EXTENDING COPILOT IN DYNAMICS 365 SALES- PART 2

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Recap

- Extensibility Scenarios
- ALM Considerations
- Live demo
  - Add a new topic
  - Add/Update sparkle menu
- Resources

Agenda

Extending OOB Skills
- What's supported
- Extension through Dataverse plugin
- Extended summary structure

Live demos
- Sample plugin walkthrough
- Real life scenario
- Register a plugin

- Resources
- Call to Action

Extending OOB skills

What can you extend?

Examples of Out of the box skills:

- Opportunity Summary Supported
- Account Summary Supported
- Lead Summary
- Account News

Private Preview

Extension through Dataverse plugin

New Plugin Action: msdyn_SalesExtendedSummaryProvider

Input Parameters:

- msdyn_entityName
- msdyn_entityId
- msdyn_activityId

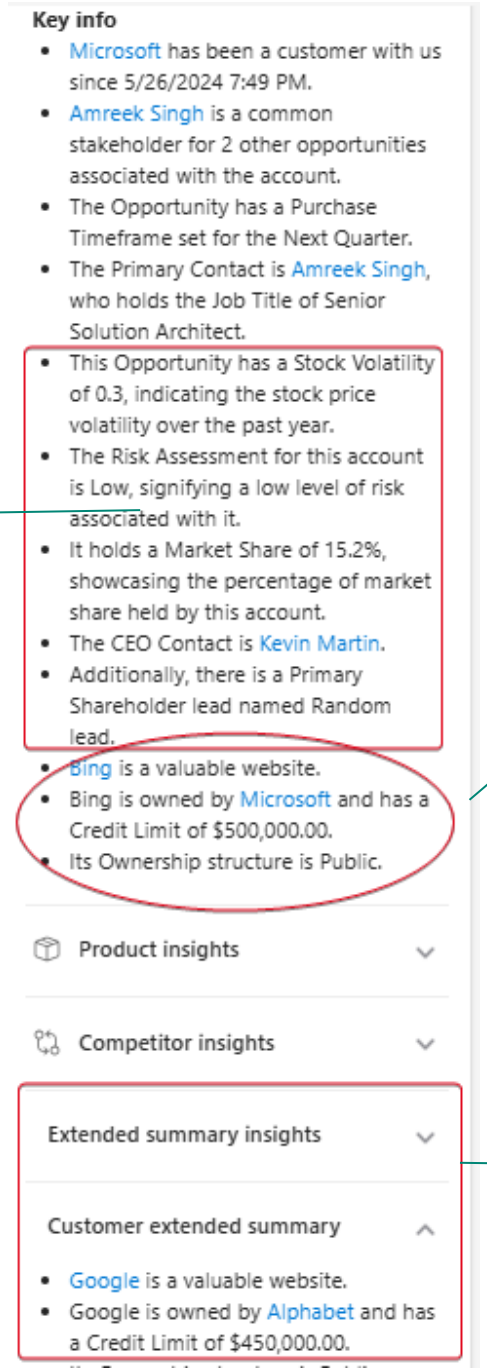
Output Parameter:

- msdyn_extendedSummaryData
  - Type: Entity
  - Contains summary data as attributes

Extended summary structure

1. Additional Fields

- Additional fields that can be added to the summary (Key Info)
- These fields will be sent to GPT model along with other OOB information to generate summary



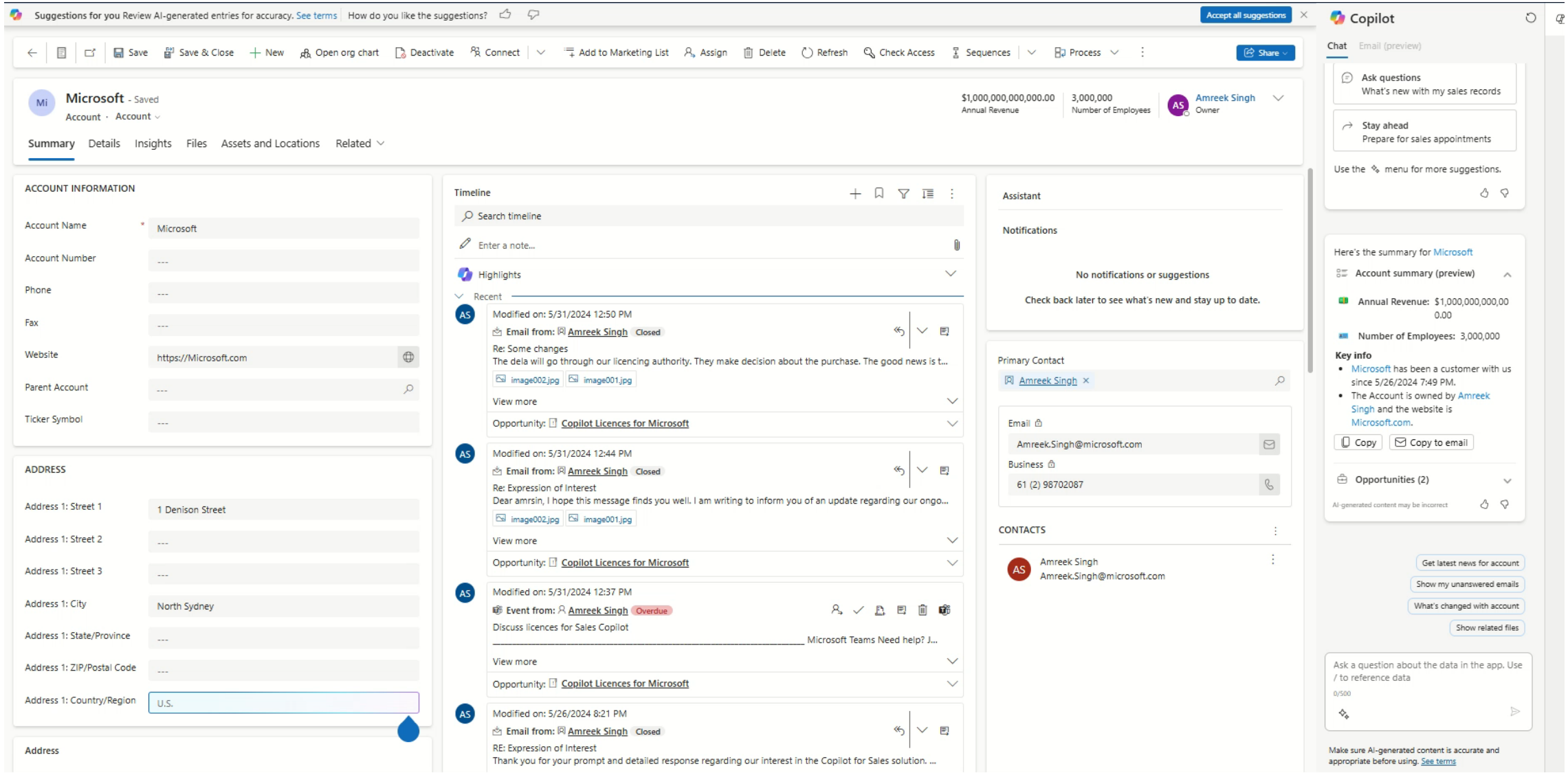
2. Base Summary

- Additional information that can be appended to the end of the OOB summary (Key Info)

3. Summary Containers

- Additional information that can be displayed in a separate container/s

Extended summary Structure



Sample plugin walkthrough

Live Demo

Real life scenario

Real life scenario

Continuing with my banking scenario from the last session

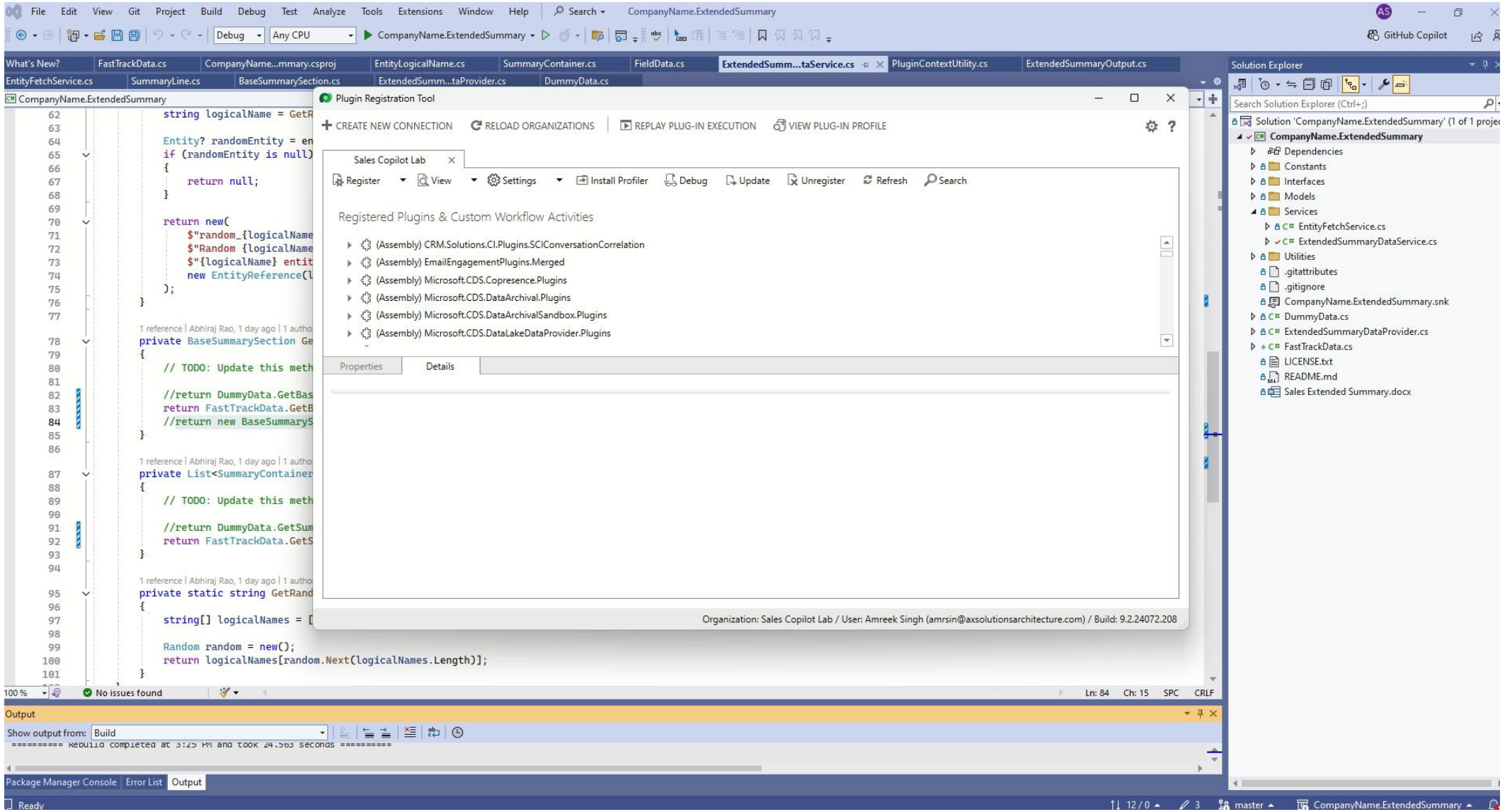
As a banking client, I would like to see :

- Credit Score of the customer
- Account balances of different accounts

Live Demo

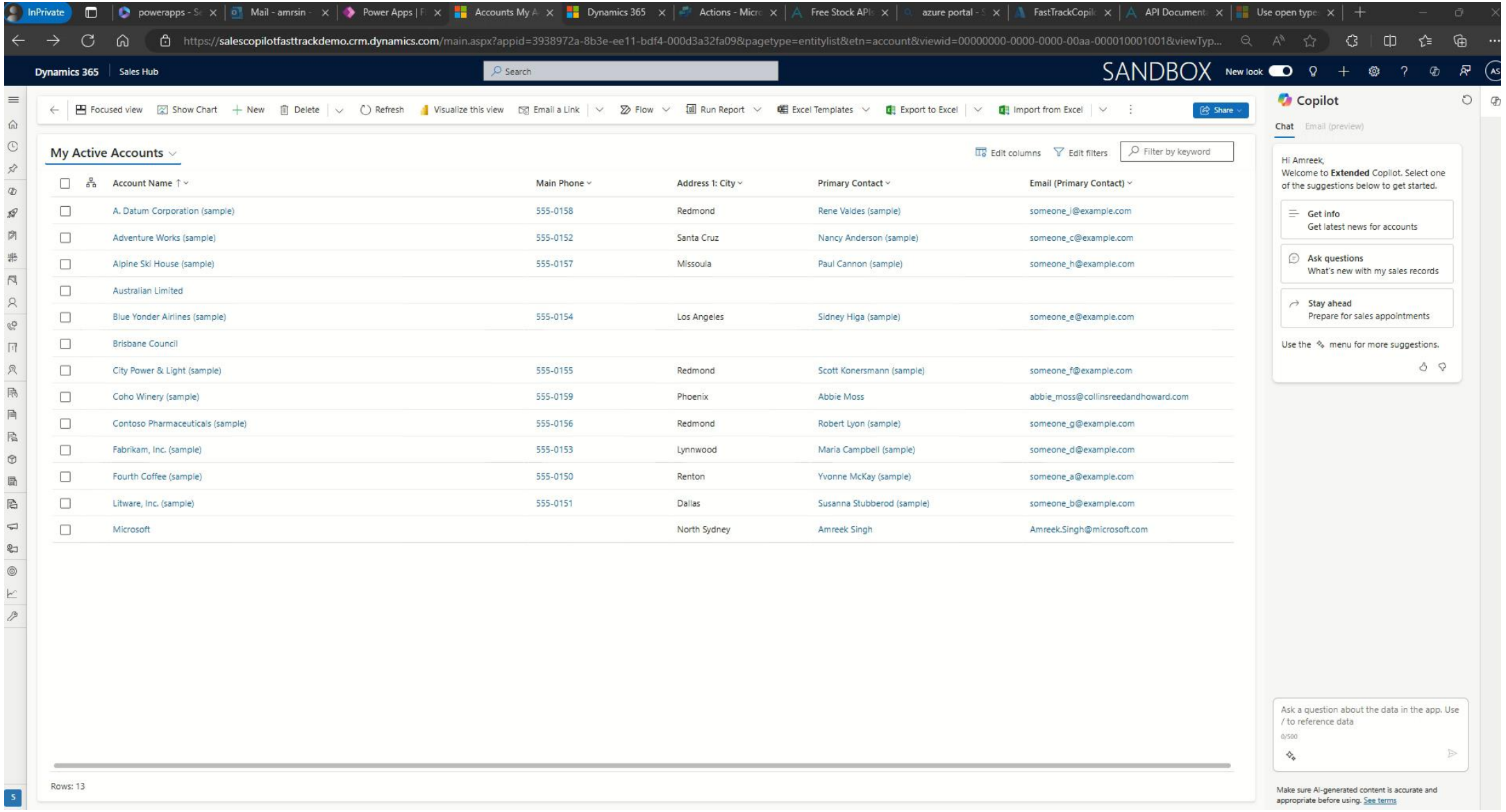
Register a plugin

Register a Plugin



Test your plugin (extension)

Test the extension



Resources

Resources

Sample Plugin

https://github.com/SinghAmreek/ExtendingCopilotInSales

Other Resources

Dynamics 365 Plugins	**Tutorial: Write and register a plug-in (Microsoft Dataverse) - Power Apps | Microsoft Learn**
Open Types	**Use open types with custom APIs - Power Apps | Microsoft Learn**

Call for action

Call for actions

- Reach out to me or your FastTrack SA, if your customer wants to test these extensions.

- Share your Feedback

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Mahalo ההודה. **Dhanyavād** Köszönöm Takk Terima kasih **Grazie** Grazzi

Thank you!

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