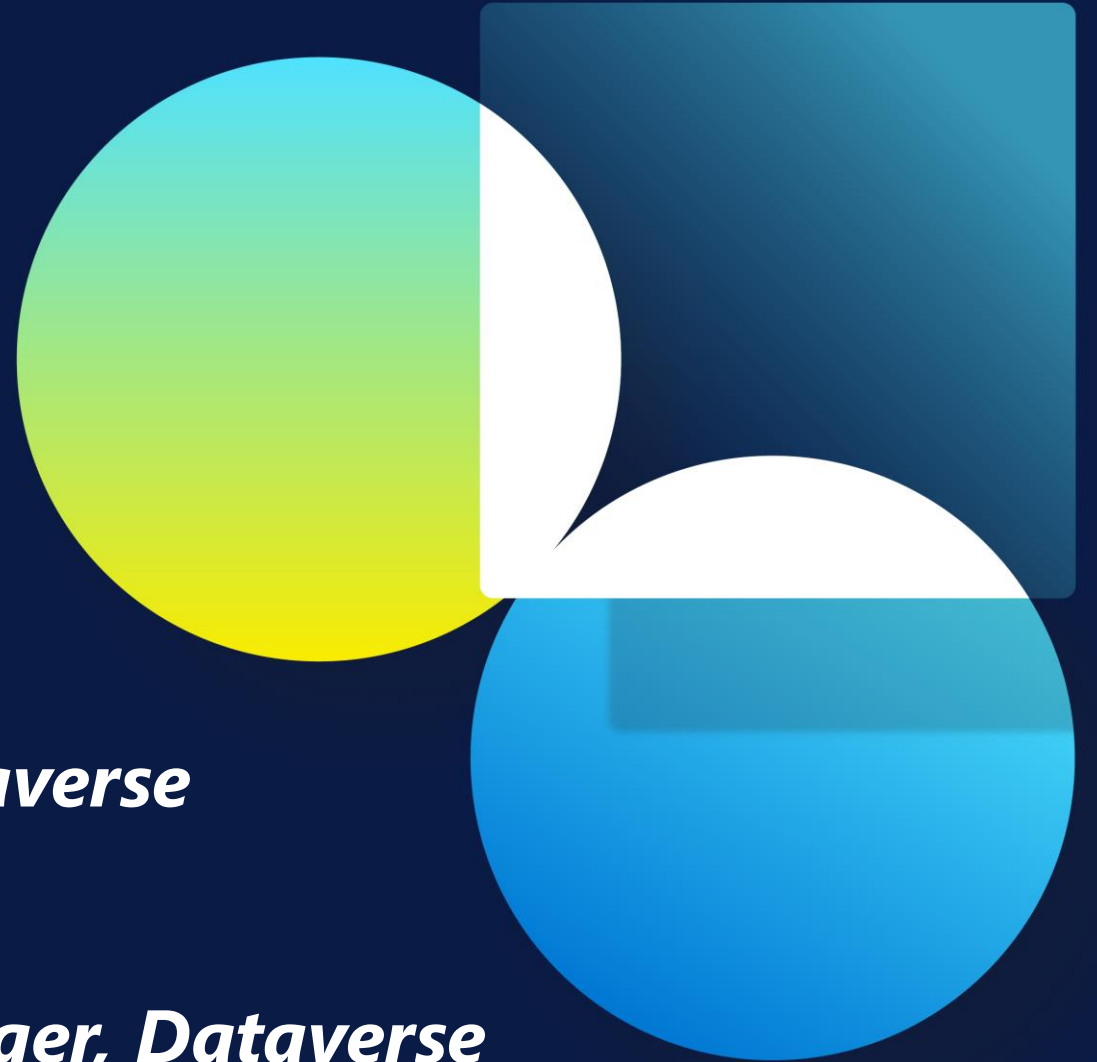


# Dynamics 365 Copilot Extensibility

***Robert Bruckner – VP & CTO, Dataverse***  
*<https://aka.ms/RobertB>*

***Sunil Garg – Group Product Manager, Dataverse***  
*<https://aka.ms/SunilGarg>*





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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

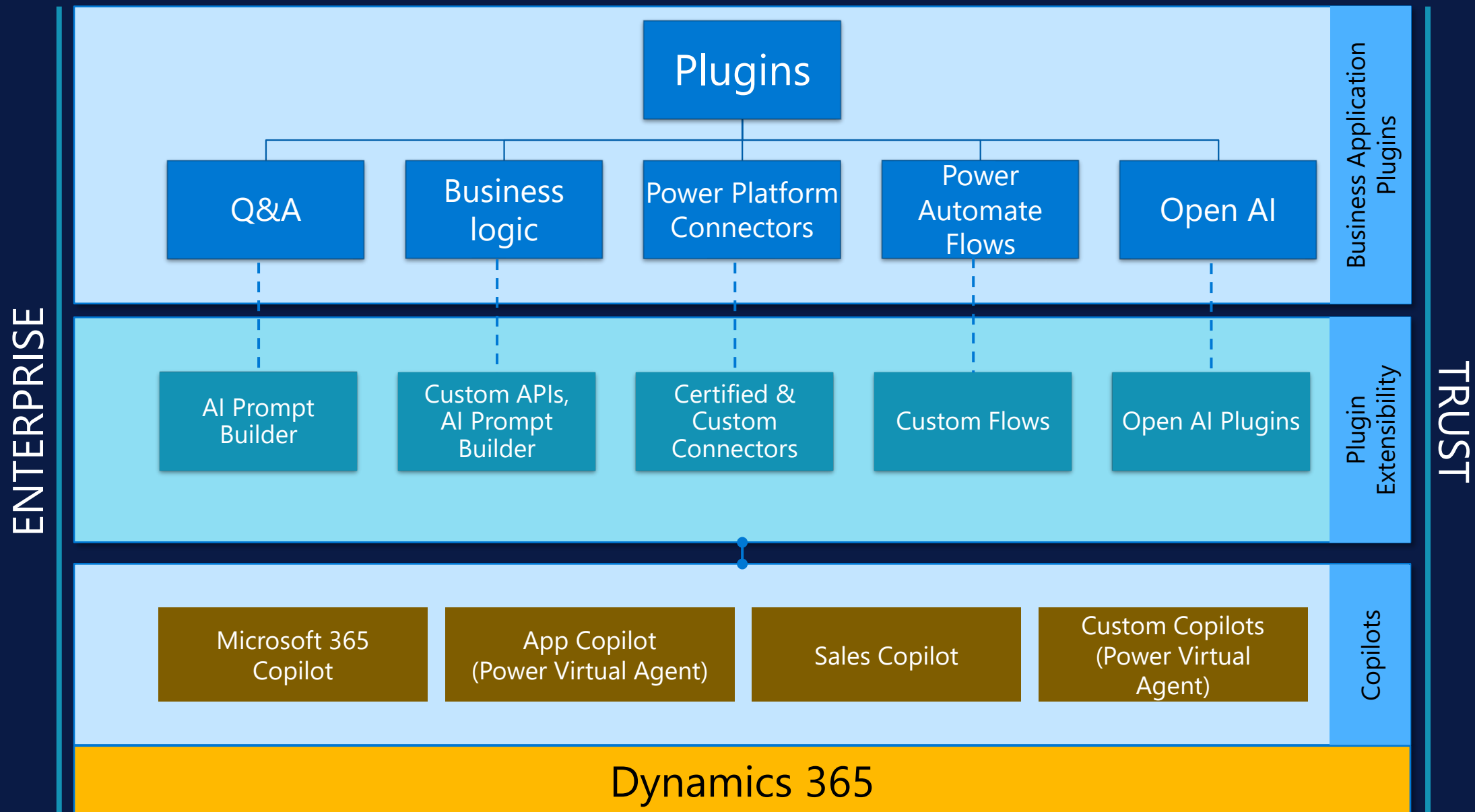
Create product descriptions



Dynamics 365 Copilot

---

# Copilot Extensibility Patterns



# What's coming in extensibility?

## Takeaways:

- ✓ Direction -> Multiple options for building plugins driven by scenarios
- ✓ Direction -> Power Platform will be the primary tool 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
<div>Available in M365 and App Copilots</div> <ul style="list-style-type: none"><li>✓ Dynamics 365 Sales – Leads</li><li>✓ Dynamics 365 Sales – Opportunity</li><li>✓ Dynamics 365 Sales – Contacts</li><li>✓ Dynamics 365 Customer Service – Cases</li></ul> <div>Available in M365 Copilot</div> <ul style="list-style-type: none"><li>✓ Dynamics 365 Supply Chain – On hand inventory</li></ul>	<div>Available in M365 Copilot</div> <ul style="list-style-type: none"><li>✓ List my approvals</li><li>✓ List my planner tasks</li></ul>	<div>Available in M365 Copilot</div> <div><div><div>Freshdesk</div><div>Dropbox</div><div>ATLASSIAN Trello</div><div>redmine.org</div><div>GitHub</div><div>Plumsail</div></div><div><div>Gmail</div><div>Shifts for Microsoft Teams</div><div>twilio</div><div>salesforce</div><div>SharePoint</div><div>PagerDuty</div></div><div><div>MSN Weather</div><div>box</div><div>Azure DevOps</div><div>Outlook</div><div>Marketo</div><div>Desk365.io</div></div><div><div>Google Calendar</div><div>Google Drive File storage service</div><div>OneDrive File hosting service</div><div>servicenow</div><div>Bing Maps</div><div>asana</div></div><div><div>INTUIT mailchimp</div><div>Office 365 Planner</div><div>Jira Software</div><div>blackbaud</div><div>SurveyMonkey</div></div></div> <div>Available in M365 &amp; Sales Copilot</div> <div><div>Adobe</div><div>DocuSign</div><div>people.ai</div></div>



# 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

### 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



#### Available in M365 & Sales Copilot





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

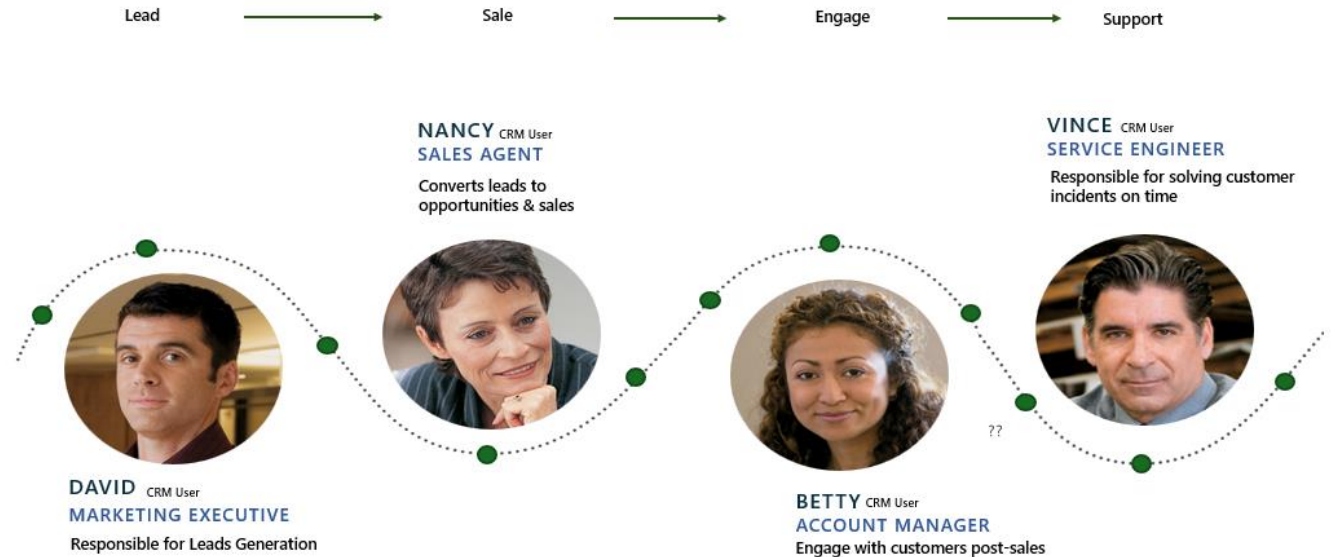
## Scenario

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 losses over time.

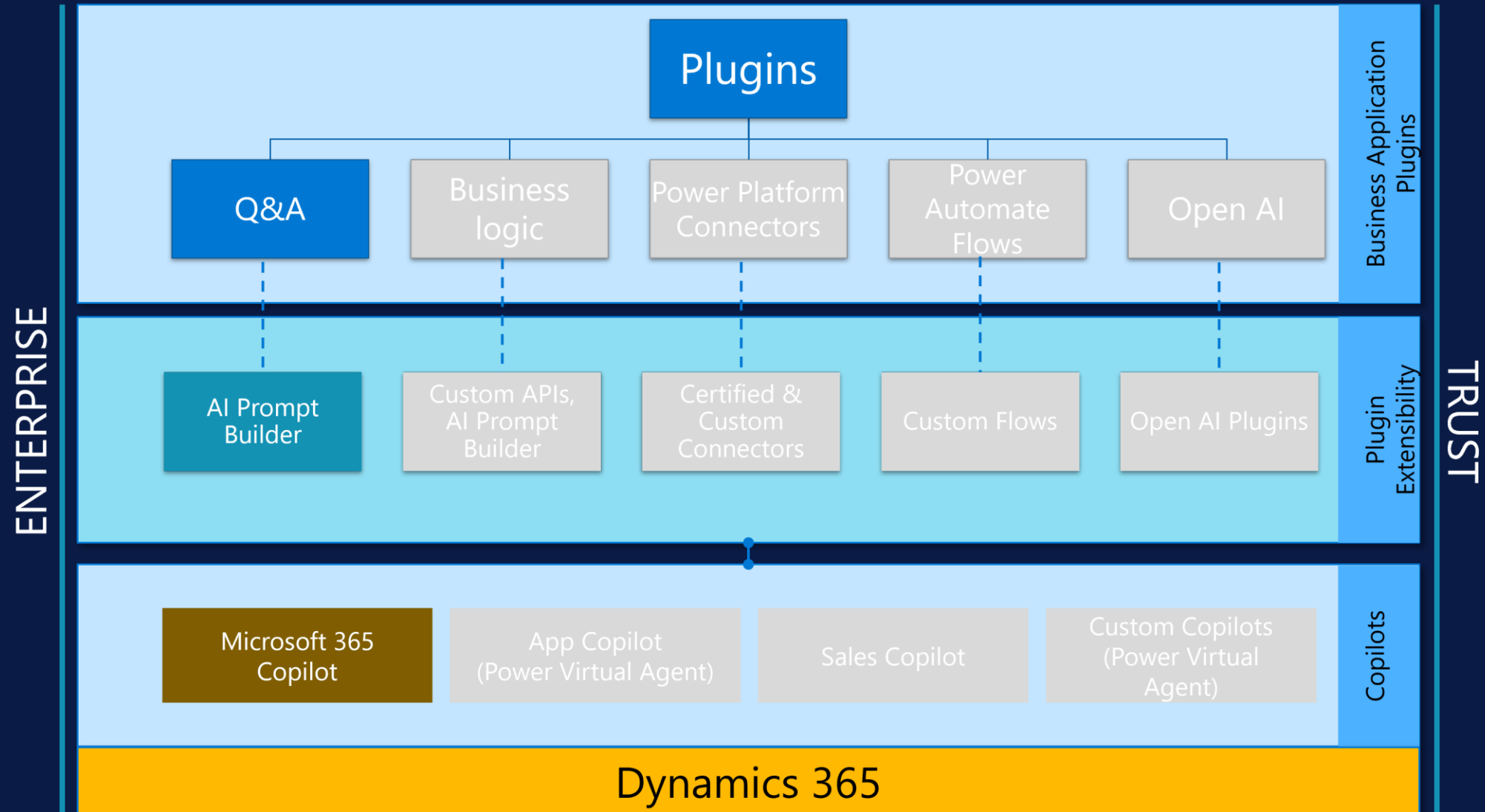
Some stats:

- ✓ 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

**Copilot (Dogfood)**

Chat About



**NANCY**  
SALES AGENT

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

When's my next meeting with [person](#)

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

Copilot (Dogfood) 2:03 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

When's my next meeting with [person](#)

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

Copilot (Dogfood) 2:18 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 my recent emails about...

Create


List ideas for a fun remote team building event

Ask

What are the action items from [meeting](#)

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


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



2:03 PM

new topic

2:18 PM

new topic 

Wednesday, September 20, 2023

# 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

Copilot (Dogfood)

Chat

About



NANCY

SALES AGENT

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

When's my next meeting with [person](#)

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

2:18 PM

new topic

Copilot (Dogfood) 2:18 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 my recent emails about...

Create

List ideas for a fun remote team building event

Ask

What are the action items from [meeting](#)

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

3:55 PM

What is the on-hand inventory for Computer Mouse in company BOH?


Copilot (Dogfood) 3:55 PM

According to the information I found, the on-hand inventory for Computer Mouse in company BOH is 105 units. <sup>1</sup> Is there anything else you would like to know?


Copy

1 reference ^

1




<https://msft-boh-uat.sandbox.operations.dynamics.com/?mi=InventOnhandItem>



1/20

AI-generated content may be incorrect

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



# 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

Copilot (Dogfood)

Chat About



NANCY

SALES AGENT

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

4:58 PM

new topic

Copilot (Dogfood) 4:58 PM

OK, let's start over. What can I help you with now?

For some ideas, try one of the suggestions below...

Catch Up

List key points from file

Create

Suggest edits to make this file more concise: file

Ask

How do I write a request for proposal?

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

4:59 PM

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


Copilot (Dogfood) 4:59 PM


According to my search results, the computer mouse is available in white and black colors in site BOH. <sup>1</sup> <sup>2</sup> Additionally, I found an email from Rama Krishnamoorthy, who announced that the company is glad to introduce a computer mouse in pink color in site BOH starting 1st January 2024. <sup>3</sup>


Copy

3 references ^

1/20 AI-generated content may be incorrect

<sup>1</sup>  <https://msft-boh-uat.sandbox.operations.dynamics.com/?mi=InventOnhandItem>

<sup>2</sup>  <https://msft-boh-uat.sandbox.operations.dynamics.com/?mi=InventOnhandItem>

<sup>3</sup>  Internal Marketing Email

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

# 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*

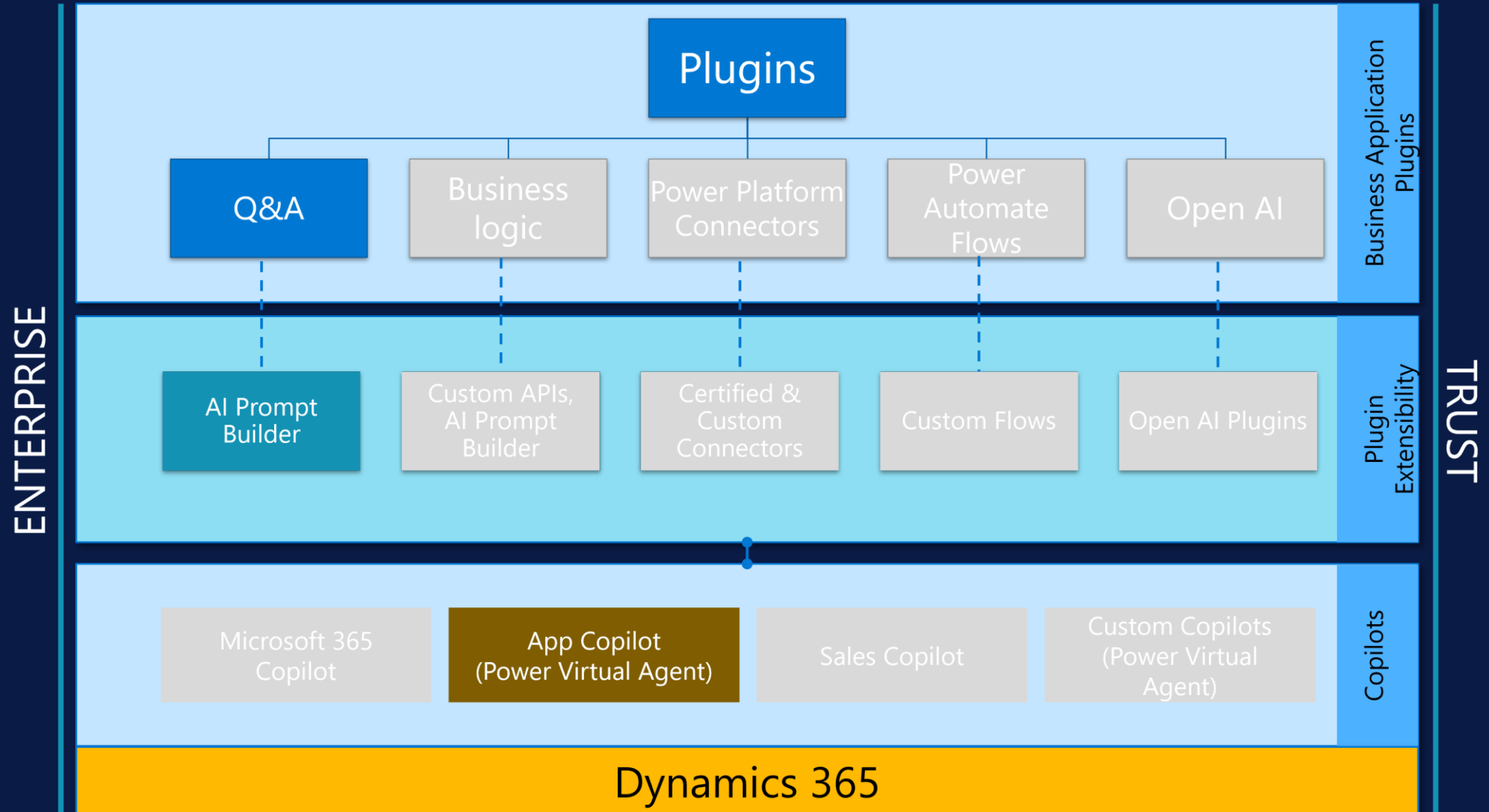
# Summary – Prompt plugins in M365 Copilot

## Variety of functional behaviors

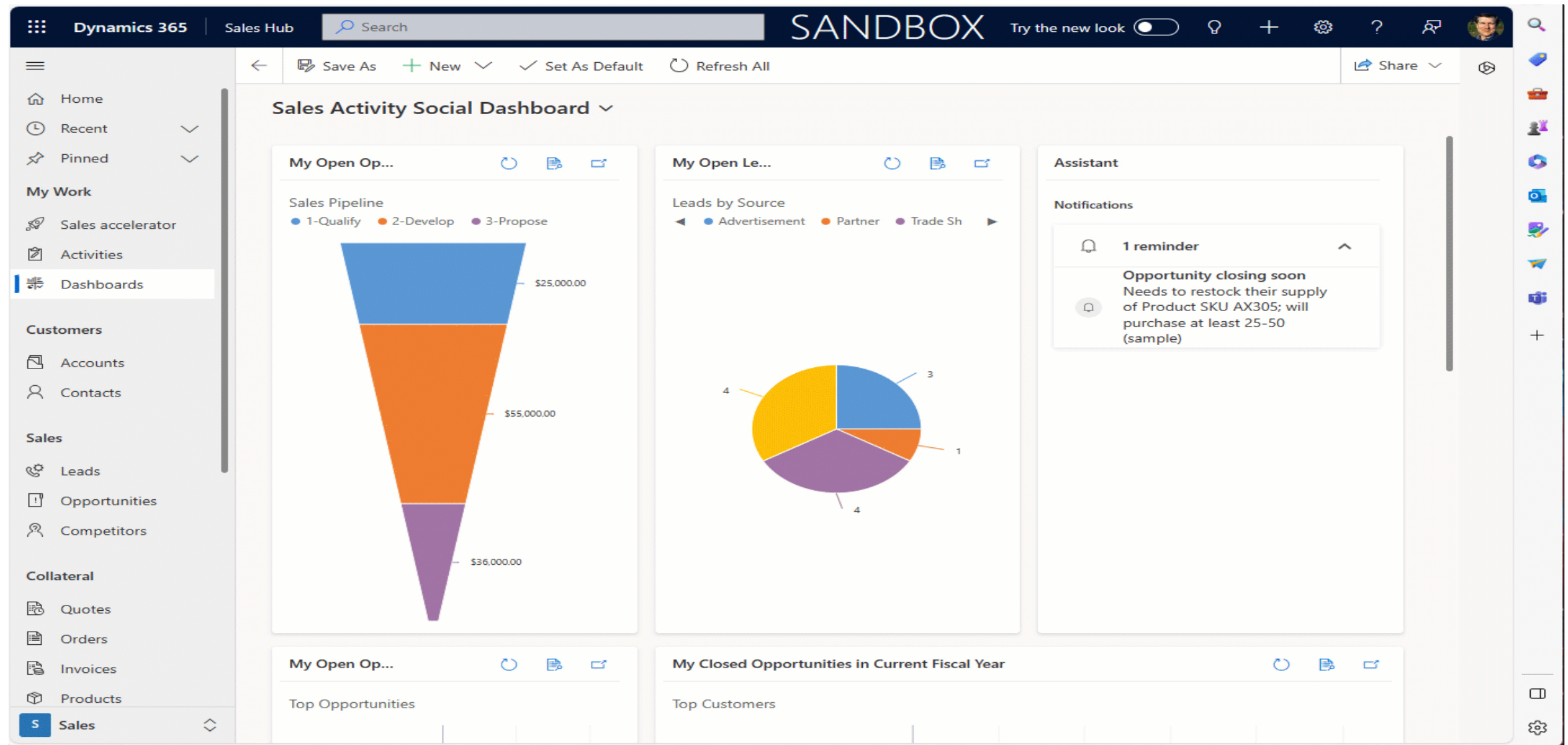
- ✓ Scoping
- ✓ Semantic matching
- ✓ Aggregation
- ✓ Consolidation across productivity & business data
- ✓ Formatting results
- ✓ References

# 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).*

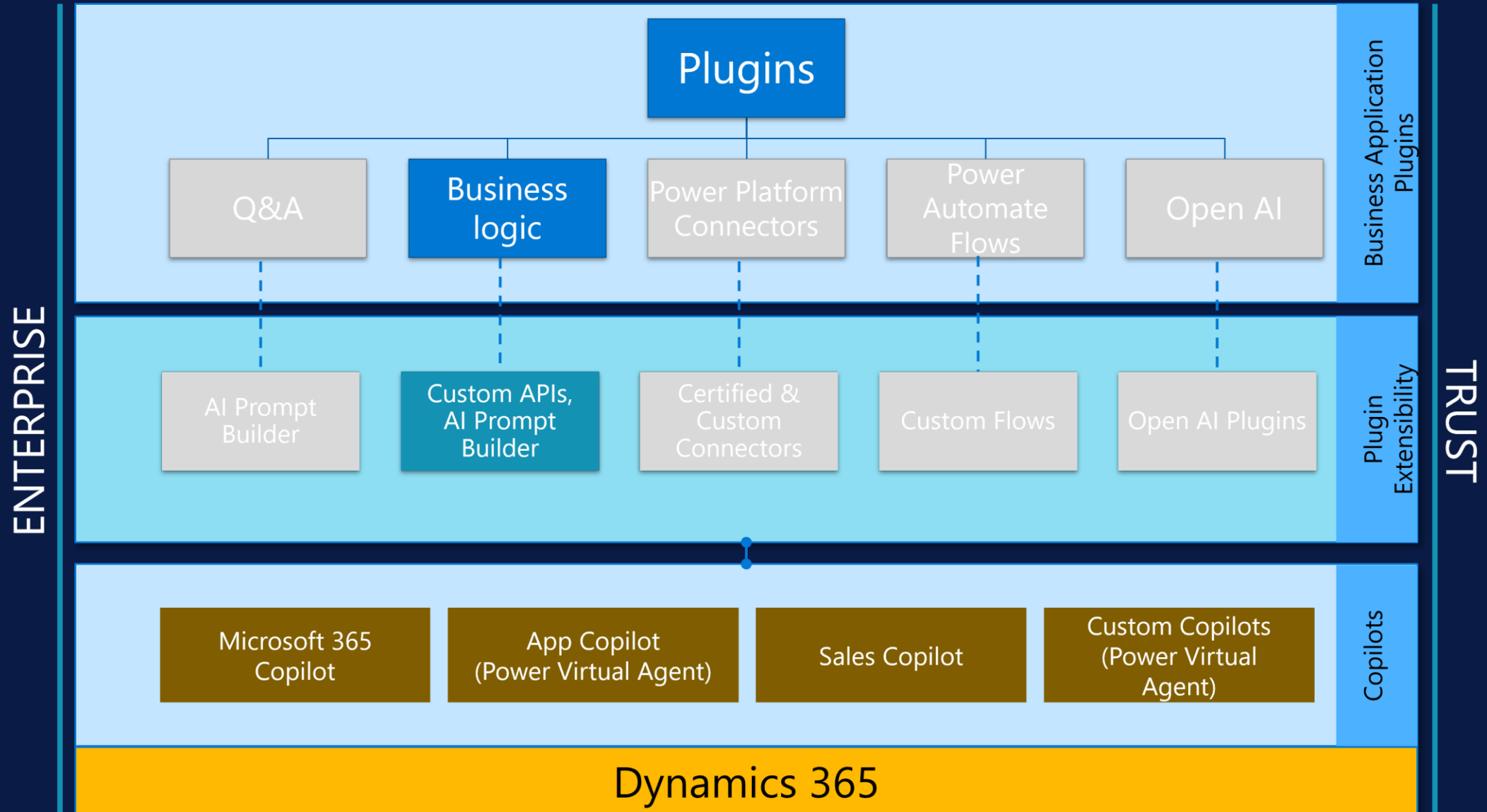
## Availability

*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

Q&A on account activities

Prompt

Answer to the  Question   using data from  Account   and  Activity  

+ Add dynamic value

 Add data source

Test your prompt

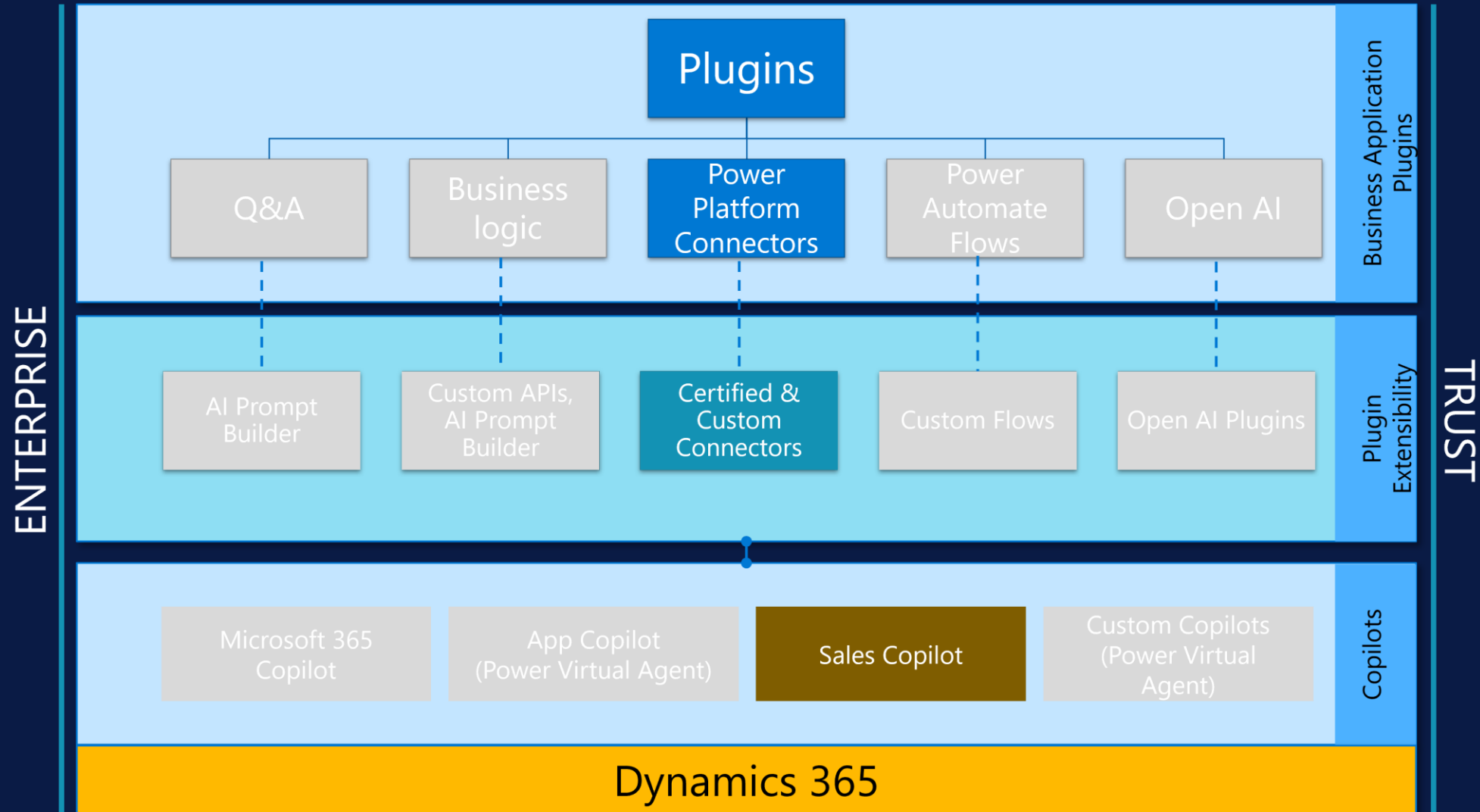
AI-generated content may be incorrect. Make sure it's accurate and appropriate before using it. [Read terms.](#)

Save dynamic prompt

Cancel

# 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

The image displays three overlapping screenshots of the Sales Copilot interface, demonstrating the integration with Dynamics 365 and the DocuSign Connector.

**Left Screenshot:** Shows an email from Kathryn Murphy received on 10/3/22 at 11:35 AM. Below the email, the "Highlights" tab is active, displaying an "Opportunity summary" for "50 Cafe A-100 Automatic". The summary states the cafe was opened for Contoso on July 6th, 2010, with an expected close date of June 20th, 2023. Alberto Burgos is the primary contact, and the budget is \$24,000. The "Latest activity" section lists four items: a signed contract on 9/7/2023, an email thread summary on 04/15/2023, a follow-up by Alberto Burgos with no response, and another follow-up with an incomplete quote.

**Middle Screenshot:** Similar to the left, but with a "Contract signed" notification overlay. The notification states: "Contract signed Sun 9/7/2023 1:30 PM", "Contract 50 Cafe A-100 Automatic Renewal Contract", "Signed by Alberto Burgos", "Signed on 9/7/2023", and "Source: DocuSign".

**Right Screenshot:** Shows the "Account details" for "Alpine Ski House". The details include: Account name (Alpine Ski House), Owner (Daisy Phillips), Website (http://www.alpineskihouse.com/), Type (Prospect), Industry (Manufacturing), Annual revenue (\$13,000,000), Employees (850), and Parent account (Contoso). Below the account details, a "DocuSign contracts" section lists two contracts: "50 Cafe A-100 Automatic Renewal Contract" signed on 9/7/2023, and "ABC Company 2023 Renewal Contract" delivered on 9/3/2023.

# 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

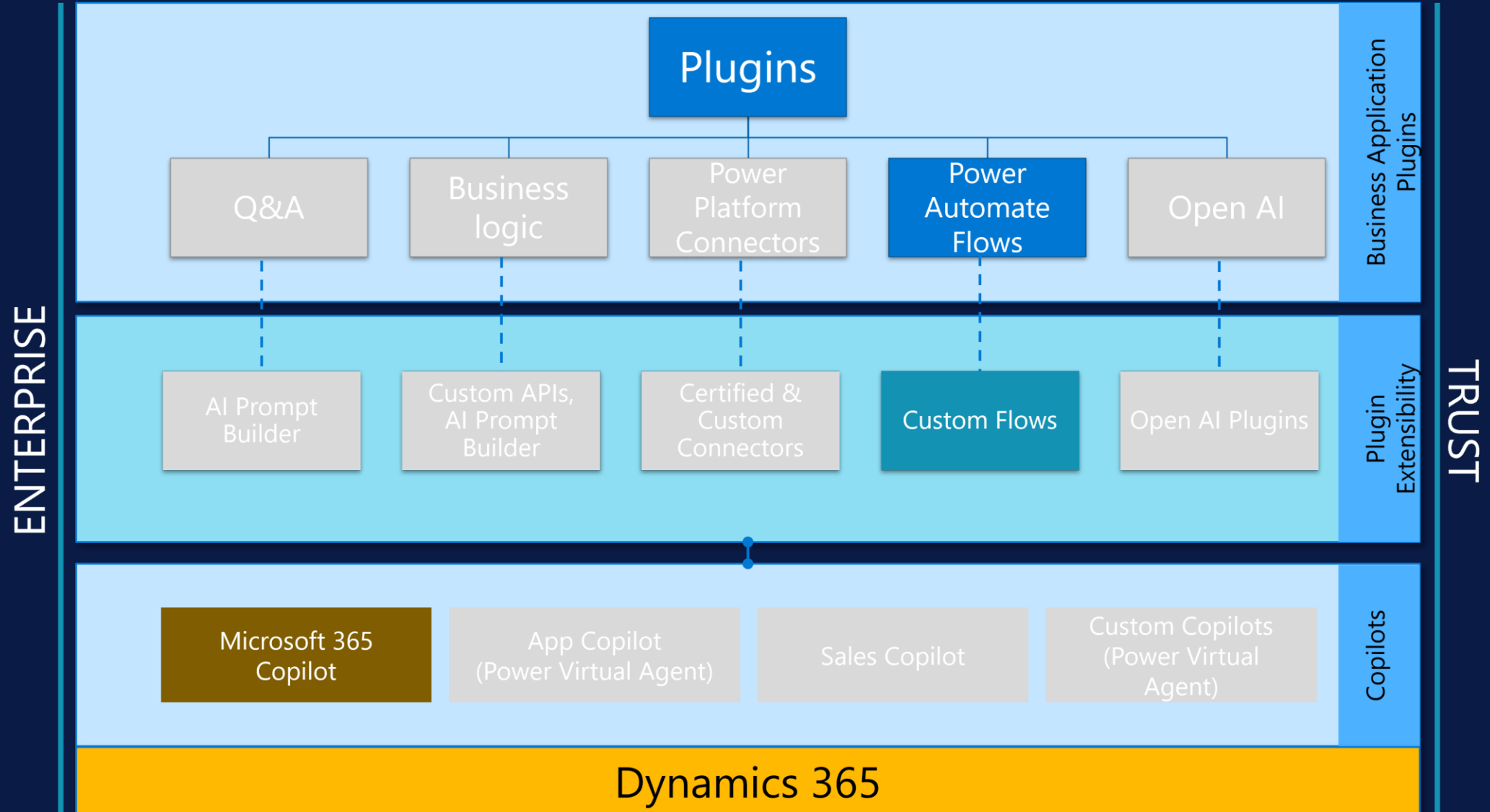
- ✓ Extend CRM record summary in Sales Copilot with non-CRM data
- ✓ Sellers can follow a link for additional details in the non-CRM application.

## Availability

Later this calendar year.

# What are the extensibility patterns?

Power Automate Flows





# Extending Dynamics 365 with Power Automate Flow Plugins

List my pending approvals

Copilot (Dev) 8:47 AM

You have 11 pending approvals. Here are the details:

Title	Description	Created By
Sequential Dynamic Output		Tim Rigby
Approval from tip1 Flow		Tim Rigby
Flow Group Viewership	The Flow team was added as a single group	Tim Rigby
Test	Amount: \$100	Harysh Menon
testing localization in approval	Additional Notes: Test2	Rishu Mehndiratta
approval test in tip1 on 7/11	testing if email is localized. You are welcome	Sherry Zhang
Sequential Dynamic Output	Power Automate	Tim Rigby
Testing Email Piece	First step: Tim	Tim Rigby
Create -> Wait	Second step: Harysh	Tim Rigby
No action needed	Testing dynamic output	Tim Rigby
Testing group behavior - no need to respond	No action needed here	Tim Rigby

Copy

1/20

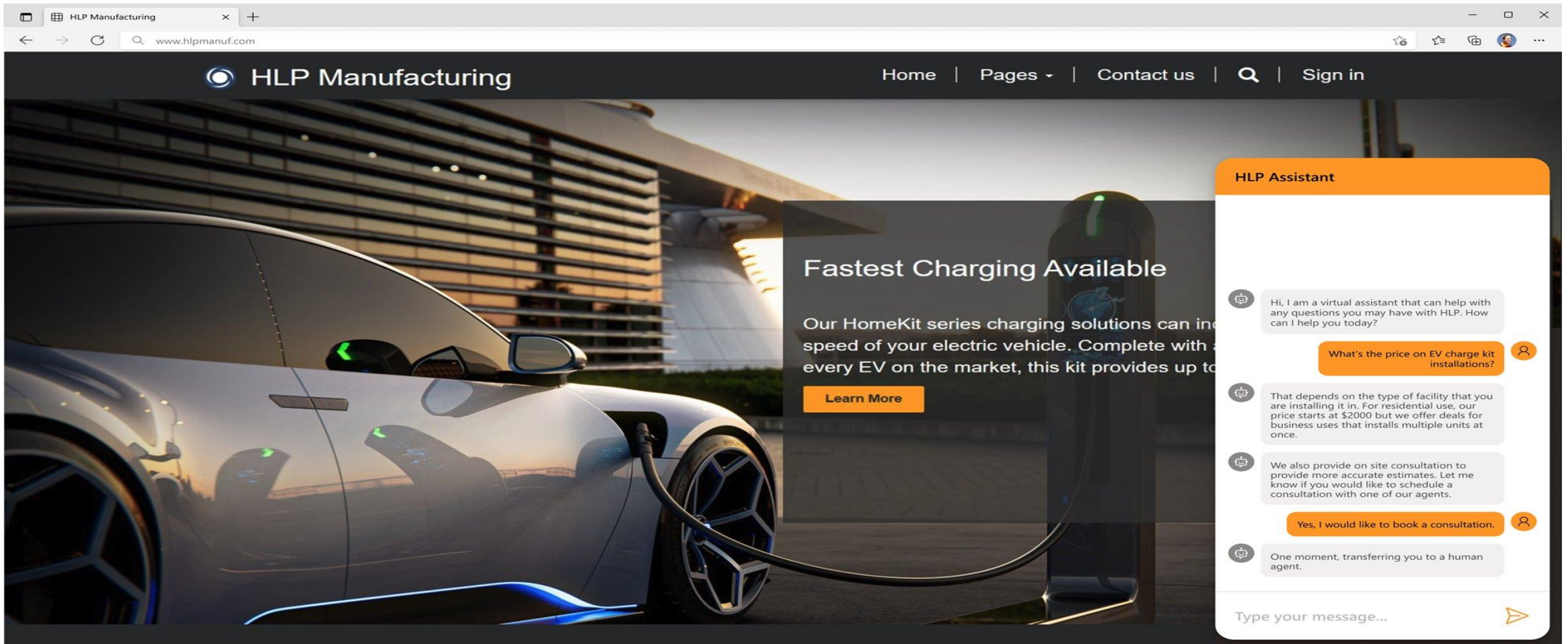
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# What are the extensibility patterns?

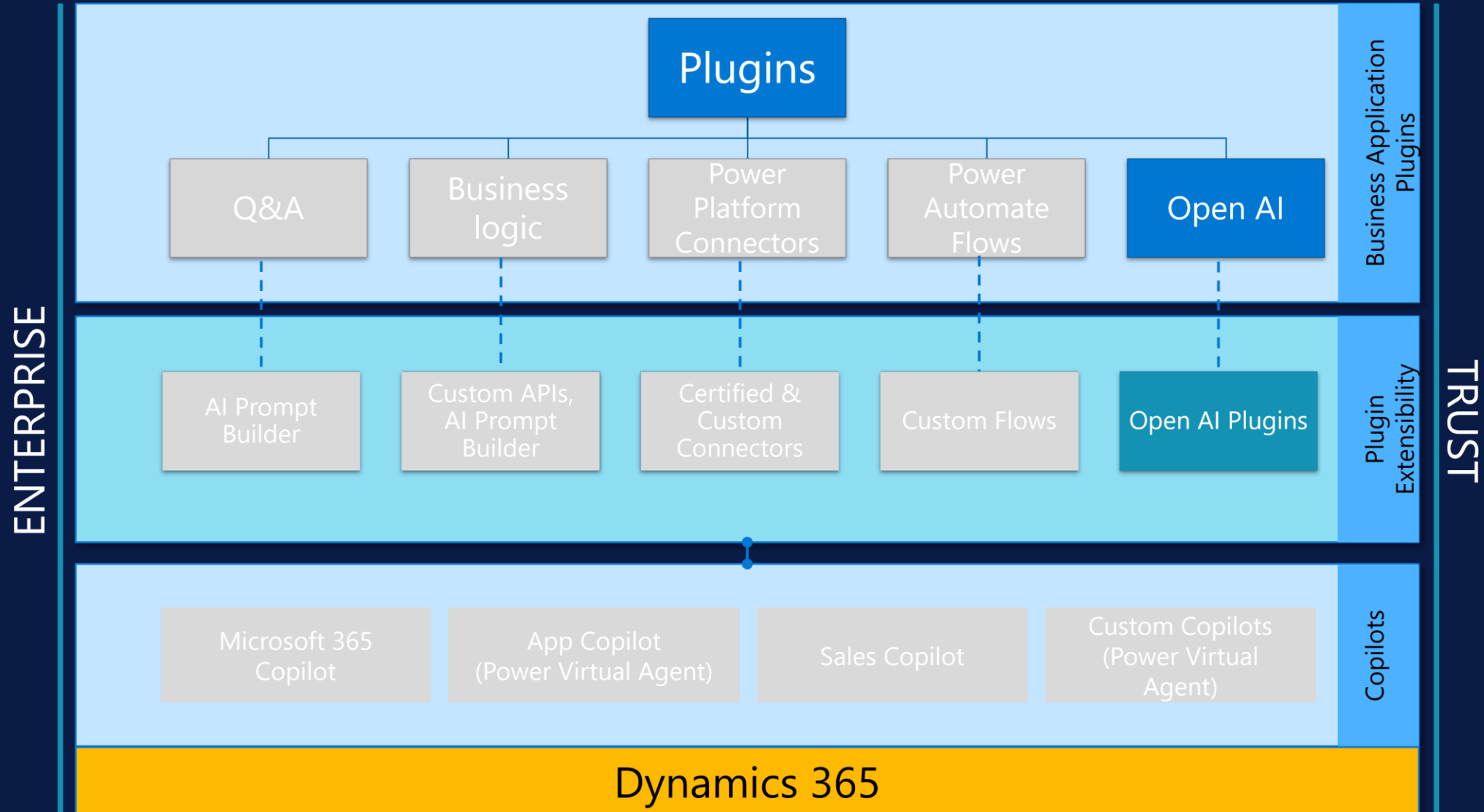
Custom Copilots using PVA

# 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



**Using Open AI plugins to  
auto-generate connectors**

# 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

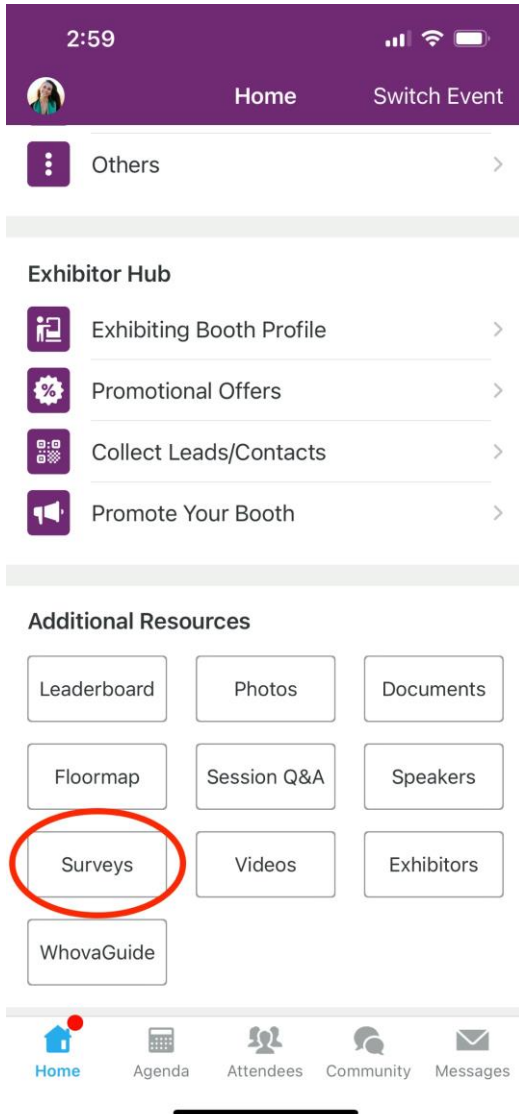
- How can I get started for F&O?
  - ✓ [FAQ for chat with finance and operations data on Microsoft 365 Copilot - Finance & Operations | Dynamics 365 | Microsoft Learn.](#)
- How can I get started for Sales apps?
  - ✓ [Add Copilot to model-driven apps - Power Apps | Microsoft Learn](#)
  - ✓ [Add Copilot 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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- *Scroll down on the Microsoft Power Platform Conference Homepage to 'Additional Resources' to click "Surveys".*
- *Click Session Feedback.*
- *Scroll down to find this session title.*
- *Complete the session feedback survey.*
- *Finally, click 'Submit'*

*It's just that easy!*

Thank you