



# EXTENDING COPILOT IN DYNAMICS 365 SALES- PART 2



**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

**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 ▾

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...  
   
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...  
   
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 x

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: \$1,000,000,000.00
- 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) ▾

All 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 the **Plugin Registration Tool** window open. The tool window shows the **Sales Copilot Lab** organization and a list of registered plugins and custom workflow activities. The background shows the **CompanyName.ExtendedSummary.cs** file with the following code:

```
62 string logicalName = GetR
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)];
```

The **Plugin Registration Tool** window shows the following registered plugins and 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

The **Output** window shows the following build output:

```
==== kebulia 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 top navigation bar includes the Dynamics 365 logo, a search bar, and a 'SANDBOX' label. The main content area is titled 'My Active Accounts' and displays a table of account information. The table has columns for Account Name, Main Phone, Address 1: City, Primary Contact, and Email (Primary Contact). The table lists 13 accounts, including A. Datum Corporation, Adventure Works, Alpine Ski House, Australian Limited, Blue Yonder Airlines, Brisbane Council, City Power & Light, Coho Winery, Contoso Pharmaceuticals, Fabrikam, Inc., Fourth Coffee, Litware, Inc., and Microsoft. The bottom of the table indicates 'Rows: 13'.

On the right side of the interface, there is a Copilot chat sidebar. The chat area shows a greeting from Amreek and a list of suggestions: 'Get info', 'Ask questions', and 'Stay ahead'. The 'Get info' suggestion includes the text 'Get latest news for accounts'. The 'Ask questions' suggestion includes the text 'What's new with my sales records'. The 'Stay ahead' suggestion includes the text 'Prepare for sales appointments'. Below the suggestions, there is a text input field with the placeholder text 'Ask a question about the data in the app. Use / to reference data' and a character count '0/500'. A 'See terms' link is also present at the bottom of the sidebar.

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



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      Tänan      Kiitos      **Merci**      Danke      Ευχαριστώ      A dank  
Mahalo      ἰτι.      **Dhanyavād**      Köszönöm      Takk      Terima kasih      **Grazie**      Grazzi

# Thank you!

감사합니다      Paldies      Choukrane      Ačiū      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