



# Dynamics 365 & Power Platform UK User Groups

## AI and Autonomous Agents: the new UI Transmogrifying Microsoft Dynamics 365

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Presented by | Sharon Smith  
12-Jan-25



# TODAY'S AGENDA

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1. Who am I?
2. What was the Shifting Landscapes?
3. Spotlight: Immersive Copilot Homepage in D365 Sales
4. Spotlight: Project Sophia in M365 Copilot for Sales (preview)
5. Autonomous Agents at Microsoft Ignite 2024
6. Live Demo of Pre-built D365 Autonomous Agents?
7. Where next?

# Speaker Bio: Sharon Smith

- Dynamics 365 Solution Architect
- Dual Microsoft BizApps MVP for Customer Experience and Customer Service
- 8+ Years Experience with Dynamics 365 CRM & ERP Apps
- Working both Global and National projects
- Lead Architect for ANS Group's Microsoft FastTrack Portfolio Partner program
- Microsoft Women In Power(Platform) Mentor and Power Up Program Champ



*“There’s no such thing as Normal”*

*#ANS Squirrel Club Power*



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# What were the Shifting Landscapes?

# Microsoft's London Offices in Paddington – February 2024



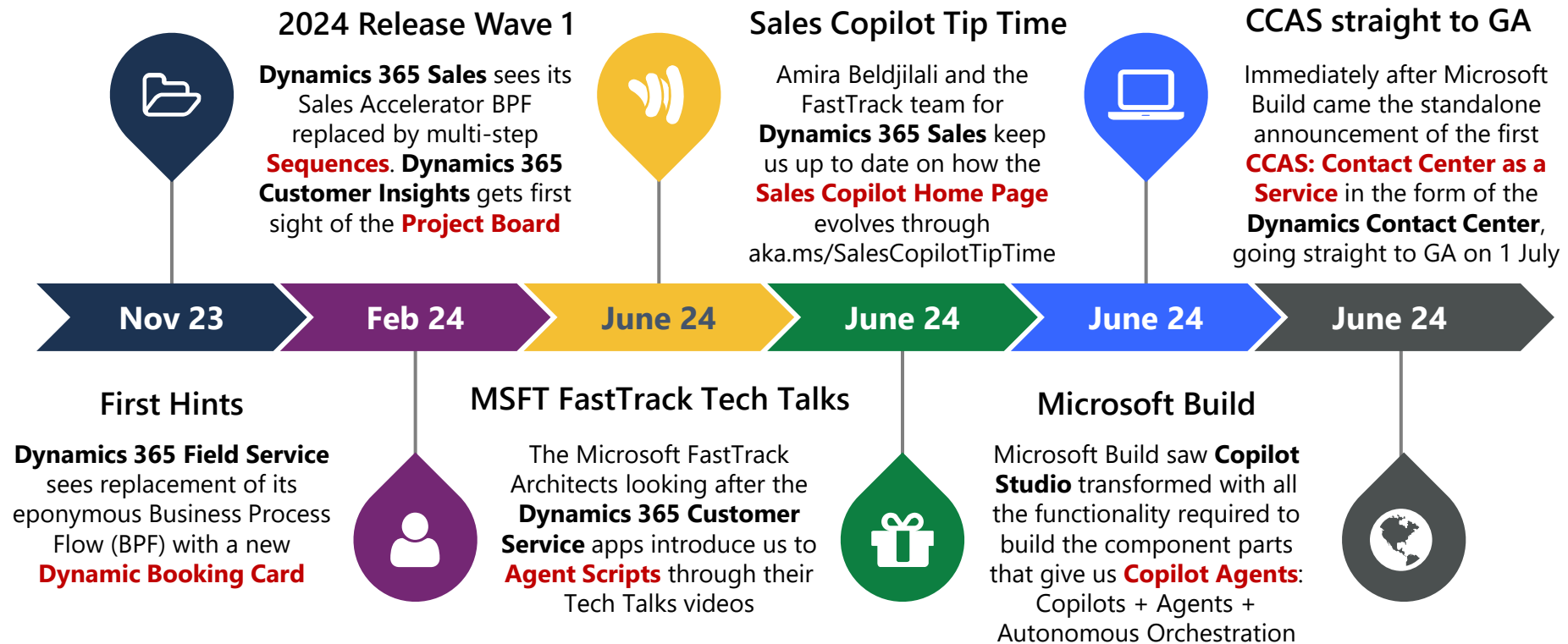
# Kings College London Strand Campus, Safral Hall – June 2024



On the BIG stage!

# Timeline of the Shifting Landscapes

— From First Hints, through the 2024 Release Waves, and standalone announcements from Microsoft —



# [Dwell Time] Spotlights

# Immersive Copilot Homepage: UI for AI

## Dynamics 365 Sales

**Get info**      **Ask questions**      **Stay ahead**

Get latest news for accounts      What's newly assigned to me      Prepare for sales appointments

Show my pipeline      What's new with my sales records      Show emails that need follow up

Use the menu for more suggestions.

Show my pipeline

Here's the pipeline of your open opportunities ordered based on est. close date.

**Deal tracker**      Sales funnel

Today, 06/15/24

Probability

Est close date

1-Qualify      2-Develop      3-Propose      4-Close

**7 Café Corto Espresso Machines for Graphic Design Institute**  
Graphic Design Institute • Est. revenue €110,000.00

**Low Waste Technology - Organic and Shade-Grown Coffee Beans**  
Alpine Ski House • Est. revenue €3,990.00

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](#)



# Project Sophia: Optimising Insights

## Microsoft Copilot for Sales (preview): Project Sophia



The screenshot displays the Project Sophia interface. At the top, a navigation bar includes a 'Back to top' button and a 'Sign in' button. The main header reads 'Project Sophia' with the subtitle 'Explore solutions to complex business problems with Project Sophia's infinite, AI-powered canvas'. Below this is a horizontal menu with tabs for 'Sales and marketing', 'Customer service', 'Finance', and 'Human resources'. A central sign-in prompt asks users to 'Sign in to save your work and unlock insights for your enterprise data', with 'Add data' and 'Generate' buttons. A grid of four preview cards is shown, each with a 'Coming soon' button. The bottom section features a 'Start a data exploration journey highlighting key insights and trends' button and a 'Preview with sample data' button. A data visualization panel is open, showing an 'Overview' section with a 'Summary' and a 'Sales Rep Performance based on Territory' section with a horizontal bar chart.

Sales Rep (Territory)	Performance
Lisa Johnson (Florida)	Low
Peter Pen (Montana)	Low-Mid
Tom Tims (Alaska)	Mid
Ben Olson (Idaho)	Mid-High
Luna Moon (Oregon)	High
June Bennis (Kansas)	High
Jacob John (New York)	High
Lena Powels (Washington)	Very High

# Copilot Learning Hub with Dona & Per

Introducing Project Sophia: AI-Driven Decision-Making for Leadership | Microsoft Learn



The screenshot displays the Copilot Learning Hub interface, which is a dashboard for project management. The main dashboard is titled "Copilot Learning Hub" and features a "New workspace" button and a "Details: Project Operations" dropdown. The dashboard is divided into several sections:

- Overview:** A central section with a pie chart titled "Total hours spent on each portfolio" and a scatter plot titled "Scatter plot for actuals and estimates, % completion for each proj...".
- Portfolio Performance:** A section with a line chart titled "Temporal trend of the hours spent on each portfolio" and a bar chart titled "Actual costs incurred by each portfolio".
- Resource Utilization:** A section with a line chart titled "Temporal trend of the costs associated with each resource role" and a bar chart titled "Cost comparison by resource role for each project".
- Actual costs by project:** A section with a bar chart titled "Actual costs by project".

A video inset in the bottom right corner shows two people, Dona and Per, sitting at a table with laptops, engaged in a discussion. The background of the video inset is a blue, textured wall.

# Autonomous Agents at Microsoft Ignite 2024

# Transform work with Autonomous Agents

Transform work with autonomous agents across your business processes - Microsoft Dynamics 365 Blog



Microsoft | Dynamics 365 Explore Products Pricing Resources Partners Support Contact us Try for free Sign in All Microsoft Light Dark

Blog home / Business Decision Makers Search the blog

Business Decision Makers News and product updates  
Dynamics 365 Customer Service · 4 min read

## Transform work with autonomous agents across your business processes

By Bryan Goode, Corporate Vice President, Business Applications and Platform

October 21, 2024

Facebook X LinkedIn

Tags: AI

Business Applications Launch Event

Product: Dynamics 365 Customer Service

We're expanding our ambition to bring AI-first business process to organizations. First, we're announcing that the ability to **create autonomous agents with Microsoft Copilot Studio** will be available in public preview in November 2024. Learn more on the [Copilot Studio blog](#).

Second, we're introducing **10 new autonomous agents in Microsoft Dynamics 365** to build capacity for sales, service, finance, and supply chain teams. These agents are designed to help you accelerate your time to value and are configured to scale operational efficiency and elevate customer experiences across roles and functions.

# Sales Qualification Agent for Dynamics 365

Introducing the Sales Qualification Agent for Dynamics 365 Sales



The screenshot displays the Dynamics 365 Sales hub interface. On the left, a navigation pane lists various sections: Home, Recent, Private, My work (Sales accelerator, Dashboards, Activities), Customers (Accounts, Contacts), Sales (Leads, Opportunities, Competitors), Colateral (Quotes, Orders, Invoices, Products, Sales Literature), Marketing (Marketing lists, Quick Campaigns), and Performance (Sales). The main content area shows a 'My open leads' section with a summary: 'Hi Mona, 68% of goal achieved and rest can be achieved by focusing on 20 top leads.' Below this, a Copilot-generated message states: 'Copilot has pinpointed 20 key leads that show strong purchase intent and are actively engaging. These leads need your attention.' Two suggested actions are visible: 'Engage with Jane Reyes' (with a note that she may be interested in upgrading espresso machines) and 'Prepare for meeting with Allan Munger' (with a note to prepare for a high-flying meeting). Below the suggestions is a search bar 'Sort, filter and search with Copilot' and a table of leads.

Name	Topic
<input type="checkbox"/> Wilfred Asher	Cafe A100 for commercial use
<input type="checkbox"/> Julia Lovel	Upgrading service plan
<input type="checkbox"/> Harriet Curtis	Issue with throughput on EspressoMaster
<input type="checkbox"/> Jermaine Bennett	New roaster in distribution facility
<input type="checkbox"/> Gerald Stephens	Concerns on current machines
<input type="checkbox"/> Hufe Griffiths	Expanding business
<input type="checkbox"/> Rachel Michael	Addressing service concerns
<input type="checkbox"/> Alex Baker	Premium coffee beans
<input type="checkbox"/> Lily Pyles	Cafe A100 bulk rate
<input type="checkbox"/> Jane Reyes	Improving cost per cup

# Sales Qualification Agent for Dynamics 365

## Sales Qualification Agent click through Demo



The screenshot displays the Dynamics 365 Sales Hub interface. At the top, a summary card for 'My open leads' shows a progress bar for '1 month until Q4 2025 ends' with a target of \$45 million, 68% of which has been achieved. Below this, Copilot has pinpointed 20 key leads. Two lead cards are visible: one for Jane Reyes (COO of Northwind Traders) with the task 'Engage with Jane Reyes' and a note that she is interested in upgrading espresso machines; another for Allan Munger (Head of Real Estate Development at Contoso Coffee) with the task 'Prepare for meeting with Allan' and a note about a meeting scheduled for 2 PM regarding a service contract upgrade. To the right, 'Other key activities' include 'Cafe A100 for Woodland Bank' and a 'Partnership opportunity for Fabrikam'. A central black overlay box contains the text: 'Welcome to Sales Qualification Agent Demo. The Sales Qualification Agent is designed to automate manual aspects of the sales process such as researching leads and reaching out to customers so you can maximize your time building customer relationships and closing deals. LET'S TAKE A LOOK'. Below the overlay is a table of leads.

Name	Description	Status	Created on
<input type="checkbox"/> Winford Asher			4/02/2024 12:00 PM
<input type="checkbox"/> Josia Love	Upgrading service plan	New	3/30/2024 7:45 AM
<input type="checkbox"/> Harrison Curtis	Issue with throughput on EspressoMaster	New	3/28/2024 3:30 PM
<input type="checkbox"/> Jermaine Berrett	New roaster in distribution facility	New	3/25/2024 11:05 AM
<input type="checkbox"/> Gerald Stephens	Concerns on current machines	New	3/23/2024 4:50 PM
<input type="checkbox"/> Halle Griffiths	Expanding business	New	3/21/2024 10:20 AM
<input type="checkbox"/> Rachel Michael	Addressing service concerns	New	3/19/2024 1:15 PM
<input type="checkbox"/> Alex Baker	Premium coffee beans	New	3/17/2024 8:00 AM
<input type="checkbox"/> Lilly Pyles	Cafe A100 bulk rate	New	3/13/2024 2:45 PM
<input type="checkbox"/> Jane Reyes	Improving cost per cup	New	3/10/2024 9:30 AM

# Case Management Agent for Dynamics 365

Get started with the Case Management Agent for Dynamics 365



Dynamics 365  
**Case Management Agent**

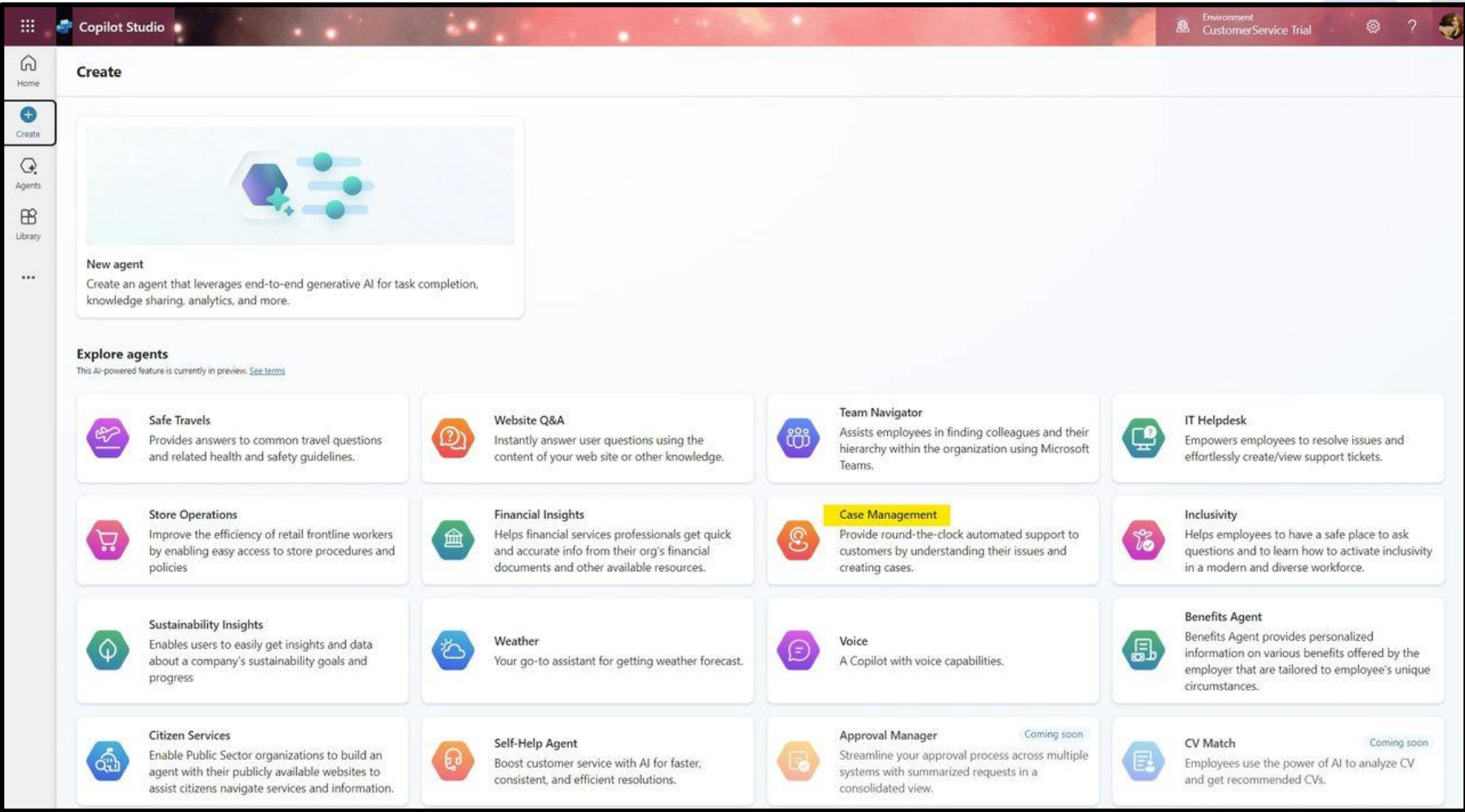
The screenshot displays the Dynamics 365 Customer Service workspace. On the left, a chat window shows a conversation with a customer named Christie Cline. The Virtual Assistant suggests closing the Cloud Storage Drive application and re-opening it. Christie Cline responds that the issue is resolved but she has a new problem: she cannot restore a previous version of a file. The Virtual Assistant offers to connect her with an agent. Below the chat is a 'Conversation summary' section. On the right, the 'Case Management Agent' interface is visible, showing a case titled 'Restore file to previous version in Cloud Storage Drive' with a case number of CAS-47999-RS. The case details include SLA information, a description, and primary details such as customer name, title, type, product, subject, origin, and creation date.

# Live Demo of D365 Autonomous Agents?



# Pre-built Case Management Agent in Copilot Studio

## Case Management Agent - Microsoft Copilot Studio | Microsoft Learn



# ServiceNow and Microsoft expand strategic alliance...

ServiceNow and Microsoft to modernize front-office processes – ServiceNow Press Nov 19, 2024



**servicenow.**

Products ▾ Platform ▾ Partners ▾ Resources ▾ Company ▾

## ServiceNow and Microsoft expand strategic alliance to modernize the front-office with Copilot and AI agents

*Enhanced alliance builds on existing ServiceNow Now Assist and Microsoft 365 Copilot integration that streamlines workflows and enables self-service capabilities within Microsoft apps*

*Microsoft Copilot and ServiceNow AI agent collaboration will bring together two leading AI offerings to drive maximum value across every corner of a business*

SANTA CLARA, Calif. – Nov. 19, 2024 – [ServiceNow](#) (NYSE: NOW), the AI platform for business transformation, today announced an expanded strategic alliance with Microsoft to modernize front-office business processes with Copilot and agents.

The news builds on years of partnership bringing new advanced cloud and AI capabilities to customers in their flow of work. Most recently, both companies introduced [ServiceNow Now Assist and Microsoft 365 Copilot integration](#) which streamlines workflows and enables self-service capabilities within Microsoft applications. Initial use cases include employee and IT scenarios where employees working in Microsoft Teams can use Copilot to search the ServiceNow knowledge base, request service catalog items through a guided, conversational experience, and ask to chat with a live agent when a case needs to be escalated. Now Assist provides employees with responses to questions as well as recommended actions and next steps in a conversational manner based on domain knowledge of the enterprise and awareness of the user's context and organizational data from Microsoft 365 chats, email, calendar, and files.

AI-enhanced products and services are rapidly becoming a central theme for C-suite executives looking to digitally transform their businesses. With this expanded partnership, ServiceNow and Microsoft will advance their vision to reimagine the front-office with a Microsoft Copilot and ServiceNow AI agent collaboration that leverages the unique strengths of both platforms. Guided by strong governance and human oversight, these front-end agents will solve customer problems in Copilot to seamlessly connect back-end workflows. Copilot will streamline user tasks through intelligent automation, while ServiceNow AI agents orchestrate workflows, providing real-time responses to complex issues, ultimately collaborating to execute tasks on behalf of employees.

As AI transforms every corner of work, customers are migrating from legacy systems of record. Together, Microsoft and ServiceNow are innovating to help customers drive maximum value with GenAI, including through a new shared initiative to modernize their front-office. With this joint commitment, customers will benefit from customizable, interoperable solution offerings spanning ServiceNow and Microsoft products, which move customers to AI-first business processes across the enterprise.

# Create Power Platform Solutions with AI and Copilot

## Create Power Platform solutions with AI and Copilot - Training | Microsoft Learn



3500 XP

### Create Power Platform solutions with AI and Copilot

4 hr 12 min • Learning Path • 6 Modules

Beginner App Maker Business User Microsoft Power Platform Power Apps Power Automate Microsoft Copilot AI Builder  
Microsoft Dataverse Power Pages

Do you want to create intelligent apps for your organization fast? Then this path is for you. It introduces you to creating Power Platform solutions with Copilot to speed up development and add AI functionality to make your solutions more intelligent.

This Learning Path covers the new GPT powered experiences for Power Platform including:

- Excel to Power App
- Power Apps Copilot
- Power Automate Copilot
- AI Builder create text with GPT using a prompt
- Power Pages Copilot
- Create copilots with natural language

#### Prerequisites

- New to Copilot? Start with this learning path: [Get started with Copilot for Microsoft Power Platform learning path](#)
- You'll need a Power Apps Developer environment (based in the United States region) with a licensed user to complete these exercises.
- An AI Builder trial or license
- A Power Pages trial or license
- A Copilot Studio trial or license

[Start >](#) [+ Add](#)

# Create a Copilot (aka Agent) for a real estate solution...

Create a copilot for a real estate solution using natural language in Copilot Studio - Training | Microsoft Learn

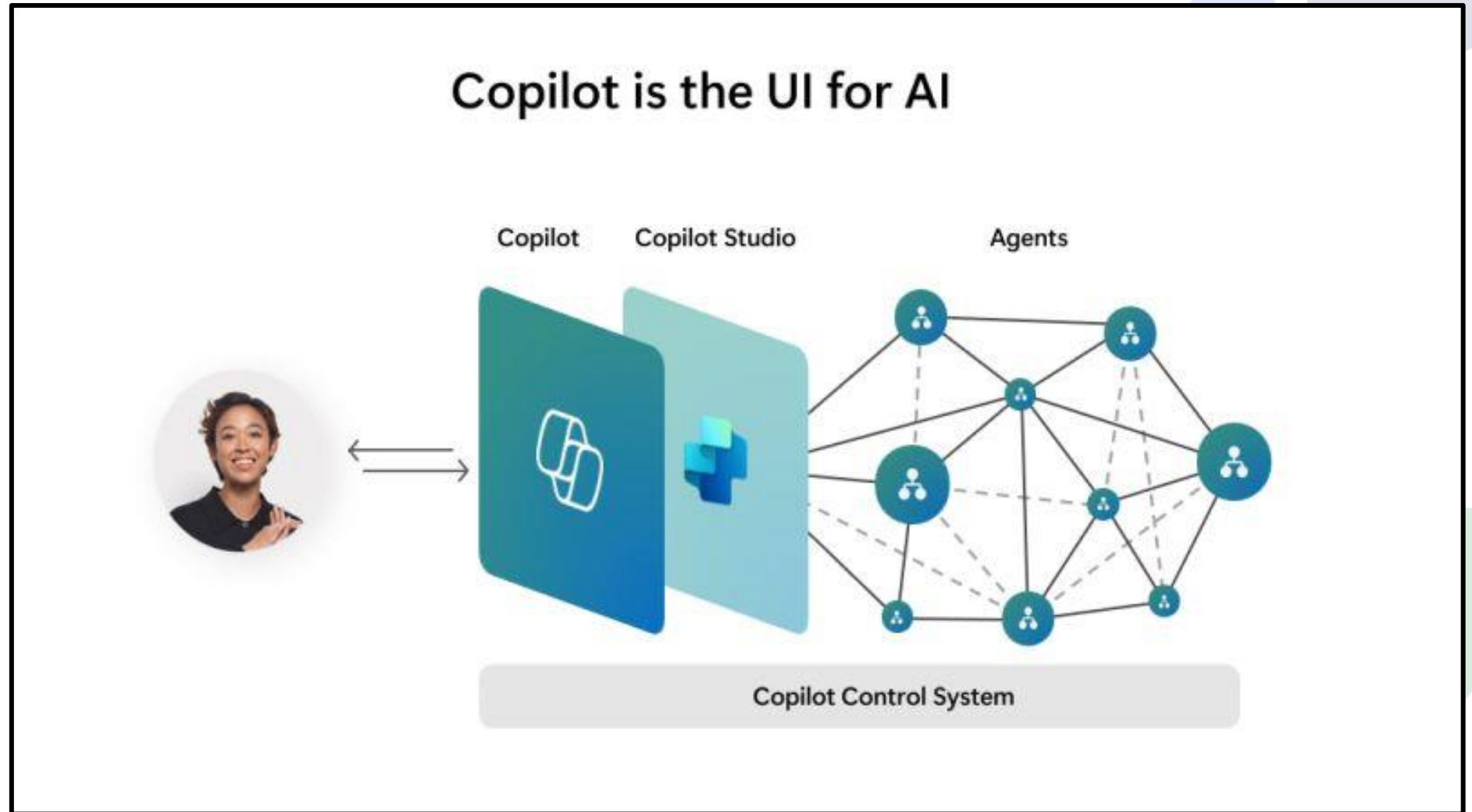


A screenshot of the Copilot Studio web interface. The main content area displays the configuration for an agent named 'Real Estate Booking Service'. At the top, a blue banner reads 'Your agent is ready! Here's what's next:' with three bullet points: 'Add actions so your agent can do things for you', 'Build topics to focus and guide how your agent answers', and 'Publish your agent so others can use it'. Below this, the 'Details' section shows the agent's name, description, and instructions. The 'Orchestration' section has a toggle for 'Use generative AI to determine how best to respond to users and events (preview)' which is currently 'Enabled'. The 'Knowledge' section includes a link to 'Add knowledge' and a toggle for 'Allow the AI to use its own general knowledge' which is 'Disabled'. A URL 'https://contosorealestate-1234.powerappsportals.com/' is listed under knowledge. The 'Actions' section has a link to 'Add action'. On the right side, a 'Test your agent' panel shows a chat window with a message: 'Hello, I'm Real Estate Booking Service, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.' Below the chat is a text input field with a character count '0/2000' and a 'Send' button. The top navigation bar includes 'Home', 'Create', 'Agents', and 'Library'. The top right corner shows 'Environment: Heuristics Environment', 'Published 12/9/2024', and buttons for 'Publish', 'Settings', and 'Test'.

# Autonomous Agents at Microsoft Ignite 2024 Pt.2

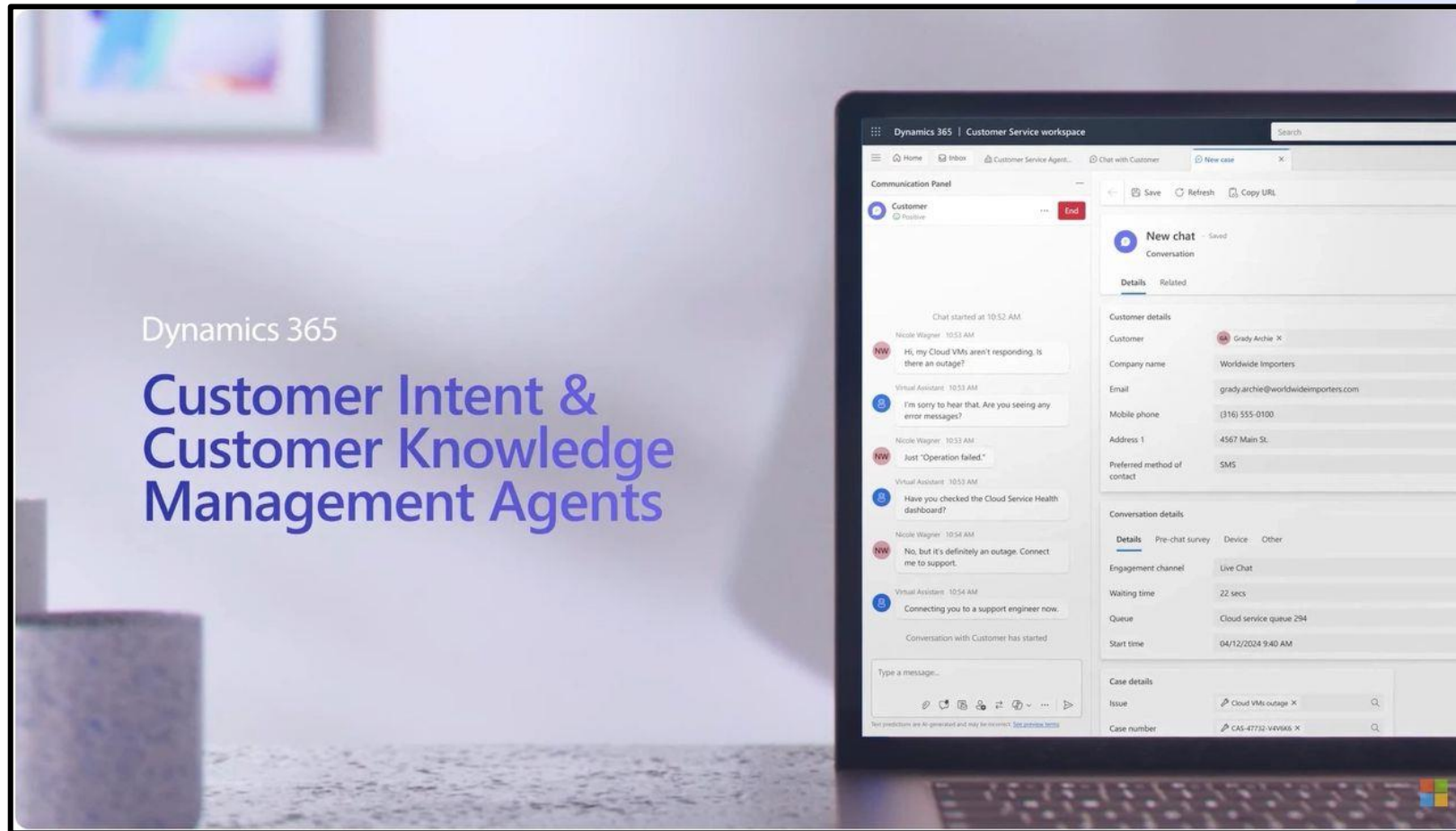
# Copilot is the UI for AI

[Introducing Microsoft Copilot actions, new agents, and tools to empower IT | Microsoft 365 Blog](#)



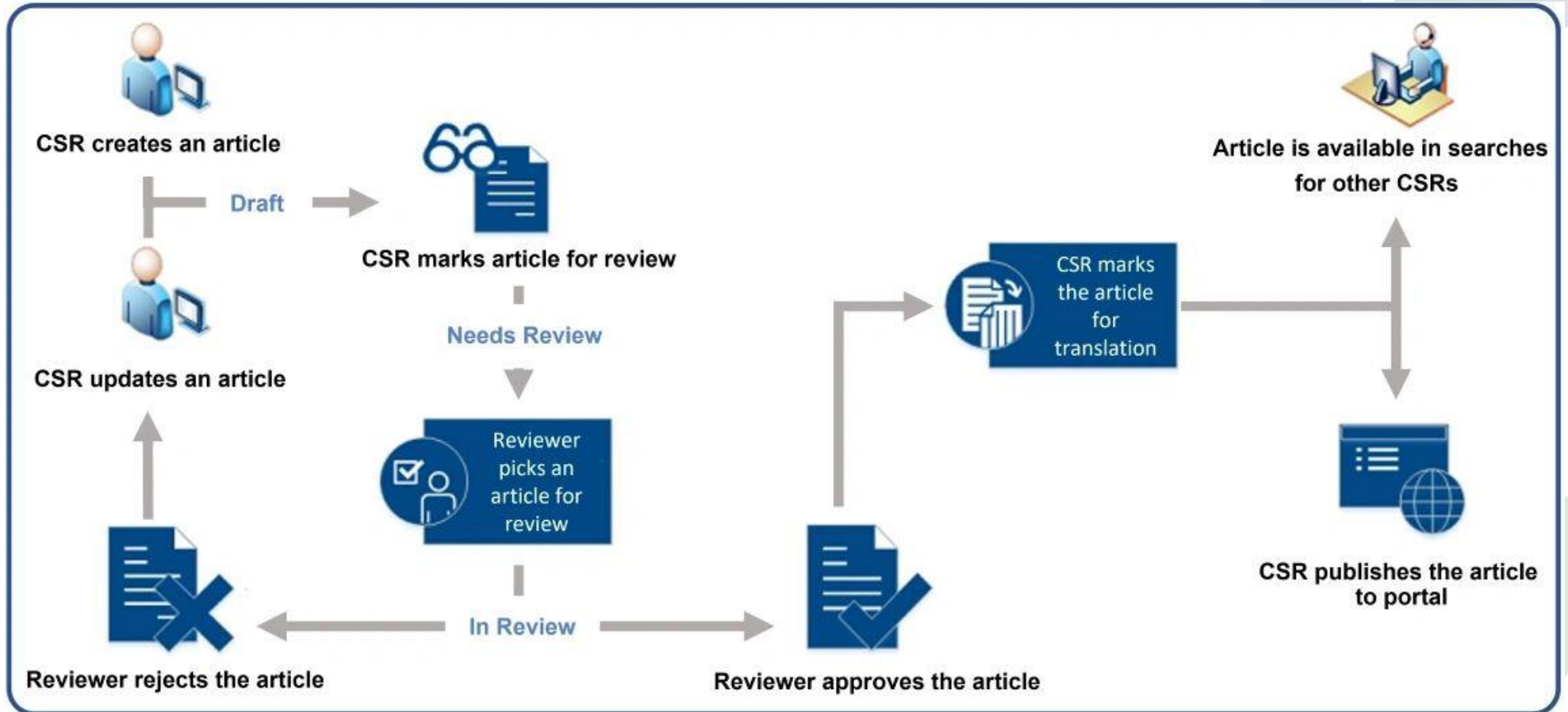
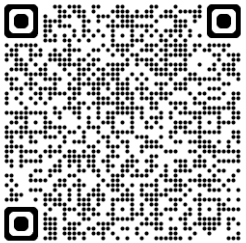
# Customer Intent & Customer Knowledge Management Agents for Dynamics 365

Get started with the Customer Intent & Customer Knowledge Management agents for Dynamics 365



# Knowledge Management in D365 Customer Service

## Convert a case to a knowledge article | Microsoft Learn





THANK YOU!  
ANY QUESTIONS?



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<https://heuristicdev.co.uk>