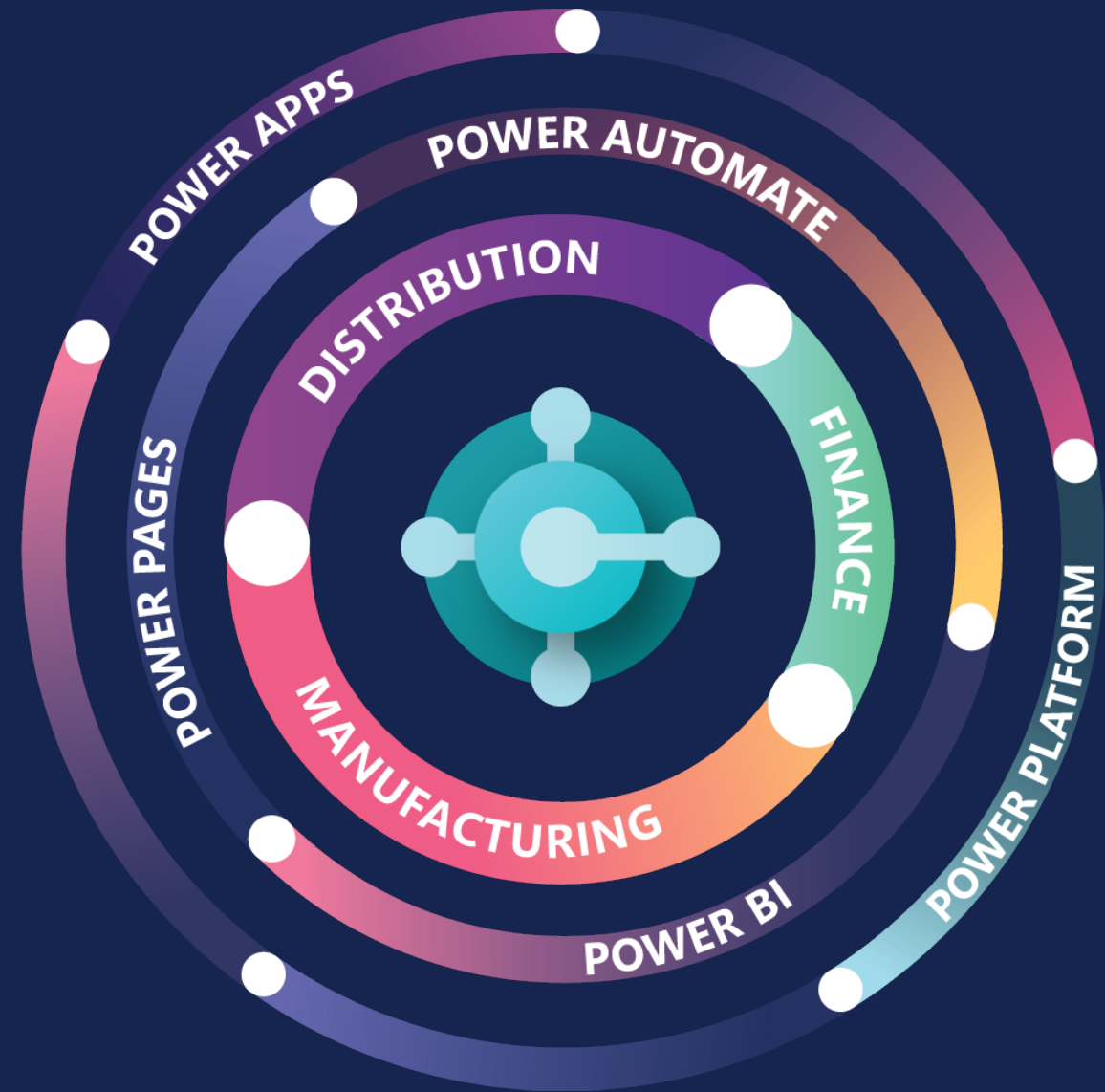


BUSINESS CENTRAL connect

Chat GPT and Dynamics
CRM have had a love child –
why you need to adopt it?





Can you hear me?



Is everything clear?



~ 45 mins



Q & A



Hi!
I'm Jason

What we'll cover

1. Co-Pilot in CRM – What's Its Aim?
2. Dynamics 365 Sales Copilot
3. Dynamics 365 Customer Service Copilot
4. Dynamics 365 Customer Insights Copilot
5. Dynamics 365 Field Service Copilot
6. Am I a Fan? Am I in Love?
7. What's next for CRM Copilot?





What's the aim of copilot in CRM

“To bring to life your business relationships with the data available using natural language, to **help** identify trends, opportunities, risks and manage issues efficiently. **Assisting** employees with the priority of the tasks at hand”



Dynamics 365 Sales Copilot

Dynamics 365 Sales Copilot

Home Screen

- Front and centre highlights
- Latest account news
- Prepare for meetings
- What's newly assigned to me
- And more...

Co-Pilot Chat

- Get info
- Ask questions
- Stay ahead
- Or ask about data in the CRM app
- Assist on emails

Dynamics 365 | Sales Hub

Search

New look

Copilot Preview

Hi Jason Tromans,
Welcome to Copilot. Select one of the suggestions below to get started.

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.

Get latest news for accounts

Here's some news from Bing for your top accounts.

Sisters' Side Hustle Earns \$45M+ After a 'Light Bulb ...' - Entrepreneur
16 hours ago

Business News | Today's International Headlines | Reuters
1 day ago

Business | PBS News
3 days ago

The Latest News from Howard and Anne Arundel Counties | The Business ...
3 days ago

Cedar Rapids Business News, Iowa City Business News | The ... - The Gazette
3 days ago

Show more on Bing

What's new with my sales records

Here are the latest updates with your sales records.

Opportunity updates (2)

Enquiry for new Puzzle Range
Est. close date was updated to "9/29/2024" and more updates in last 7 days

Interest in Arcade Games
Est. close date was updated to "12/31/2024" and more updates in last 7 days

Lead updates (0)

Account updates (0)

All-generated content may be incorrect

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](#)

Dynamics 365 | Sales Hub

Search

New look

Save Save & Close + New Open org chart Deactivate Connect Add to Marketing List Dynamics 365 Busines... Assign Delete Share

Tesco Stores Limited - Saved 1010 Account Number Annual Revenue Number of Employees KW Kelly Wood Owner

Summary Online Trade Details Details Servicing Files Related

ACCOUNT INFORMATION

Account Number: 1010

Account Name: Tesco Stores Limited

Relationship Type: Customer

Sales Channel: High Street

Relationship Type: Customer

Account Tier: Silver

Account Status: Stable

Phone: 01707 500600

Email: ---

Website: https://www.tesco.com

Parent Account: ---

CONTRACT DETAILS

Contract Signed: Yes

Contract Start Date: 01/01/2024

Contract Signed Date: 01/01/2024

Date of Last Contact: ---

ADDRESS

Service Address: Accounts Payable, Shire Park, Kestrel Way, Welwyn Garden City Hertfordshire, AL7 1GA, GB

Timeline

Search timeline

Enter a note...

Highlights

There's not enough information to generate highlights.

Recent

Modified on: 09:37

Appointment from: Jason Tromans (Active)

Meeting to discuss 2025 pricing

View more

Modified on: 01/07/2024 20:56

Phone Call from: Jason Tromans (Overdue)

Follow up to discuss commercials and timescales

View more

Contact: Jess Gilbert

Auto-post on Account Tesco Stores Limited: 06/05/2022 16:41
Account created by Business Central I...

Primary Contact

Jess Gilbert

Email: ---

Business: 01707 500600

Dynamics 365 Business Central Customer No.

1010

Balance

£0.00

Modified On

17/07/2024

12:45

Sales

Outstanding Orders: £11.02

Shipped Not Invd.: £0.00

Outstanding Invoices: £0.00

Service

Outstanding Serv. Orders: £0.00

Serv. Shipped Not Invd.: £0.00

Outstanding Serv. Invoices: £0.00

Total

£11.02

Credit Limit

£150,000.00

Overdue Amounts

Copilot

Chat Email (preview)

Here's the summary for **Tesco Stores Limited**

Account summary

Country/Region: GB

Key info

- Tesco Stores Limited has been a customer with us since 06/05/2022 16:40.
- The Account is owned by Kelly Wood with a Credit Limit of £200,000.00.

Copy Copy to email

AI-generated content may be incorrect

Get latest news for account

Here's some news from Bing that mentions **Tesco Stores Limited**

TSCOL - | Stock Price & Latest News | Reuters
3 days ago

Tesco H1 sales surge to £31.46bn in fiscal 2024/25
10 days ago

Britain's Tesco lifts profit outlook after strong first half
10 days ago

Tesco Lifts Outlook as Sales Gain Amid Easing Inflation - Bloomberg.com
11 days ago

Tesco Lifts Guidance on Robust Volume Growth - Update
11 days ago

Show more on Bing

View Prompts

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

Dynamics 365 Sales Copilot Ctd....

Co-Pilot for Sales in Outlook

- Create, read and update and delete CRM records
- Save email and meeting to CRM
- General email summary
- Draft email responses
- View Opportunity Summary

Teams Meetings

- Collaboration spaces
- Use during a Teams meeting (connected CRM record)
- Meeting Summary
- Conversation Intelligence dashboard



Miguel Silva



Leticia Rivas



Maria Lopez



Emily Phillips

Copilot

Meeting prep

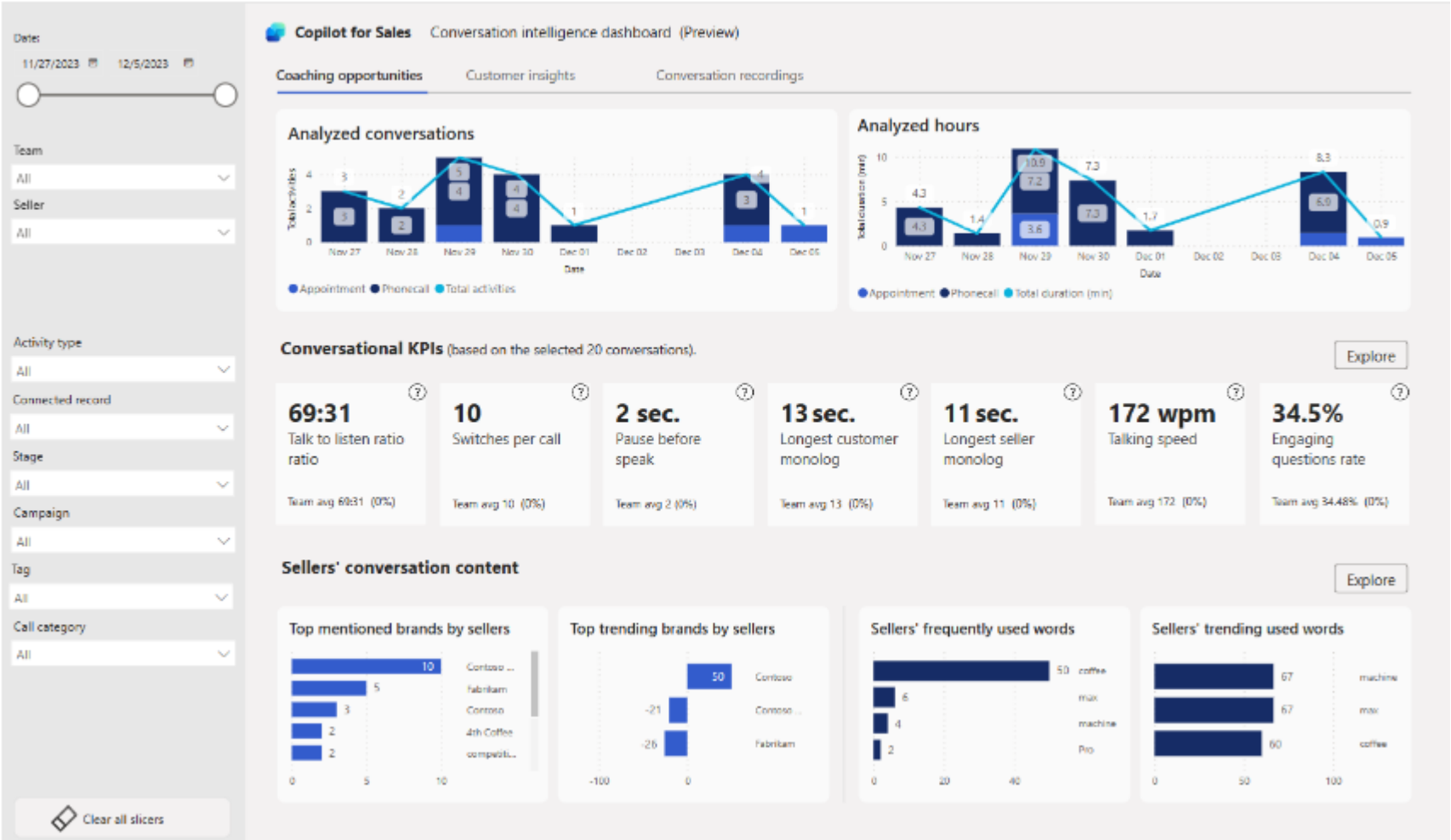
Here are some points to consider for the meeting: Reviewing RFP - They Research | Alpine Ski House with Maria Lopez and Miguel Silva from Alpine Ski House

- Strategic Direction for Alpine Ski House: Understand their expansion goals and challenges to provide targeted advice.
- Marketing Optimization: Discuss ways to enhance their brand positioning and customer engagement strategies.
- Digital Integration Solutions: Recommend technology enhancements for improved operational capabilities.
- Tailored Approaches: Develop personalized strategies to support their growth objectives.

2 references

- Alpine Ski House
- Strategic Advisory Services

Conversation Intelligence





Dynamics 365 Customer Service Copilot

Dynamics 365 Customer Service Copilot

Case Summary

Summarising the case based on the timeline, including emails and notes. Meaning can quickly get up to speed.

Assist in Emails

Using the content of the case, assist in communicating back to the client on the status of the case

Chat – KBA Search

Help resolve or investigate case by getting Co-Pilot to search an approved knowledgebase for the user.

Dynamics 365 Customer Service Hub

Search

New look

Save Save & Close Save & Route Refresh New Convert to Work Order Resolve Case Cancel Case Assign Add to Queue Create swarm Queue Item Details Create Child Case Share

AM Arcade Machine - Blue Screen - Saved

High Priority 08/10/2024 17:20 Created On Logged Status Jason Tromans Owner

Phone to Case Process Active for 5 days

Logged Under Investigation (5 D) Resolution Proposed Resolved

Summary Case Relationships Enhanced SLA Details Associated Knowledge Records Additional Details Social Details Articles and Contract Information Field Service Related

CASE DETAILS

Case Title: Arcade Machine - Blue Screen

ID: CAS-01152-Z6Y1S1

Customer: [Cotswolds Gift Shop Limited](#)

Contact: [Edward Hughes](#)

Project: ---

Origin: Email

CASE SUMMARY

The arcade machine on display in the store has blue screened. Only been in situ for less than 3 months. Now is in prime position in shop and is turned off and not a good look

CUSTOMER SERVICE

Publish to Web:

Steps to Reproduce: ---

Resolution Date: ---

Resolution: ---

Summary

TIMELINE

Timeline

Search timeline

Enter a note...

Highlights

- Requested images of blue screen for the arcade machine on a phone call and potentially need to source an engineer to update the software version.
- Received pictures for review, will come back with next steps soon. Apologized for any inconvenience caused.

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

Pinned (1)

Modified on: 08/10/2024 19:56

Note modified by Jason Tromans

Potentially need to source an engineer to visit and update the software version

View more

Recent

Modified on: 10:03

Phone Call from: Jason Tromans Closed

Ask for images of blue screen

View more

Modified on: 09:56

Email from: Jason Tromans Closed

Thanks for feedback CRM:0001013

Thanks for sending the pictures, we will now review and come back asap with next steps. Again, we apo...

View more

Modified on: 08/10/2024 19:58

Email from: Jason Tromans Closed

Sorry CRM:0001011

View more

APPLICABLE SLA

Resolve By: ---

First Response By: ---

SLA Timers

Last update: 14/10/2024 10:03

First Response By: ---

Resolve By KPI: 07d 01h

CUSTOMER DETAILS

Cotswolds Gift Shop Limited

Email: ---

Phone: 01242 301205

RECENT CASES

Status	Case Title
Active	Arcade Machine - Blue Screen
Active	10.45 Arcade machine dent.
Active	Test
Active	Damaged machine - screen crac...
Active	6th June Arcade Machine

Rows: 12

Entitlement

Entitlement No... Remaining Terms Status

AM **Arcade Machine - Blue Screen** - Saved
 Case · Case ▾

High Priority | 08/10/2024 17:20 Created On | Logged Status | JT Jason Tromans Owner

Phone to Case Process Active for 5 days | Logged | Under Investigation (5 D) | Resolution Proposed | Resolved

Summary Case Relationships Enhanced SLA Details Associated Knowledge Records Additional Details Social Details Articles and Contract Information Field Service Related ▾

CASE DETAILS

Case Title * Arcade Machine - Blue Screen

ID CAS-01152-Z6Y1S1

Customer * [Cotswolds Gift Shop Limited](#) ×

Contact [Edward Hughes](#) ×

Project ---

Origin Email

CASE SUMMARY

The arcade machine on display in the store has blue screened. Only been in situ for less than 3 months. Now is in prime position in shop and is turned off and not a good look

CUSTOMER SERVICE

Publish to Web

Steps to Reproduce * ---

Resolution Date ---

Resolution ---

TIMELINE

Timeline

Search timeline

Enter a note...

Highlights

- Requested images of blue screen for the engineer to update the software version.
- Received pictures for review, will come back

Copy Refresh

AI-generated content may be incorrect. Make sure AI-generated content is accurate.

Pinned (1)

JT Modified on: 08/10/2024 19:56
 Note modified by Jason Tromans
 Potentially need to source an engineer
 View more

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 Thanks for sending the pictures, we will
 View more

JT Modified on: 08/10/2024 19:58
 Email from Jason Tromans
 Sorry CRM:0001011
 View more

Modified on: 08/10/2024 17:21

Compose

New Email - Unsaved
 Email · Email ▾

Normal Priority | Draft Status Reason | JT Jason Tromans Owner

Email

From Jason Tromans (Available) ×

To Edward Hughes ×

Cc ---

Bcc ---

Subject ---

Attachment

Attachments (0) < > + ▾ :
 No attachments included.

Email Engagement

- Recipient Activity will be followed Do Not Follow
- Schedule email to be sent at a later time. Send Later
- Set a reminder to follow up on this email. Set a Reminder

Draft with Copilot

Segoe UI 11 B

Draft with Copilot

What kind of email do you want?

- Suggest a call
- Request more information
- Empathize with feedback
- Provide product/service details
- Resolve customer's problem
- Describe what you need

Dynamics 365 | Customer Service Hub

Search

New look

AM **Arcade Machine - Blue Screen** - Saved

High Priority | 08/10/2024 17:20 Created On | Logged Status | Jason Tromans Owner

Phone to Case Process Active for 5 days | Logged | Under Investigation (5 D) | Resolution Proposed | Resolved

Summary | Case Relationships | Enhanced SLA Details | Associated Knowledge Records | Additional Details | Social Details | Articles and Contract Information | Field Service | Related

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Search timeline

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View more

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View more

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View more

Modified on: 08/10/2024 19:58

Email from: Jason Tromans Closed

Sorry CRM:0001011

View more

APPLICABLE SLA

Resolve By: ---

First Response By: ---

SLA Timers Last update: 14/10/2024 10:03

First Response By: ---

Resolve By KPI 07d 01h

CUSTOMER DETAILS

Cotswolds Gift Shop Limited

Email: ---

Phone: 01242 301205

RECENT CASES

- Arcade Machine - Blue Screen Active
- 10.45 Arcade machine dent. Active
- Test Active
- Damaged machine - screen cracked Active
- 6th June Arcade Machine Active

1 - 12 of 12 | Page 1

Entitlement

Copilot

Get AI-powered help with solving customer issues.

Ask a question | Write an email

Clear chat

How can I resolve a blue screen on arcade machine

To resolve a blue screen on an arcade machine, follow these steps:

- Unplug and restart the machine.
- If the blue screen persists, boot the machine in safe mode and run a diagnostic.
- If the issue still persists, contact Retro Stop for an engineer to attend the site and consider a software update.

Edit | Translate

AI-generated content may be incorrect. Check sources

Describe what you need

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



Dynamics 365 Customer Insights Copilot



Microsoft
Dynamics 365

Starting in February 2024, Gmail and Yahoo will require all marketing emails to support one-click unsubscribe. Navigate to Settings->Feature Switches to turn the feature on. [Learn more](#)

- Recent
- Pinned
- Engagement
 - Get started
 - Journeys
 - Analytics
 - Triggers
- Audience
 - Segments
 - Accounts
 - Contacts
 - Leads
 - Opportunities
 - Consent center
- Channels
 - Emails
 - Forms
 - Push notifications
 - Text messages
 - More channels
- Real-time journeys

Create journey with Copilot

Multiple types of business records are available for the journey.

Contact

Submit

Marketing Form Submitted

Good choice! For this trigger, you can select a record to orchestrate on. Please select one record from the box below, or leave it blank if you want to orchestrate on all records.

Choose a trigger *

Marketing Form Submitted

Choose from the events for all forms

To create another customer journey, describe it in everyday words

0/500

Make sure AI-generated content is accurate and appropriate before using. This feature is in preview. [Terms of use](#)

Preview: Contact submits marketing form

Trigger: Marketing Form Submitted | Audience: Contact

If/then branch
If Phone Call Completed

Yes No

Email
Follow-up Email

Exit

Skip and create from blank



Dynamics 365 Field Service Copilot

Copilot features in Field Service

Chat

- List work orders
- Who is booked for WO XXX
- What products are used on WO XXX

Summary

- Summarise the work order record using the data inside

Dynamics 365 | Field Service

Search

New look

WO-00023 - Saved
Work Order · Work Order

09/10/2024 10:44 Created on
Cotswolds Gift Shop Limited Service account

General | Products and services | Tasks | Reference | Timeline | Related

Details

Status: Scheduled

Priority: No priority

Service account: Cotswolds Gift Shop Limited

Work order type: Arcade Machine Repair

Incident type: Arcade Machine Repair

Agreement: ---

Summary: Blue screen on machine in the showroom/store

Account instructions: Access is from 7.30am Mon-Sat. Always ask for Manager/Supervisor

Promised window: 11/10/2024 07:30 - 12/10/2024 17:30

Time window: ---

Timeline notes: ---

Location

Functional location: ---

Service address: Chalk Road, dfdsfd, Cheltenham Gloucestershire GL50 1BA, GB

Copilot PREVIEW

You are scheduled to work on an arcade machine repair in Cheltenham, Gloucestershire, with access available from 7:30 AM, Monday to Saturday. You should arrive on-site by 7:30 AM on November 10, 2024, and the work is expected to be completed by 5:30 PM on November 12, 2024.

Your tasks include:

1. Triage the arcade machine to identify the fault.
2. Repair the arcade machine.
3. Observe the machine to ensure it is back in working order.

You will need to have the skills of an arcade machine repairer to perform these tasks effectively.

Ben Humphries is the assigned resource for this work, with a scheduled booking starting on September 10, 2024, at 2:15 PM, lasting for 6 hours.

Make sure to ask for the manager or supervisor upon arrival for access to the site.

Please review before using to ensure this AI-generated content is accurate, complete, and appropriate. [Learn more](#) [Terms](#)

Regenerate

Booking

BH Ben Humphries

09 Oct 2024

14:15 - 20:15

6h

No travel required

Scheduled

Rebook

Contacts

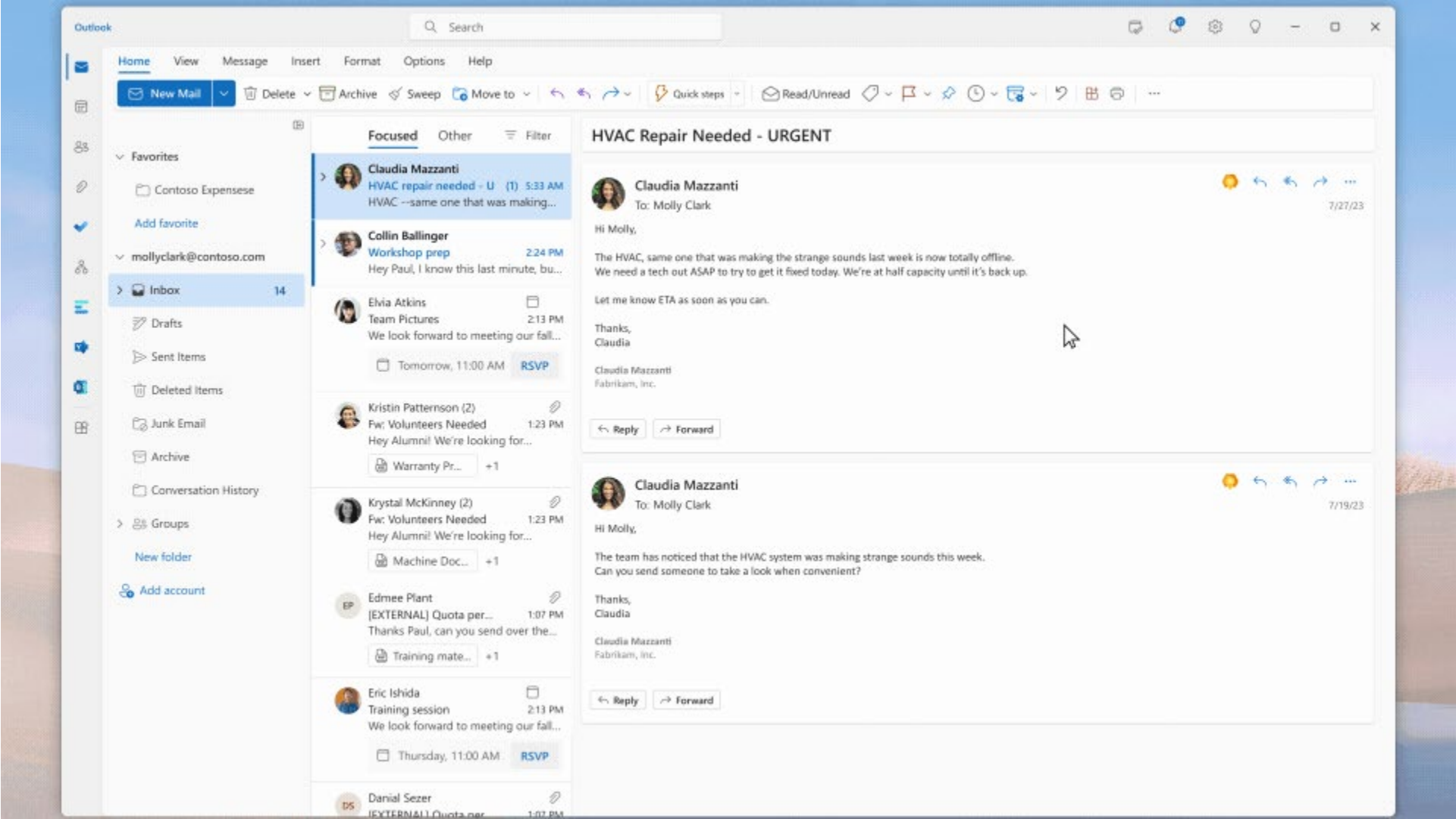
Service Account

Edward Hughes
Managing Director
Cotswolds Gift Shop Limited

edward@cotswold.com
Message

Assets

Primary asset: ---





Am I a Fan? Am I in Love?

My love is growing...

Insightful

Ability to surface insight and summaries easily

Help users prioritise on the most important tasks

Engaging

Allow ability to engage quicker and more efficiently with customers, but also relationships across the business

Starting to help identify the behaviours and trends

Involve the rest of the business easier

Frustrating

Doesn't work with 'Professional' based CRM licenses

There are dependencies on M365 Co-Pilot for Sales & Service too (additional licenses)

Data structures need to evolve – meaning turning on copilot right now may not give instant results

Questions must be structured

Worthy of Divorce? AI Suggestions...

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface for creating a new account. The main content area is titled "New Account" and shows a form with several sections: "ACCOUNT INFORMATION", "CONTRACT DETAILS", and "ADDRESS". The "ACCOUNT INFORMATION" section includes fields for Account Number, Account Name, Relationship Type (set to "Prospect"), Sales Channel, Phone, Email, Website, and Parent Account. The "CONTRACT DETAILS" section includes fields for Contract Signed (set to "No"), Contract Start Date, Contract Signed Date, and Date of Last Contact. The "ADDRESS" section includes a Service Address field. A large message in the center of the form reads "Almost there. Select Save to see your timeline." The left sidebar shows navigation options, and the top bar includes a search bar and a notification for "Try form fill assistance".

What's next for CRM Copilot?

Sales

Create Opps from meeting summary

Manage objections in real time

Adoption metrics

Update CRM from Teams Meeting Insight Page

Service / Customer Insights

Create emails and campaigns with copilot

Understand custom fields

Extend it....

Copilot studio – see the last session of the day- AI – is it productive or expensive hype?

Work cross application....



Your business relationships are better *with copilot* than without

(without structured data = copilot pointless)

Thank you.

BUSINESS CENTRAL

connect

15th & 16th OCTOBER 2024

