Lab Guide – Sales Opportunity & Support Portal

Dataverse + SharePoint Hybrid Copilot Agent

1 | Scenario Summary

Sales reps work in Dynamics 365; Support engineers reference SharePoint docs. A unified Copilot agent will surface opportunities, contracts and open tickets in a single chat, while automating high-priority alerts and project kick-offs.

2 | Learning Objectives

1. Federate data from Dataverse (D365) and SharePoint libraries inside one Copilot.
2. Implement multi-persona dialogues for Sales vs. Support context.
3. Create document retrieval actions using Graph API.
4. Build complex **Power Automate** flows for escalations and won-deal hand-offs.
5. Demonstrate proactive "at-risk deal" insights and KB article broadcasts.

3 | Prerequisites

- D365 Sales with sample data (Accounts, Opportunities).
- SharePoint libraries **Proposals**, **Contracts**, **SupportKB**.
- Teams channels `#sales-alerts`, `#support-escalations`, `#project-launch`, `#kb-announcements`.
- Graph API consent for `Sites.Read.All`, `Files.ReadWrite.All`.

4 | Data Sources

Dataverse Entities

Accounts, Contacts, Opportunities, Activities, SupportCases.

SharePoint Libraries

Library	Folder Strategy	Key Metadata
Proposals	`/Proposals/{Account}`	DocumentType, UploadDate
Contracts	`/Contracts/{Account}`	Signed (Yes/No), SignedDate
SupportKB	single-level	KBID, Category, PublishedDate

5 | Lab Exercises

EX 1 – "Opportunity Status" Topic

1. Trigger: "Status of opportunity *{OppName}*".
2. Steps:

   - Query *Opportunities* by *Name*.
   - Retrieve stage, probability, estimated revenue, close date.
   - Follow-up question if multiple matches.
3. Reply with adaptive card including **stage colour bar** and latest *Activity* summary.

EX 2 – "Open Support Cases" Topic

1. Trigger: "Open cases for *{AccountName}*".
2. Return bullet list with Owner, Priority badge and open duration.
3. Quick Actions: **"Assign to me"**, **"Escalate"** (updates Priority=High).

EX 3 – Document Retrieval Action

1. Input: *AccountName* + DocumentType ("latest proposal" or "signed contract").
2. Action:

   - Call **Graph List DriveItems** on target folder.
   - Order by *UploadDate desc*.
   - Return file card with link and *Open in Word* button.

EX 4 – Automated Flows

Flow	Trigger	Steps
High-Priority Support Escalation	SupportCases row where Priority=High & Status=Active	1. Post alert in `#support-escalations` with 🚨 badge. 2. E-mail Account.PrimaryContact with ETA template.
Opportunity Won → Project Kick-Off	Opportunities stage changes to Won	1. Copy signed contract to `/Client Projects/{Account}`. 2. Create *Project* entity + default *ProjectTasks*. 3. Post celebration GIF in `#project-launch` and tag PM.
At-Risk Deal Digest	Scheduled 07:00 daily	Query open opps closing in 7 days & Probability<50 → Compose Copilot summary; Teams post in `#sales-alerts`.
New KB Article Announcement	File created in **SupportKB** where Category=Troubleshooting	Generate teaser text via Copilot; post in `#kb-announcements`.

EX 5 – Multi-Persona Switch

Add **Condition** in root topic:

```
if caller.Department = 'Support' then load sub-topic group 'Support'
else load 'Sales'
```

Each group has tailored tone, synonyms and quick replies.

6 | End-to-End Test Script

1. **Sales Rep** asks opportunity status → verify Dataverse data.

2. Upload new signed contract → agent copies & confirms path.

3. **Support Engineer** escalates a case → Teams alert fires.

4. Mark opportunity *Won* → project kick-off flow triggers; contract copied.

7 | Enhancements

- Enable **semantic search** across SharePoint + Dataverse using Copilot extensions.

- Add Viva Sales plugin to log calls automatically as *Activities*.

- Gamify sales behaviour: push adaptive card leaderboard in `#sales-alerts`.