Microsoft

Microsoft Viva Sales

Architecture Overview

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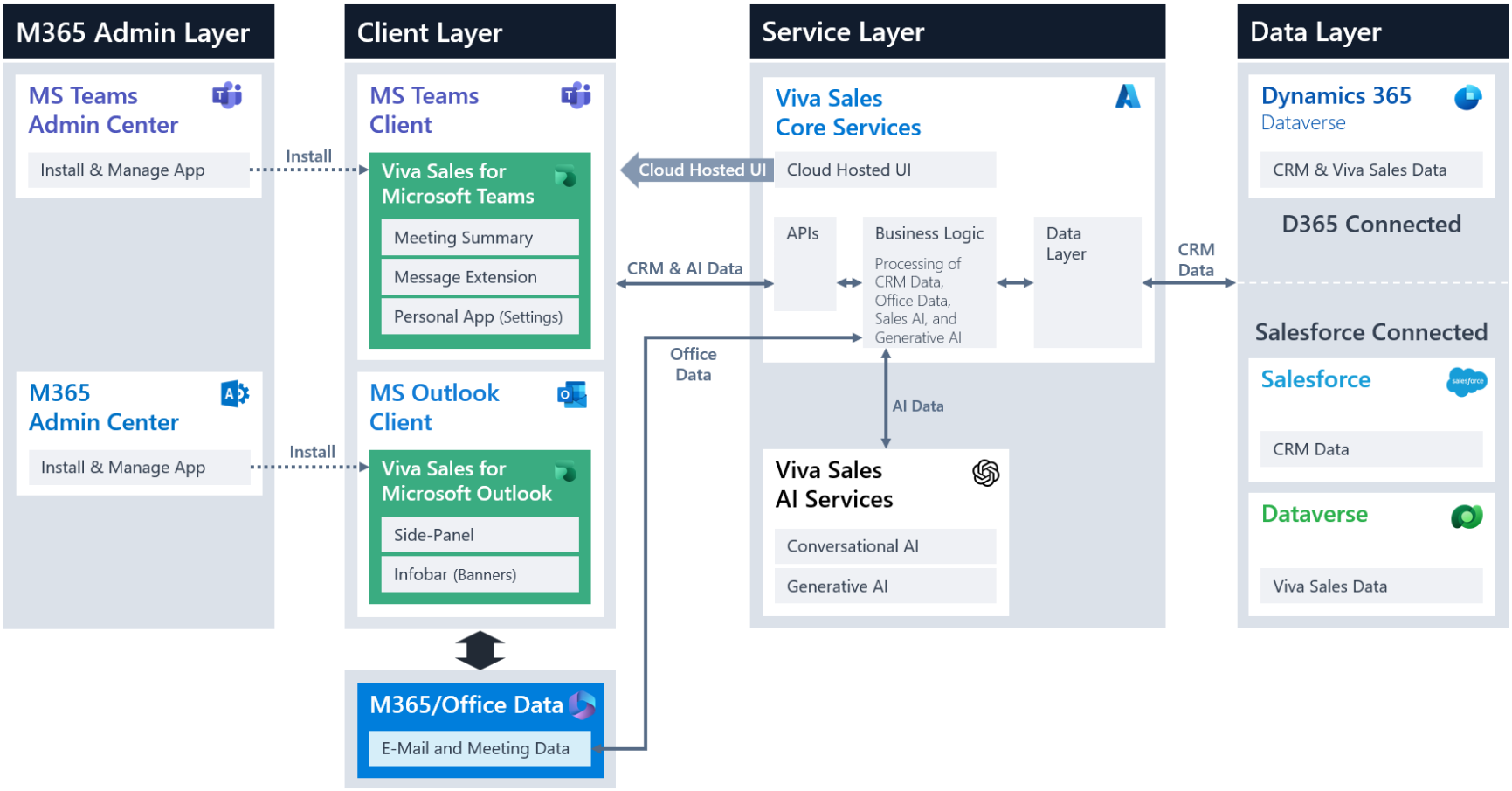
Viva Sales Architecture Overview

Component Overview



Client Layer

Viva Sales consists of two distinct client experiences, namely the **Viva Sales for Microsoft Outlook Add-In** and the **Viva Sales for Microsoft Teams App**. The Outlook experience is developed as a third-party Outlook add-in and the Teams experience is developed as a third-party Teams app.

Both consist of a manifest, which describes how the add-in and app integrate into Outlook and Teams, and JavaScript/HTML, which makes up the UI of the experience. The UI for both experiences is cloud-hosted and fully managed by Microsoft. None of the UI or business logic for Viva Sales is shipped as client-side code in Teams or Outlook. Therefore, customers do not need to manage any of the application lifecycle for the Viva Sales client or server-side components. See the Application Lifecycle Management section for more details.

The Viva Sales clients only store minimal setup and settings data in the local browser-based application storage and no personal or other customer data outside of settings is persisted locally.

Service Layer

The Viva Sales service layer consists of the **Cloud Hosted UI**, which is served to the Viva Sales client experiences, and **Core Business Logic**, which processes and combines CRM data, M365 / Office data (e.g., E-Mails, Meetings), Generative AI, and Sales Conversational Intelligence. All Viva Sales services are hosted on the Microsoft Azure cloud to provide a resilient foundation to help meet organizational compliance, reliability, availability, and disaster recovery needs.

Data Layer

The Viva Sales data layer consists of three distinct sets of data:

- **M365 / Office Data**: The end user's existing M365/Office Data (E-Mails, Meetings, etc) are stored in the Microsoft Graph.
- **CRM Data**: The customer's CRM data is only stored in the existing CRM system (Dynamics 365 or Salesforce), which serves as the system of record for all CRM entities.
- **Viva Sales Data**: The customer's Viva Sales data is generated through Viva Sales feature flows and does not fall into the above definition for "Office Data" or "CRM Data", e.g., Viva Sales settings or Viva Sales generated insights data.

Storage and security

Viva Sales always respects the data privacy, data security, data retention, and compliance boundaries of the underlying data store for data at rest and uses Transport Layer Security (TLS) to protect data in transit and does not store data outside any of the data stores described above.

M365 / Office Data

The end-user's M365 / Office data is always accessed in the end user's auth context and referenced in three distinct ways:

- **Read in real-time to enable insights scenarios**, for example Generative AI e-mail replies, AI generated e-mail summaries, or Teams' meeting summaries. The M365 / Office data is only read in these scenarios and discarded after it has been processed.
- **Read in real-time to enable value in the customer's CRM system**, for example when e-mail and meeting data is copied from the Microsoft Graph to the customer's CRM as activities or meeting transcripts are copied to Dataverse to enable extensibility scenarios.
- **Updated or generated in real-time to enable Viva Sales capabilities**, for example when the Viva Sales Teams app is added to a meeting to enable Teams' Meeting summary.

CRM Data

All CRM data access (read and write access) in Viva Sales is managed via **real-time integrations** with the underlying CRM system. **Viva Sales does not currently copy any CRM data** to other systems except when unique identifiers are used for the purpose of mapping CRM org and entities to Viva Sales specific data, for example Viva Sales settings data or Viva Sales generated insights data. When mapping CRM data to Viva Sales data, only the unique identifiers from the CRM system are being referenced. Viva Sales fully respects the existing retention policies and compliance boundaries of the existing CRM system.

Currently, Viva Sales only supports **Dynamics 365** and **Salesforce ®** as external CRM systems.

Viva Sales Data

Dynamics 365 Connected

For Dynamics 365 customers, Viva Sales uses the existing Dynamics 365 Dataverse instance (org) to store any Viva Sales specific data. Users can switch connections between different Dynamics 365 orgs, at which point Viva Sales will also use the underlying Dataverse instance to store and retrieve any Viva Sales data.

Salesforce® Connected

For Salesforce[1] CRM customers, a new Microsoft Dataverse instance is provisioned when the first user from a given AAD tenant launches the **Viva Sales for Microsoft Outlook Add-In** and connects to their Salesforce org. Viva Sales will provision a new Dataverse instance per tenant to be leveraged across all connected Salesforce environments and orgs after the first user is logged in to Viva Sales via the Viva Sales for Microsoft Outlook Add-In.

Application Lifecycle Management

Release Cycle

There are two sets of release cycles for Viva Sales:

- **Monthly product releases**, which include major product capabilities.
- **Ongoing service updates**, which include product hotfixes and minor product changes.

Refer to the "**What's New**" section of the Viva Sales Documentation for additional details about net new capabilities for each monthly product release.

Component Overview

There are two distinct components that are relevant to the Viva Sales application lifecycle management:

- **Viva Sales client add-in / app manifests**, which are deployed as third-party Outlook add-in and third-party Teams app and describe the behavior of the add-in / app.

[1] Microsoft isn't affiliated with or endorsed by Salesforce in any way.

- **Viva Sales service layer**, which is hosted the UI experiences for all Viva Sales add-ins / apps and the core service layer, containing front-end APIs, core business logic, data integration layer, and AI services.

Availability

Viva Sales is available for installation through the following channels:

Install Type	Deployment Channels			
	Viva Sales for Microsoft Outlook Add-In		Viva Sales for Microsoft Teams App	
Admin-managed Install	Microsoft App Source	Full Support	Microsoft App Source	Full Support
	M365 Admin Center	Full Support	Microsoft Teams Store	Full Support
User-managed Install	Microsoft App Source	Partial Support *	Microsoft App Source	Full Support
	Microsoft Outlook Add-Ins	Partial Support *	Microsoft Teams Admin Center	Full Support

* The following capabilities are currently unavailable when the Viva Sales for Microsoft Outlook Add-In is deployed via user-managed installations. Existing user-managed installs can be converted to admin-managed install if the admin conducts the corresponding installation (no uninstall or other steps are required by the end-user).

- **Infobars** (banners) that are displayed when drafting or reading an e-mail from an external contact.
- **Automatically adding the Viva Sales Teams App to a meeting** when external contact from the CRM is present on the meeting invite when sent via Outlook.

In addition to the gaps in functionality, user-managed installs will be blocked if admins disable **Optional Connected Experiences** are turned off as described in the Privacy and security for Office Add-ins article. However, admin-managed installs will continue to work.

Updates

Viva Sales client add-in / apps

The manifests for the **Viva Sales for Microsoft Outlook Add-In** and the **Viva Sales for Microsoft Teams App** require occasional updates when new capabilities are introduced. These updates are rolled out by Microsoft as part of the monthly product releases and will be automatically pushed to all users who have the add-in / app installed without the need for an admin or end-user to take any action.

In rare circumstances, Microsoft will introduce new permissions as part of a monthly release, which will require explicit consent and update from the admin or end-user. In these circumstances, admins and users will see that a new update is available via the **M365 Admin Center** or **Teams Store**. Additionally, Microsoft will inform admins via the "**What's New**" section of the Microsoft Viva Sales documentation, via the Mocrosoft Viva Block (https://aka.ms/VivaSalesUpdates), and via notifications in the Microsoft Message Center. Customer's will not be able to take advantage of the latest Viva Sales capabilities when they do not apply the updates to the add-in / app.

Monitoring

Viva Sales only supports native Microsoft Outlook and Microsoft Teams usage monitoring. Admins can view the **Viva Sales for Microsoft Outlook Add-In** usage metrics via Microsoft 365 Reports and the **Viva Sales for Microsoft Teams App** usage metrics via the Microsoft Teams app usage report.

User Experiences

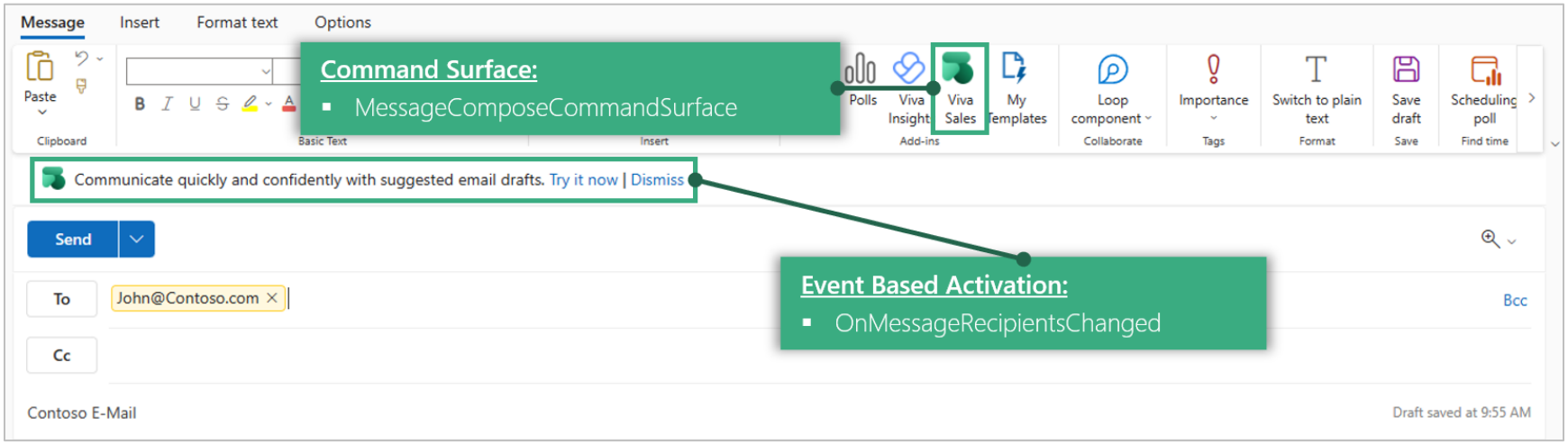
Launching the Viva Sales Client Experiences

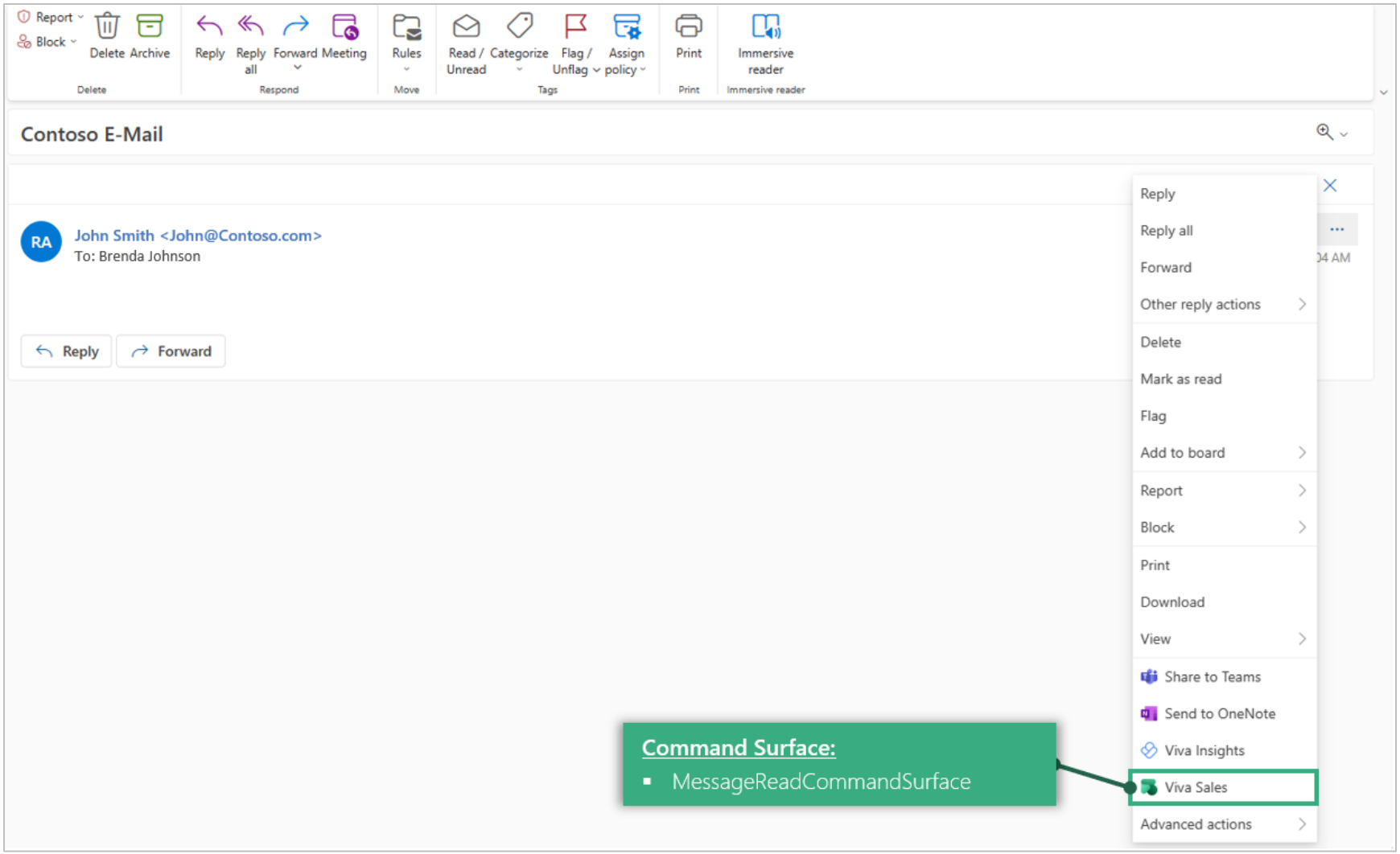
Viva Sales for Microsoft Outlook Add-In

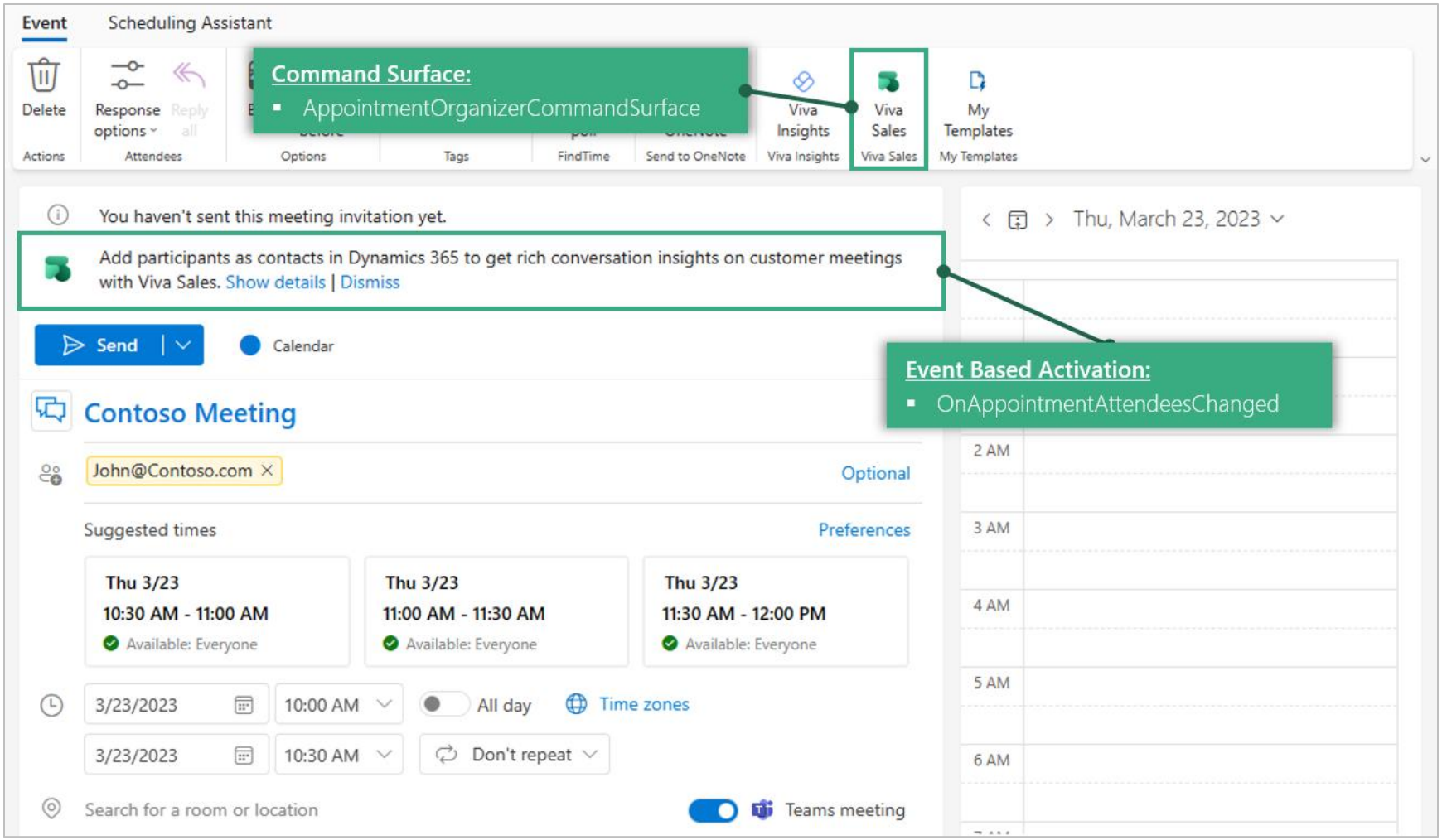
The Viva Sales for Microsoft Outlook Add-In can be launched by the end-user through several command surfaces and event-based activation.

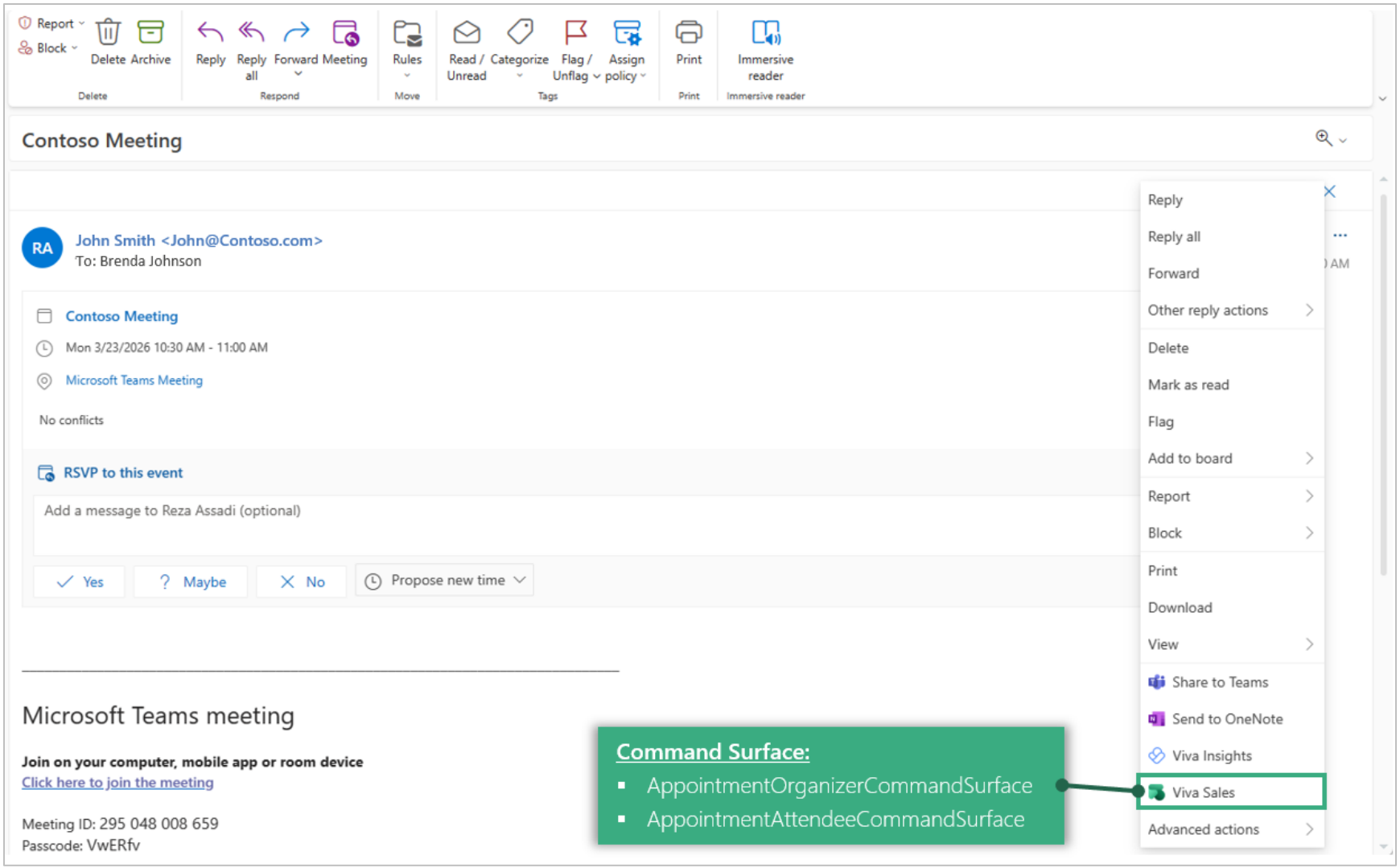
Surface Area Overview

The following describes a high-level overview of the surface areas to launch the Viva Sales for Microsoft Outlook.




Report
Block
Delete
Archive
Reply
Reply all
Forward
Meeting
Rules
Read / Unread
Categorize
Flag / Unflag
Assign policy
Print
Immersive reader
Delete
Respond
Move
Tags
Print
Immersive reader
Contoso E-Mail
RA
John Smith <John@Contoso.com>
To: Brenda Johnson
Reply
Forward
Reply
Reply all
Forward
Other reply actions
Delete
Mark as read
Flag
Add to board
Report
Block
Print
Download
View
Share to Teams
Send to OneNote
Viva Insights
Viva Sales
Advanced actions
Command Surface:
MessageReadCommandSurface


Event
Scheduling Assistant
Command Surface:
AppointmentOrganizerCommandSurface
Delete
Response options
Reply all
Actions
Attendees
Options
Tags
FindTime
Send to OneNote
Viva Insights
Viva Sales
My Templates
You haven't sent this meeting invitation yet.
Add participants as contacts in Dynamics 365 to get rich conversation insights on customer meetings with Viva Sales. Show details | Dismiss
Thu, March 23, 2023
Send
Calendar
Event Based Activation:
OnAppointmentAttendeesChanged
Contoso Meeting
John@Contoso.com
Optional
Suggested times
Preferences
Thu 3/23
10:30 AM - 11:00 AM
Available: Everyone
Thu 3/23
11:00 AM - 11:30 AM
Available: Everyone
Thu 3/23
11:30 AM - 12:00 PM
Available: Everyone
3/23/2023
10:00 AM
All day
Time zones
3/23/2023
10:30 AM
Don't repeat
Search for a room or location
Teams meeting
2 AM
3 AM
4 AM
5 AM
6 AM



Command Surfaces

The following describes the full list of Outlook command surfaces for Viva Sales:

Command Surface Name	Command Surface Description
MessageReadCommandSurface	Put buttons in the command surface for the mail read view. In Outlook desktop, this appears in the ribbon.
MessageComposeCommandSurface	Put buttons on the ribbon for add-ins using mail compose form.
AppointmentOrganizerCommandSurface	Put buttons on the ribbon for the form that's displayed to the organizer of the meeting.
AppointmentAttendeeCommandSurface	Put buttons on the ribbon for the form that's displayed to the attendee of the meeting.

Event-Based Activation

The following describes the full list of Outlook event-based activations for Viva Sales:

Event Name	Event Description	Viva Sales Usage
OnNewMessageCompose	On composing a new message (including reply, reply all, and forward) but not on editing, for example, a draft.	Shows the **Viva Sales Infobar** (banner) if an external contact is present in the list of recipients of the e-mail.
OnNewAppointmentOrganizer	On creating a new appointment but not on editing an existing one.	Shows the **Viva Sales Infobar** (banner) if an external contact is present in the list of recipients of the meeting invite.
OnMessageRecipientsChanged	On adding or removing recipients while composing a message.	Shows the **Viva Sales Infobar** (banner) if an external contact is present in the list of recipients of the e-mail.
OnAppointmentAttendeesChanged	On adding or removing attendees while composing an appointment.	Shows the **Viva Sales Infobar** (banner) if an external contact is present in the list of recipients of the meeting invite.

OnAppointmentSend	On sending an appointment item.	Automatically adds the **Viva Sales Teams App** to the meeting, which enables **Sales Conversational Intelligence** during the call.

Viva Sales for Microsoft Teams App

The Viva Sales for Microsoft Teams App is integrated as an App for Teams meetings and calls, Personal Tab, Bot, and Message Extension.

App for Teams Meetings and Calls

The following describes the list of meeting contexts that the Viva Sales app integrates with:

Event Name	Event Description	Viva Sales Usage
meetingChatTab	A tab in the header of a group chat between a set of users for a scheduled meeting.	Shows the **Viva Sales Conversational Intelligence Meeting Summary** after the meeting is meeting has been successfully processed.
meetingDetailsTab	A tab in the header of the meeting details view of the calendar.	Shows the **Viva Sales Conversational Intelligence Meeting Summary** after the meeting is meeting has been successfully processed.
meetingSidePanel	An in-meeting panel opened through the unified bar (U-bar).	Placeholder experience to show that **the Viva Sales App** is added to the meeting.

Personal Tab

The following describes the list of personal tabs in the Viva Sales app:

Home	Viva Sales Usage
Home	An experience with quick access links to key seller documentation and getting started guides for Outlook and Teams.
Settings	Settings experiences to Customize forms and fields and Set up e-mail insights.

Bot

The following describes the list of bots in the Viva Sales app:

Home	Viva Sales Usage
chat	Allows users to search for CRM records and add a **Viva Sales Adaptive Card** into a chat between two users via searching of the record or via link unfurling.
groupChat	Allow users to search for CRM records and add a **Viva Sales Adaptive Card** into a chat between multiple users.

Message Extension

The following describes the list of message extensions in the Viva Sales app:

Message Extension Type	Message Extension Name	Viva Sales Usage
Action	**Share Feedback**	Allows users to share feedback about Viva Sales.
Link	**N/A**	Allows **the unfurling of Viva Sales CRM record links** into adaptive cards.
Search	**All**	Allow users to perform a **search across CRM entities** (e.g., Contacts, Accounts, Opportunities) and paste the selected record as an adaptive card.
	Contacts	Allows users to perform a **search across the contact entity** and paste the selected record as an adaptive card.
	Opportunities	Allows users to perform a **search across the opportunity entity** and paste the selected record as an adaptive card.

	Accounts	Allows users to perform a **search across the account entity** and paste the selected record as an adaptive card.

Security

Authentication

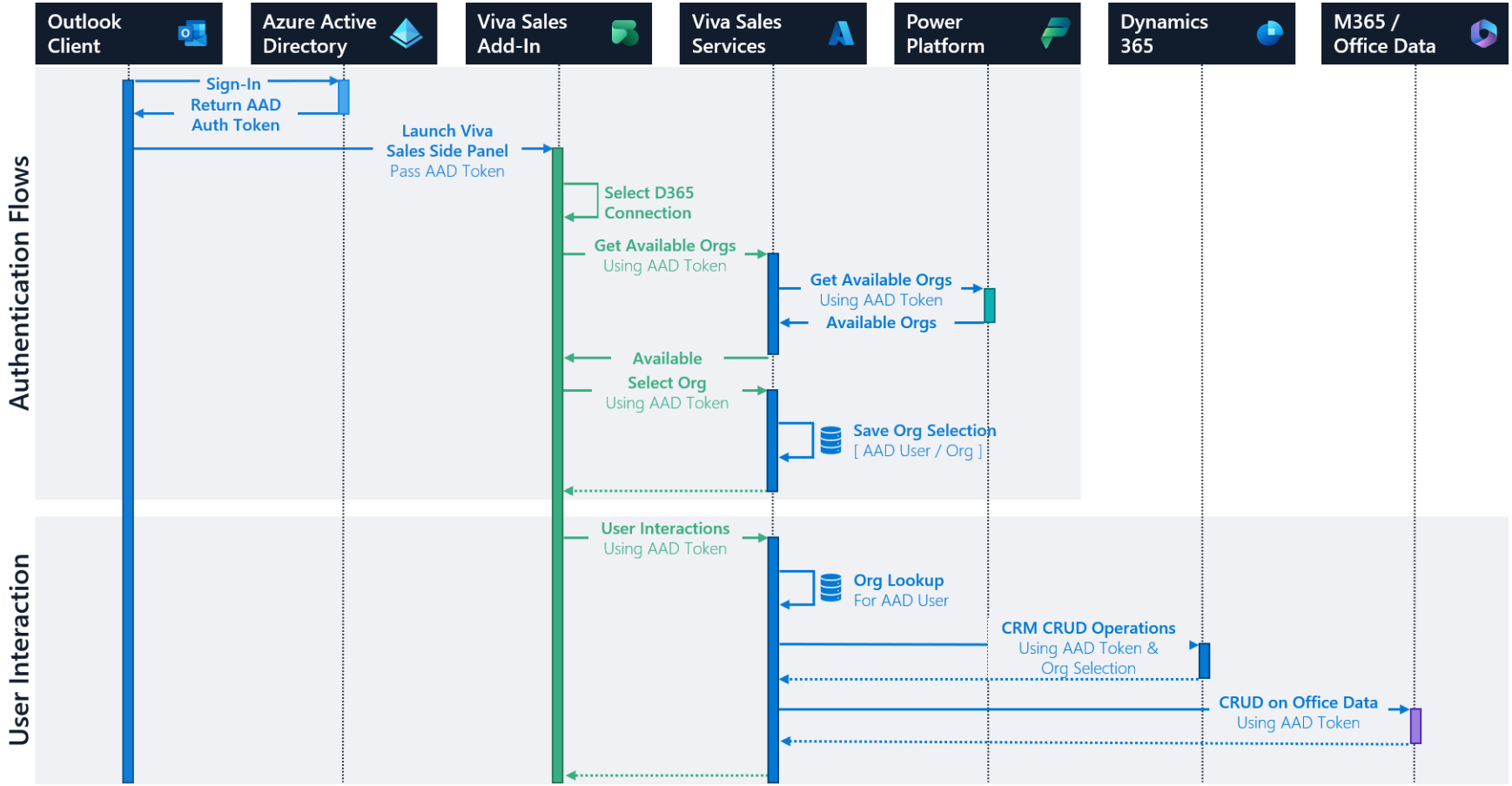
To interact with any of the Viva Sales client experiences, all users must be authenticated through AAD, which happens when users initially sign-in to the Outlook and Teams clients. To determine subsequent authentication flows, users must first select the CRM system to connect to upon the initial launch of the **Viva Sales for Microsoft Outlook Side-Panel**, where users are prompted to select the CRM, i.e., "Dynamics 365" or "Salesforce".

The section below describes the detailed authentication flows based on which CRM system the user chooses to connect to.

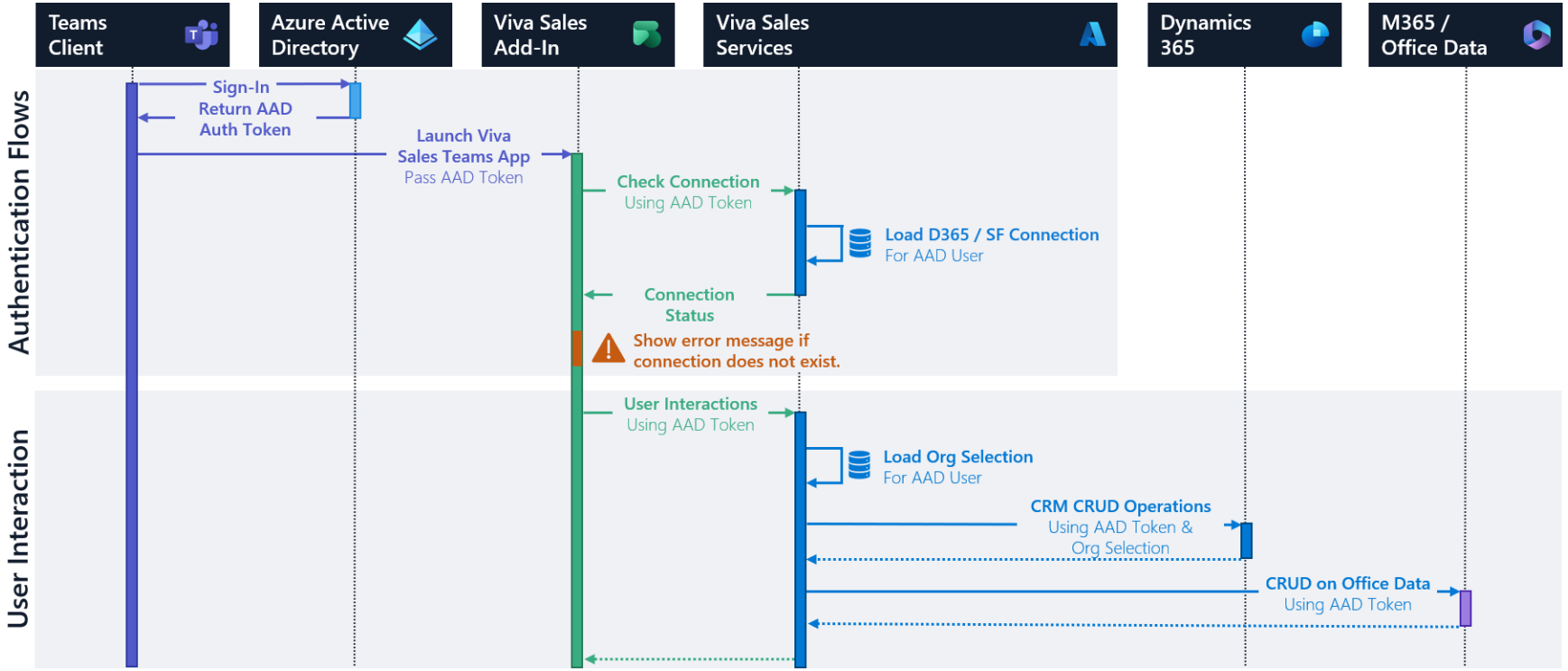
Dynamics 365 Connected

This section describes the Viva Sales authentication flow for Dynamics 365 connected experiences.

Viva Sales for Microsoft Outlook Add-In



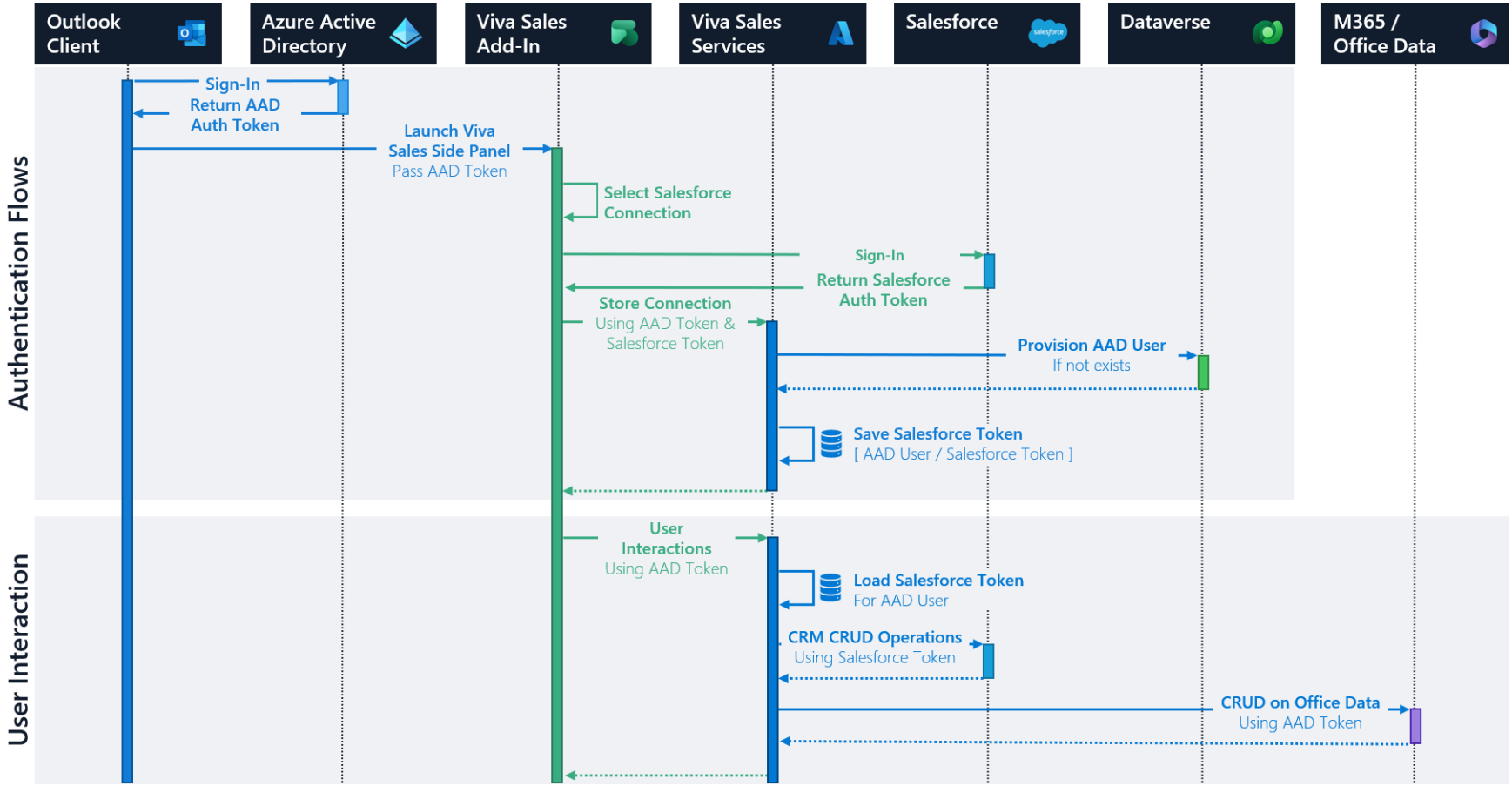
Viva Sales for Microsoft Teams App



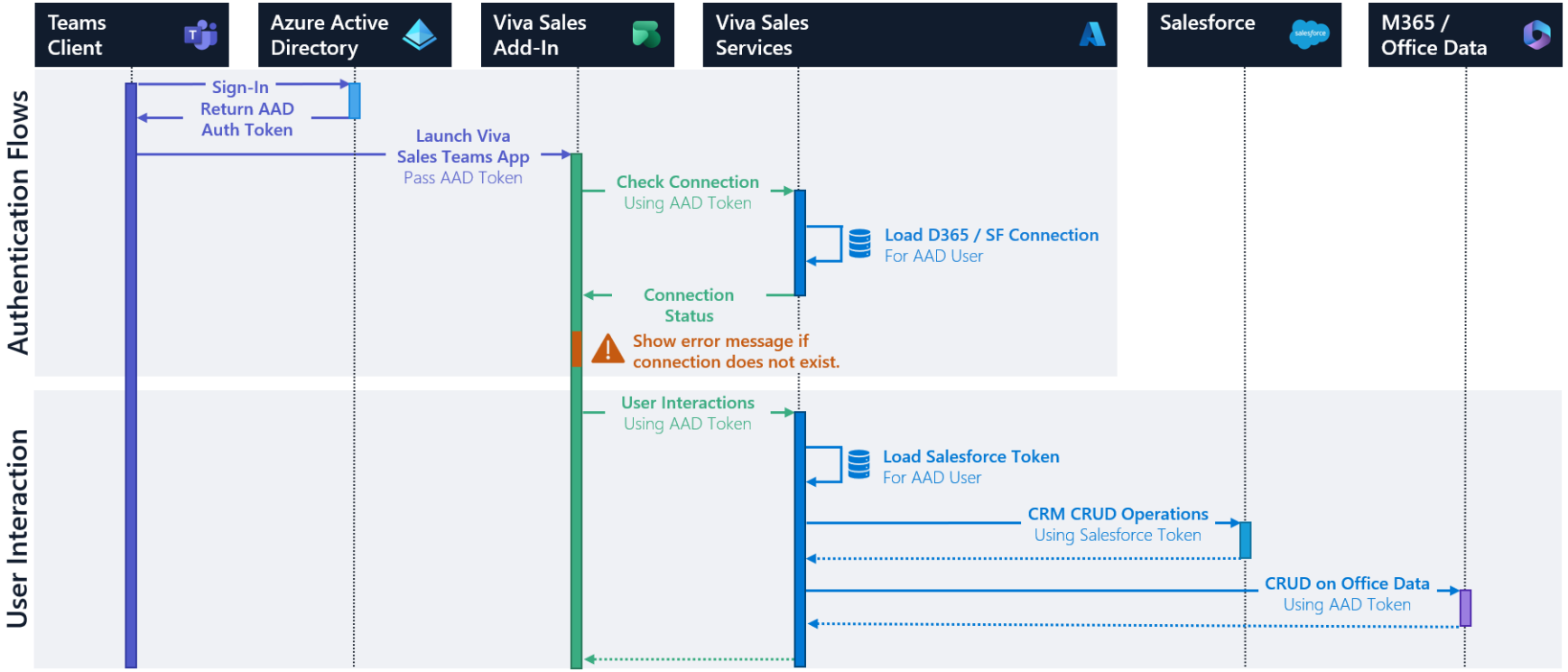
Salesforce CRM Connected

The following flow describes the Viva Sales authentication flow for Salesforce CRM connected experiences:

Viva Sales for Microsoft Outlook Add-In



Viva Sales for Microsoft Teams App



Data Access

M365 / Office Data

All M365 / Office data is accessed via the end-user's authentication context, i.e., Azure Active Directory (AAD) login. Access to M365 / Office data is granted to the **Viva Sales for Microsoft Outlook Add-In** and **Viva Sales for Microsoft Teams App** by the admin (during admin-managed installations) or the end-user (during user-managed installations) via an explicit consent.

CRM Data

All CRM data access is managed via the existing end-user authentication and authorization scheme of the underlying CRM system.

Dynamics 365 Connected

For Dynamics 365 users, Viva Sales accesses CRM data in the context of the logged in AAD user. All data access is based on the **AAD user's permissions** on the existing CRM data through predefined or configured security roles. Additionally, customers can manage user permissions and data access directly on the underlying Dataverse instance via Power Platform. View Security concepts in Microsoft Dataverse and Security roles and privileges for additional details.

Salesforce CRM Connected

For Salesforce CRM Customers, Viva Sales accesses CRM data in the context of the logged in **Salesforce User** and the **Microsoft Power Platform Connected App**. All data access is based on the Salesforce user's object permissions on the existing CRM data and the access available to the connected app.

When Viva Sales users log in to their Salesforce account, they are prompted to consent for the Microsoft Power Platform Connect App to access their CRM data in Salesforce. Once the consent is granted, Viva Sales can access the CRM data the user has access.

The **Microsoft Power Platform Connected App** is enabled by default, by Salesforce system administrators can block the app per environment, at which point none of the Viva Sales users will be able to access any CRM data.

Viva Sales Data

The following list describes all Viva Sales specific entities stored in Dataverse and the corresponding permissions associated with each entity. View the data operations and access rights documentation for additional details.

Entity Name	Description	Predefined Roles	Access rights
msdyn_taggedrecord	Contains the list of Contacts that are connected to the CRM via Viva Sales.	**Viva Sales User**	READ CREATE WRITE DELETE APPEND APPENDTO

		Sales Manager	READ CREATE WRITE DELETE APPEND APPENDTO
		Salesperson	READ CREATE WRITE DELETE APPEND APPENDTO
msdyn_vivaorgsetting	Contains org wide settings for Viva Sales, including CRM Customization settings.	**Viva Sales Administrator**	READ CREATE WRITE DELETE APPEND APPENDTO
		Viva Sales User	READ
		Sales Manager	READ
		Salesperson	READ
		Vice President of Sales	READ

Data Management

Data Security, Privacy, and Compliance

Viva Sales strictly follows the data privacy, data security, data retention, and compliance boundaries of the underlying data store. Below is a reference table for common documentation for each of the data stores. When data is copied from one data source to another the storage and governance constraints of the target data store are always respected.

For general information on how Microsoft manages security, privacy and compliance, refer to the Microsoft Trust Center.

Below are references to the data storage and governance concerns for the various data sources used in Viva Sales. For Salesforce related information please refer to the official Salesforce public documentation.

Type	M365 / Office Data	CRM Data Dynamics 365	Viva Sales Data Dataverse
Data Security		Dynamics 365 security	Security in Microsoft Dataverse
Data Encryption	Encryption in the Microsoft Cloud	Enhance security by encrypting your data	About data encryption in Dataverse
Compliance and Data Privacy	Privacy & data management overview	Privacy and personal data for Microsoft Dynamics 365	Compliance and data privacy

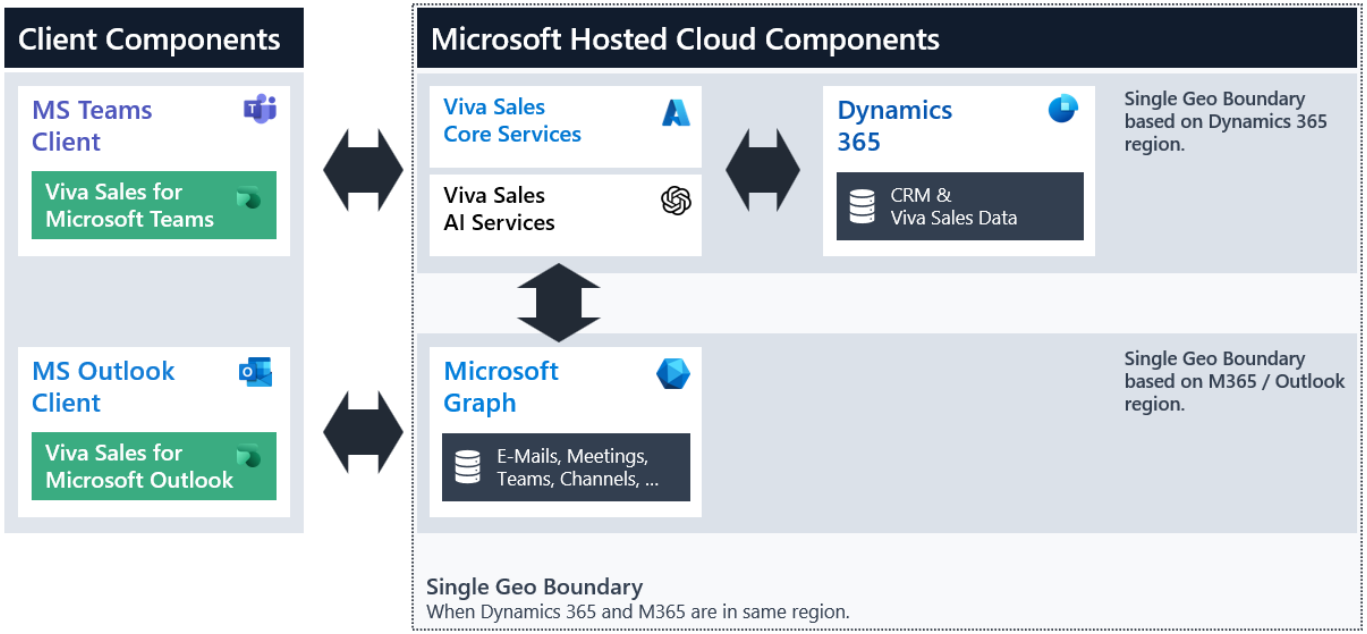
Data Residency

The following section describes the data residency for Viva Sales.

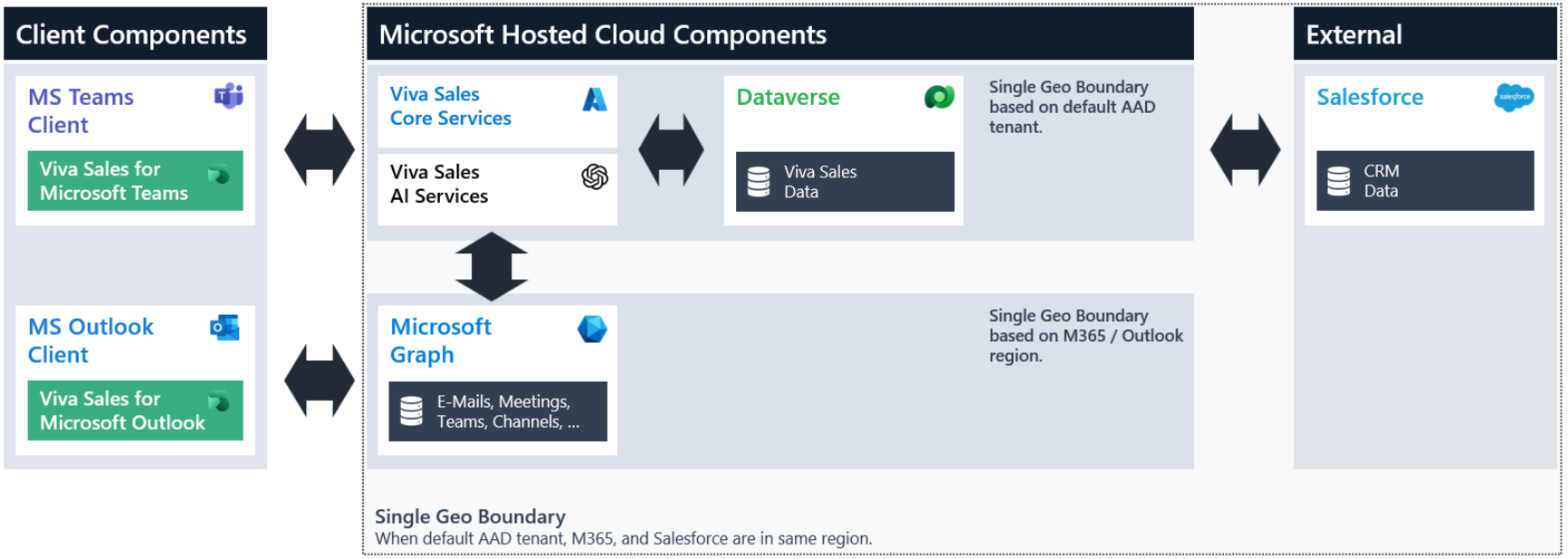
Overview

The following describes the high-level overview of all data at rest and data in transit for Viva Sales.

Dynamics 365 Connected



Dynamics 365 Salesforce



CRM and M365 / Office Data at Rest

For all CRM and M365 / Office data, Viva Sales respects the data residency of the existing data stores and does not move or copy data into any new data stores or geographies.

Viva Sales Data at Rest

Dynamics 365 Connected

For Dynamics 365 customers, Viva Sales stores all Viva Sales specific data in the Dynamics 365 Dataverse instance for the organization selected by the end user when signing in via the Viva Sales for Microsoft Outlook Add-In. This ensures that Viva Sales aligns to the pre-existing data residency of the customer's Dynamics 365 instance.

Salesforce CRM Connected

For Salesforce CRM customers, Viva Sales provisions the Dataverse instance for Viva Sales specific data in the region closest to the closest to the default region of the Azure AD tenant. For additional details, refer to the Power Platform default environment.

Data in Transit

Dynamics 365 Connected

When a user is connected to Dynamics 365, the Viva Sales Core and AI services are hosted in the same Geo as the Dynamics 365 region. As a result, Viva Sales data in transit aligns to the geo boundaries if the Dynamics 365 region and M365 / Office (Graph) region are the same.

Salesforce CRM Connected

When a user is connected to Salesforce CRM, the Viva Sales Core and AI services are hosted in the same Geo as the default AAD region. As a result, data in transit processed by Microsoft aligns to the geo boundaries if the AAD default region, M365 / Office (Graph) region are the same.

Data Inventory

The following section describes the detailed data inventory for Viva Sales.

Data Generation

The following section describes the data generated and stored by Viva Sales.

Type	Description	End-User Flow	Target Data Store
CRM Entities	Net new **CRM entities** and **field data**.	Generated in the **Viva Sales for Microsoft Outlook Add-In** via the Side-Panel when records are created or modified.	**Customer's CRM System**
Teams Meeting Insights	**Teams meeting insights data**, including meeting summary, sentiment analysis, follow up	Generated when the **Viva Sales for Microsoft Teams App** is	**Viva Sales Dataverse Instance**

	items, and the raw meeting transcript.	added to a Teams Meeting after the meeting is completed.	
Viva Sales Settings	**Org and Tenant level settings** configured by the CRM admin.	Updated in the **Viva Sales for Microsoft Teams App** Settings page.	**Viva Sales Dataverse Instance**

! NOTE

Meeting insights, including meeting summary, sentiment analysis, and follow ups are currently stored in the Microsoft Graph but are moving to Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences) as part of the **May 2023 release**. The diagram above already illustrates migration of the data.

Data Movement

The following section describes the data copied between data stores by Viva Sales.

Type	Description	End-User Flow	Source Data Store	Target Data Store
E-Mails and Appointments	**E-Mail and Meetings data** generated in Office.	Tracked to the CRM system through the **Viva Sales for Microsoft Outlook Add-In** side-panel when through explicit end-user tagging.	**End-User's M365 / Office Data**	**Customer's CRM System**

AI Feature Overview

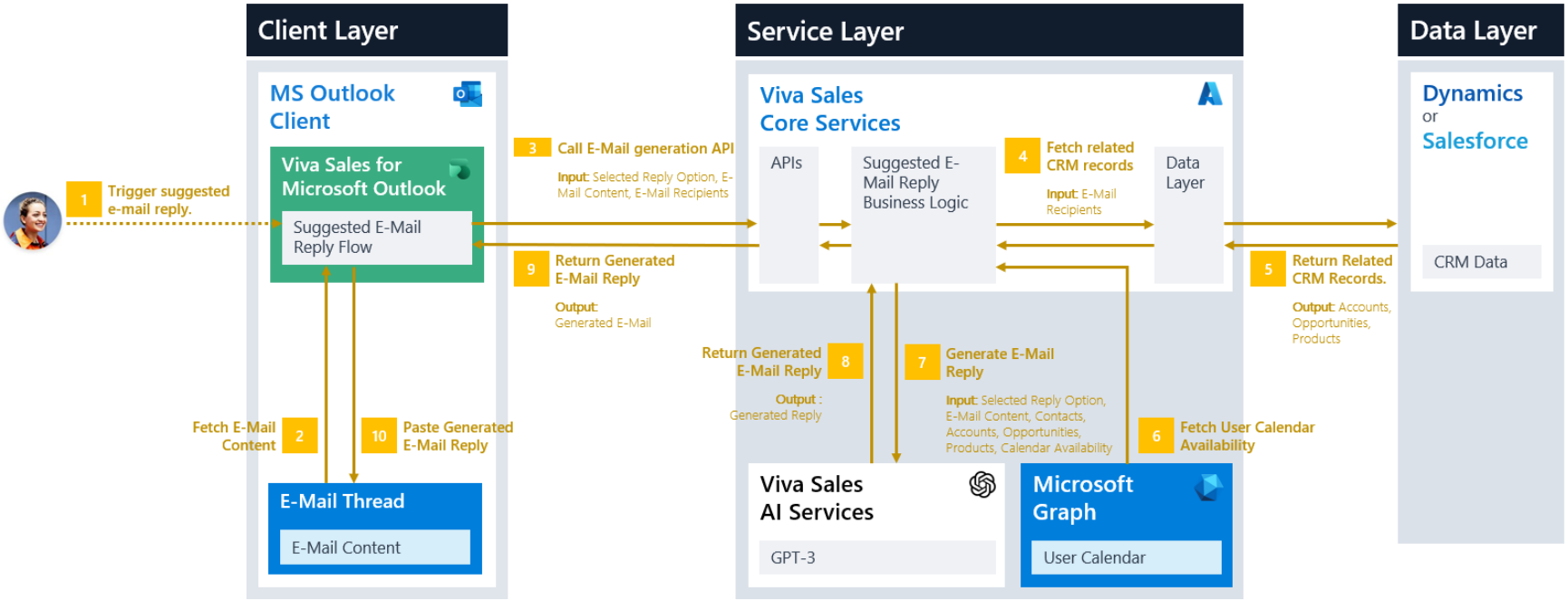
Generative AI

The following section describes the technical and architectural details for generative AI capabilities in Viva Sales.

Suggested E-Mail Content in Outlook

Initial E-Mail Generation Data Flow

The following describes the data flow during the initial e-mail generation flow.



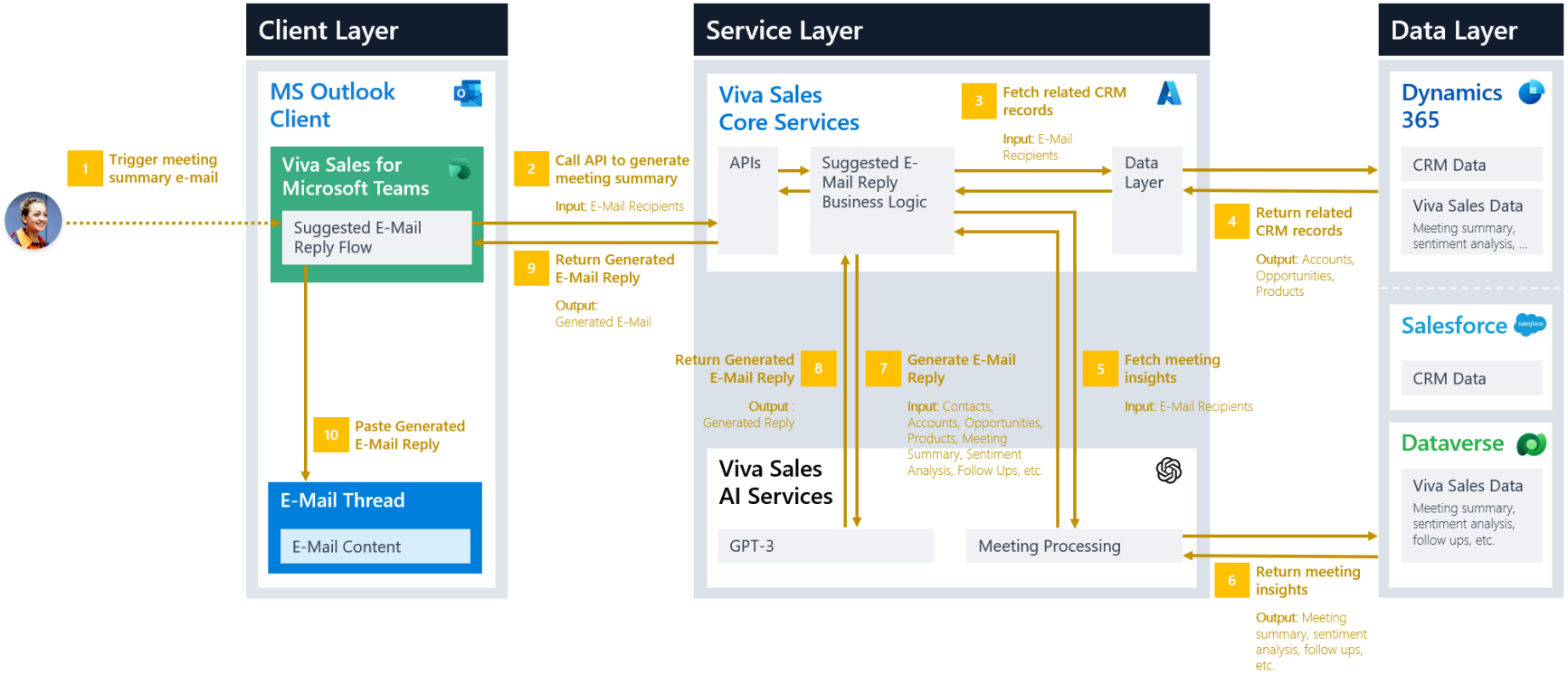
#	Title	Description
1.	**Trigger Suggested E-Mail Reply**	All generative AI scenarios are invoked directly by the end user in the **compose** mode of the e-mail. All generative AI data flow occurs in real-time when the flow is invoked by the end user and no data is being processed via background jobs.
2.	**Fetch E-Mail Content**	The existing e-mail content is retrieved from the e-mail body to be used as input for the generative AI flow.
3.	**Call E-Mail Generation API**	All e-mail generation occurs on the Viva Sales service layer. The Viva Sales client code invokes the corresponding server-side APIs including the following parameters: ▪ **Selected Reply Option**, which provides context on the type of reply to generate. ▪ **E-Mail Content**, retrieved from the e-mail body of the e-mail currently in compose mode. ▪ **E-Mail Recipients**, retrieved from the e-mail.
4.	**Fetch Related CRM Records**	Based on the **E-Mail Recipients** on the e-mail thread, additional CRM data is being fetched from the CRM.
5.	**Return Related CRM Records**	The Viva Sales data layer returns all **Accounts**, **Opportunities**, and **Products** associated with the **Contacts** (e-mail recipients) on the e-mail thread.
6.	**Fetch Available User Schedule**	To provide meeting schedule suggestions the **calendar availability** of the current user is retrieved from Microsoft graph.
7.	**Generate E-Mail Reply**	Based on the **Selected Reply Options**, **E-Mail Content**, **Contacts**, **Accounts**, **Opportunities**, **Products**, and end-user **calendar availability** Azure Cognitive Services is invoked to generate an e-mail reply. The entire flow is stateless, and no background jobs are processed to train the model currently.

8.	**Return Generated E-Mail Reply**	Azure Cognitive Services returns the **generated e-mail reply** to the main Viva Sales core service layer.
9.	**Return Generated E-Mail Reply**	The Viva Sales core services layer returns the **generated e-mail reply** to the Viva Sales client experiences.
10.	**Paste Generated E-Mail Reply**	The end-user can either paste the **generated e-mail reply** directly into the body of the e-mail or manually copy the response. The end-user can chose when to send the reply.

Meeting Summary E-Mail Generation in Outlook

Initial E-Mail Generation Data Flow

The following describes the data flow during the initial e-mail generation flow.



#	Title	Description
1.	**Trigger meeting summary e-mail**	All generative AI scenarios are invoked directly by the end user in the **compose** mode of the e-mail. All generative AI data flow occurs in real-time when the flow is invoked by the end user and no data is being processed via background jobs. The meeting summary e-mail generation is only triggered when **E-Mail Recipients** are available on the e-mail compose area.
2.	**Call API to generate meeting summary**	All e-mail generation occurs on the Viva Sales service layer. The Viva Sales client code invokes an API on the Viva Sales server side using the **E-Mail Recipients** on the e-mail tread.

3.	**Fetch related CRM records**	Based on the **E-Mail Recipients** on the e-mail thread, additional CRM data is being fetched from the CRM.
4.	**Return related CRM records**	The Viva Sales data layer returns all **Accounts**, **Opportunities**, and **Products** associated with the **E-Mail Recipients** on the e-mail thread.
5.	**Fetch meeting insights**	Based on the **E-Mail Recipients** on the e-mail thread, the latest e-mail meeting insights are fetched from the Viva Sales AI service layer that the **E-Mail Recipients** have access to.
6.	**Return meeting insights**	The meeting insights, including **meeting summary**, **sentiment analysis**, and **follow ups** are returned from Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences).
7.	**Generate E-Mail reply**	Based on the **Contacts**, **Accounts**, **Opportunities**, **Products**, **meeting summary**, **sentiment analysis**, and **follow ups** Azure Cognitive Services is invoked to generate an e-mail reply. The entire flow is stateless, and no background jobs are processed to train the model currently.
8.	**Return Generated E-Mail Reply**	The Viva Sales AI services layer returns the **generated e-mail reply** to the Viva Sales core services layer.
9.	**Return Generated E-Mail Reply**	The Viva Sales core services layer returns the **generated e-mail reply** to the Viva Sales client experiences.
10.	**Paste Generated E-Mail Reply**	The end-user can either paste the **generated e-mail reply** directly into the body of the e-mail or manually copy the response.

! NOTE

Meeting insights, including meeting summary, sentiment analysis, and follow ups are currently stored in the Microsoft Graph but are moving to Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences) as part of the **May 2023 release**. The diagram above already illustrates migration of the data.

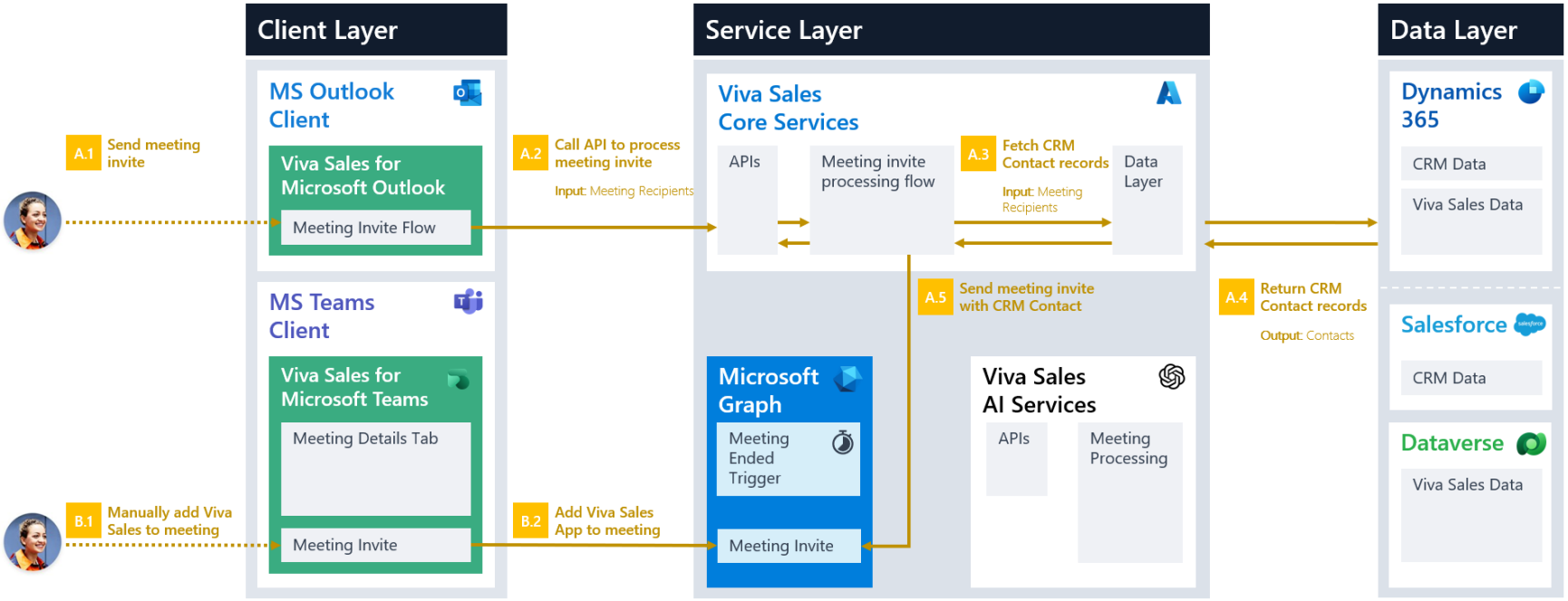
Sales Conversational Intelligence

The following section describes the technical and architectural details for Sales Conversational Intelligence capabilities in Viva Sales.

Teams Meeting Summary

Adding Viva Sales to Teams Meeting

The following describes the flow of adding Viva Sales to a Teams Meeting.

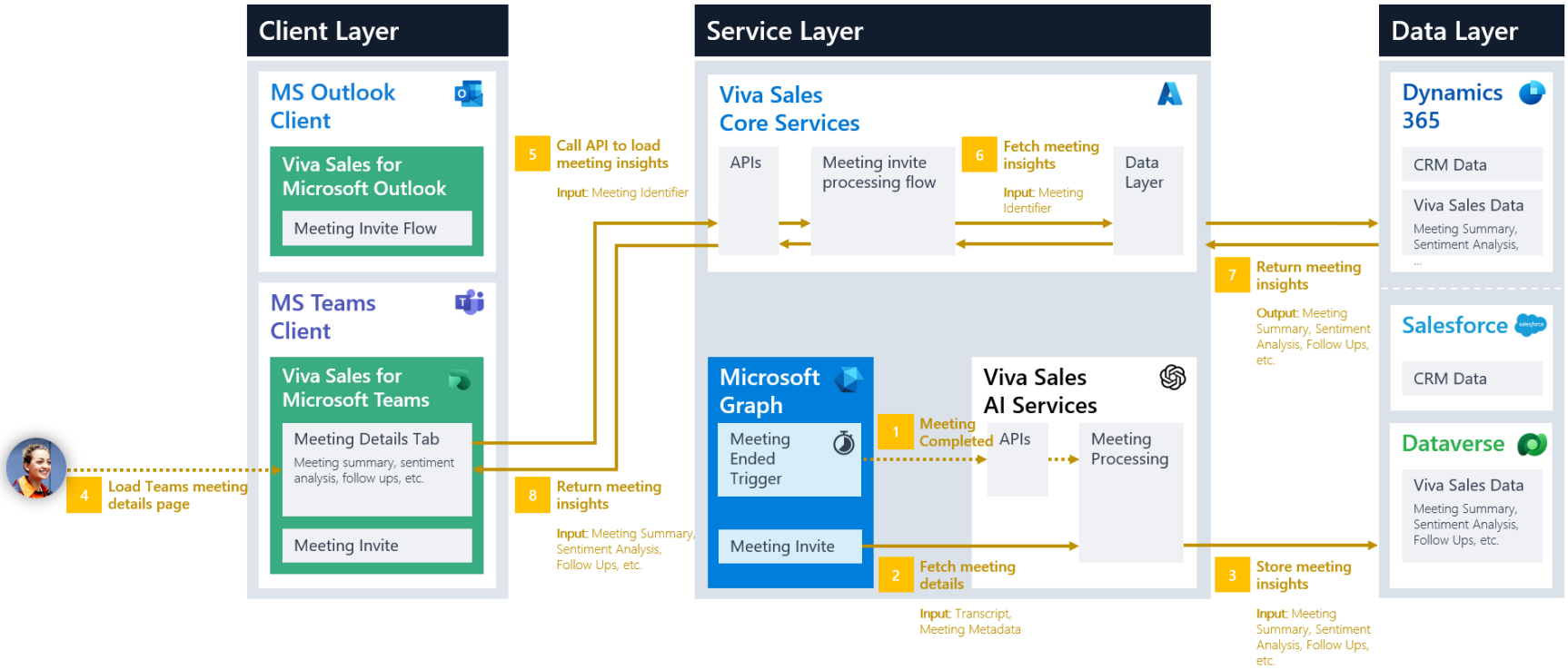


#	Title	Description
A	**Adding Meeting via Outlook**	
A.1	**Send Meeting Invite**	Adding Viva Sales to a Teams Meeting, which in turn generates the Meeting Summary, can be triggered when a new meeting is being sent via Outlook.
A.2	**Call API to process meeting invite**	When the invite is sent, an API call is made to the Viva Sales core services with the list of **Meeting Recipients** to identify whether the Viva Sales App should be added to the Teams meeting.
A.3	**Fetch CRM Contact records**	During the processing of the meeting invite, a request is made to confirm whether any of the **Meeting Recipients** are **Contacts** in the CRM.

A.4	**Return CRM Contact records**	The list of CRM **Contacts** is returned based on the list of **Meeting Recipients** on the meeting invite.
A.5	**Return Related CRM Records**	If any of the **Meeting Recipients** are **Contacts** in the CRM the Viva Sales App is added to the Teams Meeting.
B	**Adding Meeting via Teams**	
B.1	**Manually add Viva Sales to meeting**	The are several ways on which users can add the Viva Sales Teams App to a meeting. View the use apps in Teams meetings for a complete list of scenarios.
B.2	**Add Viva Sales to meeting**	When the user manually adds the Viva Sales App the meeting invite will be tagged appropriately in the Microsoft Graph for further processing.

Teams Meeting Summary Data Flow

The following describes the data flow when the Teams' meeting summary is generated and loaded in the Viva Sales for Microsoft Teams App.



#	Title	Description
1.	**Meeting completed**	An event is triggered when the meeting transcript is available, which invokes an API call on the Viva Sales AI Services to process the meeting data and generate meeting insights.
2.	**Fetch meeting details**	The meeting processing logic on the Viva Sales AI Services layer fetches the meeting **transcript** and meeting **metadata** from Microsoft Graph.
3.	**Store meeting insights**	The meeting data is processed and the resulting meeting insights, including **meeting summary**, **sentiment analysis**, **follow ups**, etc are stored in Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences).

4.	**Load Teams meeting details page**	The Teams' meeting insights are loaded when the user navigates to the Viva Sales App in the Teams meeting summary view.
5.	**Call API to load meeting insights**	An API call is triggered to load the Teams' meeting insights given a unique **meeting identifier**.
6.	**Fetch meeting insights**	The Teams' meeting insights are fetched from Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences) if available using the unique **meeting identifier**.
7.	**Return meeting insights**	The Teams' meeting insights, including the **meeting summary**, **sentiment analysis**, and **follow ups, etc** are returned from Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences).
8.	**Return meeting insights**	The Teams meeting insights, including the **meeting summary**, **sentiment analysis**, and **follow ups, etc** are returned from Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences) and rendered in the Teams' meeting details page.

CRM Customizations Overview

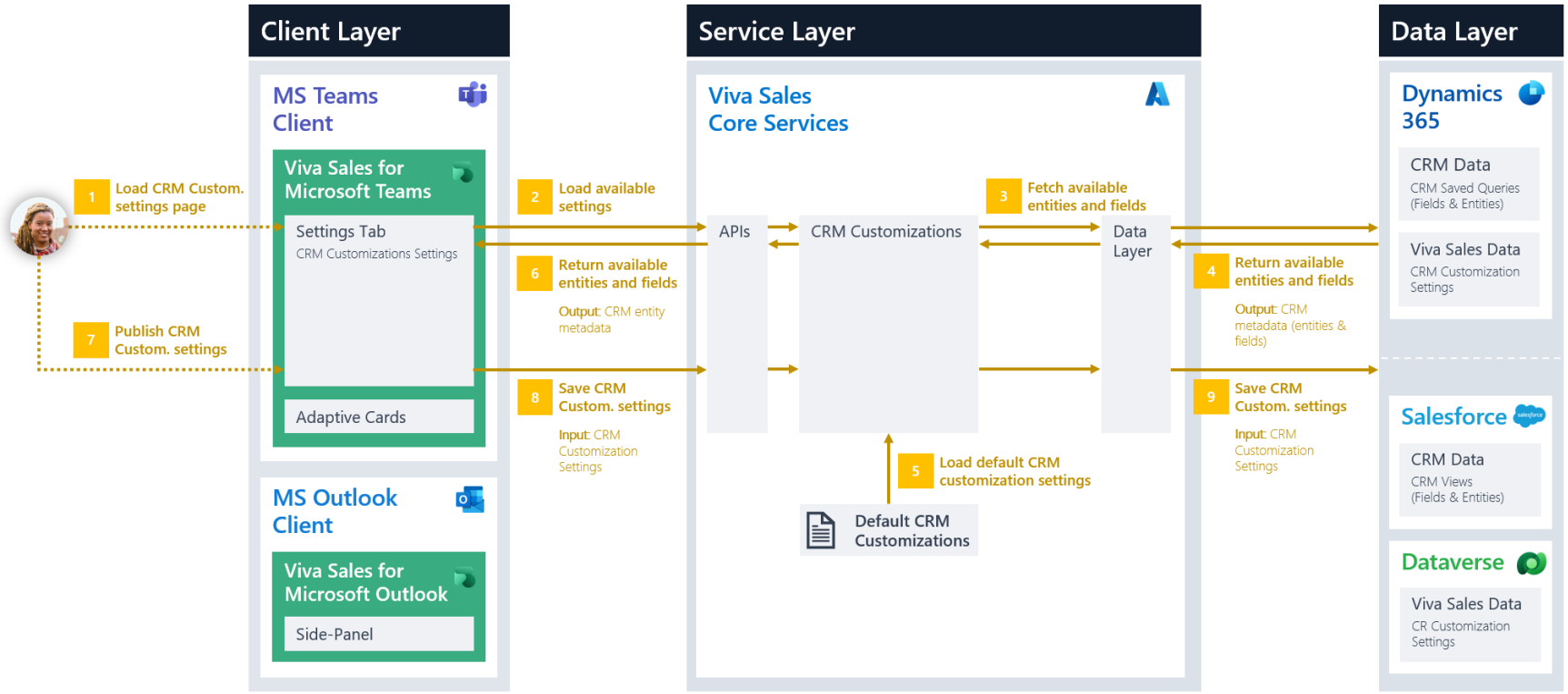
CRM Customization Setup

!NOTE

Support for CRM Custom entities via Saved Queries in Dynamics 365 or Forms in Sales will be available as part of the **May 2023 release**. This section describes the architecture with full support for custom entities.

CRM Customization Setup Data Flow

The following describes the data flow for the CRM Customizations Setup experience.



#	Title	Description

1.	**Load settings page**	The Forms Admin Settings page (CRM Customization settings) is loaded when an admin navigates to the **Settings Tab** in the **Viva Sales for Microsoft Teams App**. See the Required Permissions below for details on who can access the CRM Customizations Settings experience.
2.	**Load available settings**	When the settings experience is loaded, an API call is made to the Viva Sales core services to load the available **CRM entities and fields** to be configured for the CRM Customizations setup along with the default CRM Customizations configuration.
3.	**Fetch available entities and fields**	During the processing of the CRM Customizations, a request is made to the CRM (Dynamics 365 or Salesforce) to retrieve the list of available **CRM entities and fields**. For **Dynamics 365** connected experiences, `Saved Queries` are used to retrieve the list of custom entities. For **Salesforce** connected experiences, `Forms` are used to retrieve the list of custom entities.
4.	**Return available entities and fields**	The list of available **CRM entities and fields** are returned from the CRM.
5.	**Load default CRM Customization settings**	Upon the first launch of the CRM Customization settings, the default settings are loaded.
6.	**Return available entities and fields**	The list of available **CRM entities and fields** are returned to the client and shows on the CRM Customizations settings experience.
7.	**Publish CRM Customization settings**	Administrators can configure the CRM Customization settings (e.g., available entities and fields) and publish the changes to take effect immediately across all Viva Sales experiences.
8.	**Save CRM Customization settings**	When the user publishes the CRM customization settings, an API call is made to the Viva Sales core services to save the selected **CRM Customization settings**.
9.	**Save CRM Customization settings**	The **CRM Customization settings** are stored in Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences). The **CRM Customization settings** are stored per tenant and org.

Required Permissions

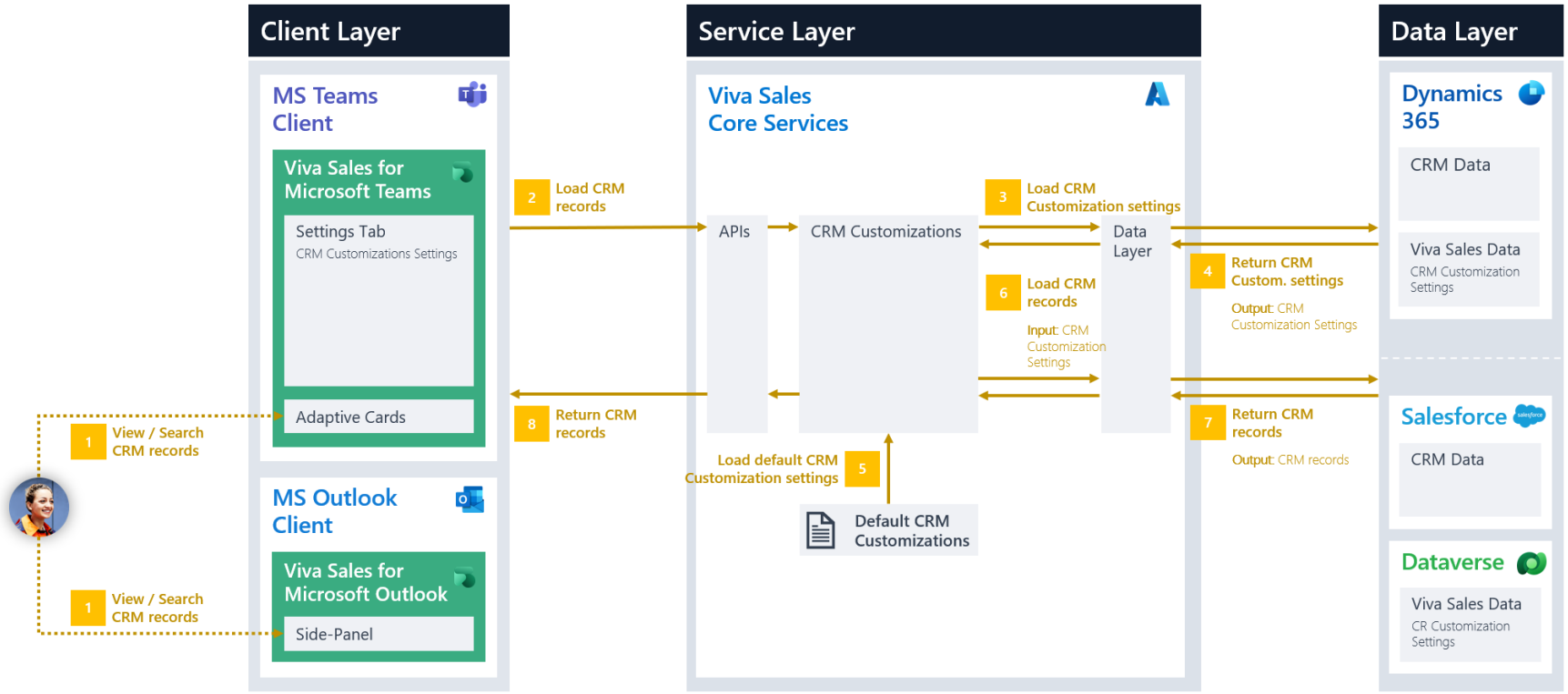
The following permissions are required to manage the CRM Customization settings:

Connected CRM	Requirement Type	Required Role / Permission
Dynamics 365	Security Role	**System Administrator** or **System Customizer**
Salesforce	Permission	**Modify All Data** or **Manage Data Integrations**

CRM Customization Rendering

CRM Customizations Rendering Data Flow

The following describes the data flow for the CRM Customizations rendering flows.



#	Title	Description
1.	**View / Search CRM records**	End users can view or search for CRM records in the side-panel in the Microsoft Dynamics 365 for Outlook Add-In or the adaptive cards in the Microsoft Dynamics 365 for Teams App.
2.	**Load CRM records**	When browsing or searching through the different end-user-facing experiences in Viva Sales, API calls are being made to the Viva Sales core services to load the configured **CRM records**.
3.	**Load CRM Customizations settings**	To determine the list of entities and fields to return to the Viva Sales client experiences, the **CRM Customization settings** are being loaded from Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences).

4.	**Return CRM Customizations settings**	The **CRM Customization settings** are returned from Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences).
5.	**Load default CRM Customizations settings**	If the stored **CRM Customization settings** are not found the default settings are being loaded. This can occur if a user navigates to any view or performs a search for CRM records before the admin has set up the CRM Customizations.
6.	**Load CRM records**	Based on the **CRM Customization settings** the underlying **CRM Records** are being fetched from the underlying CRM.
7.	**Return CRM records**	The **CRM Records** are returned from the CRM.
8.	**Return CRM records**	The **CRM Records** are returned and rendered in the Viva Sales client experiences.

Frequently Asked Questions

Data Management

AI Data Usage

How does Viva Sales handle my data in AI scenarios?

Viva Sales does not use any customer data to train any AI models. Viva Sales also does not copy your data into any AI systems for the purpose of generating insights. Viva Sales processes all your data within geo network boundaries to generate insights in real time. These insights are either served in real-time to the end user and can be discarded once the user interaction is complete, for example as part of the generative AI capabilities, or are stored within the existing geo boundaries of your data as described in the Data Residency section.

! NOTE

Meeting insights, including meeting summary, sentiment analysis, and follow ups are currently stored in the Microsoft Graph but are moving to Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences) as part of the **May 2023 release**. The diagram above already illustrates migration of the data.

Which data sources does Viva Sales use for AI scenarios?

Viva Sales only leverages the CRM data from the environment and org the end user is connected to and e-mail content that the end user has access to produce generative AI replies, meeting summaries, or sales conversational insights. No other data is being leveraged for Viva Sales AI scenarios.

What OpenAI endpoint is Suggested email replies and other Copilot capabilities using?

Suggested Email replies uses an OpenAI endpoints in Microsoft Azure. The traffic never leaves the Microsoft Network or geo boundaries of the service.

Environment Setup

Does the Viva Sales "Trial" Dataverse instance for Salesforce customers expire?

No. The default expiration time on Dataverse "Trial" instances is set to 180 days. However, we periodically extend the "Trial" expiration date for all Viva Sales Salesforce customers to prevent data loss or loss of support for Viva Sales. The "Trial" Dataverse instance gets converted to a "Production" instance for all licenses Salesforce customers.

This does not apply to Dynamics 365 customers as Viva Sales does not provision a new Dataverse instance for the Viva Sales specific data but instead use the existing Dataverse instance for the connected Dynamics 365 environment and org.

Document Version History

Version	Changes	Publish Date
1.0	Initial Version	April 3rd, 2023