Dynamics 365 FastTrack Partner Architect Bootcamp

Lab 01: Extending Copilot in Sales

Hands-on Labs step-by-step

February 2026

Microsoft Copilot Studio Workshop for Dynamics 365

Contents

LAB Extending Copilot in Sales

Extend Copilot in Sales to meet your specific business needs.

Lab Details

This lab is subject to the Terms of Use found at the end of this document.

There are many valid ways to approach and implement this scenario. In this lab, we have intentionally made certain design choices to demonstrate a broader range of tools, capabilities, and concepts available in Copilot Studio. While these choices may not always represent the most direct or optimized solution, they serve an educational purpose by exposing you to techniques you might use in more complex or varied situations.

Level	Persona	Purpose	Estimated time to complete
200	Advanced Maker	After this lab you will be able to extend Copilot in Sales • How to create a new Topic in MCS • How to make a “HTTPS call” MCS • How to create an AI prompt • How to create and call an Agent Flow • How to create Adaptive card • How to use variables • How to use PowerFX function	60 minutes

Prerequisites

- You need to have access to Microsoft Copilot Studio using https://copilotstudio.microsoft.com/.
- Access to a CE environment with Sales Copilot enabled(Turn on and set up Copilot in Dynamics 365 Sales | Microsoft Learn).

Documentation and additional training links

- Add an Adaptive Card to a Copilot Studio message or question
- Adaptive Cards
- AI Prompt in Copilot Studio
- Make HTTP requests - Microsoft Copilot Studio | Microsoft Learn
- Agent flows overview - Microsoft Copilot Studio | Microsoft Learn

Use Case

Problem Statement:

Sales teams often need to understand the financial health of publicly traded customer organizations before engaging in sales conversations, account planning, or pipeline reviews.

In most cases, sellers manually verify company financial information using public financial websites.

In most cases the process is manual and time-consuming:

- Sellers leave the CRM and navigate to a financial website.
- Search for the company using its stock symbol (ticker).
- Review financial details such as stock price, etc.
- Manually copy relevant information.
- Paste or update these details in the Account record or notes in the CRM.

This results in:

- Inconsistent and outdated financial data in the system.
- Increased effort for sellers.
- Reduced adoption of financial enrichment fields in CRM.

Solution Approach for this lab: (Note – The actual solution approach may vary depending on real-life scenarios. For this lab, we will keep things simple for learning purposes.)

By extending Copilot in Sales using Copilot Studio:

- Sellers can query company financial data directly from the Copilot chat pane while viewing an Account record.
- Copilot reads the Company Symbol (Ticker) stored on the Account record.
- It retrieves the latest financial information from Yahoo Finance using an external API e.g. https://query1.finance.yahoo.com/v7/finance/chart/MSFT?&interval=1d
- It summarizes the financial data for the seller.
- It will enrich the Account record with retrieved information (Update the description field with the summarized financial data).

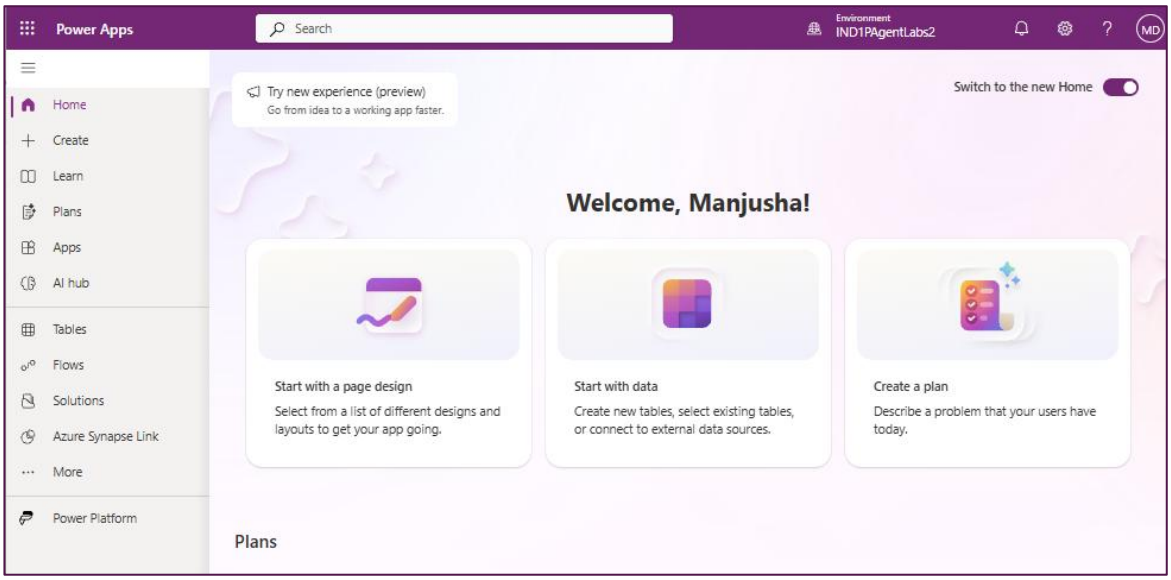
All actions happen in the context of the Account record, without leaving the Sales application.

Benefits:

- **Saves time** for sellers by eliminating manual financial research.
- **Improves data quality** by ensuring consistent and up-to-date financial information.
- **Increases seller productivity** during account research and preparation.
- **Enhances account planning** with standardized financial insights.
- **Drives CRM adoption** by making data enrichment effortless through Copilot.

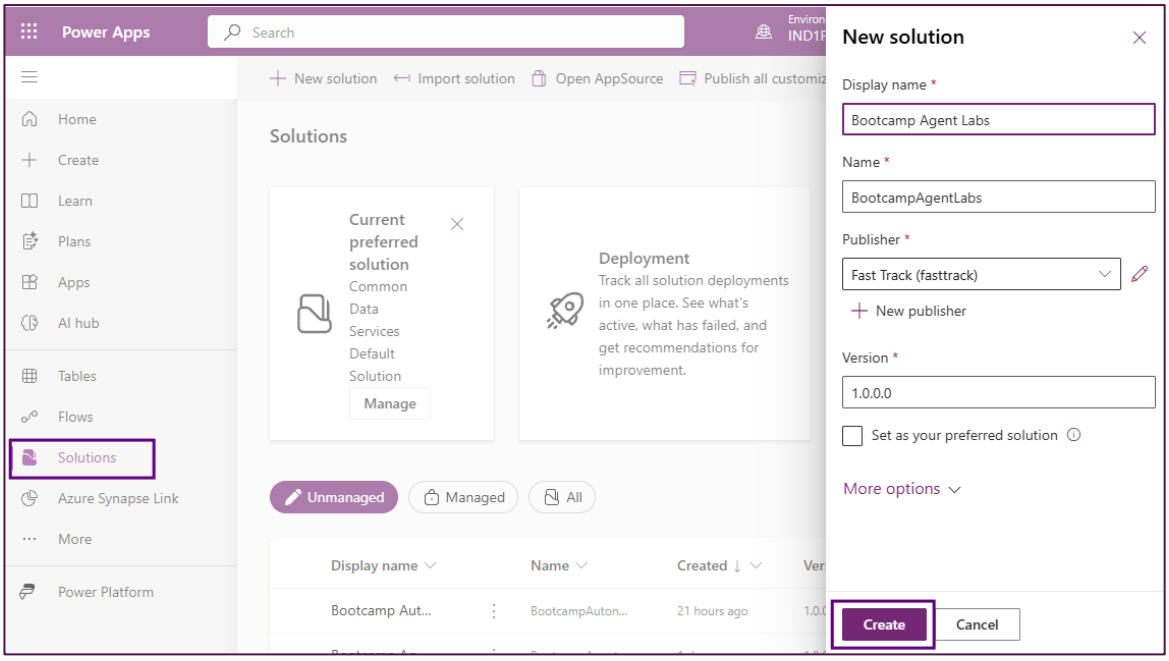
Task 1 – Create a solution in Power Apps maker experience

Step 1 Sign in to Power Apps maker experience. Verify that you are in the right environment.



Step 2 Select **Solutions** from the left navigation. If the item isn't in the side panel pane, select ...More and then select Solutions.

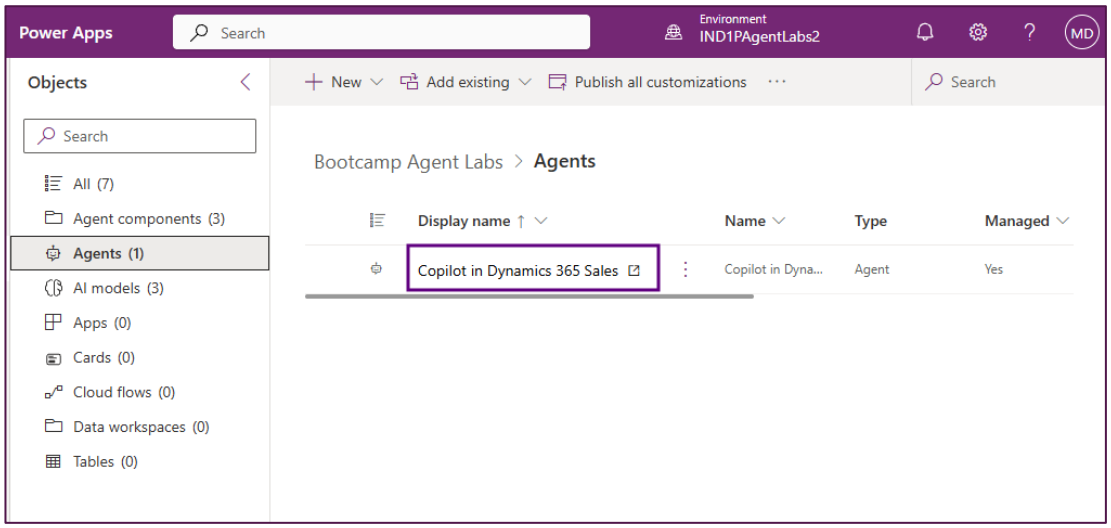
Step 3 Select **New solution**, provide the required column values to create the solution e.g., 'Bootcamp Agent Labs' and click **Create.**



Step 4 Select **Add existing**, then select **Agent** >>**Agent.**

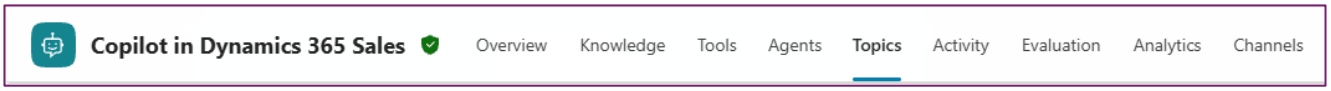
Step 5 Select **Copilot in Dynamics 365 Sales** agent and click **Add.**

Step 6 Click on the **Copilot in Dynamics 365 Sales** to open the agent in Microsoft Copilot Studio.

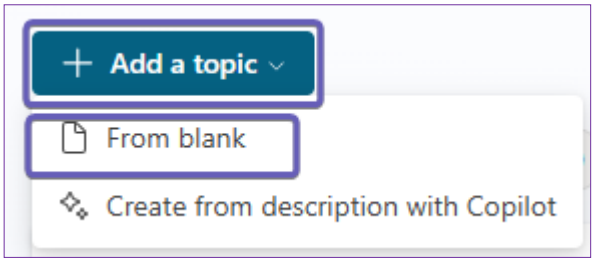


Task 2 – Create a new Topic (Search Financial Details)

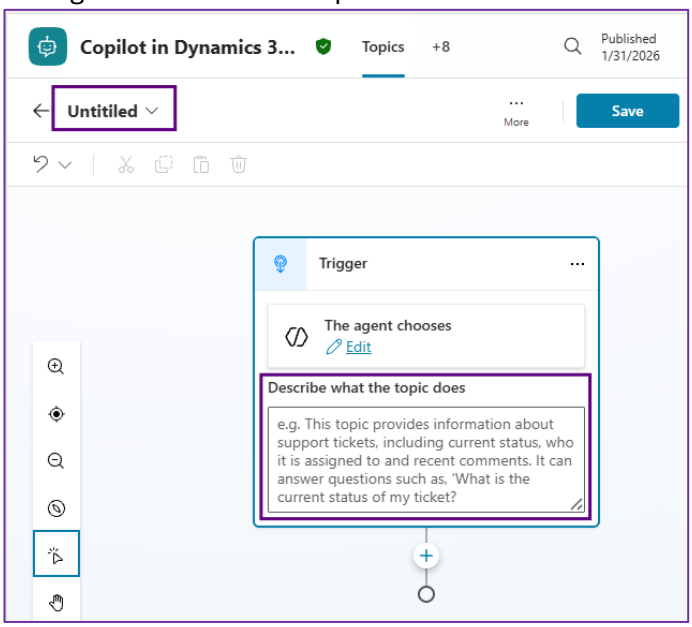
Step 1 Once the Agent is opened in MCS, click on **Topics.**



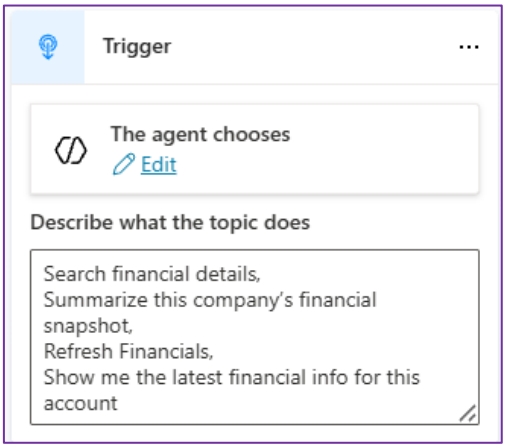
Step 2 Select **Add a topic** and select **From blank**.



Step 3 Change the name of the topic from **Untitled** to **SearchFinancialDetails**.

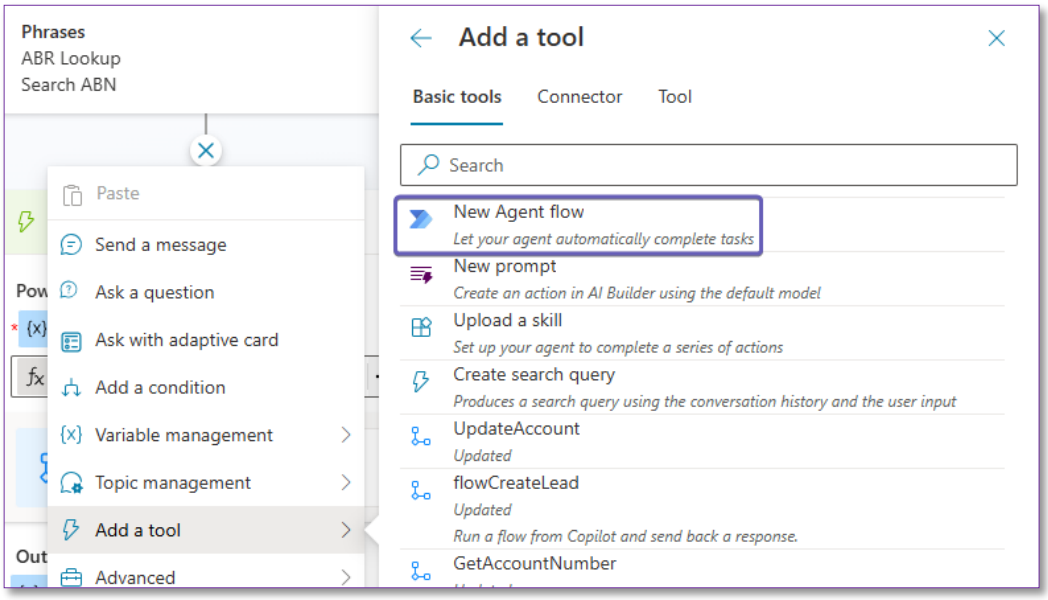


Step 4 In the Trigger, add phrases like **Search financial details, Summarize this company's financial snapshot, Refresh Financials, Show me the latest financial info for this account, Show me financial summary, Summarize financial health** as shown in below screenshot.



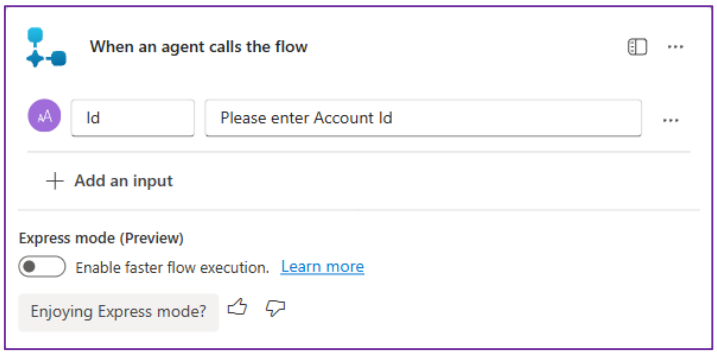
Step 5 Click **Save**

Step 6 After the trigger, click + and select **Add a tool >> New Agent Flow**.



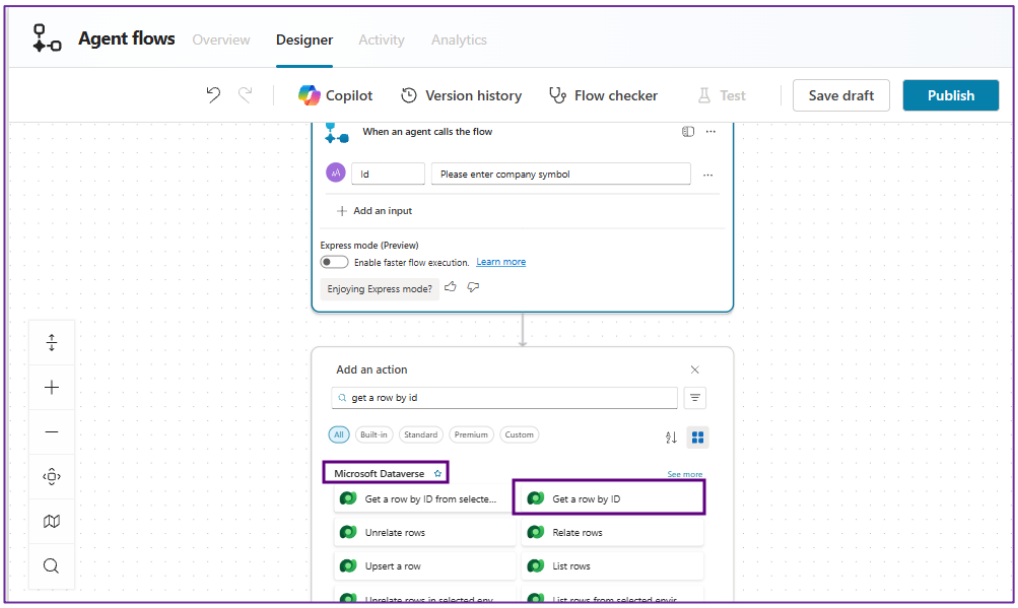
It will open the flow in the maker experience.

Step 7 Click on **When an agent calls the flow.** Add a text input parameter to the trigger. Name it **Id**.

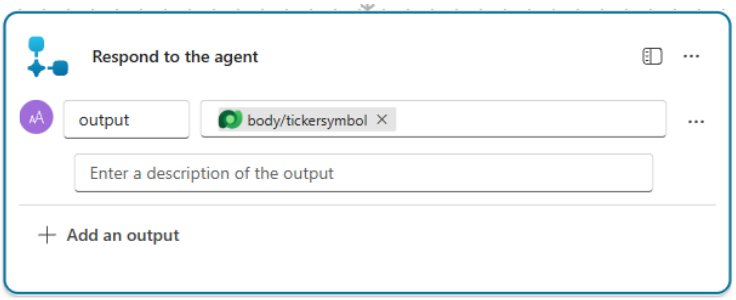


Step 8 Click (+) and Add Dataverse Connector **Get Row by ID** and the properties of the connectors as follows:

Table name : Accounts
Row Id : Id (Input parameter from above step)
Advanced Parameters>>Select columns: tickersymbol



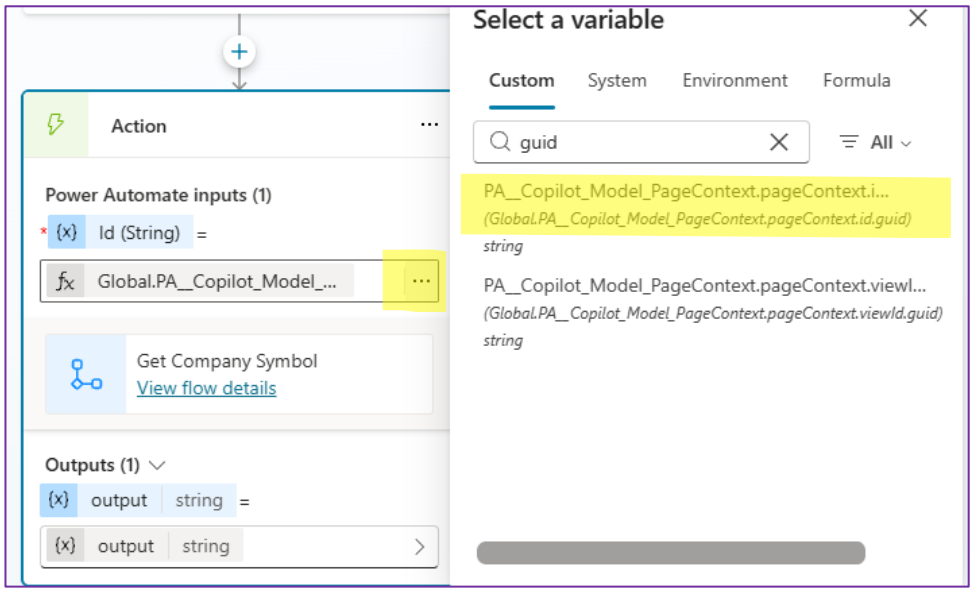
Step 9 Click on **Respond to the agent** and add a text output parameter to the trigger. Name it **output**. Set the output value to tickersymbol(Dynamic Value).



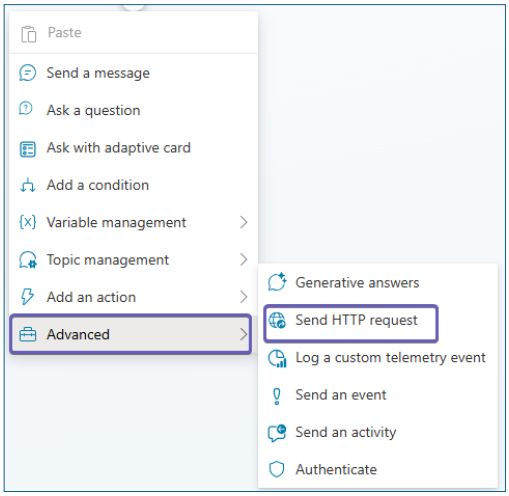
Step 10 Rename the flow from Untitled to **Get Company Symbol**.
Step 11 Save the draft flow.
Step 12 Publish the flow.
Step 13 Go back to the Copilot Studio on topic **SearchFinancialDetails** in Copilot in Dynamics 365 Sales.
Step 14 After **Trigger**, click (+) > **Add Tool** >**Get Company Symbol** (Agent Flow)

Step 15 Set the properties of the action:

Id: Global.PA__Copilot_Model_PageContext.pageContext.id.guid
Output: output (variable)

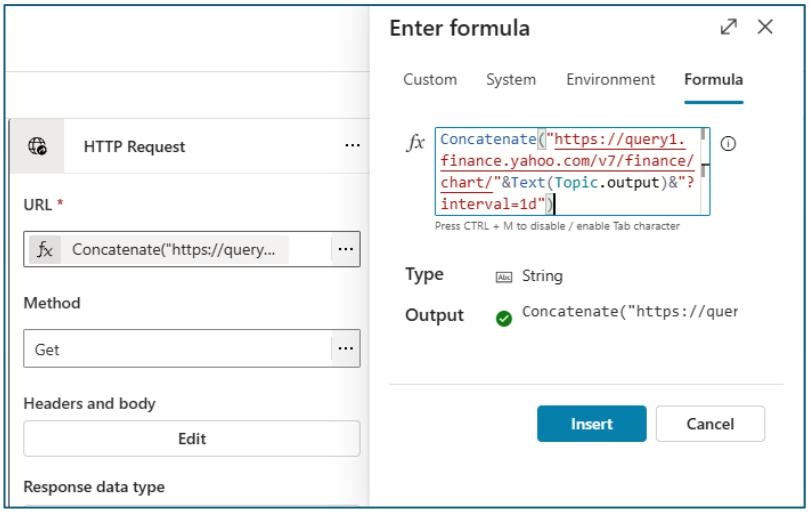


Step 16 To add node, click + and select **Advanced** >>**Send HTTP request**.

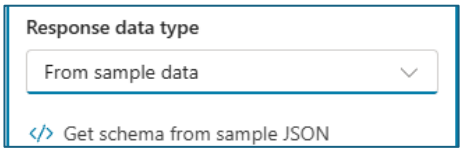


Set properties of the **Send HTTP request** as follow :

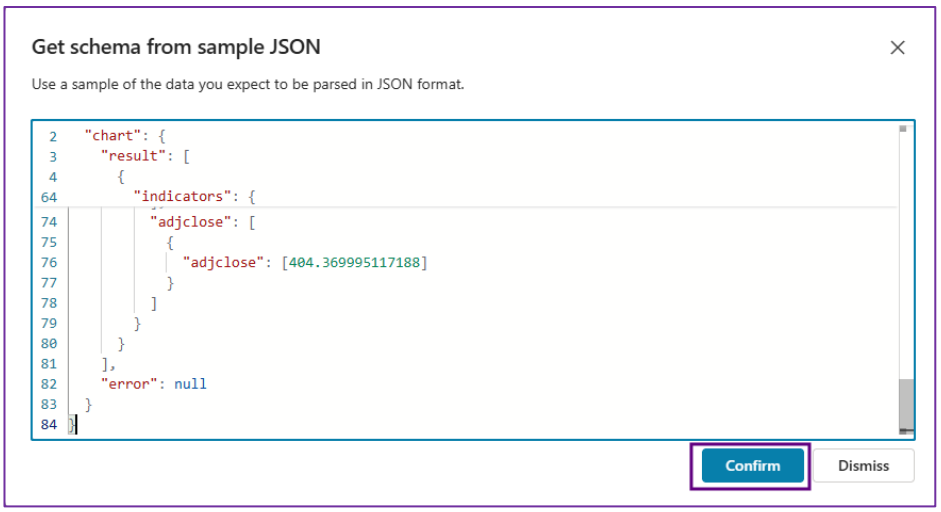
1. **URL**:
   `Concatenate("https://query1.finance.yahoo.com/v7/finance/chart/"&Text(Topic.output)&"?interval=1d")`
2. **Response data type**: Select **From sample data** dropdown value
   - In separate tab, hit the api (https://query1.finance.yahoo.com/v7/finance/chart/MSFT?&interval=1d) browser for response JSON and copy response JSON. Copy JSON response. You will use this value in the later steps.



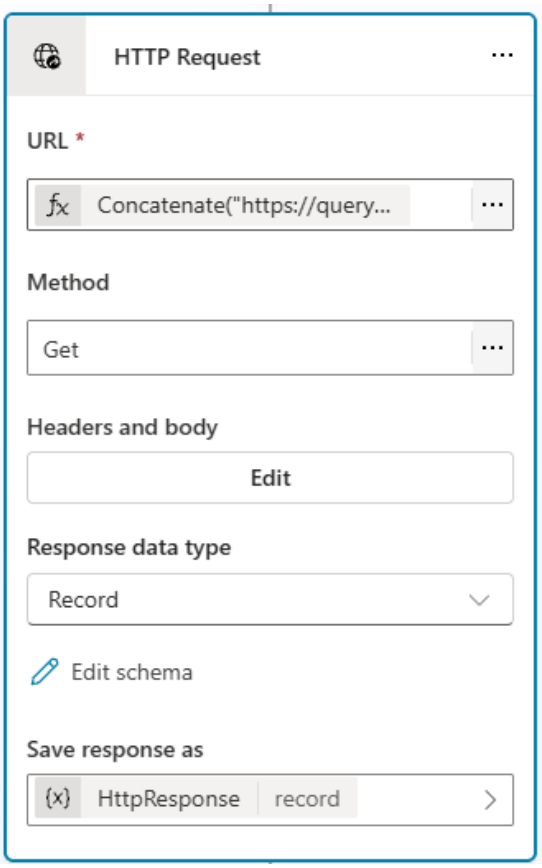
   - Click on Get schema from sample JSON



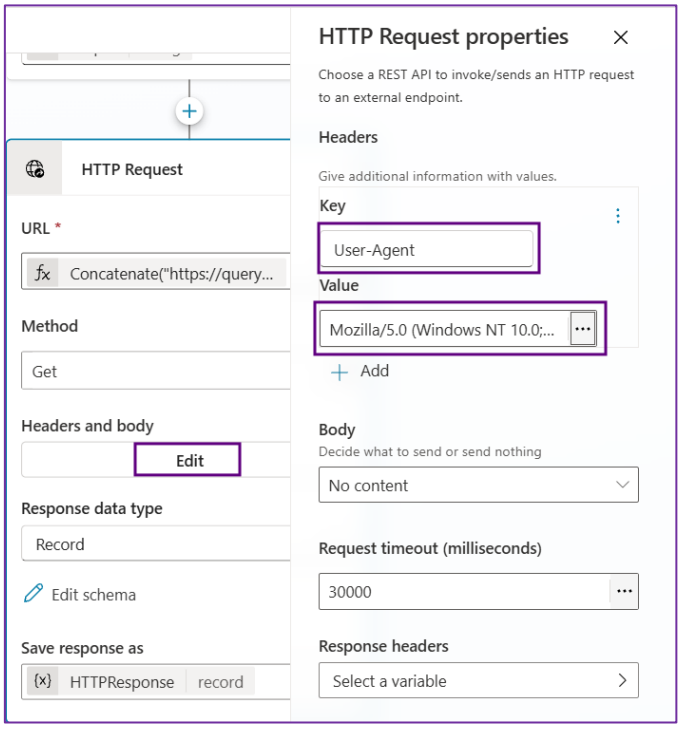
   - Paste copied JSON response from browser in **Get schema from sample JSON** input box and click **Confirm**



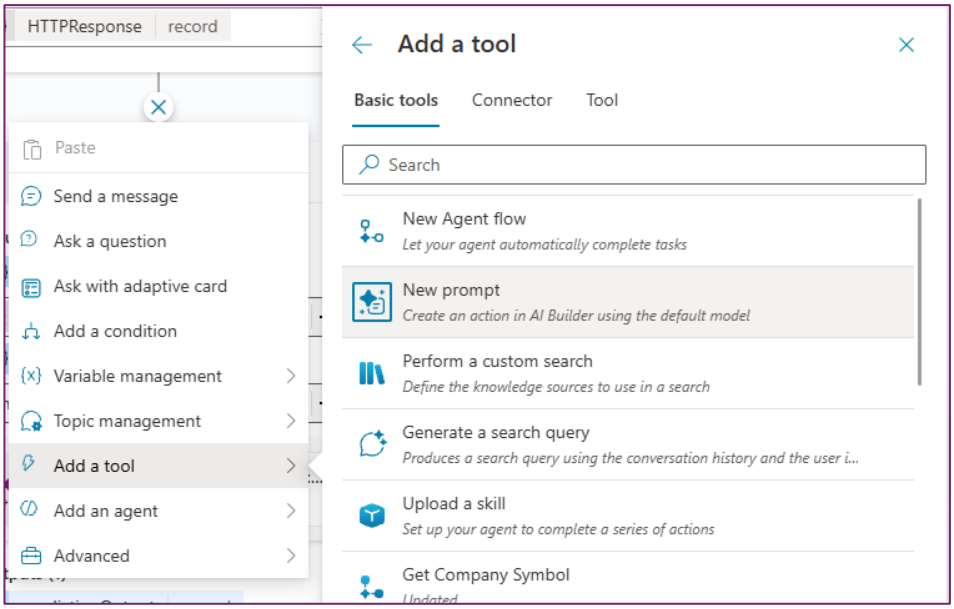
3. **Save response as**:
   - Click on Select a variable >Create a new variable>Name it as **HTTPResponse**



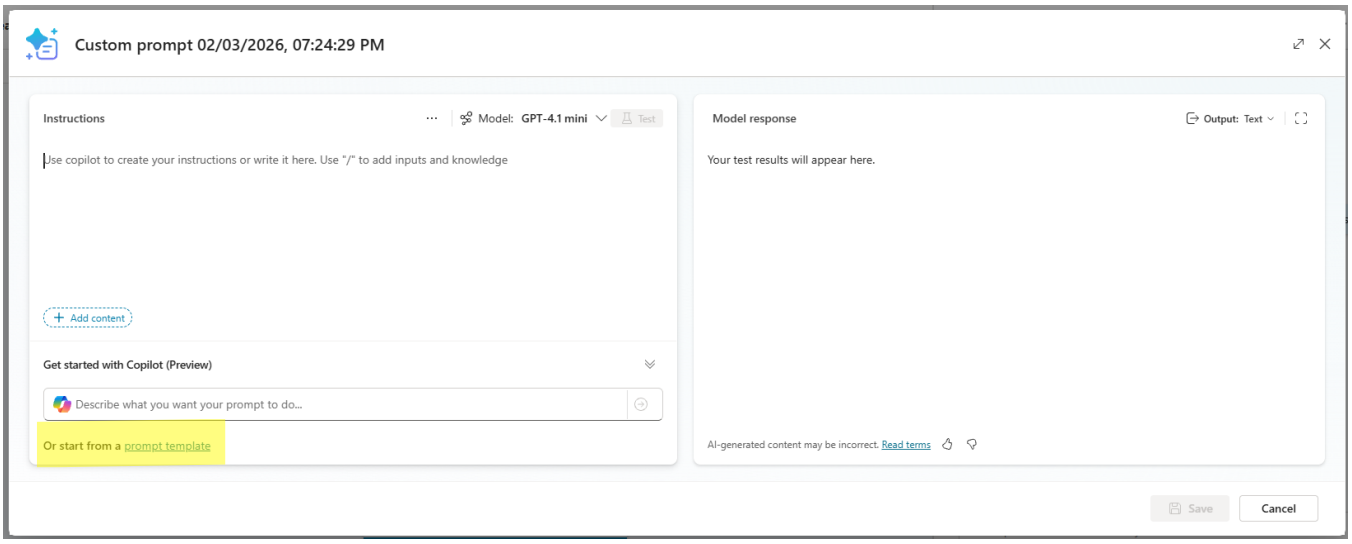
4. **Set headers**: Click Edit and set key and values as below .
   Key : User-Agent
   Value : Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/122.0.0.0 Safari/537.36



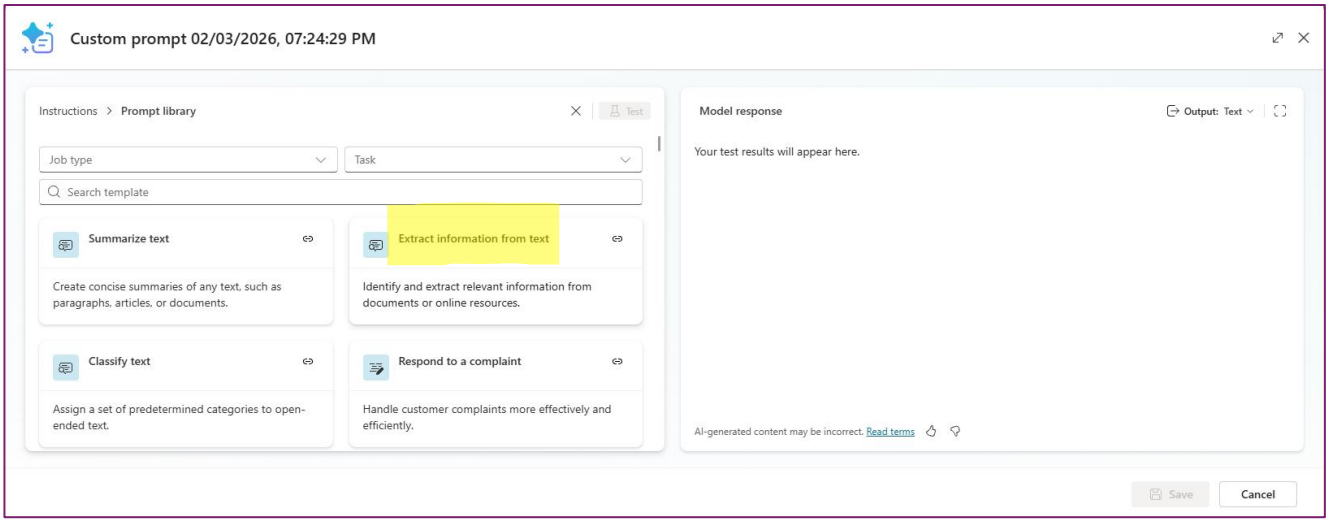
Step 17 Click + to add ne node and select **Add a tool** >>**New Prompt.**



Step 18 Click on start from a **prompt template**



Step 19 Select **Extract information from text**



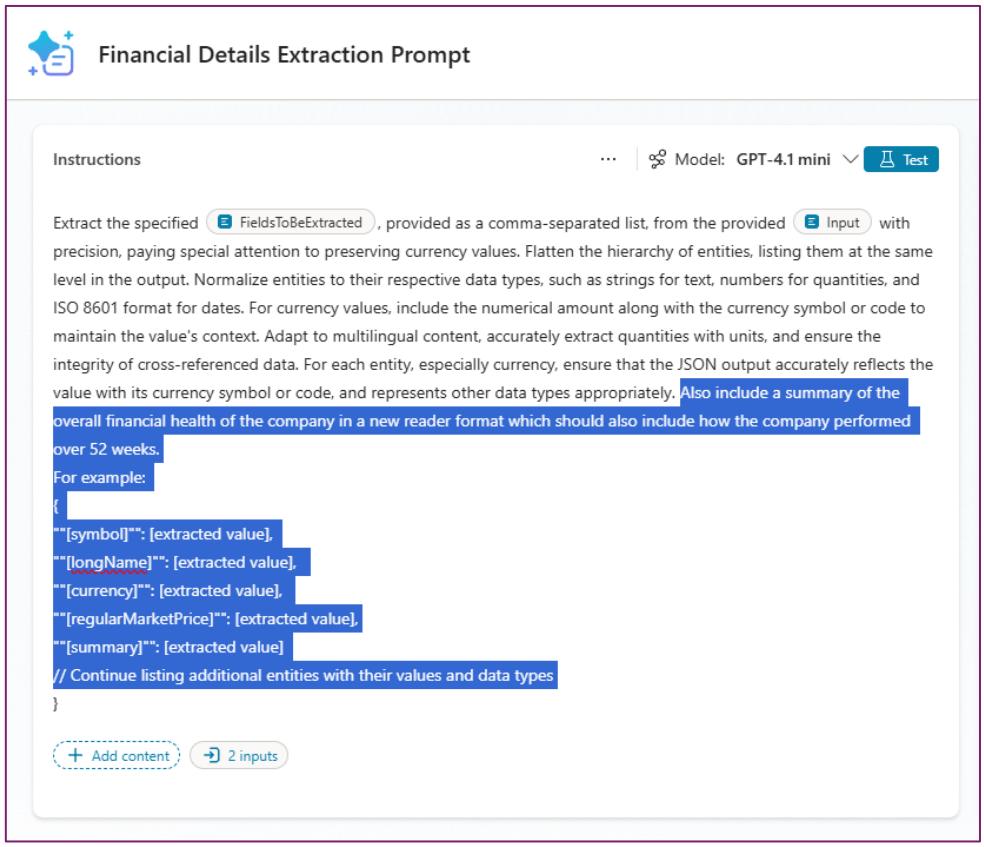
Step 20 Rename the prompt name With **Financial Details Extraction Prompt**.

Step 21 Update Instruction as below:

a. Append the Instruction text with **"Also include a summary of the overall financial health of the company in a new reader format which should also include how the company performed over 52 weeks."**

b. Replace the **example text** in the instructions pane with

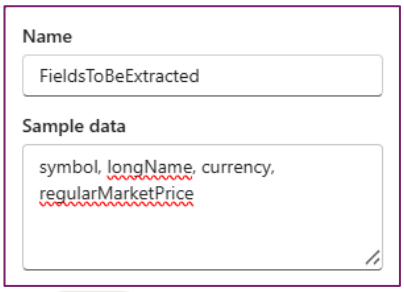
```
{
""[symbol]"": [extracted value],
""[longName]"": [extracted value],
""[currency]"": [extracted value],
""[regularMarketPrice]"": [extracted value],
""[summary]"": [extracted value]
// Continue listing additional entities with their values and data types
}
```



Step 22 Click on entity in the instructions pane.

- Rename the input parameter **entity** to FieldsToBeExtracted
- In the **Sample data** field, add the following:

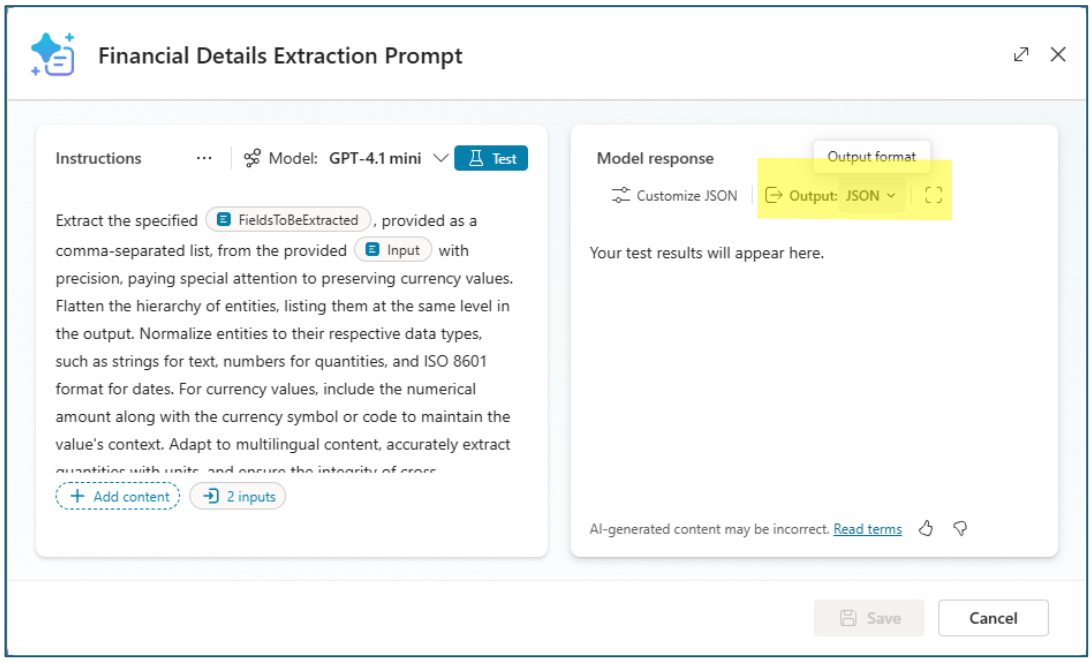
```
symbol, longName, currency, regularMarketPrice
```



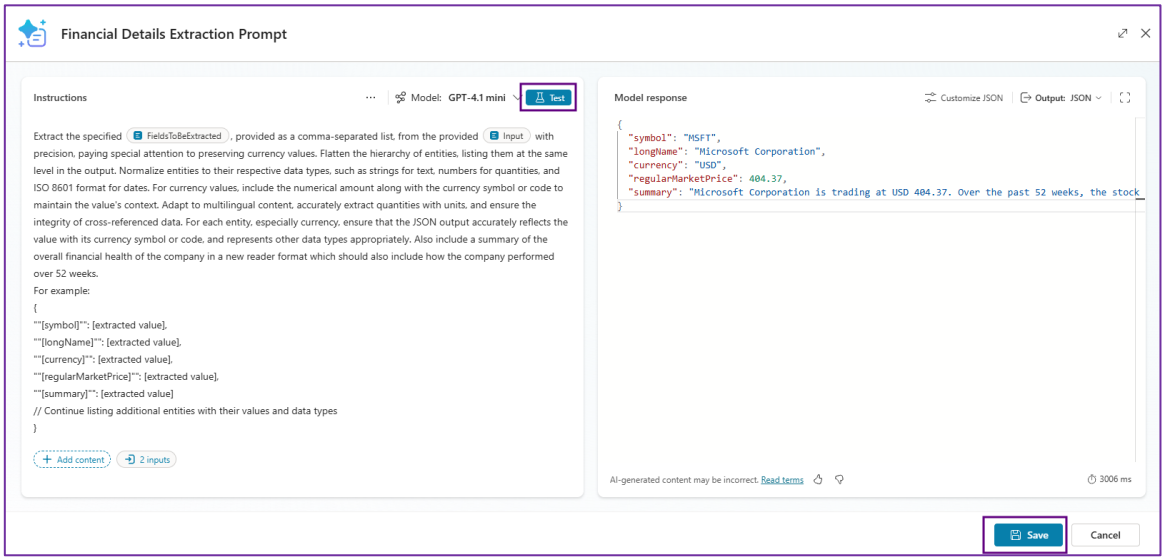
Step 23 Click on text in the instructions pane.

Rename the Input parameter **text** to Input.
In the **Sample data** field, add the value of api response copied in earlier **Step 16.2.**

Step 24 Click on **Text** in Model Response pane**.**
Select **JSON** as **Output.**



Step 25 Click on **Test** prompt**.** Check the model response.



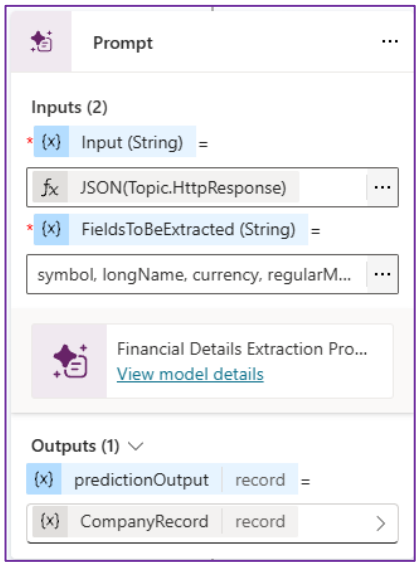
Step 26 Click **Save**. This will add the prompt to the topic pane.

Step 27 Set the properties of the prompt.

1. **Input**: `JSON(Topic.HTTPResponse)`
2. **FieldsToBeExtracted:**

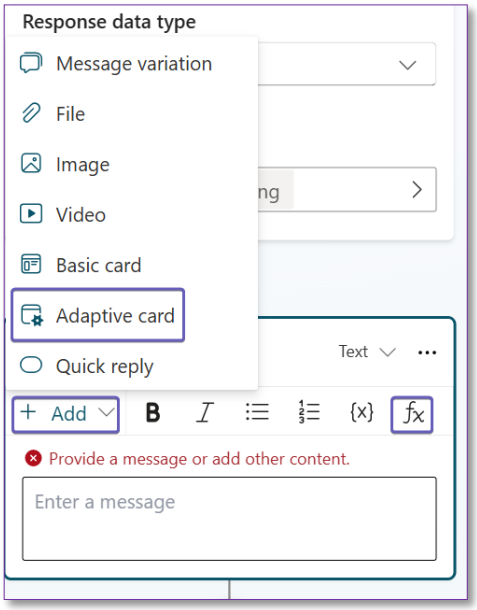
```
symbol, longName, currency, regularMarketPrice
```

3. Save **predictionOutput** as **CompanyRecord** (Click on Select a variable >Create a new variable>Name it as CompanyRecord)

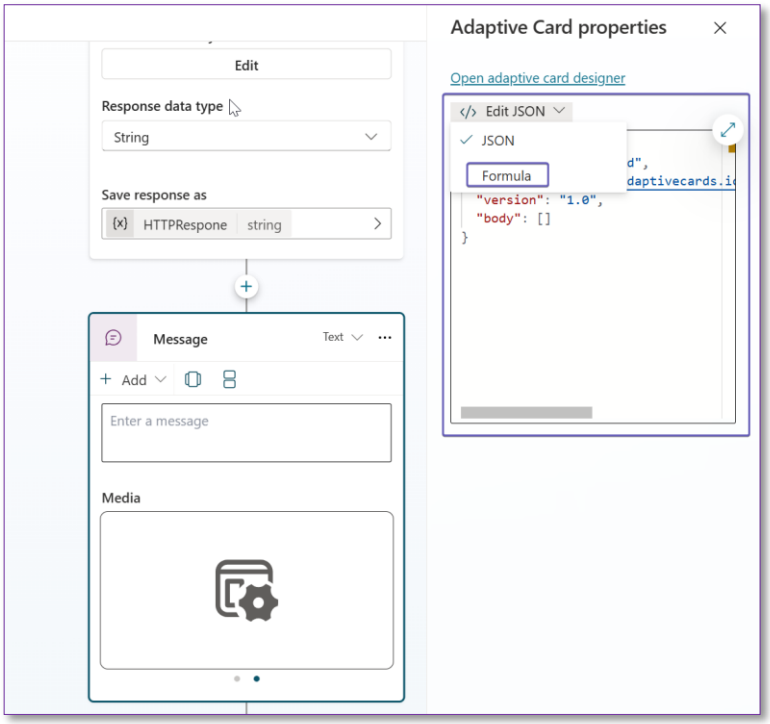


Step 28 Next node, click + and select **Send a message**.

1. Click +Add, select **Adaptive card** and click on **fx.**



2. In **Adaptive Card properties,** Click on **Edit JSON** and change it to **Formula**.



3. Replace the JSON in the property window with the following.

```
{
type: "AdaptiveCard", '$schema': "http://adaptivecards.io/schemas/adaptive-card.json",
version: "1.5",
 body: [
 {
type: "TextBlock",
text: "**Company Code:**" & " " & Topic.CompanyRecord.structuredOutput.symbol,
wrap: true
},
{
 type: "TextBlock",
text: "**Company Name:**" & " " & Topic.CompanyRecord.structuredOutput.longName,
wrap: true
},
{
 type: "TextBlock",
text: "**Currency:**" & " " & Topic.CompanyRecord.structuredOutput.currency,
wrap: true
},
{
type: "TextBlock",
text: "**Stock Price:**" & " " & Topic.CompanyRecord.structuredOutput.regularMarketPrice,
wrap: true
},
{
type: "TextBlock",
text: "**Summary:**" & " " & Topic.CompanyRecord.structuredOutput.summary,
wrap: true
```

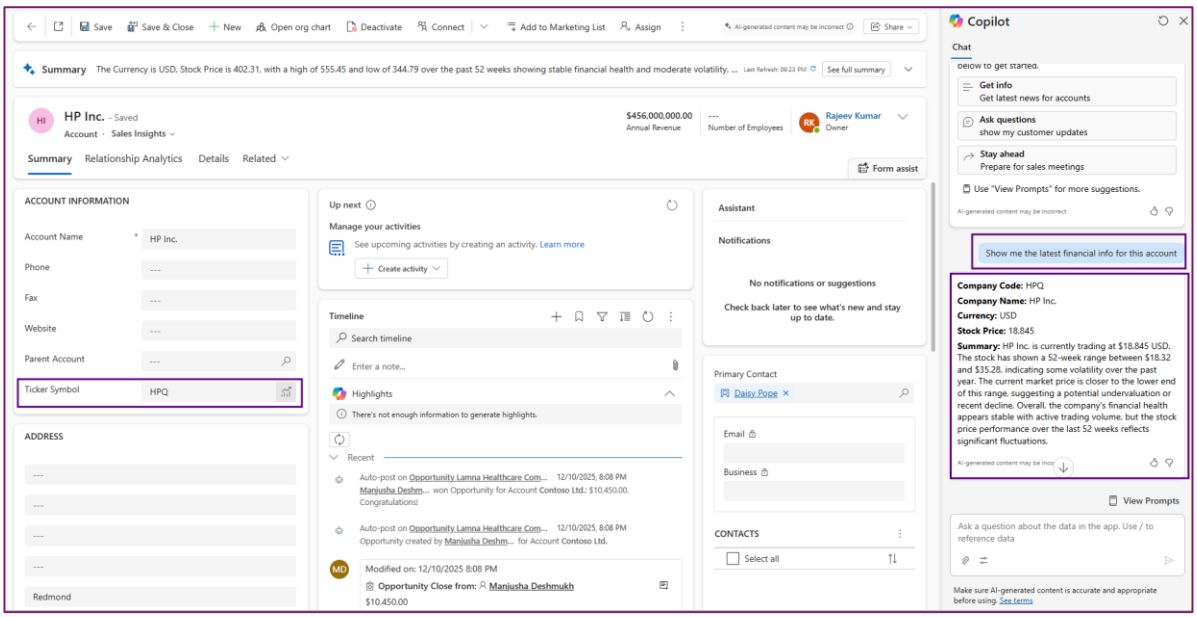
```
}
]}
```

Step 29 **Publish** the Copilot and test it in **Sales Hub**.

Step 30 Save the topic and publish the agent.

Step 31 Go to **Sales Hub app** and open an account. Make sure the 'Ticker Symbol' of the account is set to **HPQ.** (You can set symbol on test records e.g., MSFT, HAS, HPQ)

Step 32 Type **Show me the latest financial info for this account** in Copilot chat window and press **enter.** The copilot will display the ABN information.

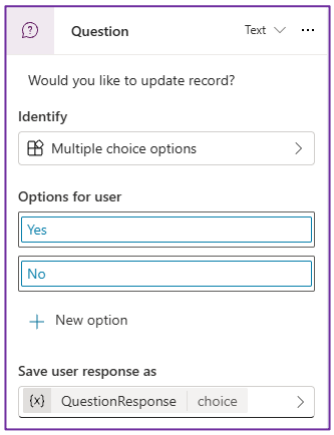


Task 4: Update the account record in CE.

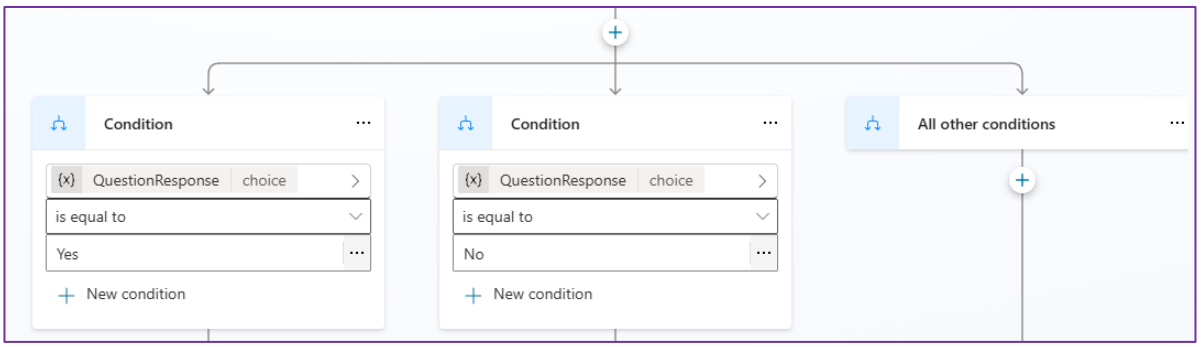
This step updates the account record by populating it wit the extracted information.

Step 1 Go back to the Topic **SearchFinancialDetails**. After the Adaptive card message, click + and select **Ask a question**.

Step 2 Set the following values as specified, and save the user's response in a named **QuestionResponse** for use in the later steps.



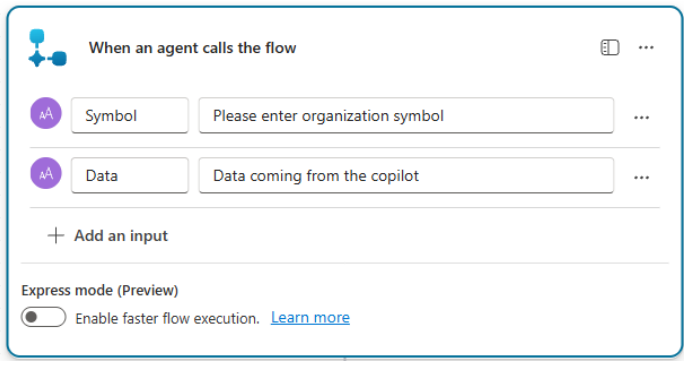
Step 3 Click + and select Add a condition. Set Condition **QuestionResponse** is equal to **Yes.**



Step 4 Click **Save**

Step 5 Click + in the condition (Yes node) and select **Add a tool >> New Agent Flow.**
It will open the Power Automate flow editor.

Step 6 Click on **When an agent calls the flow** and add two text parameters **symbol** and **Data**.

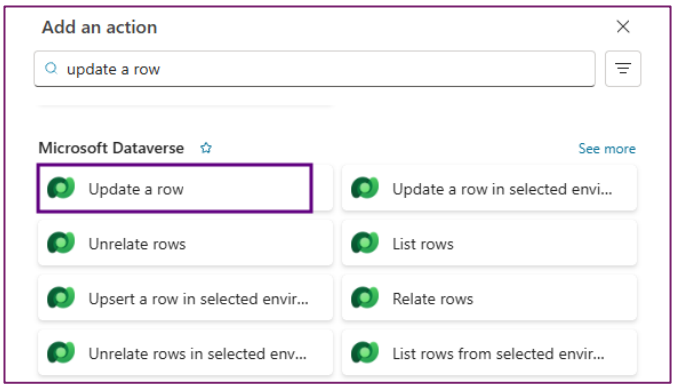


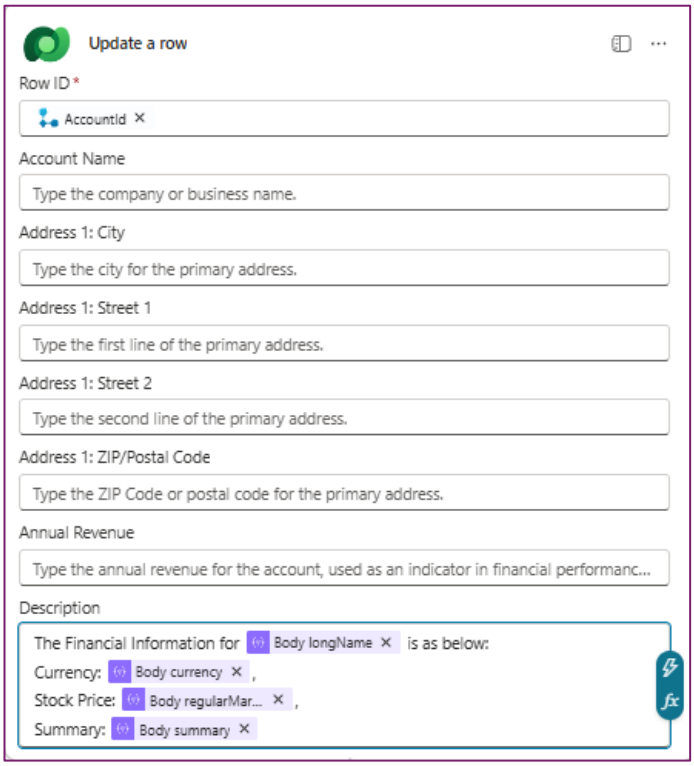
Step 7 Click + and add **Parse JSON** action. Set the following properties
Content: **Data** (Input)
Schema: select **Use sample payload to generate schema** and paste response of the AI prompt or you can use the following sample. Click **Done**

```
{
 "symbol": "MSFT",
 "longName": "Microsoft Corporation",
 "currency": "USD",
 "regularMarketPrice": 404.37,
 "summary": "Microsoft Corporation is trading at USD 404.37. Over the past 52 weeks, the stock has ranged between USD 344.79 and USD 555.45, indicating significant volatility. The current price is closer to the lower end of this range, suggesting a potential undervaluation or market correction. Overall, the company's financial health appears stable with active trading volume, but investors should consider the 52-week performance for a comprehensive assessment."
}
```

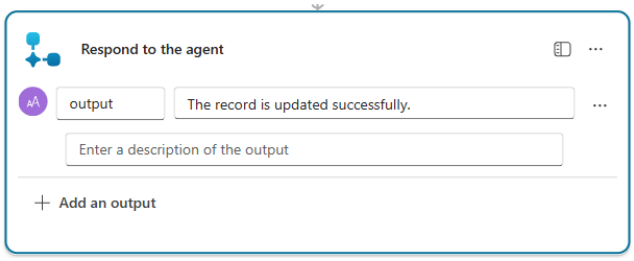

Step 8 Click + and add Dataverse **Update a row** action. Set the following properties:
Table name: Accounts

Row ID : accountId (input)
Description: Dynamics Contents from the Parse JSON action as shown below.





Step 9 Click on **Respond to the agent** and add a text parameter to the trigger. Name it **output**. Set the output value to **The record is updated successfully**.



Step 10 Save the Draft flow.

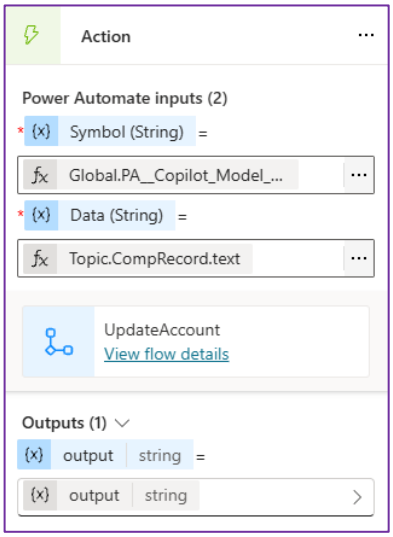
Step 11 Rename the flow from Untitled to **UpdateAccount**.

Step 12 Publish the flow.

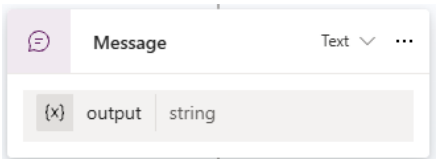
Step 13 Go back to the Copilot Studio to the Topic we working on**.**

Step 14 **Add Tool> Select UpdateAccount** and set the properties of the action:

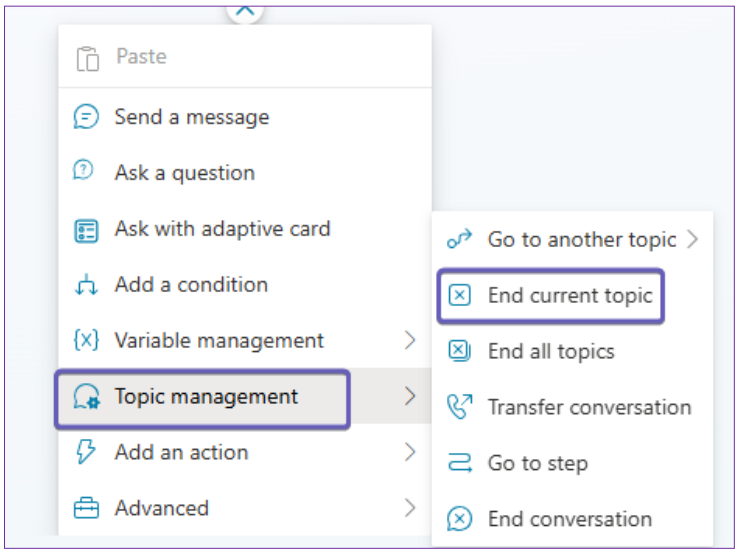
AccountID: Global.PA__Copilot_Model_PageContext.pageContext.id.guid
Data: Topic.CompRecord.text
output: output (variable)

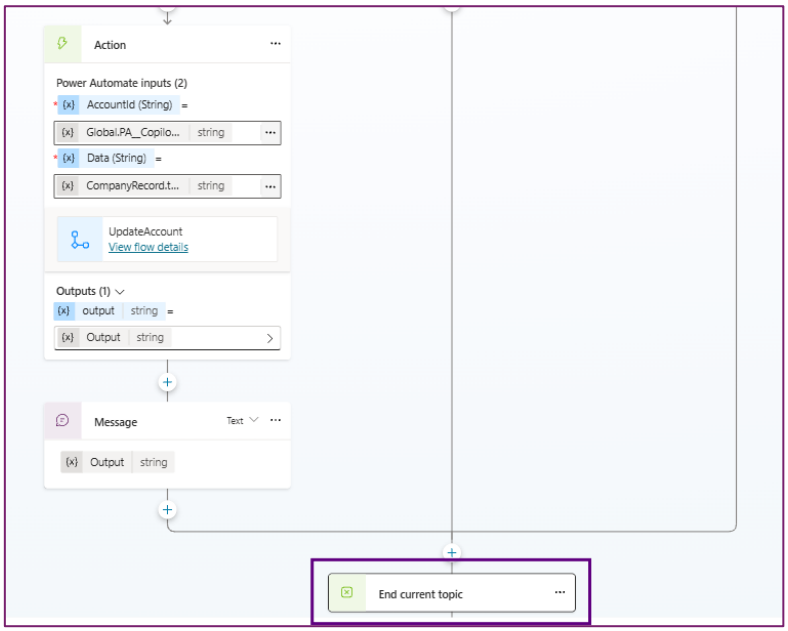


Step 15 Click **+** and select **Send a message.** Choose Variable **Topic.output.**



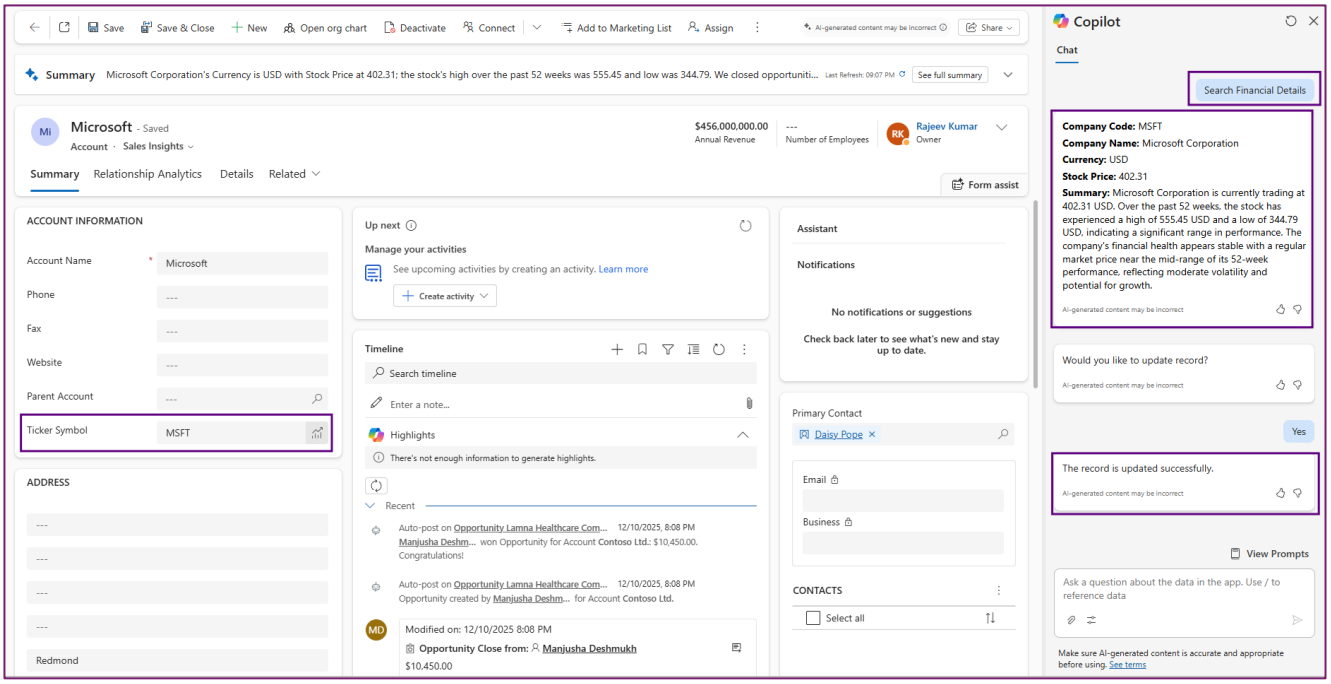
Step 16 Outside of the **Condition** loop, click **+ and** select **Topic Management >>End current Topic.**

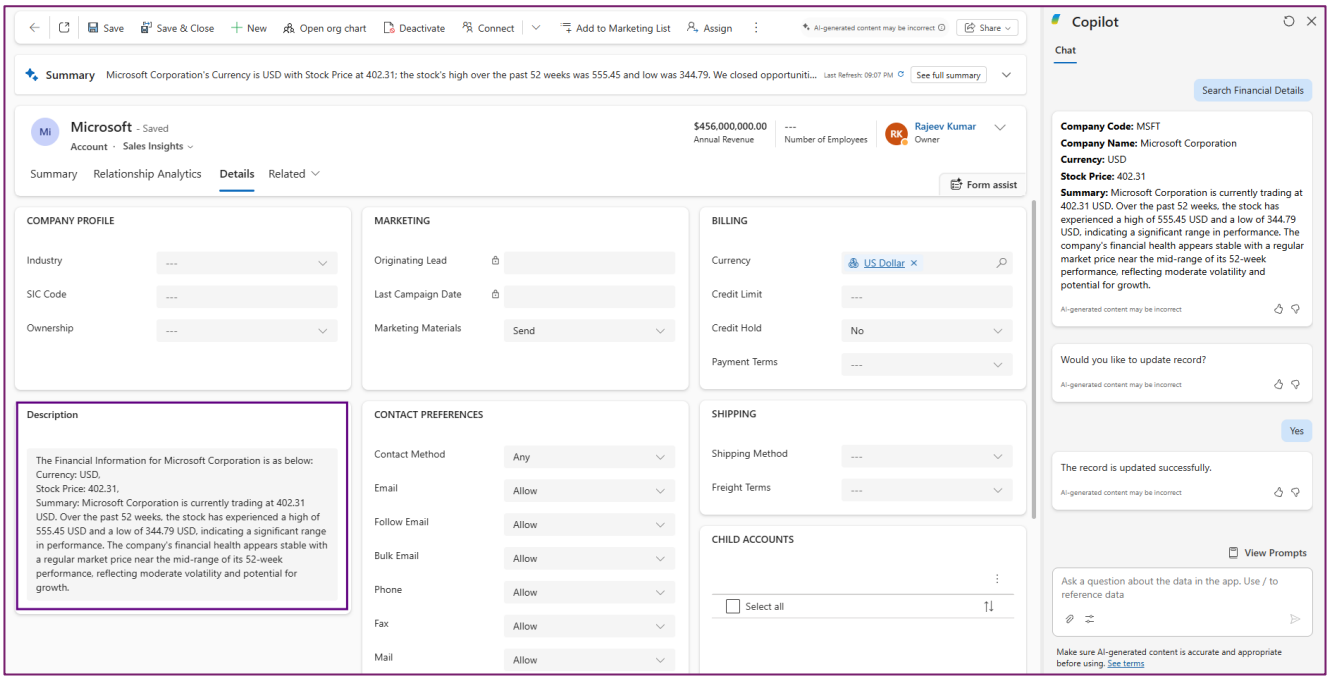




Step 17 **Save** the Topic and **Publish** the copilot.

Step 18 Test the scenario in **SalesHub.**




Save
Save & Close
New
Open org chart
Deactivate
Connect
Add to Marketing List
Assign
Share
Summary
Microsoft Corporation's Currency is USD with Stock Price at 402.31; the stock's high over the past 52 weeks was 555.45 and low was 344.79. We closed opportuniti...
See full summary
Microsoft - Saved
Account · Sales Insights
$456,000,000.00
Annual Revenue
Number of Employees
Rajeev Kumar
Owner
Summary
Relationship Analytics
Details
Related
Form assist
COMPANY PROFILE
Industry
SIC Code
Ownership
MARKETING
Originating Lead
Last Campaign Date
Marketing Materials
Send
BILLING
Currency
US Dollar
Credit Limit
Credit Hold
No
Payment Terms
Description
The Financial Information for Microsoft Corporation is as below:
Currency: USD,
Stock Price: 402.31,
Summary: Microsoft Corporation is currently trading at 402.31 USD. Over the past 52 weeks, the stock has experienced a high of 555.45 USD and a low of 344.79 USD, indicating a significant range in performance. The company's financial health appears stable with a regular market price near the mid-range of its 52-week performance, reflecting moderate volatility and potential for growth.
CONTACT PREFERENCES
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Allow
Follow Email
Bulk Email
Phone
Fax
Mail
SHIPPING
Shipping Method
Freight Terms
CHILD ACCOUNTS
Select all
Copilot
Chat
Search Financial Details
Company Code: MSFT
Company Name: Microsoft Corporation
Currency: USD
Stock Price: 402.31
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AI-generated content may be incorrect
Would you like to update record?
Yes
The record is updated successfully.
View Prompts
Ask a question about the data in the app. Use / to reference data
Make sure AI-generated content is accurate and appropriate before using. See terms

Glossary

Speak the language, bridge the world—unlock hearts, opportunities, and the true essence of every land.

Adaptive Cards:
Adaptive Cards are lightweight, flexible UI components that display rich content in a visually appealing way across different platforms. They allow you to present structured information, images, buttons, and interactive elements in a clean, responsive format. In Copilot Studio, Adaptive Cards enhance user interactions by making responses more engaging and intuitive, guiding users with quick replies, and ensuring a seamless conversational flow.

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.

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