



EXTENDING COPILOT IN DYNAMICS 365 SALES- PART 2

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June 2024

Amreek Singh

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

Key info

- [Microsoft](#) has been a customer with us since 5/26/2024 7:49 PM.
- [Amreek Singh](#) is a common stakeholder for 2 other opportunities associated with the account.
- The Opportunity has a Purchase Timeframe set for the Next Quarter.
- The Primary Contact is [Amreek Singh](#), who holds the Job Title of Senior Solution Architect.

- This Opportunity has a Stock Volatility of 0.3, indicating the stock price volatility over the past year.
- The Risk Assessment for this account is Low, signifying a low level of risk associated with it.
- It holds a Market Share of 15.2%, showcasing the percentage of market share held by this account.
- The CEO Contact is [Kevin Martin](#).
- Additionally, there is a Primary Shareholder lead named Random lead.

- [Bing](#) is a valuable website.
- Bing is owned by [Microsoft](#) and has a Credit Limit of \$500,000.00.
- Its Ownership structure is Public.

Product insights

Competitor insights

Extended summary insights

Customer extended summary

- [Google](#) is a valuable website.
- Google is owned by [Alphabet](#) and has a Credit Limit of \$450,000.00.

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

Suggestions for you Review AI-generated entries for accuracy. See terms How do you like the suggestions? Accept all suggestions

Save Save & Close + New Open org chart Deactivate Connect Add to Marketing List Assign Delete Refresh Check Access Sequences Process Share

Mi Microsoft - Saved
Account · Account

\$1,000,000,000,000.00 Annual Revenue | 3,000,000 Number of Employees | **AS Amreek Singh** Owner

Summary Details Insights Files Assets and Locations Related

ACCOUNT INFORMATION

Account Name * Microsoft
Account Number ---
Phone ---
Fax ---
Website https://Microsoft.com
Parent Account ---
Ticker Symbol ---

ADDRESS

Address 1: Street 1 1 Denison Street
Address 1: Street 2 ---
Address 1: Street 3 ---
Address 1: City North Sydney
Address 1: State/Province ---
Address 1: ZIP/Postal Code ---
Address 1: Country/Region U.S.

Timeline

Search timeline
Enter a note...

Highlights
Recent

- Modified on: 5/31/2024 12:50 PM
Email from: Amreek Singh Closed
Re: Some changes
The dela will go through our licencing authority. They make decision about the purchase. The good news is t...
image002.jpg image001.jpg
View more
Opportunity: Copilot Licences for Microsoft
- Modified on: 5/31/2024 12:44 PM
Email from: Amreek Singh Closed
Re: Expression of Interest
Dear amrsin, I hope this message finds you well. I am writing to inform you of an update regarding our ongo...
image002.jpg image001.jpg
View more
Opportunity: Copilot Licences for Microsoft
- Modified on: 5/31/2024 12:37 PM
Event from: Amreek Singh Overdue
Discuss licences for Sales Copilot
Microsoft Teams Need help? J...
View more
Opportunity: Copilot Licences for Microsoft
- Modified on: 5/26/2024 8:21 PM
Email from: Amreek Singh Closed
RE: Expression of Interest
Thank you for your prompt and detailed response regarding our interest in the Copilot for Sales solution. ...

Assistant

Notifications
No notifications or suggestions
Check back later to see what's new and stay up to date.

Primary Contact

Amreek Singh
Email Amreek.Singh@microsoft.com
Business 61 (2) 98702087

CONTACTS

Amreek Singh
Amreek.Singh@microsoft.com

Chat

Email (preview)
Ask questions
What's new with my sales records
Stay ahead
Prepare for sales appointments
Use the menu for more suggestions.

Here's the summary for Microsoft
Account summary (preview)
Annual Revenue: \$1,000,000,000,000.00
Number of Employees: 3,000,000
Key info
Microsoft has been a customer with us since 5/26/2024 7:49 PM.
The Account is owned by Amreek Singh and the website is Microsoft.com.
Copy Copy to email
Opportunities (2)
AI-generated content may be incorrect

Get latest news for account
Show my unanswered emails
What's changed with account
Show related files

Ask a question about the data in the app. Use / to reference data
0/500

Make sure AI-generated content is accurate and appropriate before using. See terms



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

The screenshot displays the Visual Studio IDE with a C# project named 'CompanyName.ExtendedSummary'. The main editor shows the 'CompanyNamesExtendedSummary' class with several methods. A 'Plugin Registration Tool' window is open in the foreground, showing a list of registered plugins and custom workflow activities. The tool window includes a search bar, a list of plugins, and tabs for 'Properties' and 'Details'. The Solution Explorer on the right shows the project structure, including folders for Dependencies, Constants, Interfaces, Models, and Services, and files for EntityFetchService.cs, ExtendedSummaryDataService.cs, Utilities, .gitattributes, .gitignore, CompanyName.ExtendedSummary.snk, DummyData.cs, ExtendedSummaryDataProvider.cs, FastTrackData.cs, LICENSE.txt, README.md, and Sales Extended Summary.docx. The Package Manager Console at the bottom shows the output of a build command, indicating that the build completed successfully at 3:25 PM and took 24.563 seconds.

```
string logicalName = GetR
62
63
64 Entity? randomEntity = en
65 if (randomEntity is null)
66 {
67     return null;
68 }
69
70 return new(
71     $"random_{logicalName}
72     $"Random {logicalName}
73     $"{{logicalName}} entit
74     new EntityReference(L
75
76
77
78
79 private BaseSummarySection Ge
80 {
81     // TODO: Update this meth
82
83     //return DummyData.GetBas
84     return FastTrackData.GetB
85     //return new BaseSummaryS
86
87
88 private List<SummaryContainer
89 {
90     // TODO: Update this meth
91
92     //return DummyData.GetSum
93     return FastTrackData.GetS
94
95
96 private static string GetRand
97 {
98     string[] logicalNames = [
99
100     Random random = new();
101     return logicalNames[random.Next(logicalNames.Length)];
```

Plugin Registration Tool

Registered Plugins & Custom Workflow Activities

- (Assembly) CRM.Solutions.CI.Plugins.SCIConversationCorrelation
- (Assembly) EmailEngagementPlugins.Merged
- (Assembly) Microsoft.CDS.Copresence.Plugins
- (Assembly) Microsoft.CDS.DataArchival.Plugins
- (Assembly) Microsoft.CDS.DataArchivalSandbox.Plugins
- (Assembly) Microsoft.CDS.DataLakeDataProvider.Plugins

Organization: Sales Copilot Lab / User: Amreek Singh (amrsin@axsolutionsarchitecture.com) / Build: 9.2.24072.208

Output

```
Show output from: Build
===== rebuild completed at 3:25 PM and took 24.563 seconds =====
```



Test your plugin
(extension)

Test the extension

The screenshot displays the Dynamics 365 Sales Hub interface. The main content area shows a table titled "My Active Accounts" with 13 rows. The table columns are: Account Name, Main Phone, Address 1: City, Primary Contact, and Email (Primary Contact). The Copilot sidebar on the right contains a chat window with a welcome message and three suggested actions: "Get info", "Ask questions", and "Stay ahead".

Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_j@example.com
Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com
Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com
Australian Limited				
Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)	someone_e@example.com
Brisbane Council				
City Power & Light (sample)	555-0155	Redmond	Scott Konersmann (sample)	someone_f@example.com
Coho Winery (sample)	555-0159	Phoenix	Abbie Moss	abbie_moss@collinsreedandhoward.com
Contoso Pharmaceuticals (sample)	555-0156	Redmond	Robert Lyon (sample)	someone_g@example.com
Fabrikam, Inc. (sample)	555-0153	Lynnwood	Maria Campbell (sample)	someone_d@example.com
Fourth Coffee (sample)	555-0150	Renton	Yvonne McKay (sample)	someone_a@example.com
Litware, Inc. (sample)	555-0151	Dallas	Susanna Stubberod (sample)	someone_b@example.com
Microsoft		North Sydney	Amreek Singh	Amreek.Singh@microsoft.com

Rows: 13

Copilot Chat:
Hi Amreek,
Welcome to **Extended** Copilot. Select one of the suggestions below to get started.

- Get info**
Get latest news for accounts
- Ask questions**
What's new with my sales records
- Stay ahead**
Prepare for sales appointments

Use the % menu for more suggestions.

Ask a question about the data in the app. Use / to reference data.
0/500

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)



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

 <https://www.linkedin.com/in/amreek-singh-55b33713/>

Dankie Faleminderit **Shukran** Chnorakaloutioun Hvala Blagodaria
Děkuji **Tak** Dank u **Tānan** Kiitos **Merci** Danke Ευχαριστώ A dank
Mahalo הודות. **Dhanyavād** Köszönöm Takk Terima kasih **Grazie** Grazzi

Thank you!

감사합니다 Paldies Choukrane Aċiū Благодарам ありがとうございます
谢谢 Баярлалаа **Dziękuję** Obrigado Mulțumesc **Спасибо** Ngiyabonga
Ďakujem **Tack** Nandri **Kop khun** Teşekkür ederim Дякую Хвала Diolch