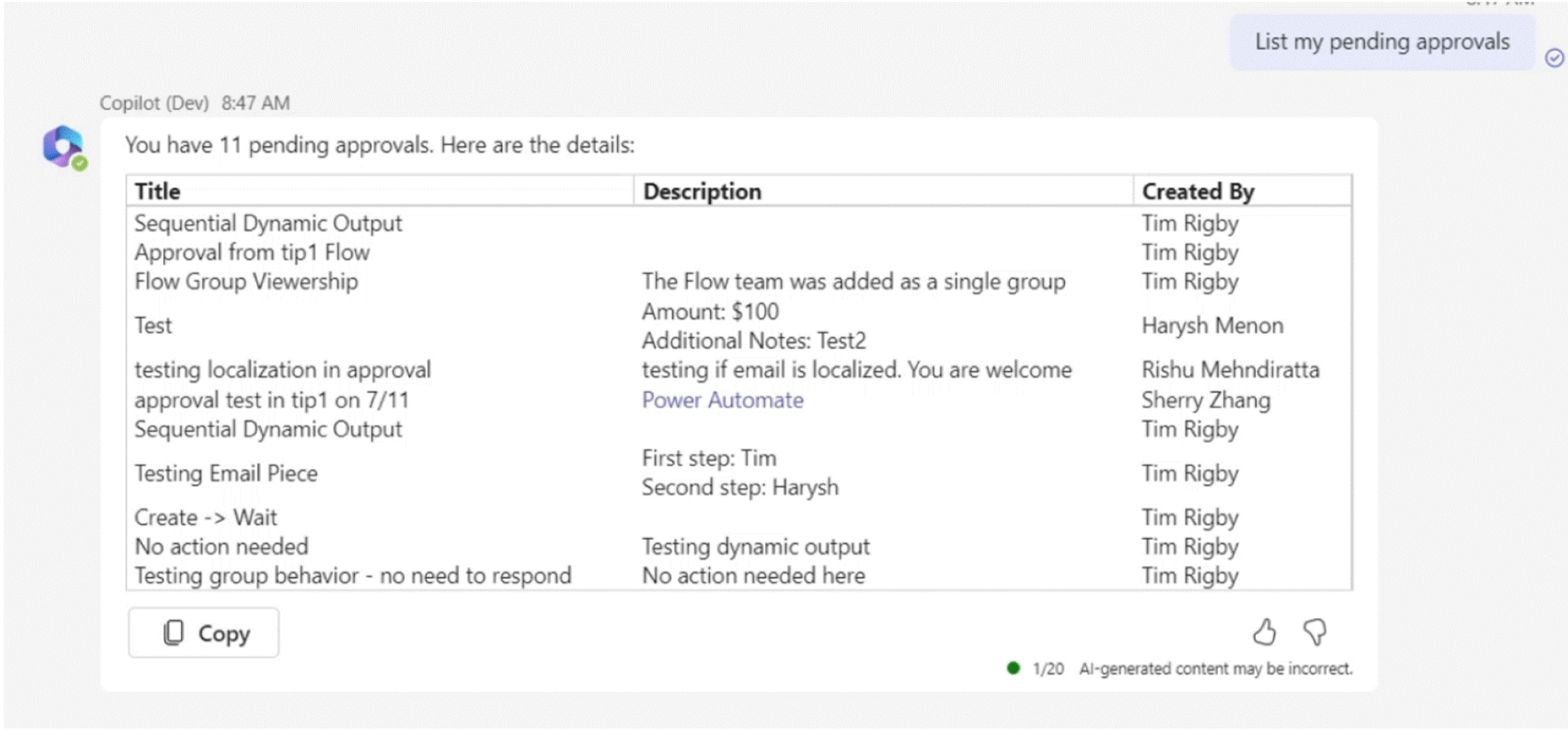
Later this calendar year.

What are the extensibility patterns?

Power Automate Flows



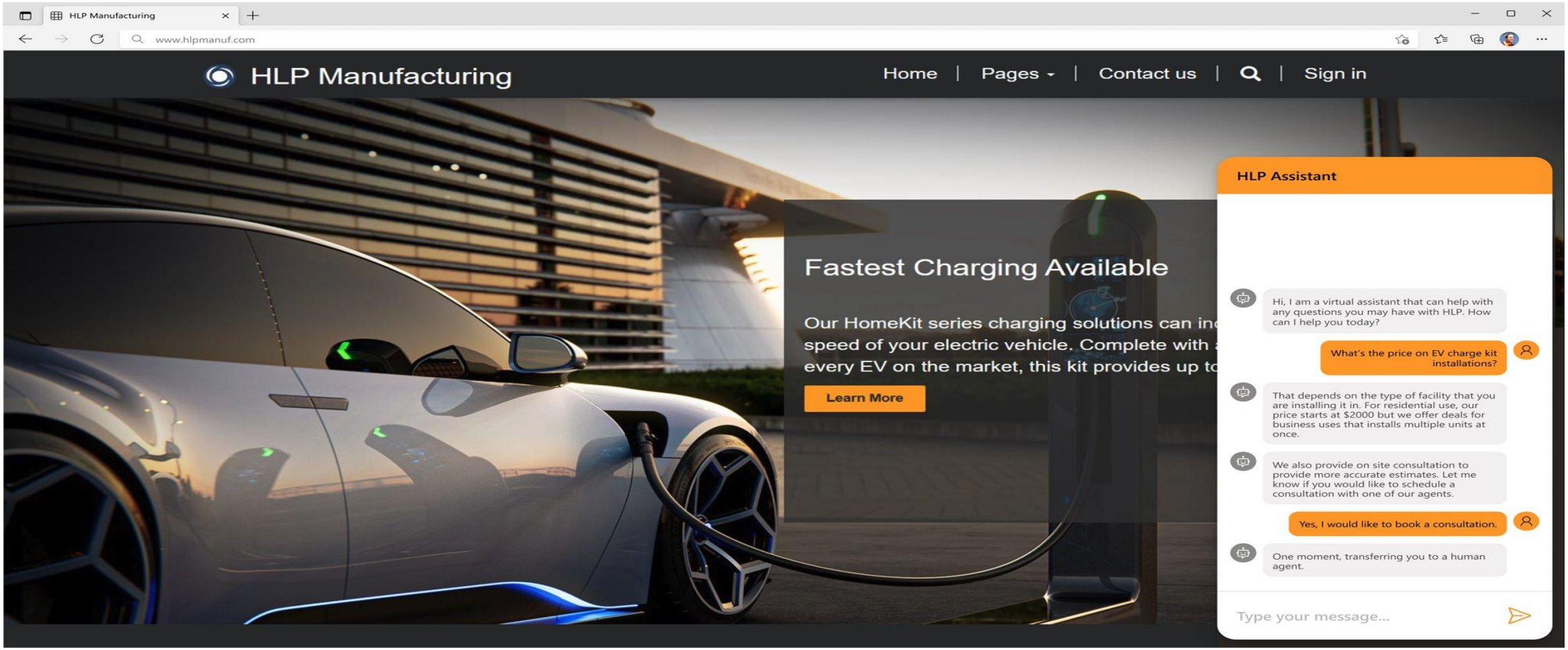
Extending Dynamics 365 with Power Automate Flow Plugins



What are the extensibility patterns?

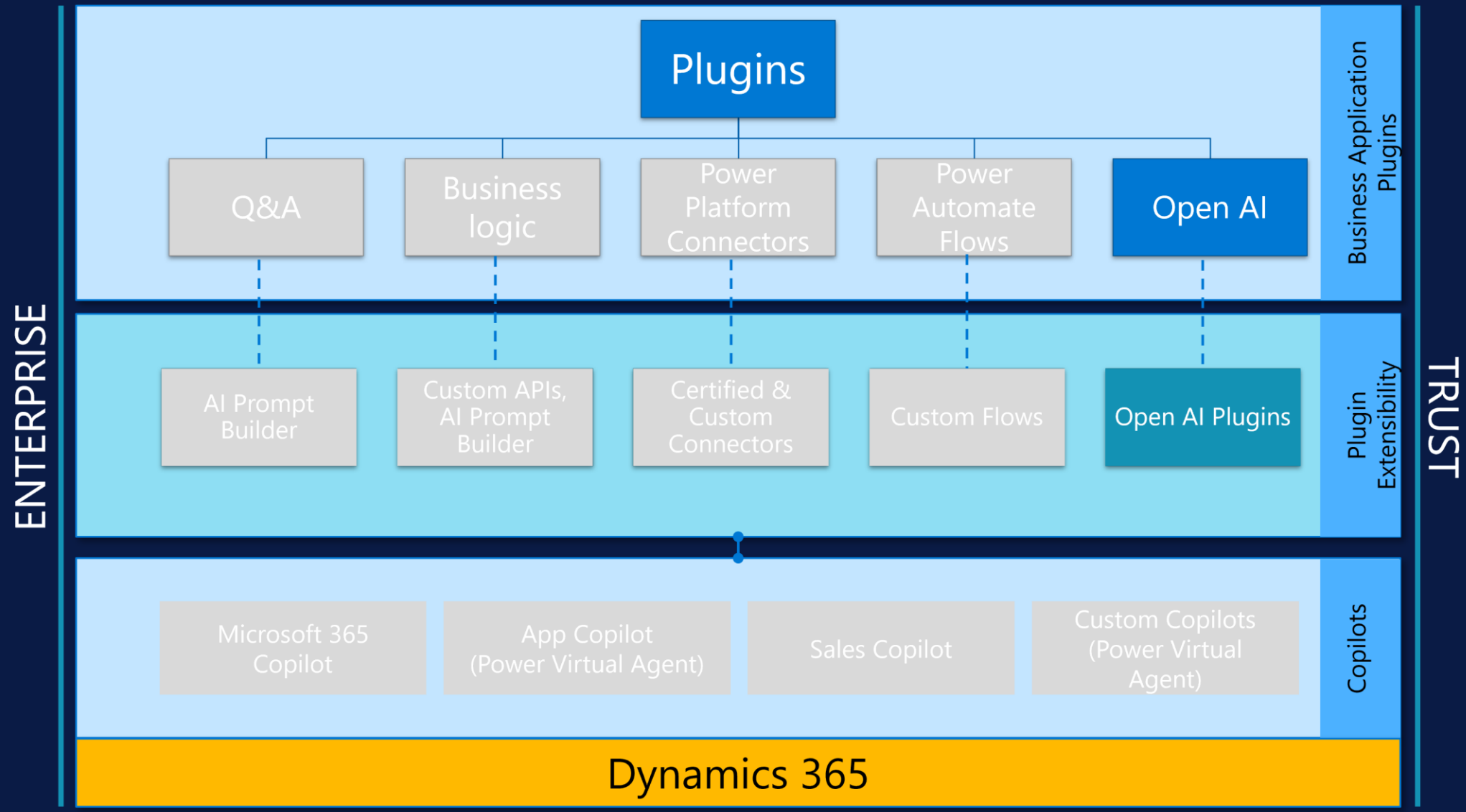
Custom Copilots using PVA

Extending Dynamics 365 Customer Service with Power Virtual Agent (PVA)

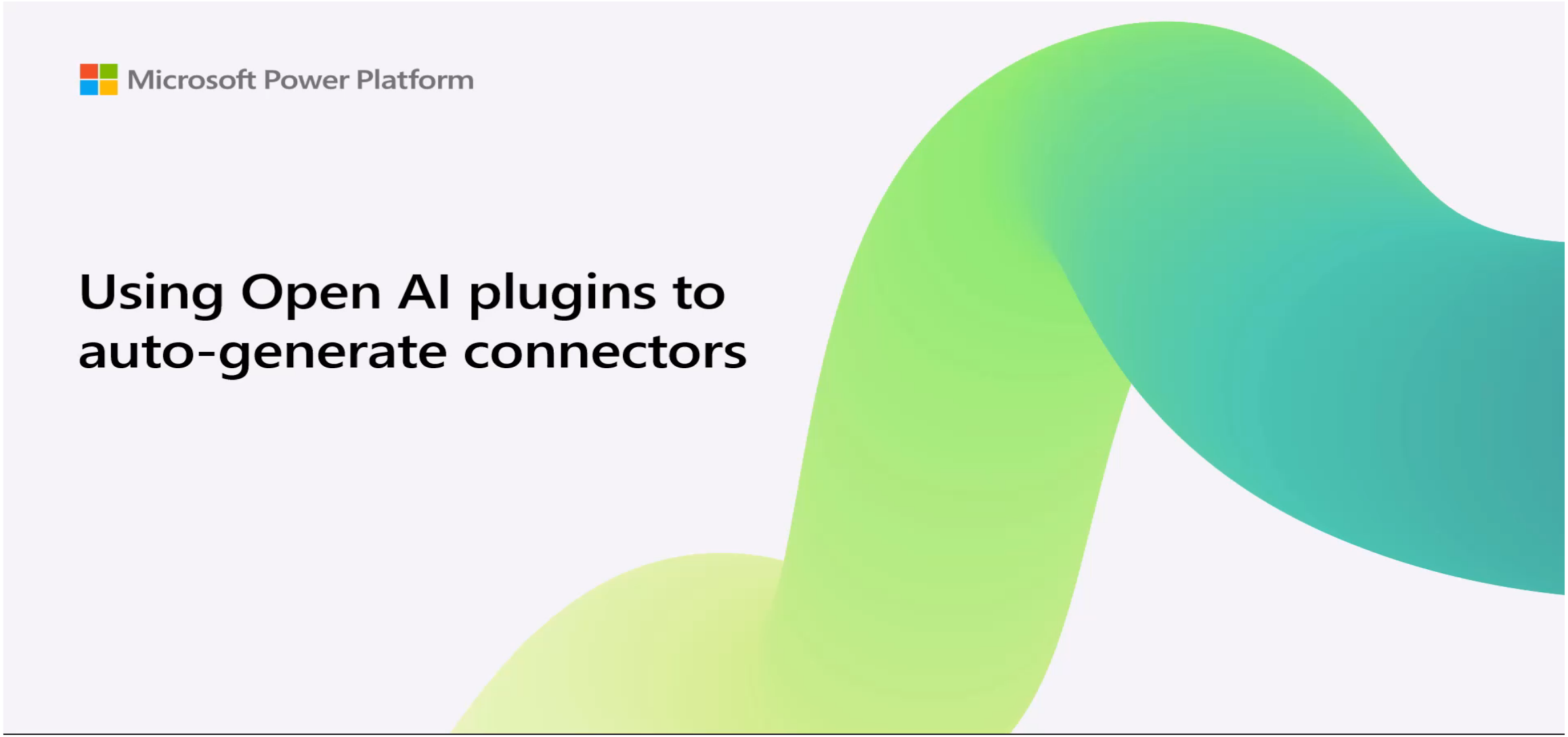


What are the extensibility patterns?

Open API Plugins



Open AI Plugins for Low Code & Copilots



Open AI Plugins for Low Code & Copilots

How are Open AI plugins useful to Low code ecosystem?

- ✓ *Create a Power Platform Connector from an Open AI plugin*
- ✓ *Use in Power Apps, Power Automate & Power Virtual Agents like any other connector.*
- ✓ *Writing an Open AI plugin will be same as creating a connector.*
- ✓ *Write once; use in both low code & Copilots*

Extensibility Options

- ✓ *Coming soon – use Open AI plugins in App Copilot.*

Availability

Open AI plugin -> Connector in early access preview

Summary

- ✓ Common types of Business application plugins
- ✓ Power Platform Connector Plugins to extend copilots to external systems.
- ✓ Write a plugin once; use it in any copilot.
- ✓ Open AI Plugins & Connectors will be one and the same

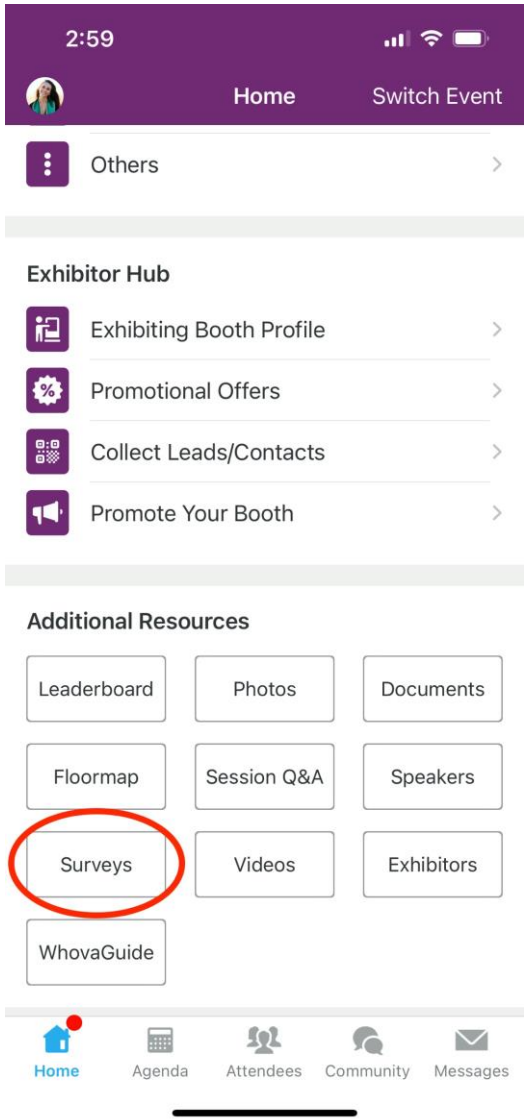
Call to action

- How can I get started for F&O?
  - ✓ FAQ for chat with finance and operations data on Microsoft 365 Copilot - Finance & Operations | Dynamics 365 | Microsoft Learn.
- How can I get started for Sales apps?
  - ✓ Add Copilot to model-driven apps - Power Apps | Microsoft Learn
  - ✓ Add Copilot control to a canvas app - Power Apps | Microsoft Learn
- How can I get started for Sales Copilot?
  - ✓ Early access preview sign up at - https://aka.ms/SalesCopilotPartnerSignUp
- How do I get started on building connectors from Open AI plugins?
  - ✓ Early access preview – sign up at – https://aka.ms/ISVPluginPreview
  - ✓ Blog went live on 10/3 - Unlocking Your Ecosystem Across Low-code Solutions and Microsoft 365 Copilot | Microsoft Power Apps

Related Sessions

- Unveiling the magic: Inside Copilot in Dataverse and AI Builder, Empowering Low Code Makers – Today @ Ballroom 370, 2-3PM
- Roundtable – Open AI and Power Platform better together – how & why?
  Today @ Room 204, 3-4PM

Session Feedback Surveys



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It's just that easy!

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