Microsoft

Nyheter i D365 Customer Engagement

DynUG Høstkonferanse, 24. november 2026



O. Stian Lundquist
Microsoft

Welcome, Agentic CRM

Designed for people, in flow of work

Dynamics CRM

NEW WAY OF WORK

Copilot

Chat, Cowork, Autopilot, Code



Productivity Apps

Teams, Outlook, PowerPoint, etc.



IN PLACE

Dynamics 365 Apps

Sales, Customer Service, Customer Insights



Dynamics 365 CRM Plugins & Agents

Work IQ

Tools | **Skills** | **Semantic Model** | **Shared Memory**

Business Data

Dynamics 365



Productivity Data

Microsoft 365



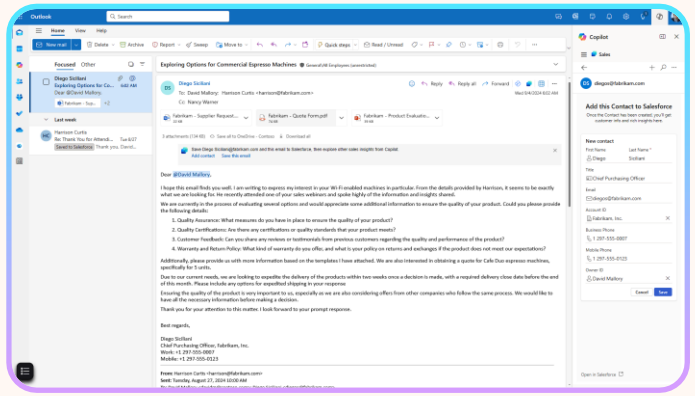
Custom Data

Custom Data Sources

Productivity-first sales powered by Agentic CRM

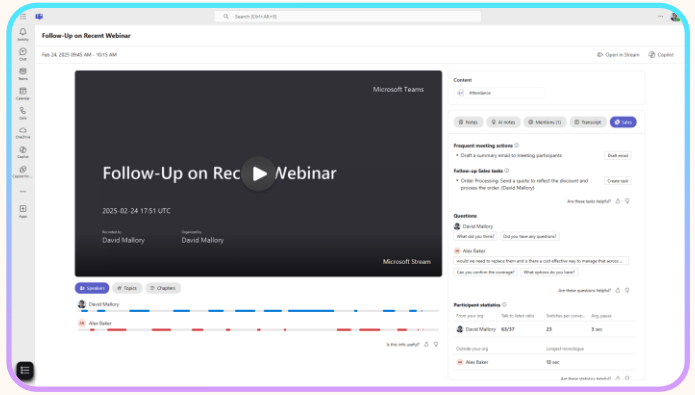


8:00AM



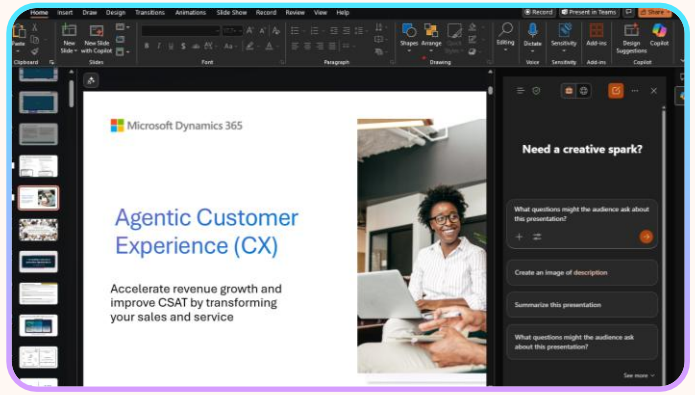
Proactively shares insights on upcoming customer meetings

11:00AM



Deliver deep meeting and customer insights based on data in CRM, emails and meeting notes

3:30PM

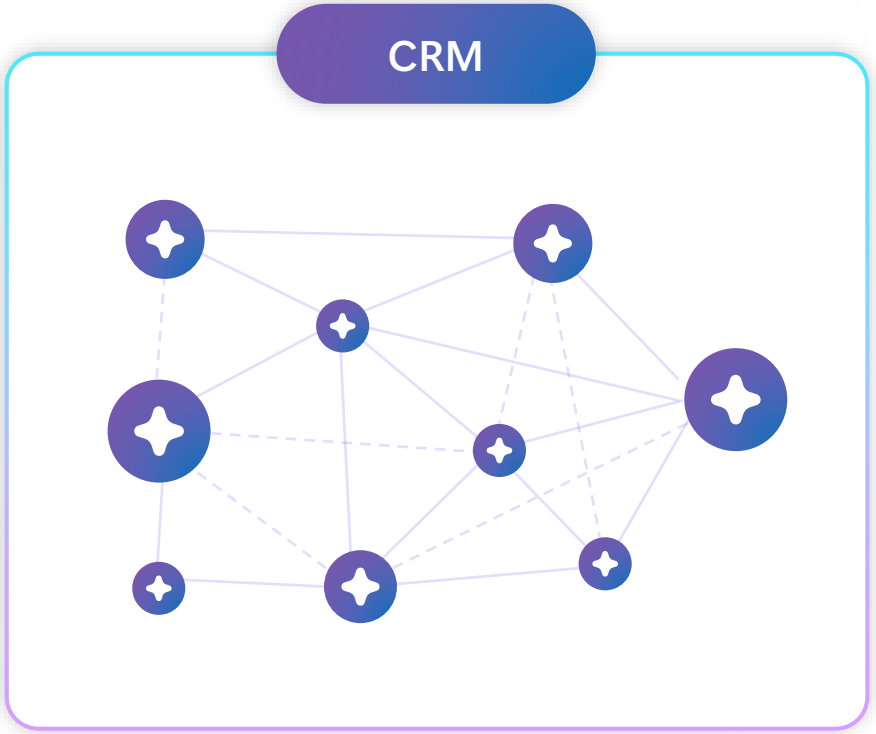


Consistent user experiences, along with chat and researcher functionality

The constraints CRM?

Tools + work disconnected

Burden on sellers



Leads | Opportunities | Cases | Knowledge

No incentive to update

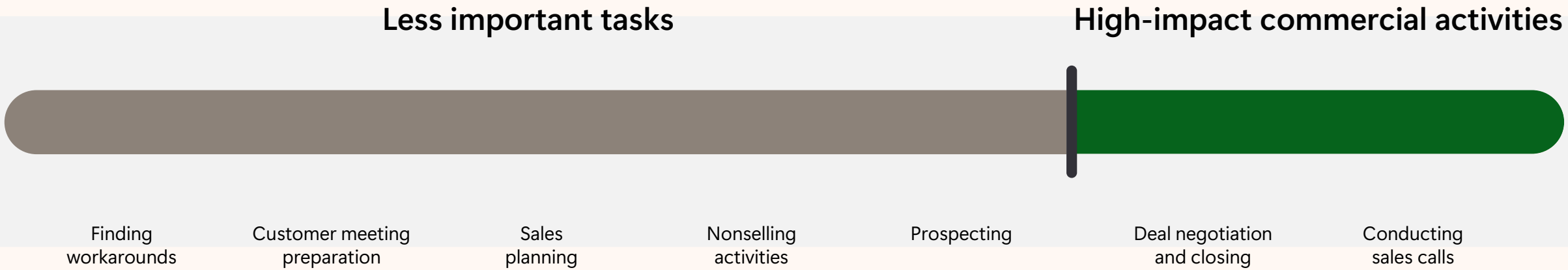
Low data quality, lost context

Results in a CRM that the business can't trust


Microsoft
Dynamics 365

THE SELLER'S DAY — TODAY

Most of the week is everything except selling



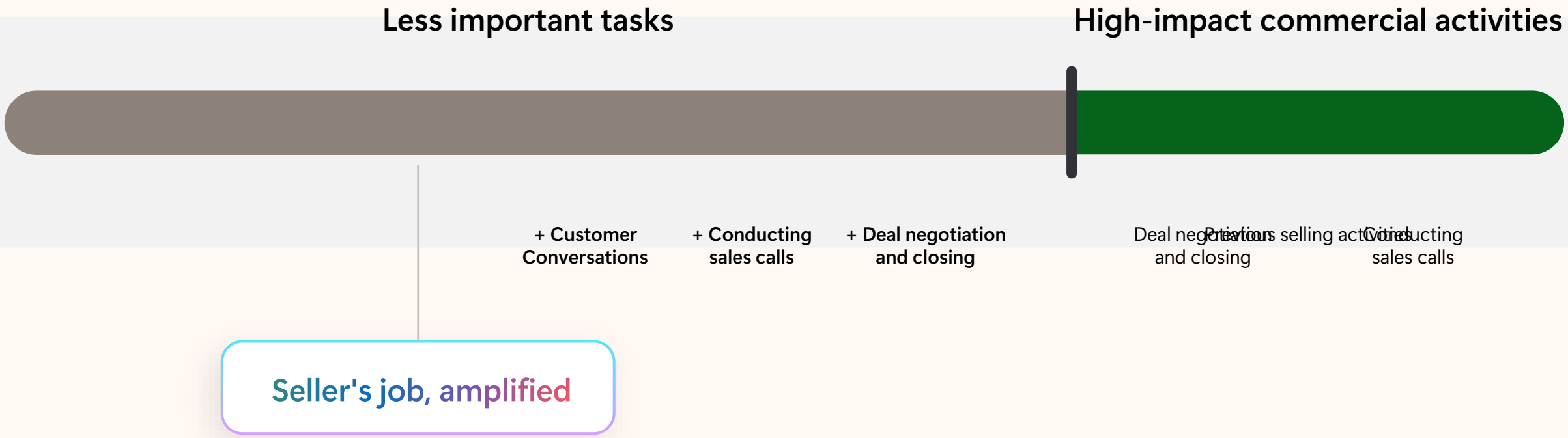
Sellers spend on **average 25 hours per week** on activities that could be delegated, automated or simplified

Sellers spend **only 9 hours per week** on the priority activities that drive high commercial impact

Gartner®, How to Focus Sellers on High-Impact Activities, 31 July 2025. GARTNER is a trademark of Gartner, Inc. and/or its affiliates.

THE SELLER'S DAY — WITH AGENTIC CRM

When agents take the busy work, selling becomes the work



Dynamics CRM

NEW WAY OF WORK

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Chat, Cowork, Autopilot, Code



Productivity Apps

Teams, Outlook, PowerPoint, etc.



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Sales, Customer Service, Customer Insights



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Dynamics 365



Productivity Data

Microsoft 365



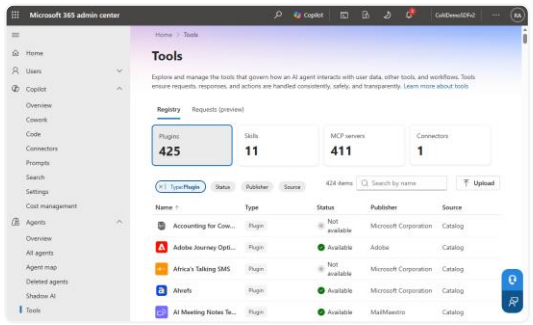
Custom Data

Custom Data Sources

Your business context and IQ

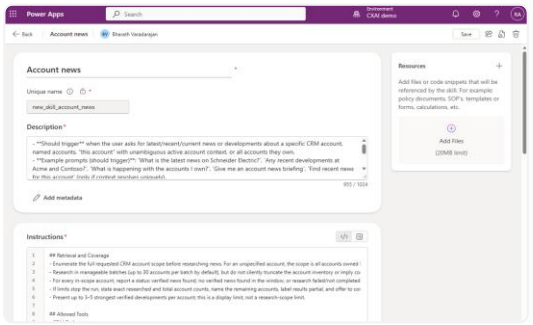
Tools

Securely connect your systems and business data through **MCP Tools**.



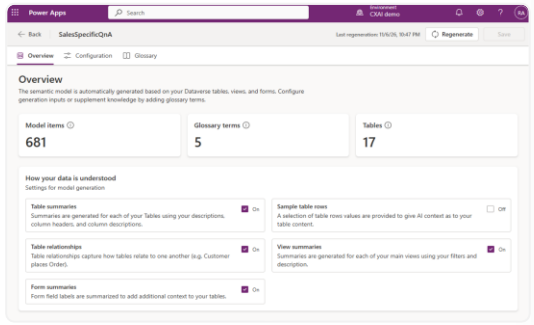
Skills

Define **business skills**, enabling agents to understand how your business operates.



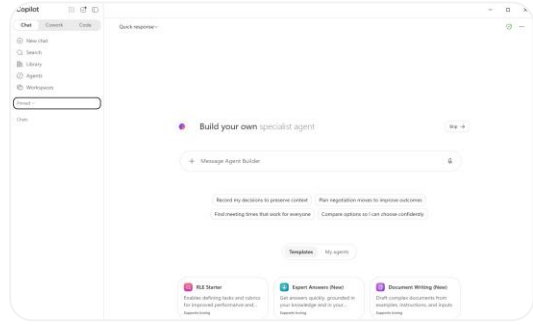
Semantic Model

Define **business entities and relationships**, giving agents a shared understanding of your business data.



Agents

Bring your **purpose-built agents**, extending the ecosystem with specialized intelligence.



Dynamics CRM plugins available in Copilot

Sales (25)

- Pipeline Prioritizer
- Deal Catch-Up
- Meeting Prep
- Post-Meeting Follow-Up
- Competitive Strategy
- Activity Synthesis
- Lead Disposition
- Deal Desk
- Deal Rescue
- Draft Outreach
- Business Case Composer
- Reconcile My Opportunity
- Stage Advance Readiness
- CRM Data Hygiene
- Customer Engagement Strategy
- Executive Deal Review
- Segment Analysis
- Sales Research
- Team Pipeline Review
- Visualize Sales Data
- Create Account Brief
- Draft Proposal Response
- Create Sales Pitch
- Exec Sales Summary
- Prepare Objection Responses

Service (8)

- Case Triage
- Case Preparation Brief
- Draft Customer Reply
- Answer Research
- Knowledge Harvest
- Email-to-Case Intake
- Resolve and Next
- Quality Evaluations

Customer Insights (3)

- Customer brief and value metrics
- Customer Outreach
- Email content advisor

CRM Skills and Tools

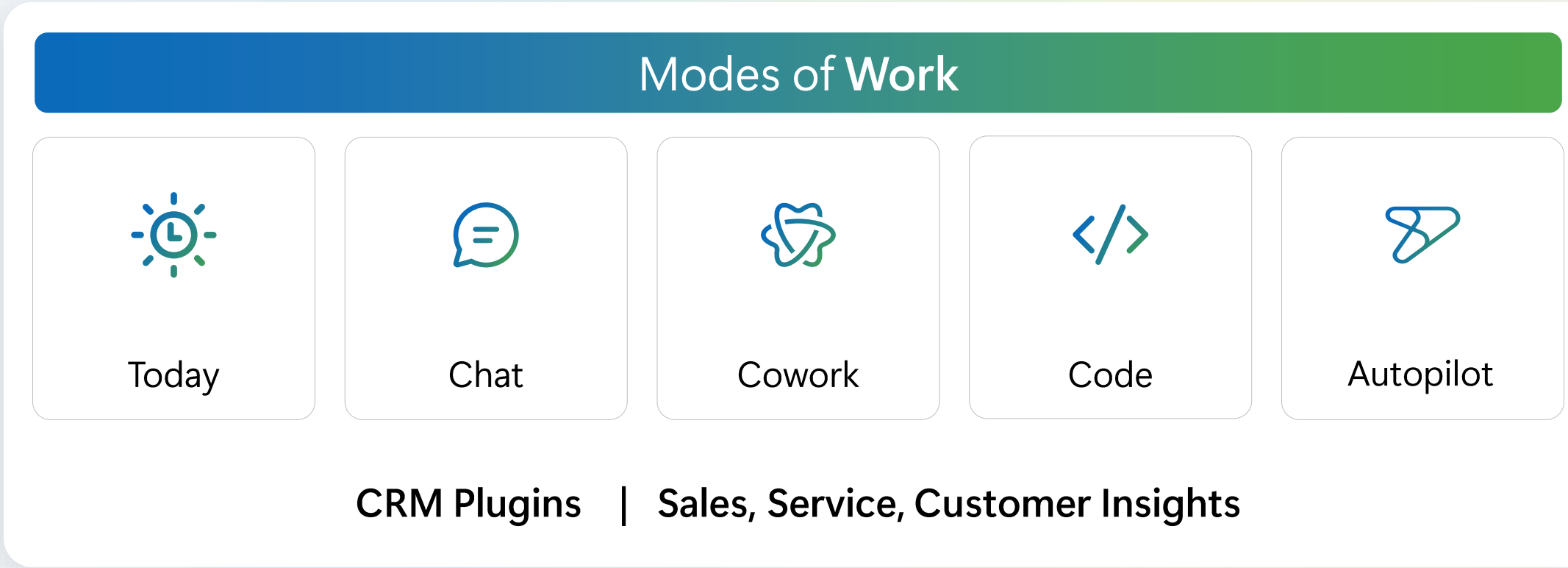
Service skills (8)

Sales skills (25)

Customer Insights skills (3)

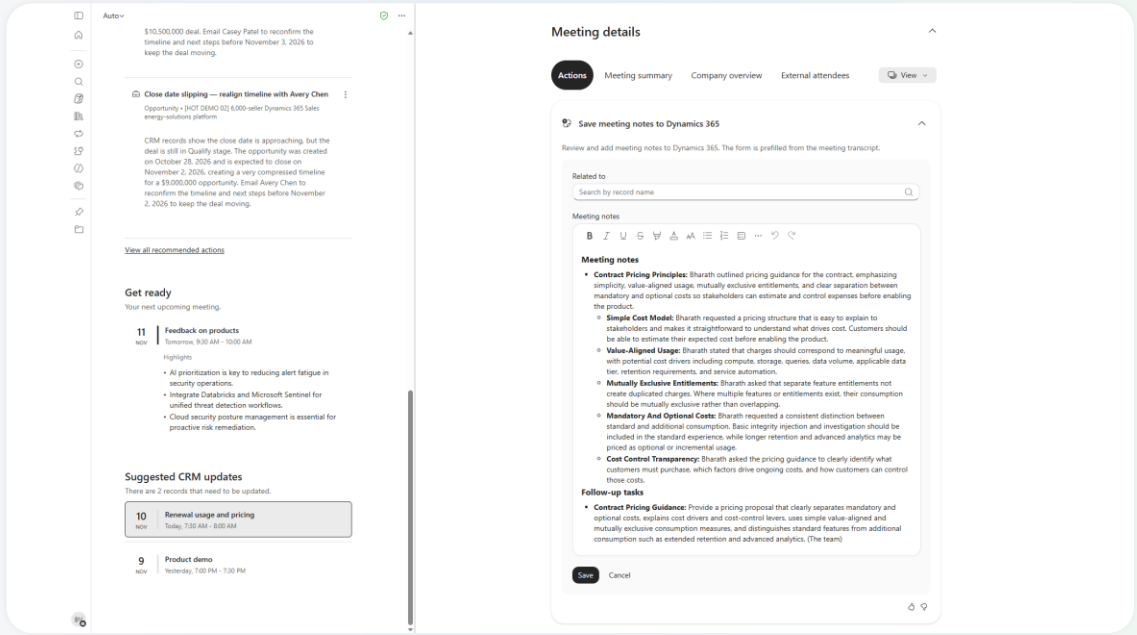
179+ GA MCP Tools

Dynamics 365 in Copilot

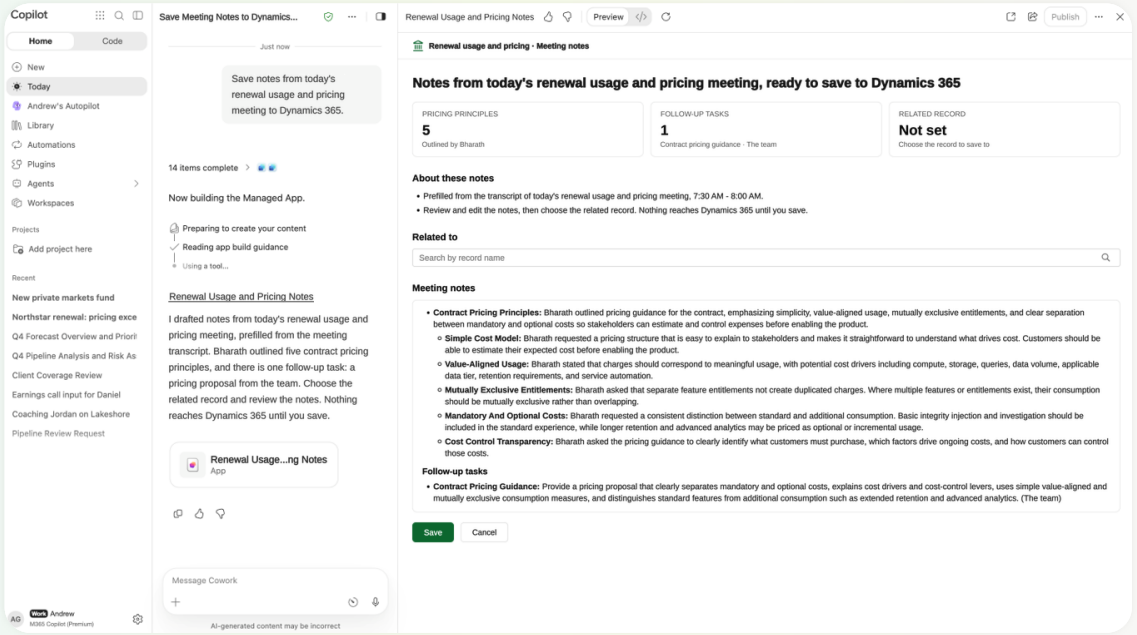


From Sales Home and Cowork & Today

Existing Sales Home Experiences ....



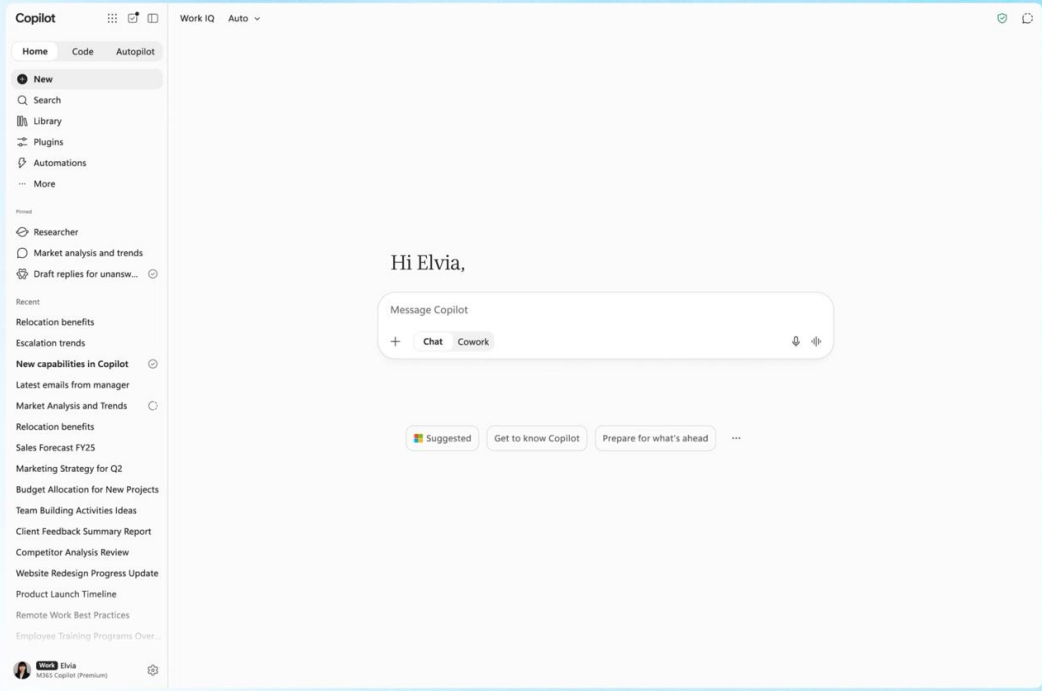
... seamlessly integrated into Cowork and “Today”.



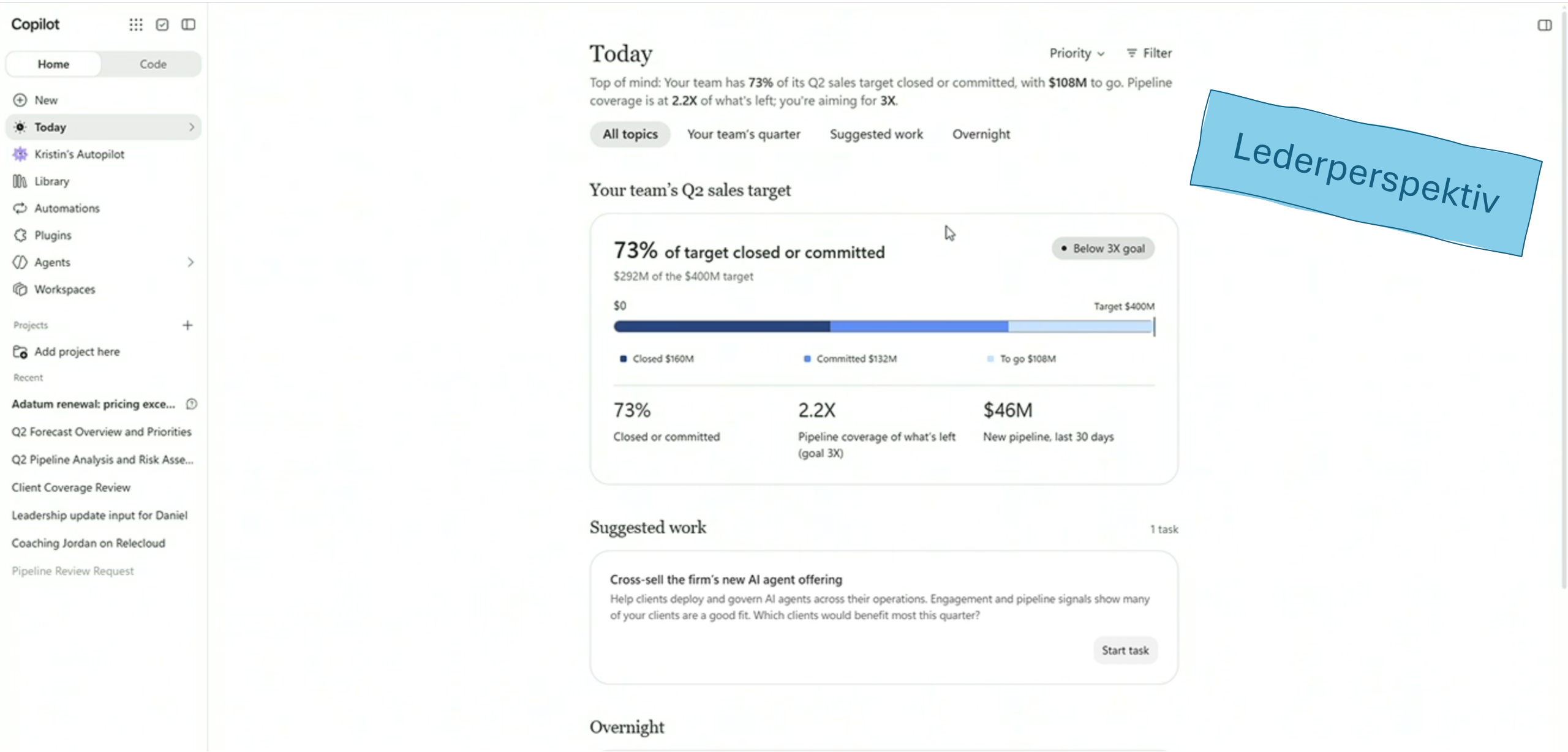
Home

One place to take work from start to finish.

- **Ask and delegate:** Get quick assistance with Chat or delegate end-to-end tasks to Cowork.
- **Stay in the flow:** Create, refine, and collaborate on Office files directly in the Copilot app.
- **Focus on what matters:** Today surfaces what needs attention and prepares your next steps (Coming soon).



Frontier Public



Lederperspektiv

Today

Priority · Filter

Top of mind: Your team has **73%** of its Q2 sales target closed or committed, with **$108M** to go. Pipeline coverage is at **2.2X** of what's left; you're aiming for **3X**.

All topics | Your team's quarter | Suggested work | Overnight

Your team's Q2 sales target

73% — Below 3X goal

of target closed or committed

$292M of the $400M target

$0 — Target $400M



Closed $160M · Committed $132M · To go $108M

73%
Closed or committed

2.2X
Pipeline coverage of what's left (goal 3X)

$46M
New pipeline, last 30 days

Suggested work

1 task

Cross-sell the firm's new AI agent offering

Help clients deploy and govern AI agents across their operations. Engagement and pipeline signals show many of your clients are a good fit. Which clients would benefit most this quarter?

In progress...

Explore the new AI agent offering
Cowork · Ready

Which clients would benefit most from the firm's new AI agent offering this quarter?

Tasks completed

10 clients · $110M of potential new work. The top 5 are already in active conversations and could sign before year-end.

Why these 10?

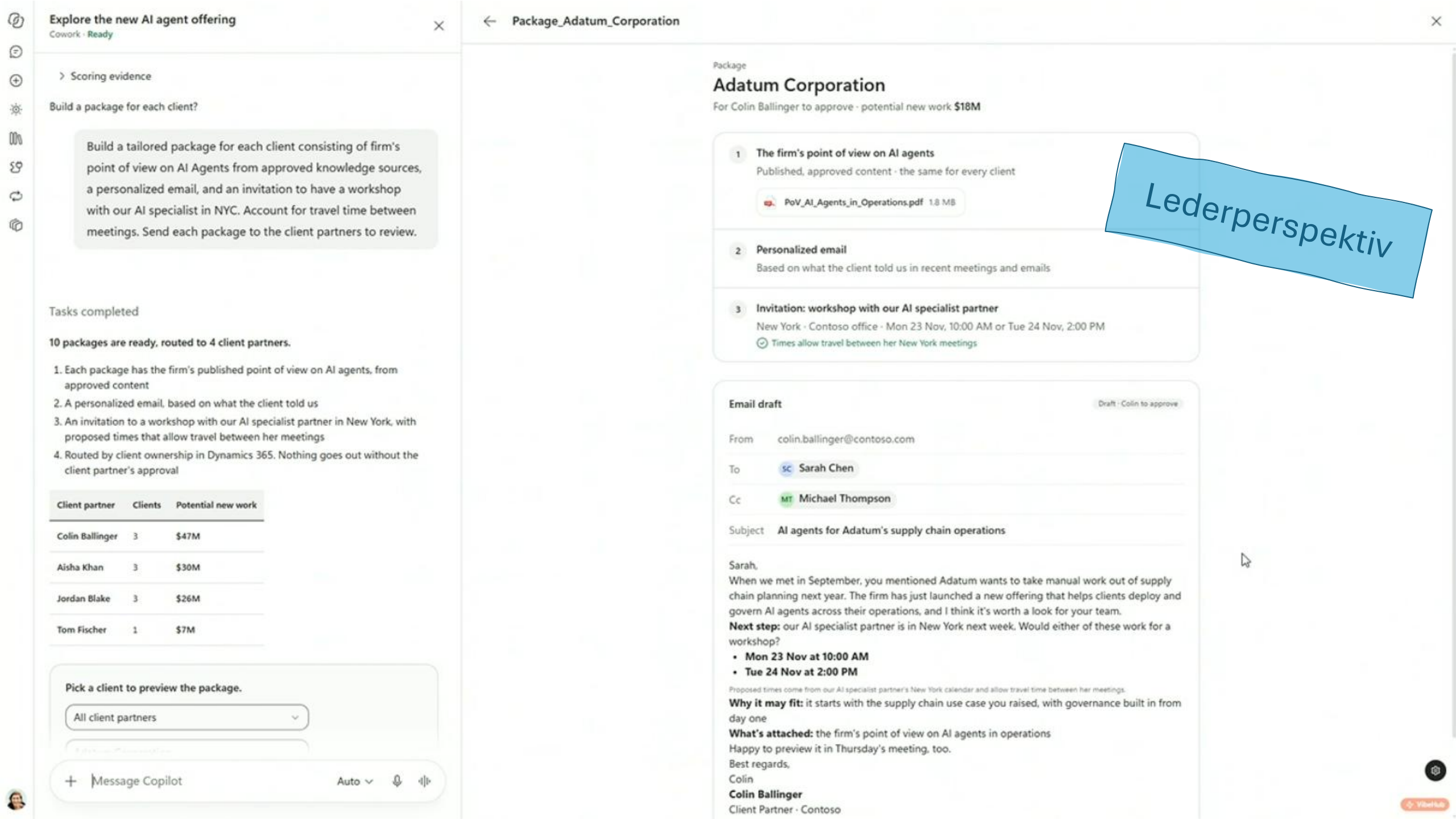
- Analyzed in seconds across every territory: engagement history, open proposals, recent client conversations, and client feedback and open issues
- Each has raised an AI agent use case with us in recent meetings or emails, and scores highest on readiness in Dynamics 365 Sales and Customer Service
- Independence check: 3 audit clients excluded, where independence rules limit the work we can offer

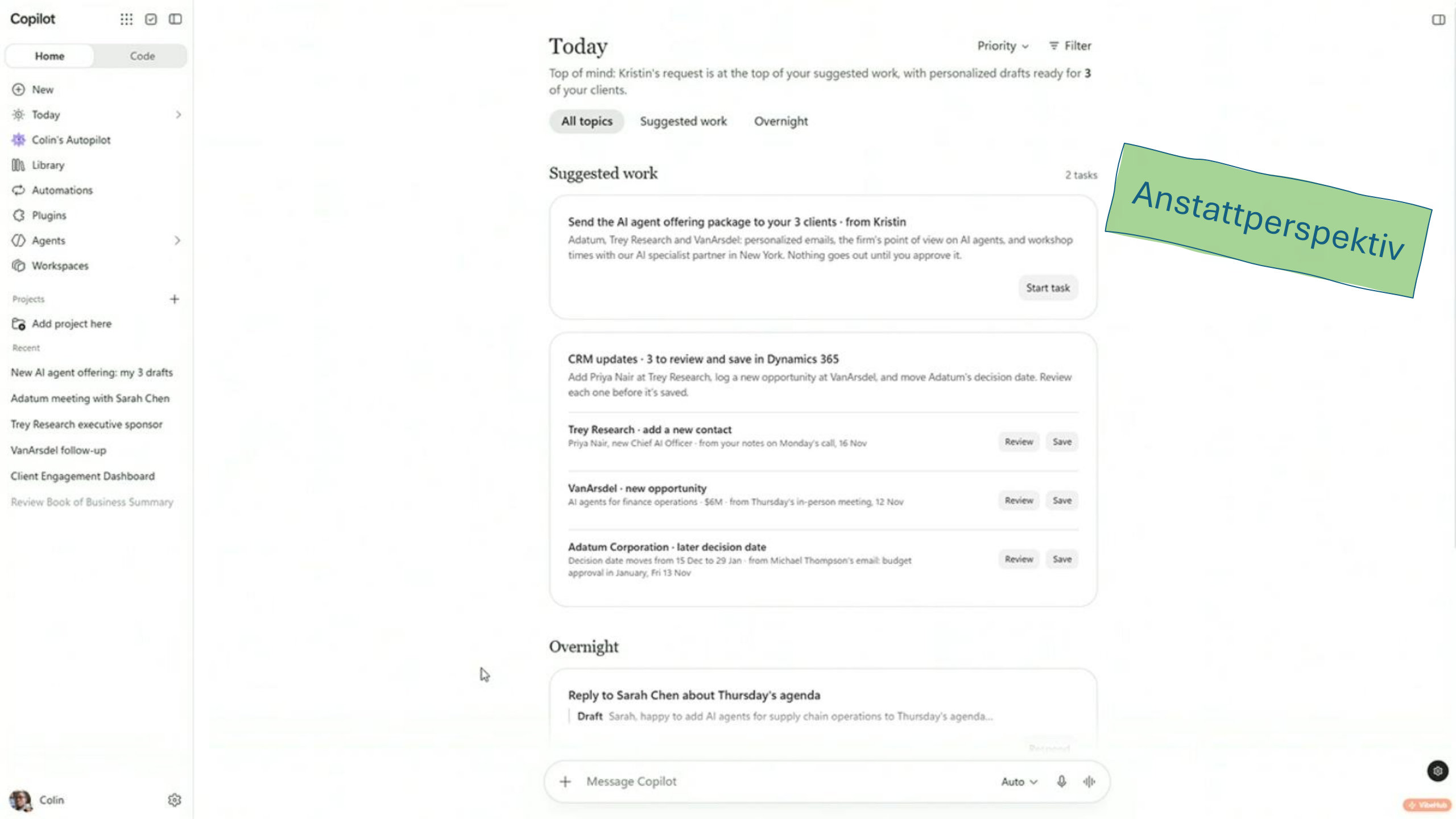
Top 10 clients

#	Client	Readiness score	AI agent use case	Potential new work	Owner
1	Adatum Corporation	94	Supply chain operations	$18M	Colin Ballinger
2	Trey Research	91	Patient services and IT service desk	$10M	Colin Ballinger
3	Consolidated Messenger	88	Procurement and supplier onboarding	$12M	Aisha Khan
4	Proseware	86	Claims handling	$13M	Jordan Blake
5	Relecloud	83	Customer service	$6M	Jordan Blake
6	VanArsdel	79	Finance operations	$19M	Colin Ballinger
7	First Up Consultants	74	HR and workforce operations	$9M	Aisha Khan
8	Boulder Innovations	71	IT service desk	$7M	Jordan Blake
9	Lucerne Publishing	64	Customer billing	$9M	Aisha Khan
10	Wide World Importers	60	Order-to-cash	$7M	Tom Fischer

Message Copilot · Auto

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Explore the new AI agent offering
Cowork · Ready
Scoring evidence
Build a package for each client?
Build a tailored package for each client consisting of firm's point of view on AI Agents from approved knowledge sources, a personalized email, and an invitation to have a workshop with our AI specialist in NYC. Account for travel time between meetings. Send each package to the client partners to review.
Tasks completed
10 packages are ready, routed to 4 client partners.
1. Each package has the firm's published point of view on AI agents, from approved content
2. A personalized email, based on what the client told us
3. An invitation to a workshop with our AI specialist partner in New York, with proposed times that allow travel between her meetings
4. Routed by client ownership in Dynamics 365. Nothing goes out without the client partner's approval
Client partner | Clients | Potential new work
Colin Ballinger | 3 | $47M
Aisha Khan | 3 | $30M
Jordan Blake | 3 | $26M
Tom Fischer | 1 | $7M
Pick a client to preview the package.
All client partners
Message Copilot
Auto
Package_Adatum_Corporation
Package
Adatum Corporation
For Colin Ballinger to approve · potential new work $18M
1 The firm's point of view on AI agents
Published, approved content · the same for every client
PoV_AI_Agents_in_Operations.pdf 1.8 MB
2 Personalized email
Based on what the client told us in recent meetings and emails
3 Invitation: workshop with our AI specialist partner
New York · Contoso office · Mon 23 Nov, 10:00 AM or Tue 24 Nov, 2:00 PM
Times allow travel between her New York meetings
Email draft
Draft · Colin to approve
From colin.ballinger@contoso.com
To Sarah Chen
Cc Michael Thompson
Subject AI agents for Adatum's supply chain operations
Sarah,
When we met in September, you mentioned Adatum wants to take manual work out of supply chain planning next year. The firm has just launched a new offering that helps clients deploy and govern AI agents across their operations, and I think it's worth a look for your team.
Next step: our AI specialist partner is in New York next week. Would either of these work for a workshop?
• Mon 23 Nov at 10:00 AM
• Tue 24 Nov at 2:00 PM
Proposed times come from our AI specialist partner's New York calendar and allow travel time between her meetings.
Why it may fit: it starts with the supply chain use case you raised, with governance built in from day one
What's attached: the firm's point of view on AI agents in operations
Happy to preview it in Thursday's meeting, too.
Best regards,
Colin
Colin Ballinger
Client Partner · Contoso
Lederperspektiv



Anstattperspektiv

Today

Priority · Filter

Top of mind: Kristin's request is at the top of your suggested work, with personalized drafts ready for **3** of your clients.

All topics | Suggested work | Overnight

Suggested work

2 tasks

Send the AI agent offering package to your 3 clients · from Kristin

Adatum, Trey Research and VanArsdel: personalized emails, the firm's point of view on AI agents, and workshop times with our AI specialist partner in New York. Nothing goes out until you approve it.

In progress...

CRM updates · 3 to review and save in Dynamics 365

Add Priya Nair at Trey Research, log a new opportunity at VanArsdel, and move Adatum's decision date. Review each one before it's saved.

Trey Research · add a new contact
Priya Nair, new Chief AI Officer · from your notes o...
Review | Save

VanArsdel · new opportunity
AI agents for finance operations · $6M · from...
Review | Save

Adatum Corporation · later decision date
Decision date moves from 15 Dec to 29 Jan · from...
Review | Save

Overnight

Review and Send AI Agent Offering Outreach Emails

PoV_AI_Agents_in_Operations.pdf

Draft 3 of 3 · AI agent offering · Hannah Weber — Draft

From: Colin Ballinger
To: Hannah Weber
Cc: —
Subject: AI agents for VanArsdel's finance operations

Hannah,

Thanks again for last Thursday. You told me month-end close is where your finance team feels the most pressure, and asked for a proposal. The firm has just launched a new offering that helps clients deploy and govern AI agents across their operations, starting with finance, and I'd like to walk you through it.

Could we hold a 45-minute video workshop with our AI specialist partner?

- **The week of 30 November, at a time that suits you**

Video workshop · times from our AI specialist partner's calendar, clear of her New York travel days.

I've attached the firm's point of view on AI agents in operations.

Best regards,
Colin

Colin Ballinger
Client Partner · Contoso
Phone: +1.212.555.0142 | Mobile: +1.212.555.0187

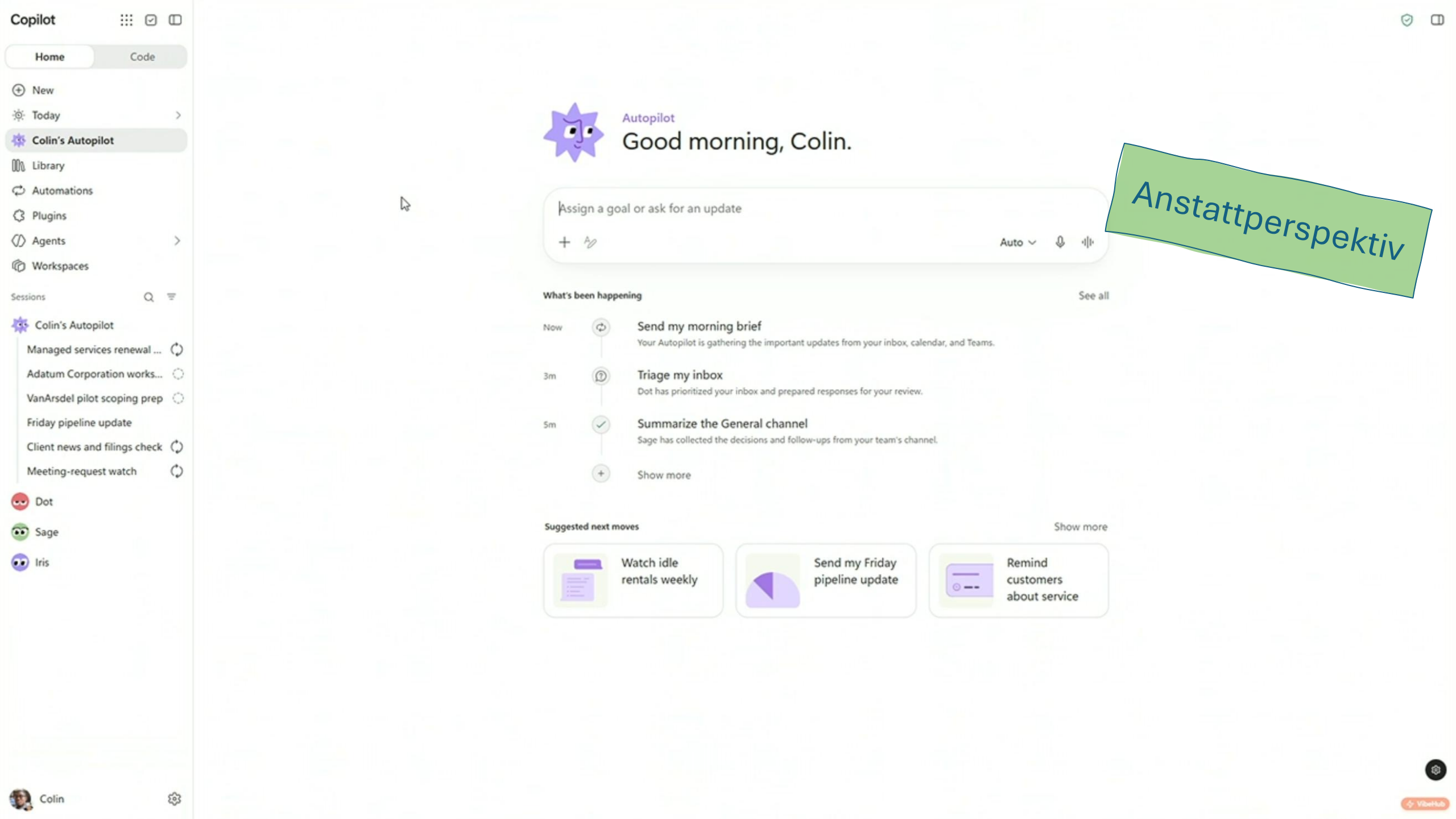
PoV_AI_Agents_in_Operations.pdf

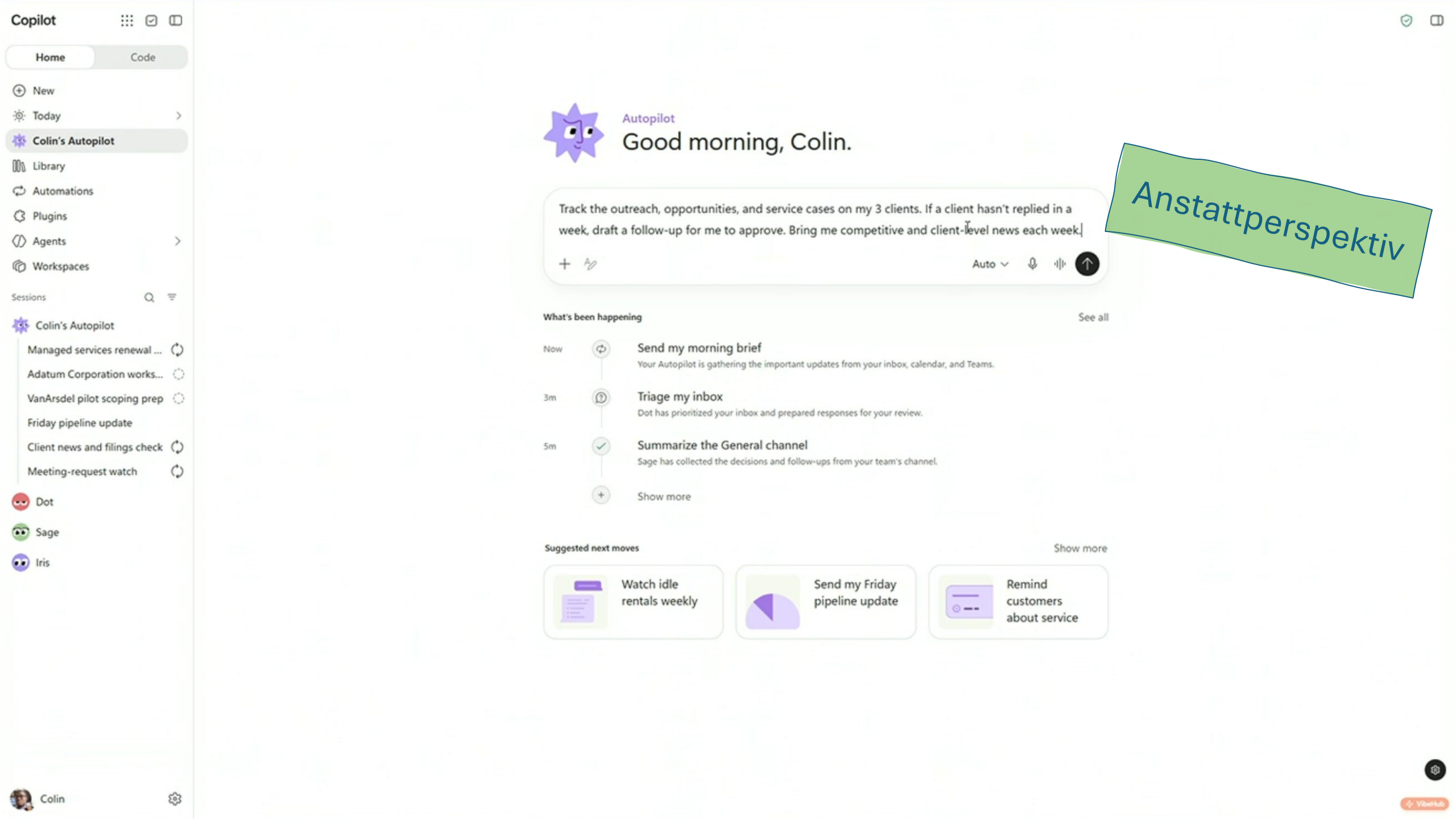
How would you like to proceed with the 3 AI agent offering outreach drafts?

- **Send all**
  Send all 3 drafts (Sarah Chen, Samir Lund, Hannah Weber) with the point of view PDF attached
- **Save all as drafts**
  Keep all 3 as Outlook drafts with the PDF attached, nothing sent

Describe another option — Submit

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Copilot
Home
Code
New
Today
Colin's Autopilot
Library
Automations
Plugins
Agents
Workspaces
Sessions
Colin's Autopilot
Managed services renewal ...
Adatum Corporation works...
VanArsdel pilot scoping prep
Friday pipeline update
Client news and filings check
Meeting-request watch
Dot
Sage
Iris
Colin
Autopilot
Good morning, Colin.
Assign a goal or ask for an update
Auto
What's been happening
See all
Now
Send my morning brief
Your Autopilot is gathering the important updates from your inbox, calendar, and Teams.
3m
Triage my inbox
Dot has prioritized your inbox and prepared responses for your review.
5m
Summarize the General channel
Sage has collected the decisions and follow-ups from your team's channel.
Show more
Suggested next moves
Show more
Watch idle rentals weekly
Send my Friday pipeline update
Remind customers about service
Anstattperspektiv


Copilot
Home
Code
New
Today
Colin's Autopilot
Library
Automations
Plugins
Agents
Workspaces
Sessions
Colin's Autopilot
Managed services renewal ...
Adatum Corporation works...
VanArsdel pilot scoping prep
Friday pipeline update
Client news and filings check
Meeting-request watch
Dot
Sage
Iris
Colin
Autopilot
Good morning, Colin.
Track the outreach, opportunities, and service cases on my 3 clients. If a client hasn't replied in a week, draft a follow-up for me to approve. Bring me competitive and client-level news each week.
Auto
What's been happening
See all
Now
Send my morning brief
Your Autopilot is gathering the important updates from your inbox, calendar, and Teams.
3m
Triage my inbox
Dot has prioritized your inbox and prepared responses for your review.
5m
Summarize the General channel
Sage has collected the decisions and follow-ups from your team's channel.
Show more
Suggested next moves
Show more
Watch idle rentals weekly
Send my Friday pipeline update
Remind customers about service
Anstattperspektiv

Track the outreach, opportunities, and service cases on my 3 clients. If a client hasn't replied in a week, draft a follow-up for me to approve. Bring me competitive and client-level news each week.

Anstattperspektiv

Went through Dynamics 365, your Outlook email and approved market news >

Created **two new Routines** for Adatum, Trey Research and VanArsdel.

Routine	Schedule, Pacific time
Client outreach watch	Daily at 8 a.m.
Weekly competitive and client news	Mondays at 9 a.m.

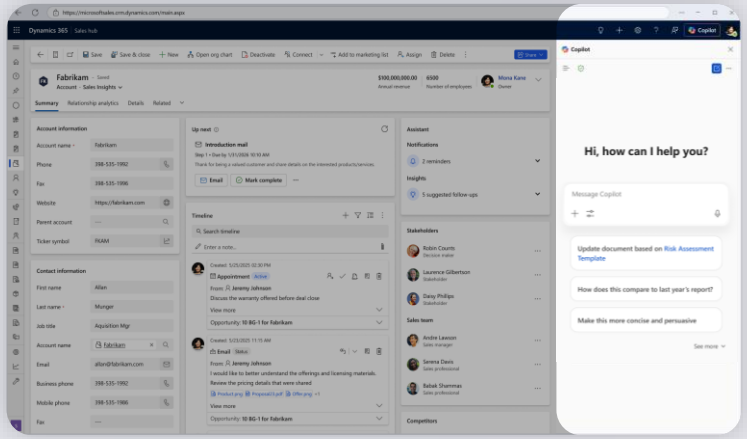
Results will appear in your **main Autopilot chat**. The daily watch tracks email-evidenced outreach, opportunities and service-case updates, and prepares follow-up text after seven days without a reply.

Nothing goes to clients without your approval.

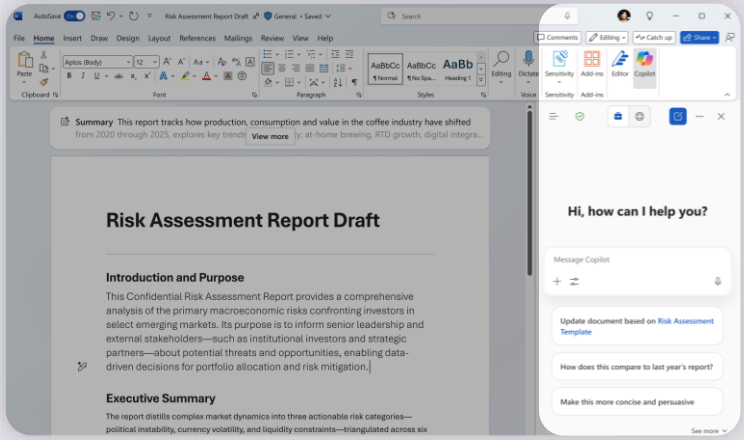
Sources: Dynamics 365 Sales and Customer Service, your Outlook email and approved market news. The Monday brief compares your clients with their competitors using the latest client and industry news.

Copilot is across the core apps where work happens

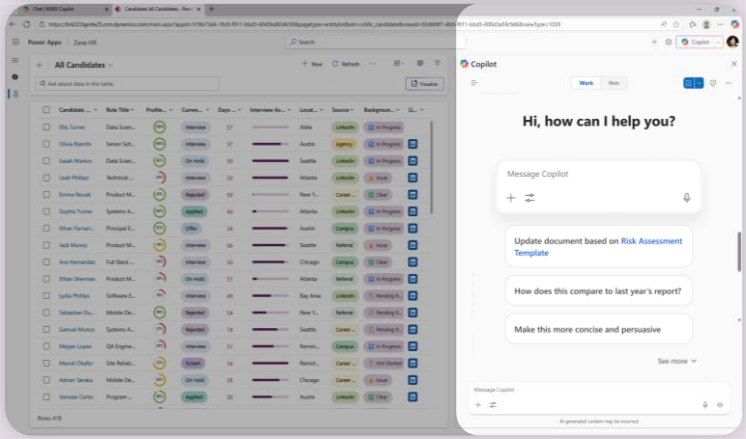
Dynamics 365



Microsoft 365



Power Platform



Persistent, unified chat experience

Context aware chat to understand what you're working on, even as you move between apps

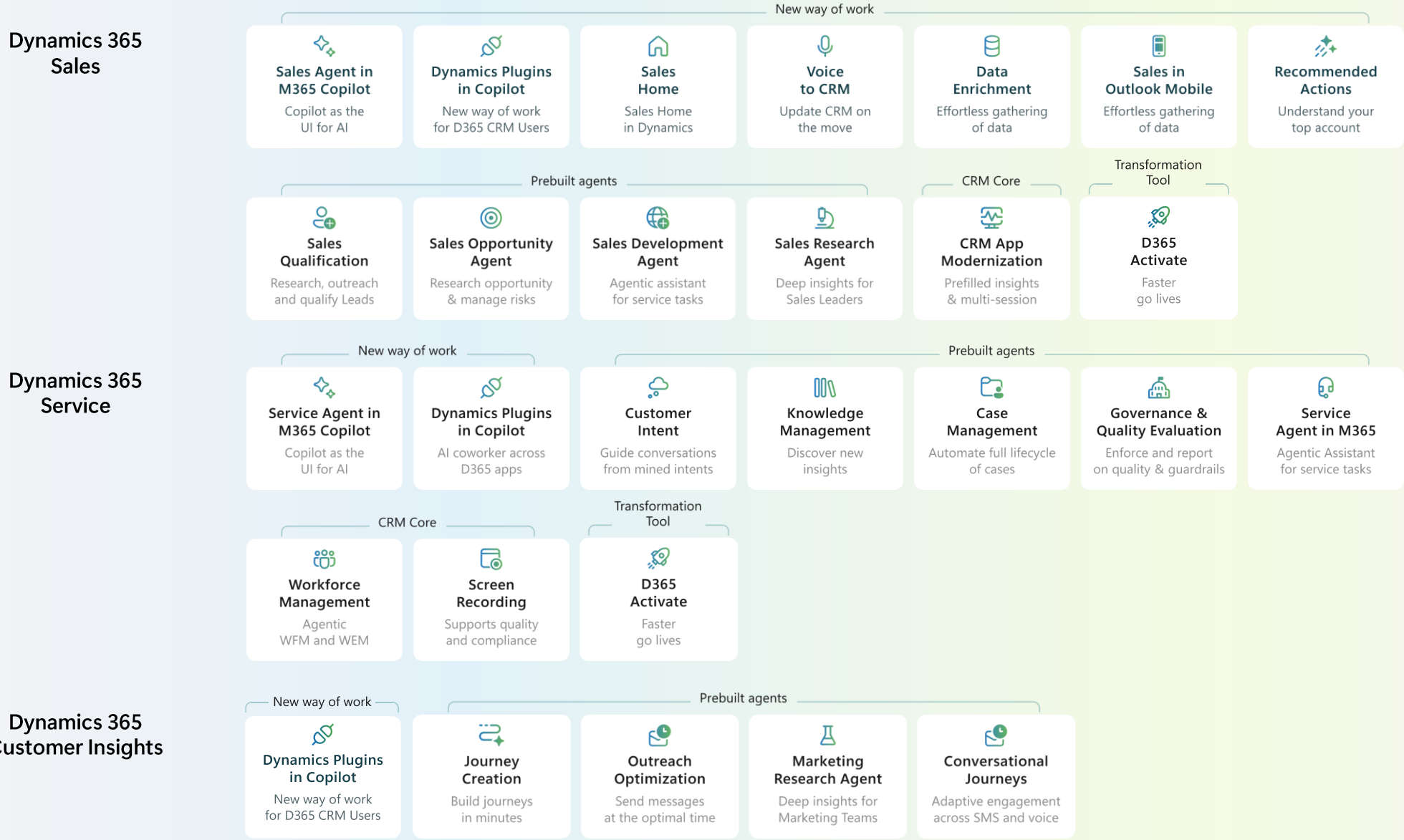
Work IQ powered-intelligence

Shared organizational and personal awareness for relevant responses across the apps

Agents to execute tasks and business processes

Access pre-built, third-party, and custom agents in the flow of work

Recent Innovation for Sales, Service, and Customer Insights



Agentic CRM covering the full sales cycle

Focus on the customer and sell, with support from the agentic sales network



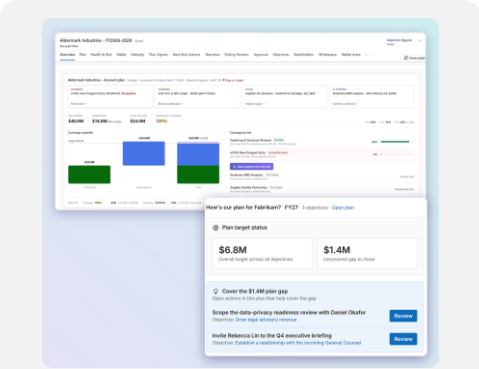
Seller experience in the flow of work

Copilot
Cowork
Sales Agent

Device and app of choice

Objectives	**Prospecting**	**Closing**	**Expansion**
Goals	Generate Pipeline Scale customer outreach Qualify high-value leads	Support Complex Deals Close Transactional Deals	Operationalize Business
Agents	**Journey Creation** **Sales Development** **Sales Qualification**	**Sales Opportunity**	**Sales Research**
	Data Enrichment		
	Recommended Actions		
Data Sources	System of record (Dynamics) Communication (Exchange/Outlook, Calendar) Collaboration (Teams) External data & Signals (LinkedIn, Bing Search, Web, internal porta, DNB, ZoomInfo etc.) Content & Files (Excel, CSV, PDF, Doc Etc.)		

New Launches! Dynamics 365 Sales

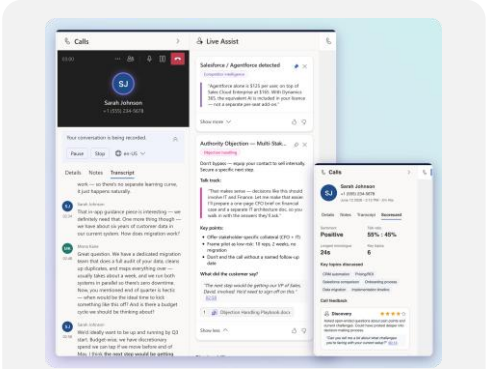


Account Planning

A living account plan that drafts and maintains itself, so sellers spend their time closing the gap

Core to Dynamics 365 Sales

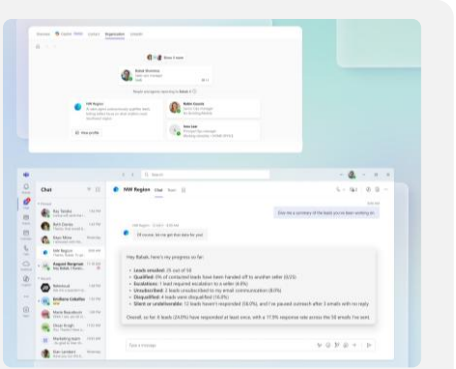
Public Preview



Seller Guidance

Real-time guidance that puts your best seller in every customer conversation

Public Preview

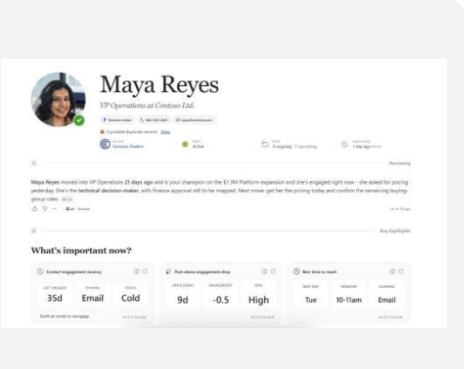


Sales Development Agent

Autonomous agent that researches, qualifies, engages with leads scaling sales capacity 24/7

Bring sales into the flow of work with Microsoft 365

Public Preview



Modern UX for Account and Contact Records

Unified, composable view of every account and contact, showing a full customer context

Bring sales and service into the flow of work and core Dynamics

Public Preview

Microsoft Dynamics 365

Customer 360
Account 360

Unified view of your customers and accounts



Prebuilt AI Agents in D365 Customer Insights

Unified customer data and engagement powering experiences agents across marketing, sales, and service

Journey Creation Agent

Build multi-step journeys from a prompt in minutes

Outreach Optimization

Send each message at the moment it lands best

Conversational Journeys

Two-way, adaptive engagement across SMS and voice

Marketing Research Agent

Explains what performed and what to fix next

TRUSTED, AGENT-READY CUSTOMER DATA FOUNDATION

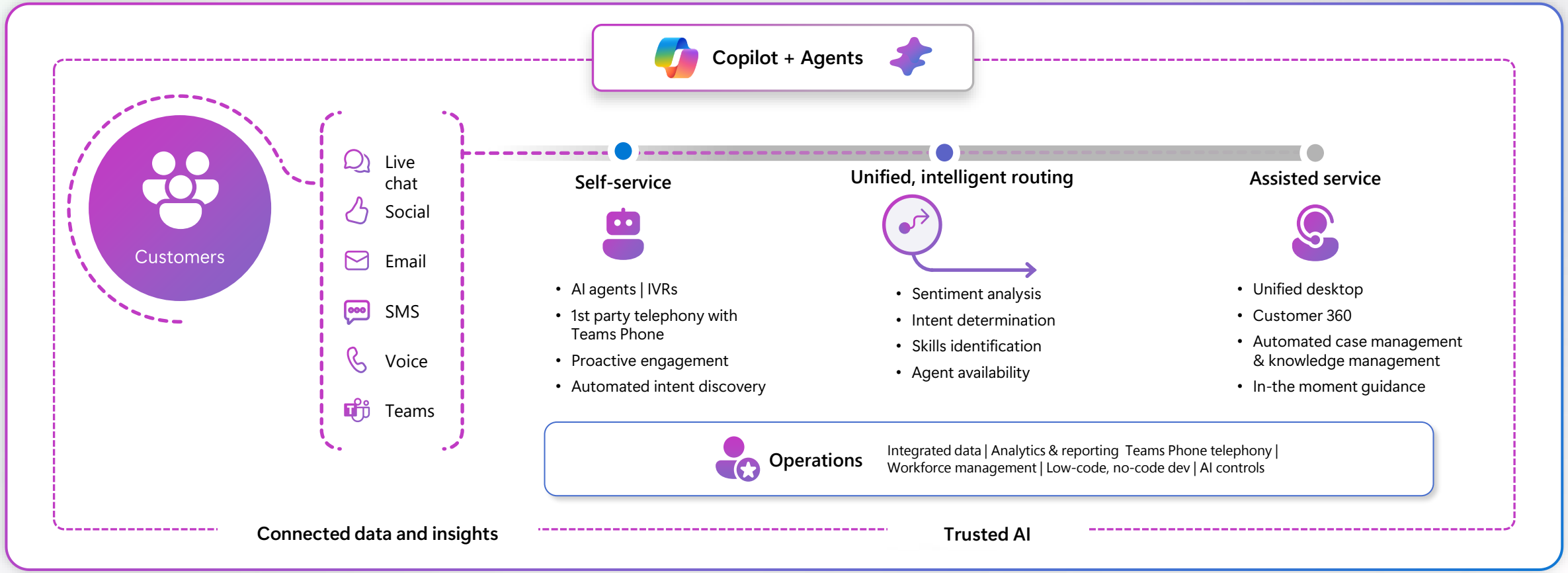
Customer 360 · Customer insights MCP server · Consent-governed access for every agent

One trusted profile and one engagement engine behind every CX agent

Journey Creation Agent
Outreach Optimization Agent



Why Dynamics 365 Contact Center



Unified platform and context

Consolidating CRM, CCaaS and AI onto one platform to cut integration cost, vendor sprawl, and a single unified data layer with WorkIQ

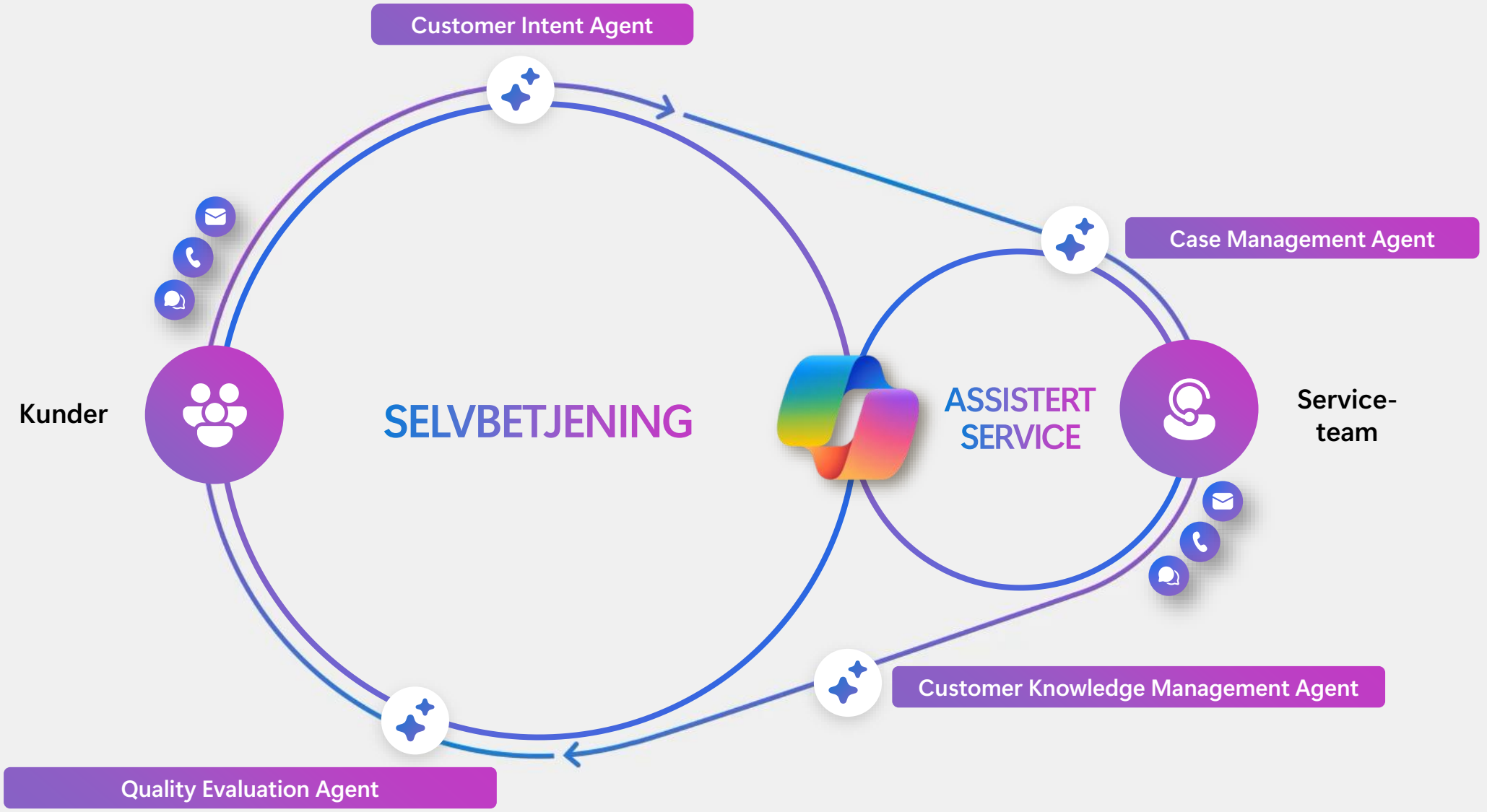
Agents as part of the workforce

Digital labor expands capacity; AI agents, Copilot and people work as one service system. that learns from every interaction.

Governance that scales with you

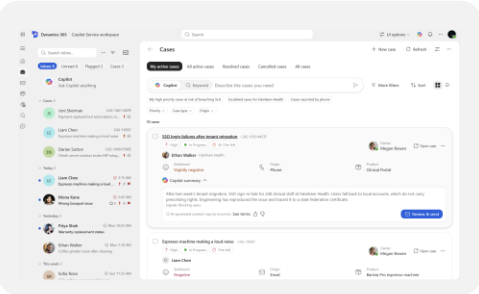
Security, compliance and responsible AI that enables you to scale with the demands of your organization

AI-drevet læringssløyfe bak smartere service



New Launches! Dynamics 365 Customer Service

Core Dynamics 365 Customer Service

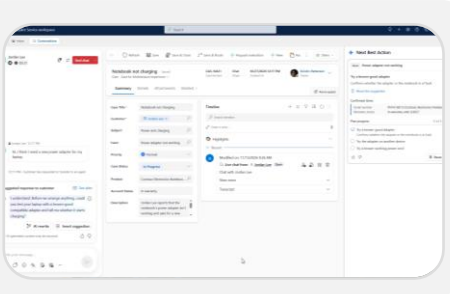


Copilot Service workspace

New UI Experience

Modernized and optimized user experience

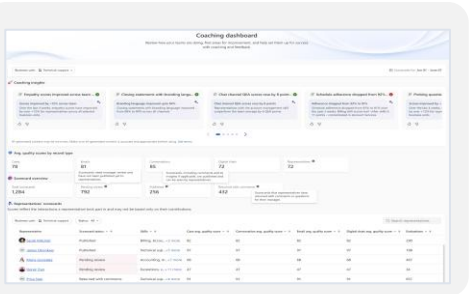
Public Preview



Next Best Action

Now consistent across case and conversation, offering advice to service reps across their workload and in real time

Public Preview

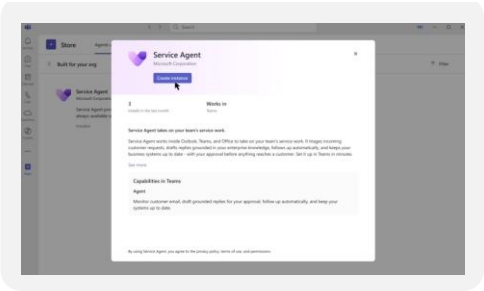


Coaching & development

AI-powered, real-time coaching in Workforce engagement management to upskill representatives and enhance quality

Public Preview

Bring Service into flow of work with M365

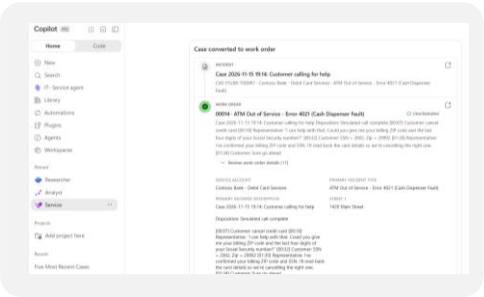


Service Agent in Microsoft 365

Empower every employee to deliver service in the flow of work with Teams and Outlook

Public Preview

Extend Service with Microsoft Copilot

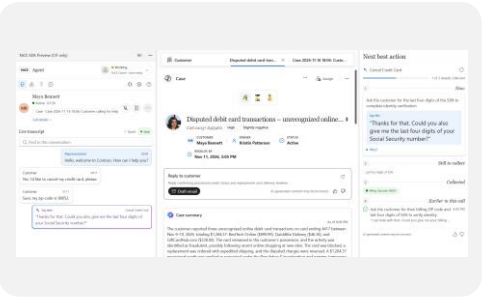


Field Service skills for Service Agent in Copilot

Service Agent supports service end to end, from case intake to field execution

Public Preview

3P CC Ecosystem

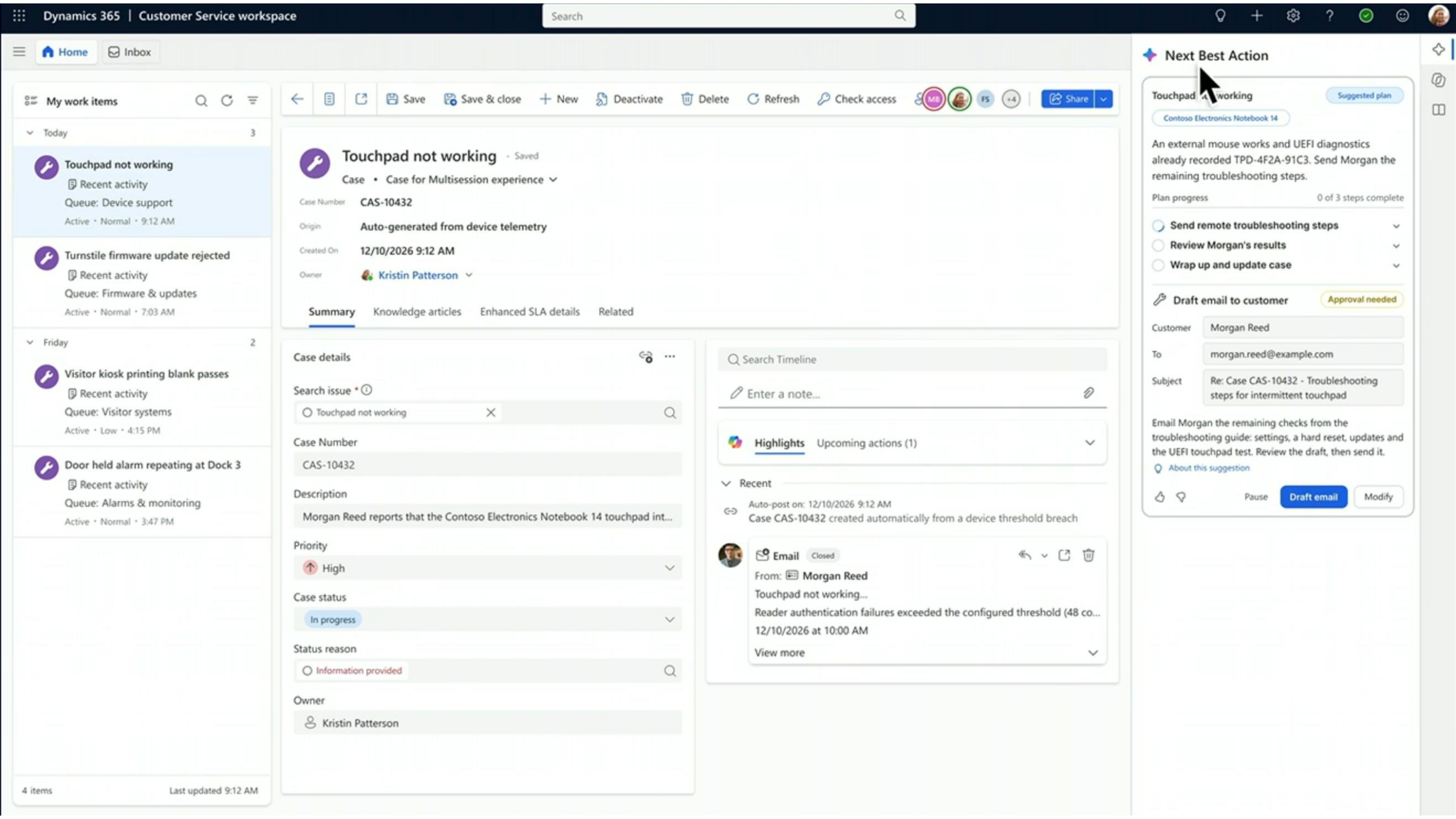


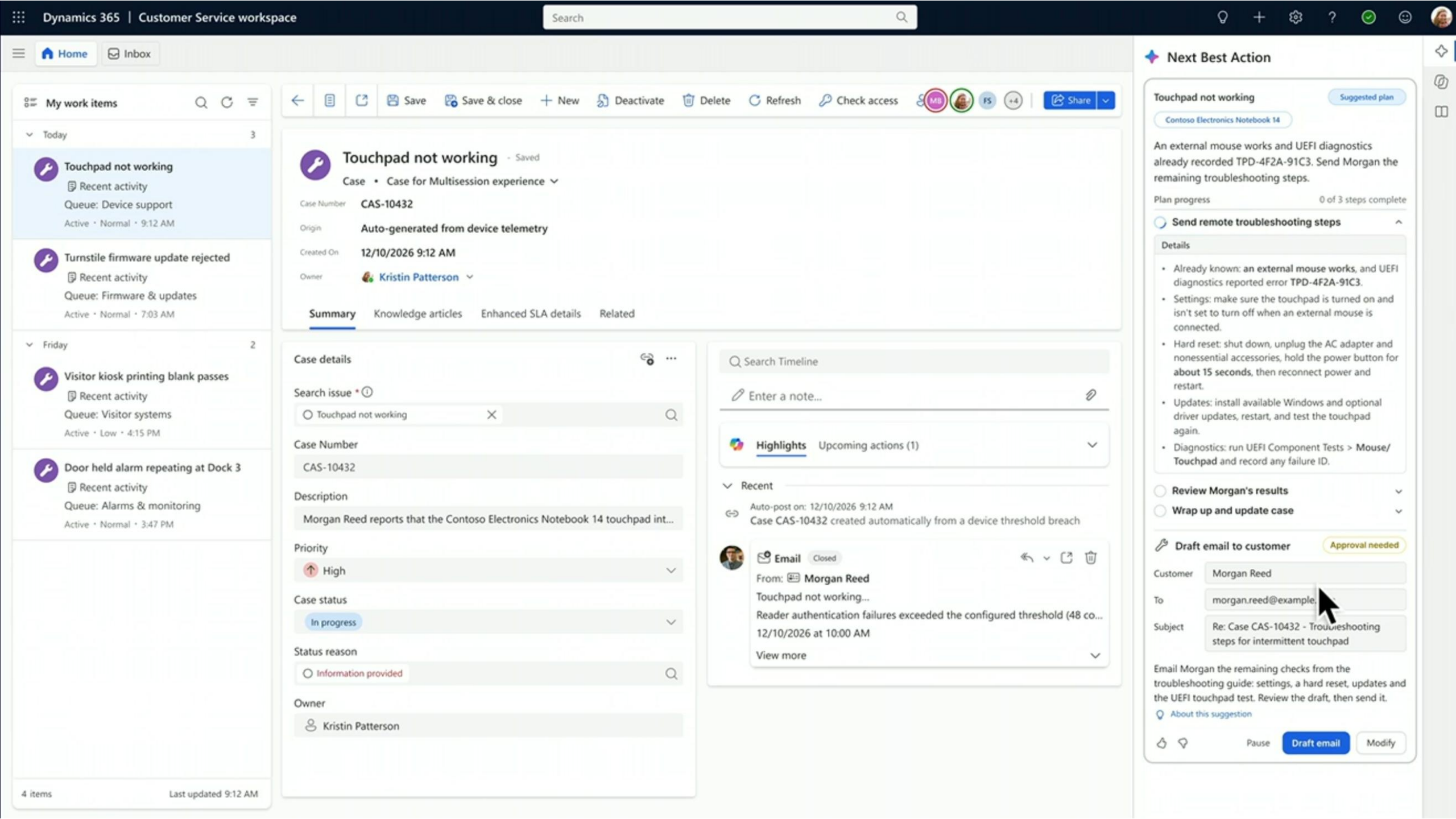
New Contact Center Integrations

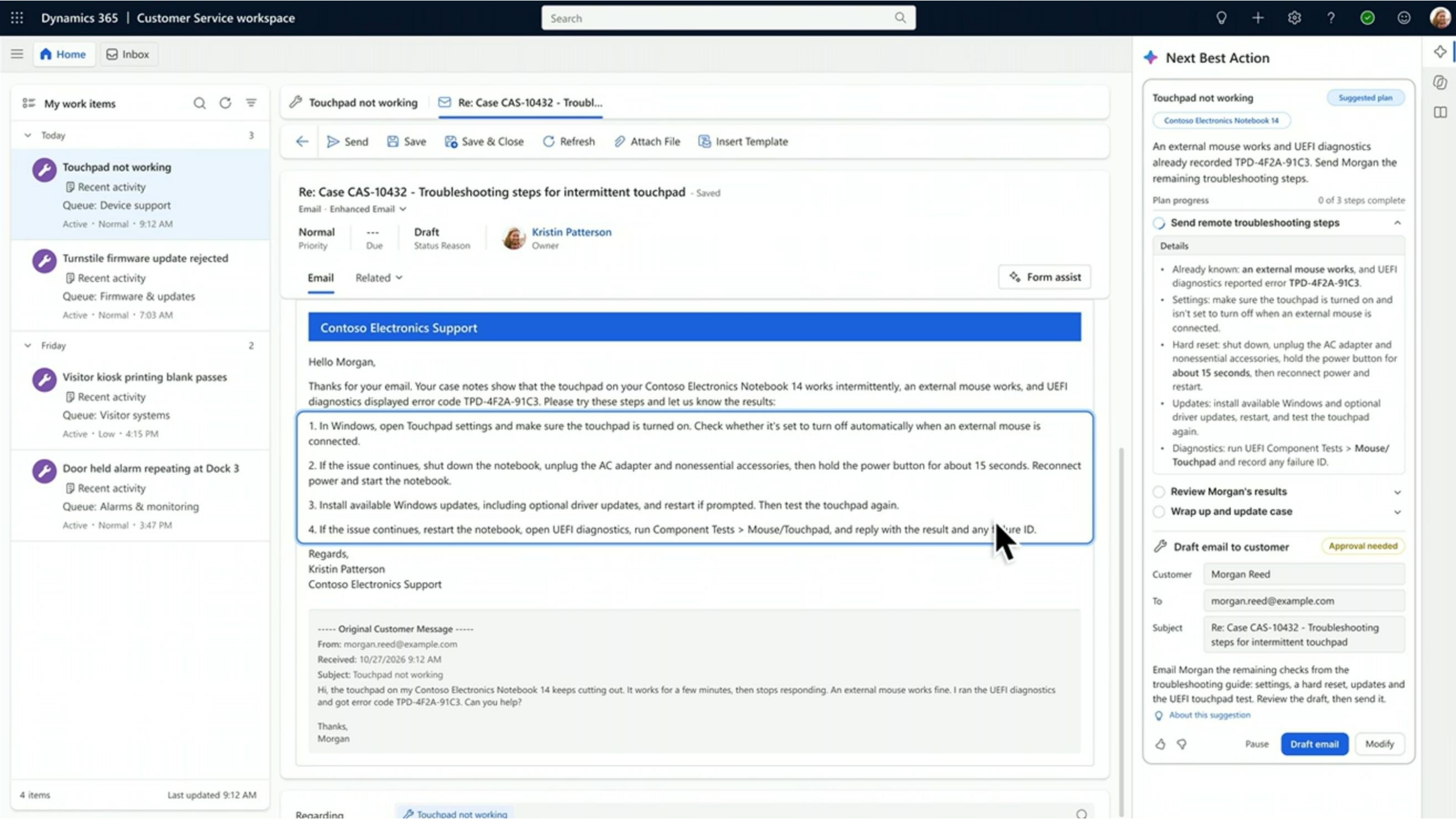
Connect Dynamics 365 Customer Service with NICE and Five9

COPILOT SERVICE WORKSPACE

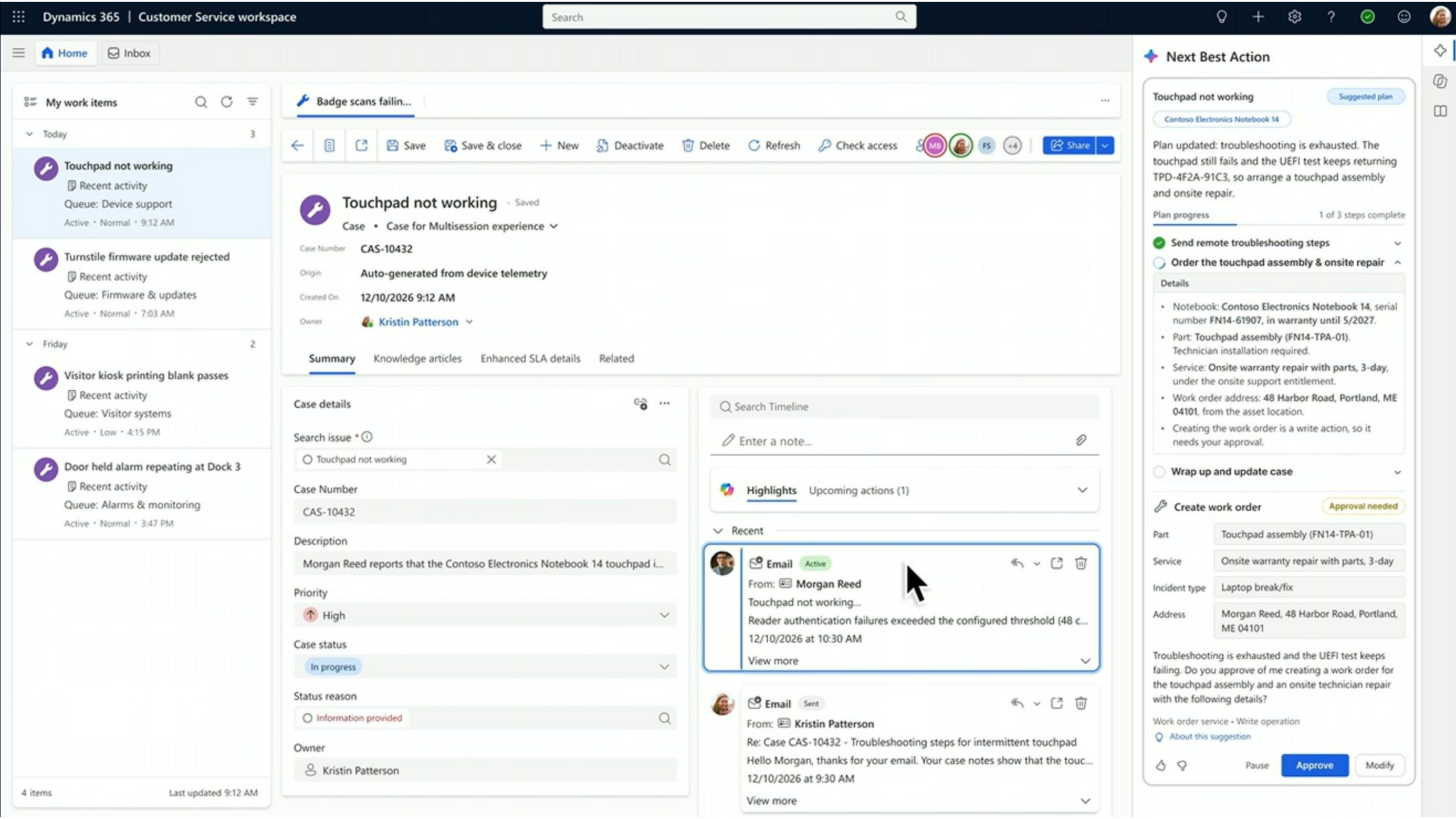
NEXT BEST ACTION

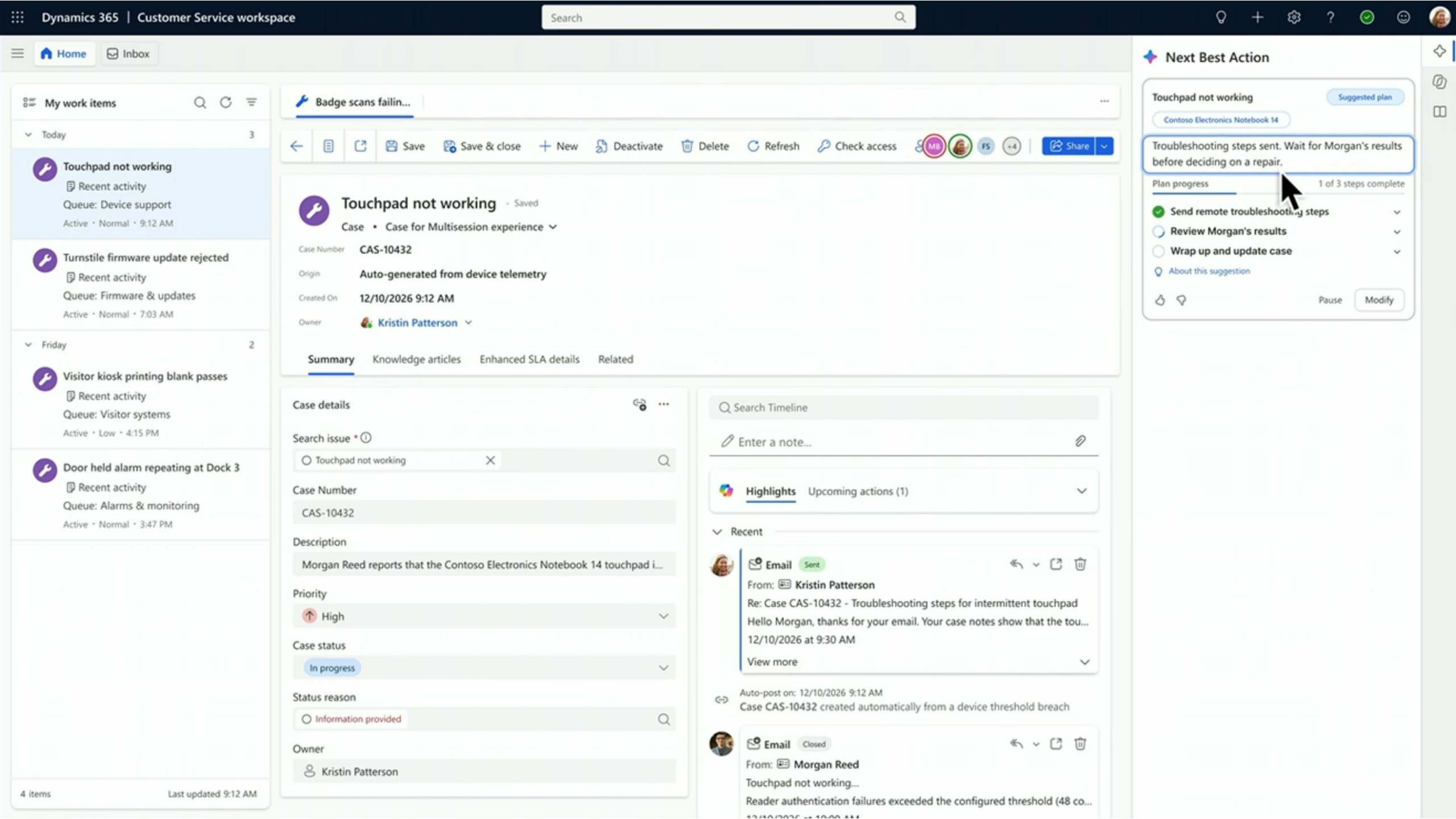

Dynamics 365 | Customer Service workspace
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Home
Inbox
My work items
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Touchpad not working
Recent activity
Queue: Device support
Active · Normal · 9:12 AM
Turnstile firmware update rejected
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Queue: Firmware & updates
Active · Normal · 7:03 AM
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Queue: Visitor systems
Active · Low · 4:15 PM
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Active · Normal · 3:47 PM
4 items
Last updated 9:12 AM
Save
Save & close
New
Deactivate
Delete
Refresh
Check access
Share
Touchpad not working
Saved
Case • Case for Multisession experience
Case Number CAS-10432
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Created On 12/10/2026 9:12 AM
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Summary
Knowledge articles
Enhanced SLA details
Related
Case details
Search issue *
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Case Number
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Case status
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Status reason
Information provided
Owner
Kristin Patterson
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Highlights
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Touchpad not working...
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12/10/2026 at 10:00 AM
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Next Best Action
Touchpad not working
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Plan progress
0 of 3 steps complete
Send remote troubleshooting steps
Review Morgan's results
Wrap up and update case
Draft email to customer
Approval needed
Customer
Morgan Reed
To
morgan.reed@example.com
Subject
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Draft email
Modify

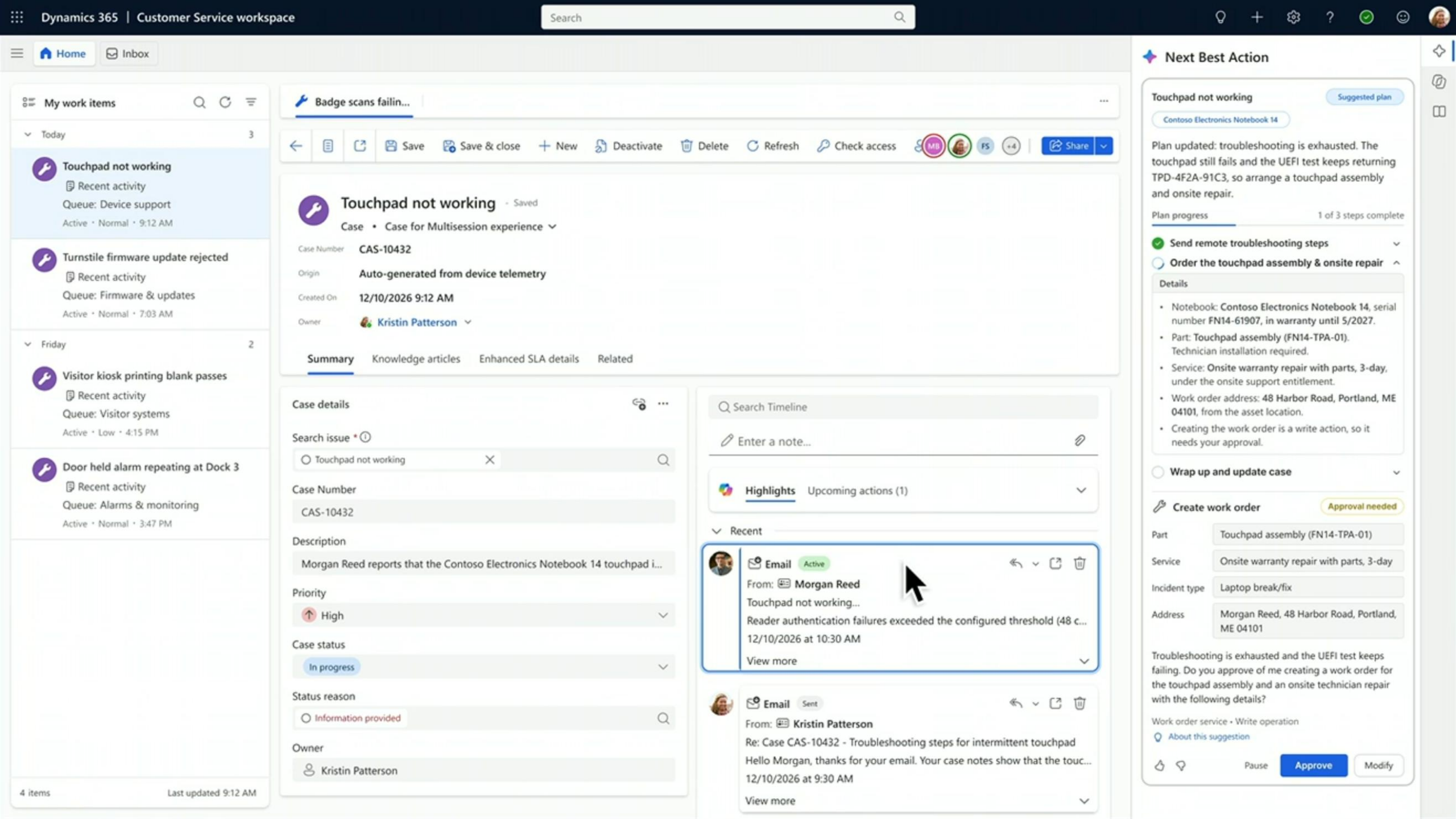

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Hard reset: shut down, unplug the AC adapter and nonessential accessories, hold the power button for about 15 seconds, then reconnect power and restart.
Updates: install available Windows and optional driver updates, restart, and test the touchpad again.
Diagnostics: run UEFI Component Tests > Mouse/Touchpad and record any failure ID.
Review Morgan's results
Wrap up and update case
Draft email to customer
Approval needed
Customer
Morgan Reed
To
morgan.reed@example.
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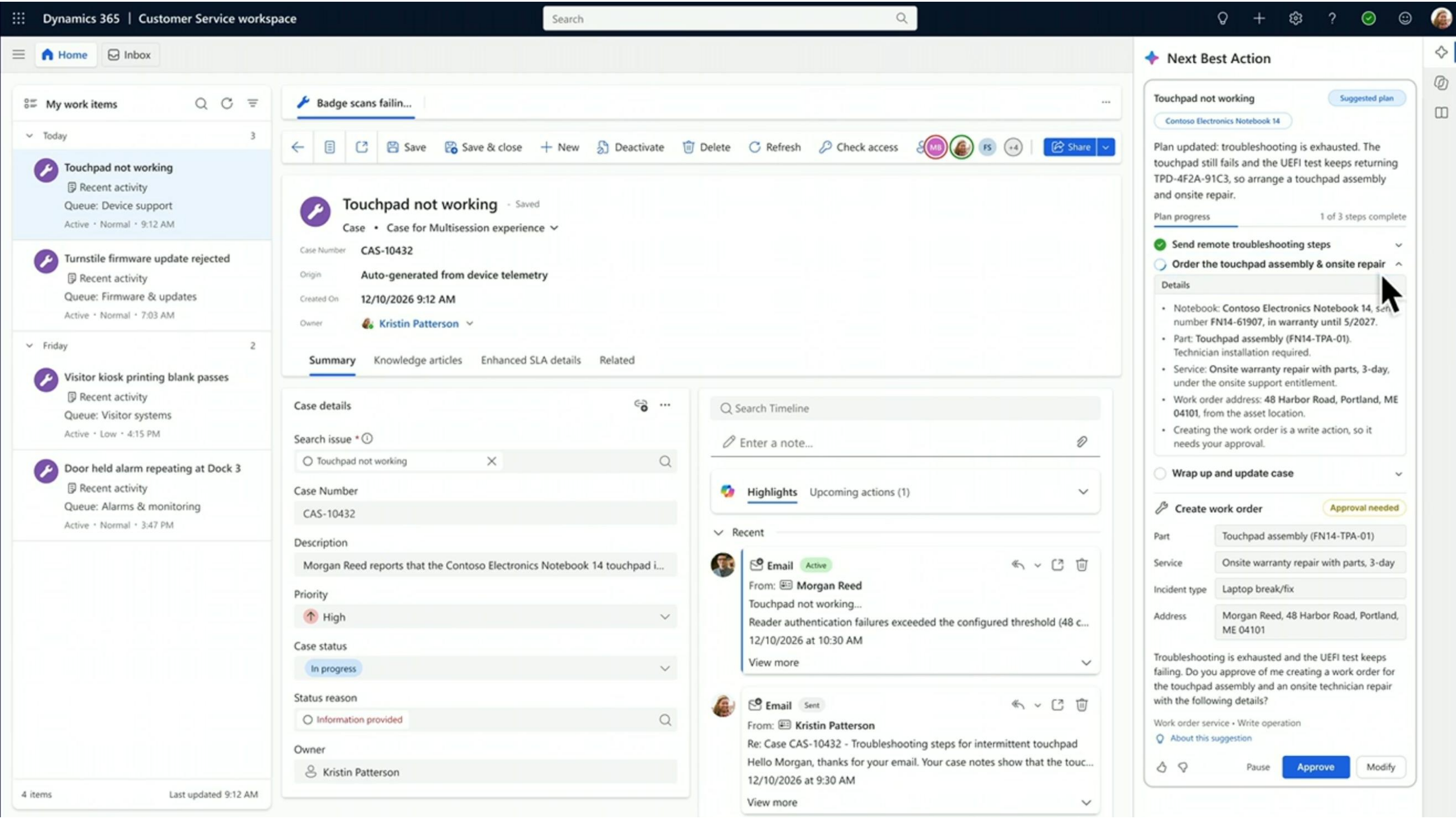

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Queue: Alarms & monitoring
Active · Normal · 3:47 PM
4 items
Last updated 9:12 AM
Touchpad not working
Re: Case CAS-10432 - Troubl...
Send
Save
Save & Close
Refresh
Attach File
Insert Template
Re: Case CAS-10432 - Troubleshooting steps for intermittent touchpad - Saved
Email · Enhanced Email
Normal
Priority

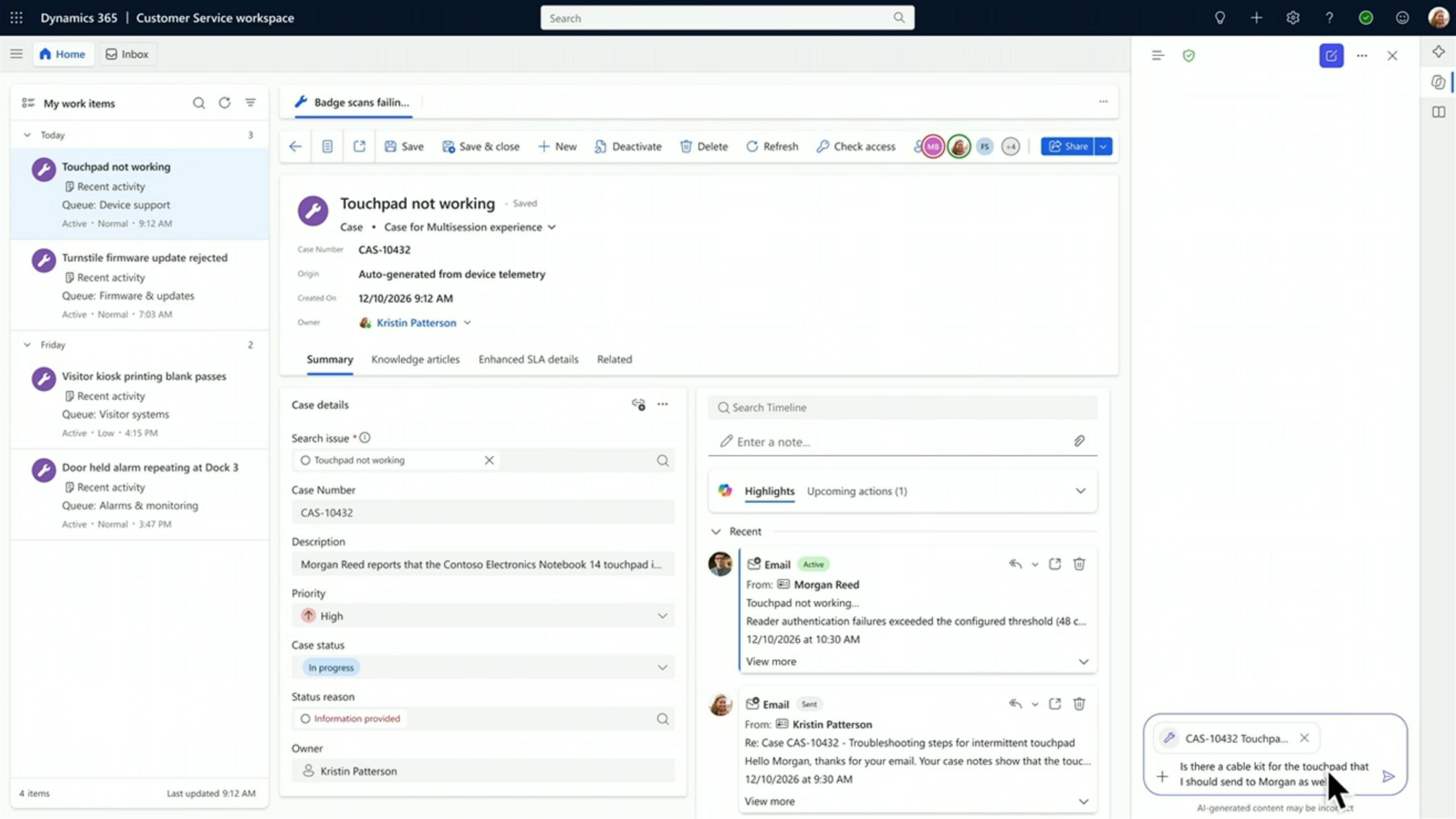
Due
Draft
Status Reason
Kristin Patterson
Owner
Email
Related
Form assist
Contoso Electronics Support
Hello Morgan,
Thanks for your email. Your case notes show that the touchpad on your Contoso Electronics Notebook 14 works intermittently, an external mouse works, and UEFI diagnostics displayed error code TPD-4F2A-91C3. Please try these steps and let us know the results:
1. In Windows, open Touchpad settings and make sure the touchpad is turned on. Check whether it's set to turn off automatically when an external mouse is connected.
2. If the issue continues, shut down the notebook, unplug the AC adapter and nonessential accessories, then hold the power button for about 15 seconds. Reconnect power and start the notebook.
3. Install available Windows updates, including optional driver updates, and restart if prompted. Then test the touchpad again.
4. If the issue continues, restart the notebook, open UEFI diagnostics, run Component Tests > Mouse/Touchpad, and reply with the result and any failure ID.
Regards,
Kristin Patterson
Contoso Electronics Support
----- Original Customer Message -----
From: morgan.reed@example.com
Received: 10/27/2026 9:12 AM
Subject: Touchpad not working
Hi, the touchpad on my Contoso Electronics Notebook 14 keeps cutting out. It works for a few minutes, then stops responding. An external mouse works fine. I ran the UEFI diagnostics and got error code TPD-4F2A-91C3. Can you help?
Thanks,
Morgan
Regarding
Touchpad not working
Next Best Action
Touchpad not working
Suggested plan
Contoso Electronics Notebook 14
An external mouse works and UEFI diagnostics already recorded TPD-4F2A-91C3. Send Morgan the remaining troubleshooting steps.
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Send remote troubleshooting steps
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Updates: install available Windows and optional driver updates, restart, and test the touchpad again.
Diagnostics: run UEFI Component Tests > Mouse/Touchpad and record any failure ID.
Review Morgan's results
Wrap up and update case
Draft email to customer
Approval needed
Customer
Morgan Reed
To
morgan.reed@example.com
Subject
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Email Morgan the remaining checks from the troubleshooting guide: settings, a hard reset, updates and the UEFI touchpad test. Review the draft, then send it.
About this suggestion
Pause
Draft email
Modify

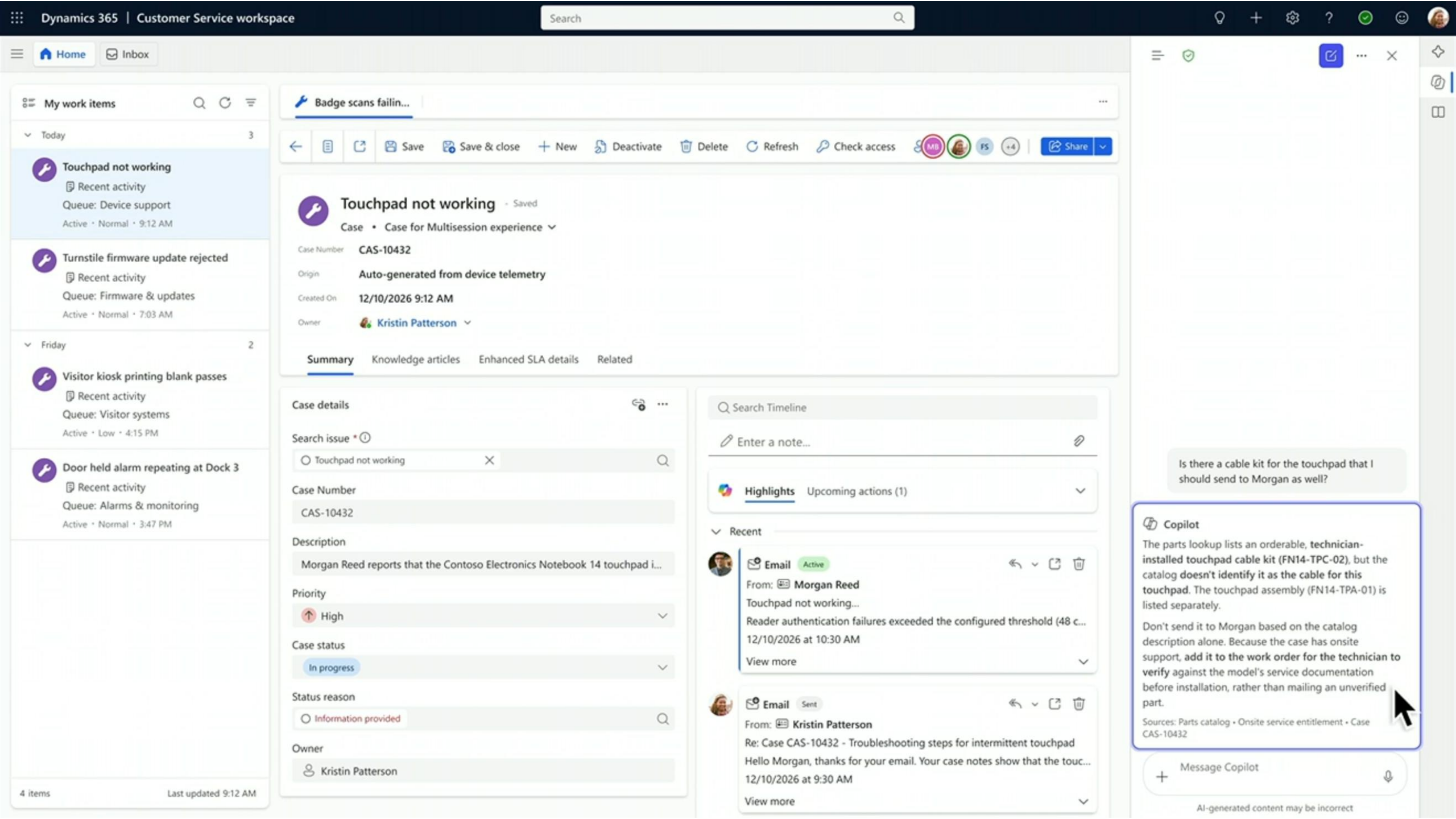

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4 items
Last updated 9:12 AM
Badge scans failin...
Save
Save & close
New
Deactivate
Delete
Refresh
Check access
Share
Touchpad not working
Saved
Case • Case for Multisession experience
Case Number CAS-10432
Origin Auto-generated from device telemetry
Created On 12/10/2026 9:12 AM
Owner Kristin Patterson
Summary
Knowledge articles
Enhanced SLA details
Related
Case details
Search issue *
Touchpad not working
Case Number
CAS-10432
Description
Morgan Reed reports that the Contoso Electronics Notebook 14 touchpad i...
Priority
High
Case status
In progress
Status reason
Information provided
Owner
Kristin Patterson
Search Timeline
Enter a note...
Highlights
Upcoming actions (1)
Recent
Email
Active
From: Morgan Reed
Touchpad not working...
Reader authentication failures exceeded the configured threshold (48 c...
12/10/2026 at 10:30 AM
View more
Email
Sent
From: Kristin Patterson
Re: Case CAS-10432 - Troubleshooting steps for intermittent touchpad
Hello Morgan, thanks for your email. Your case notes show that the touc...
12/10/2026 at 9:30 AM
View more
Next Best Action
Touchpad not working
Suggested plan
Contoso Electronics Notebook 14
Plan updated: troubleshooting is exhausted. The touchpad still fails and the UEFI test keeps returning TPD-4F2A-91C3, so arrange a touchpad assembly and onsite repair.
Plan progress
1 of 3 steps complete
Send remote troubleshooting steps
Order the touchpad assembly & onsite repair
Details
Notebook: Contoso Electronics Notebook 14, serial number FN14-61907, in warranty until 5/2027.
Part: Touchpad assembly (FN14-TPA-01). Technician installation required.
Service: Onsite warranty repair with parts, 3-day, under the onsite support entitlement.
Work order address: 48 Harbor Road, Portland, ME 04101, from the asset location.
Creating the work order is a write action, so it needs your approval.
Wrap up and update case
Create work order
Approval needed
Part
Touchpad assembly (FN14-TPA-01)
Service
Onsite warranty repair with parts, 3-day
Incident type
Laptop break/fix
Address
Morgan Reed, 48 Harbor Road, Portland, ME 04101
Troubleshooting is exhausted and the UEFI test keeps failing. Do you approve of me creating a work order for the touchpad assembly and an onsite technician repair with the following details?
Work order service • Write operation
About this suggestion
Pause
Approve
Modify

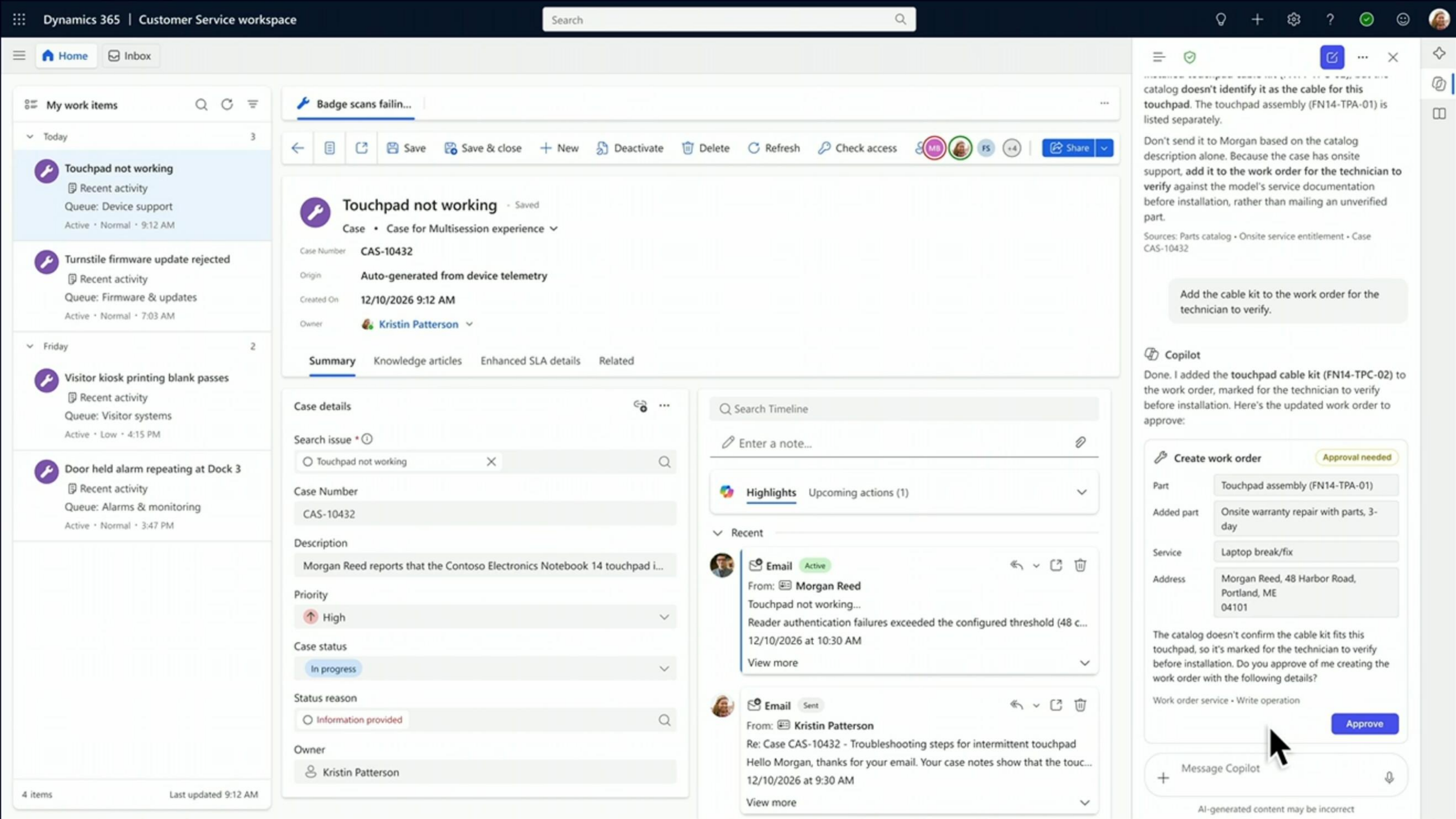

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Save & close
New
Deactivate
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Refresh
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Share
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Case details
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Case status
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Status reason
Information provided
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Search Timeline
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Highlights
Upcoming actions (1)
Recent
Email Sent
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Re: Case CAS-10432 - Troubleshooting steps for intermittent touchpad
Hello Morgan, thanks for your email. Your case notes show that the tou...
12/10/2026 at 9:30 AM
View more
Auto-post on: 12/10/2026 9:12 AM
Case CAS-10432 created automatically from a device threshold breach
Email Closed
From: Morgan Reed
Touchpad not working...
Reader authentication failures exceeded the configured threshold (48 co...
Next Best Action
Touchpad not working
Suggested plan
Contoso Electronics Notebook 14
Troubleshooting steps sent. Wait for Morgan's results before deciding on a repair.
Plan progress
1 of 3 steps complete
Send remote troubleshooting steps
Review Morgan's results
Wrap up and update case
About this suggestion
Pause
Modify

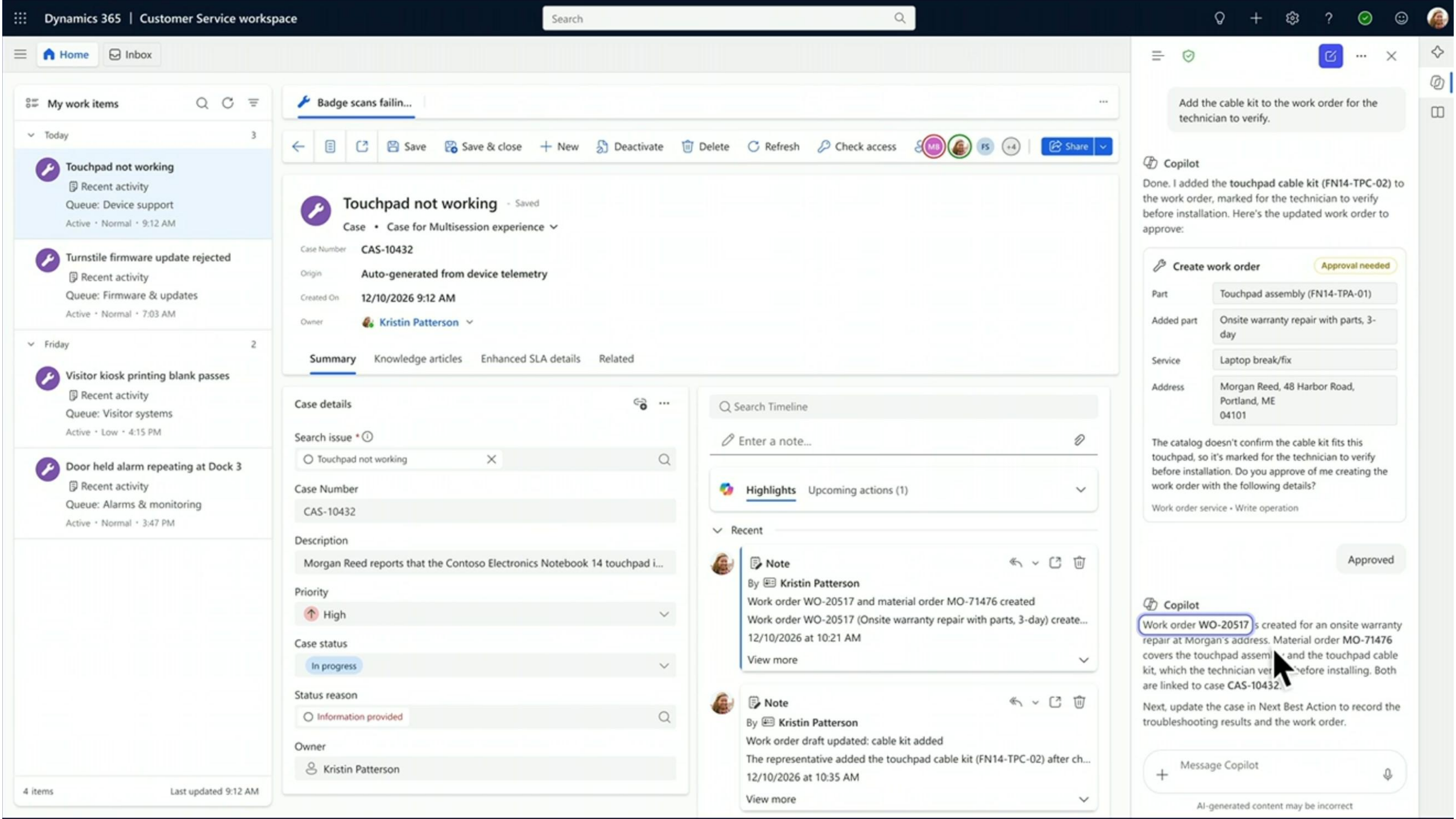

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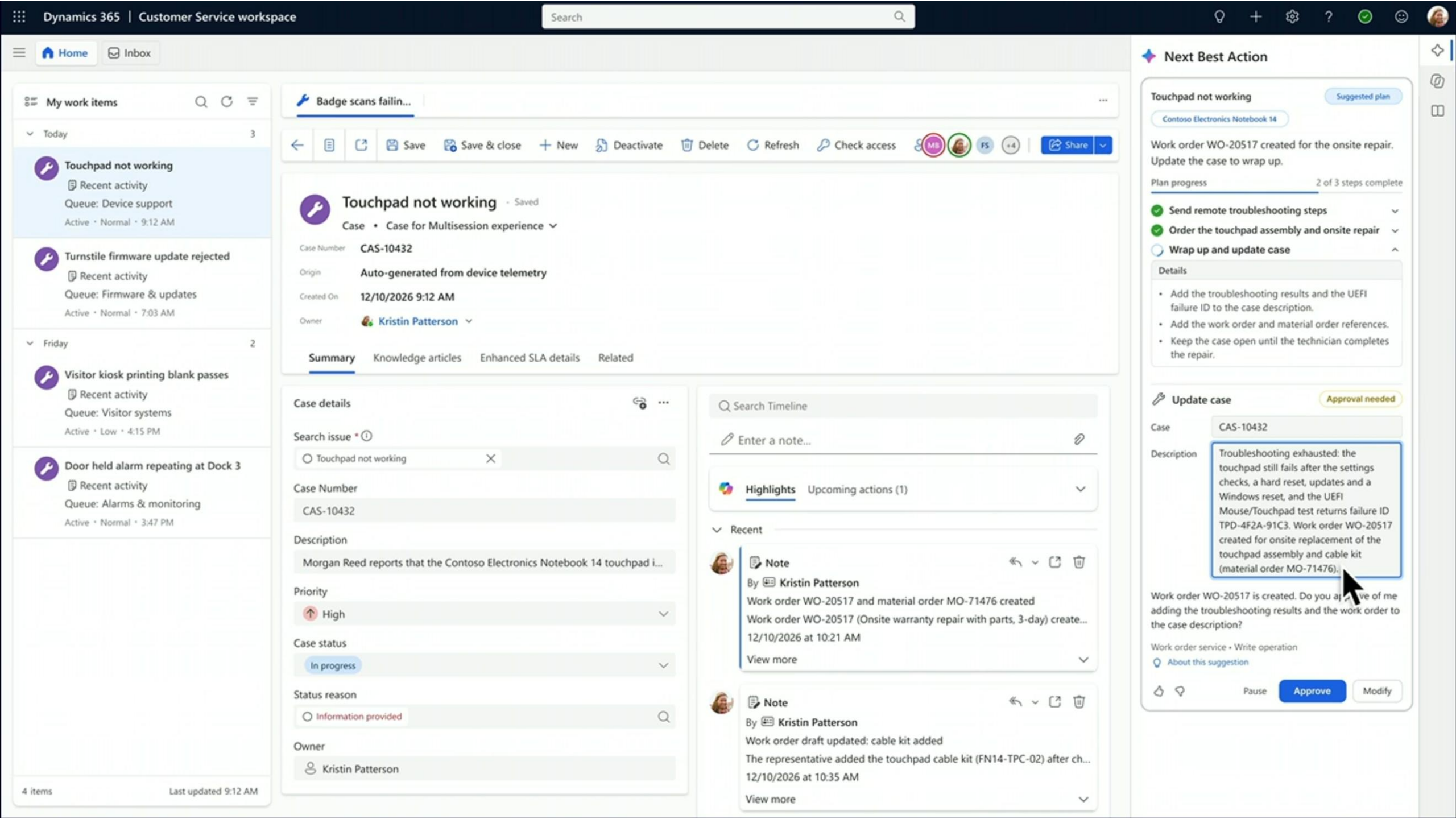

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Sent
From: Kristin Patterson
Re: Case CAS-10432 - Troubleshooting steps for intermittent touchpad
Hello Morgan, thanks for your email. Your case notes show that the touc...
12/10/2026 at 9:30 AM
View more
Next Best Action
Touchpad not working
Suggested plan
Contoso Electronics Notebook 14
Plan updated: troubleshooting is exhausted. The touchpad still fails and the UEFI test keeps returning TPD-4F2A-91C3, so arrange a touchpad assembly and onsite repair.
Plan progress
1 of 3 steps complete
Send remote troubleshooting steps
Order the touchpad assembly & onsite repair
Details
Notebook: Contoso Electronics Notebook 14, serial number FN14-61907, in warranty until 5/2027.
Part: Touchpad assembly (FN14-TPA-01). Technician installation required.
Service: Onsite warranty repair with parts, 3-day, under the onsite support entitlement.
Work order address: 48 Harbor Road, Portland, ME 04101, from the asset location.
Creating the work order is a write action, so it needs your approval.
Wrap up and update case
Create work order
Approval needed
Part Touchpad assembly (FN14-TPA-01)
Service Onsite warranty repair with parts, 3-day
Incident type Laptop break/fix
Address Morgan Reed, 48 Harbor Road, Portland, ME 04101
Troubleshooting is exhausted and the UEFI test keeps failing. Do you approve of me creating a work order for the touchpad assembly and an onsite technician repair with the following details?
Work order service • Write operation
About this suggestion
Pause
Approve
Modify

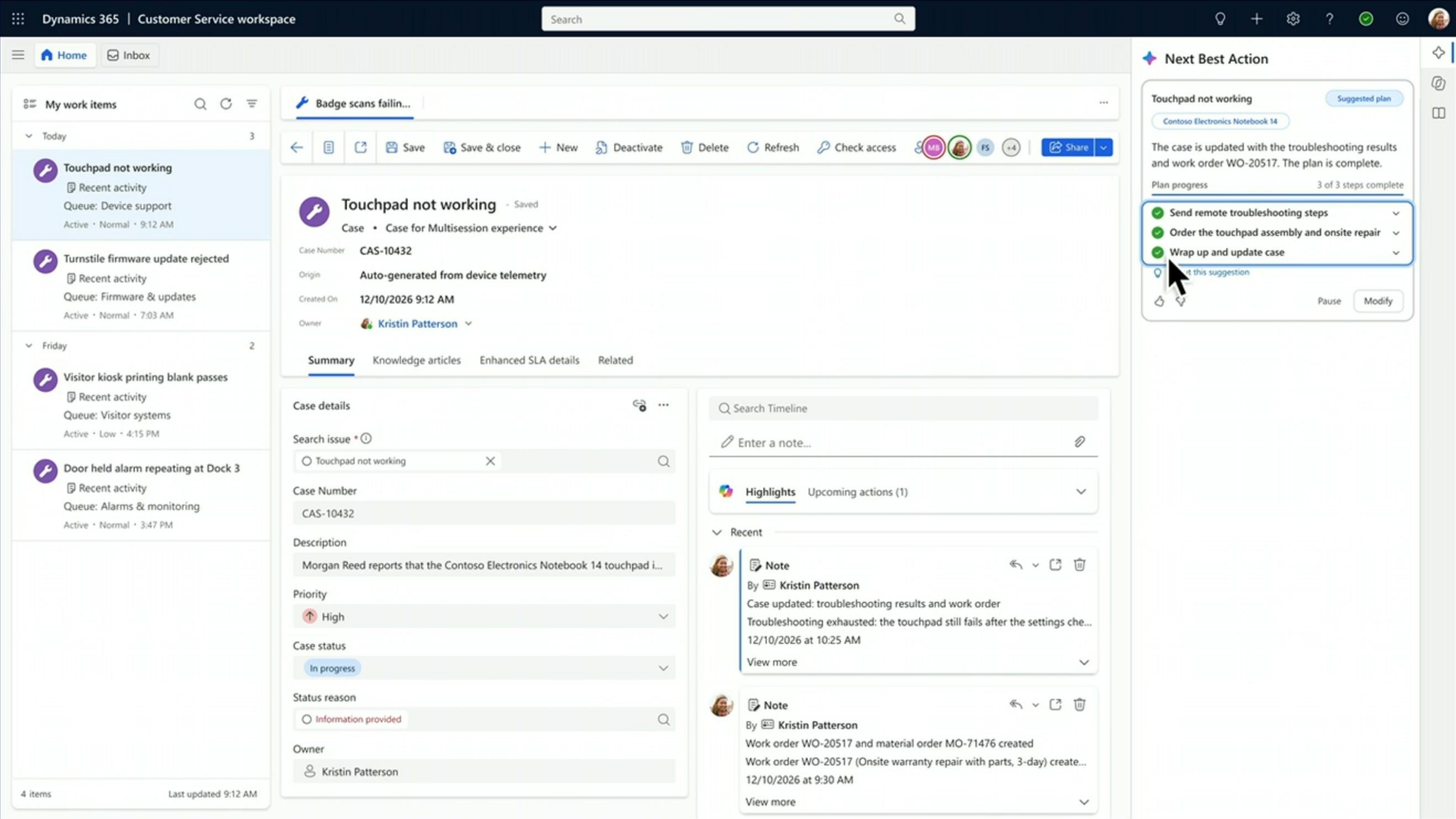

Dynamics 365 | Customer Service workspace
Search
Home
Inbox
My work items
Today 3
Touchpad not working
Recent activity
Queue: Device support
Active · Normal · 9:12 AM
Turnstile firmware update rejected
Recent activity
Queue: Firmware & updates
Active · Normal · 7:03 AM
Friday 2
Visitor kiosk printing blank passes
Recent activity
Queue: Visitor systems
Active · Low · 4:15 PM
Door held alarm repeating at Dock 3
Recent activity
Queue: Alarms & monitoring
Active · Normal · 3:47 PM
4 items
Last updated 9:12 AM
Badge scans failin...
Save
Save & close
New
Deactivate
Delete
Refresh
Check access
Share
Touchpad not working
Saved
Case • Case for Multisession experience
Case Number CAS-10432
Origin Auto-generated from device telemetry
Created On 12/10/2026 9:12 AM
Owner Kristin Patterson
Summary
Knowledge articles
Enhanced SLA details
Related
Case details
Search issue *
Touchpad not working
Case Number
CAS-10432
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Morgan Reed reports that the Contoso Electronics Notebook 14 touchpad i...
Priority
High
Case status
In progress
Status reason
Information provided
Owner
Kristin Patterson
Search Timeline
Enter a note...
Highlights
Upcoming actions (1)
Recent
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Active
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Touchpad not working...
Reader authentication failures exceeded the configured threshold (48 c...
12/10/2026 at 10:30 AM
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12/10/2026 at 9:30 AM
View more
CAS-10432 Touchpa...
Is there a cable kit for the touchpad that
I should send to Morgan as wel
AI-generated content may be incorrect


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12/10/2026 at 9:30 AM
View more
Is there a cable kit for the touchpad that I should send to Morgan as well?
Copilot
The parts lookup lists an orderable, technician-installed touchpad cable kit (FN14-TPC-02), but the catalog doesn't identify it as the cable for this touchpad. The touchpad assembly (FN14-TPA-01) is listed separately.
Don't send it to Morgan based on the catalog description alone. Because the case has onsite support, add it to the work order for the technician to verify against the model's service documentation before installation, rather than mailing an unverified part.
Sources: Parts catalog • Onsite service entitlement • Case CAS-10432
Message Copilot
AI-generated content may be incorrect


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Don't send it to Morgan based on the catalog description alone. Because the case has onsite support, add it to the work order for the technician to verify against the model's service documentation before installation, rather than mailing an unverified part.
Sources: Parts catalog • Onsite service entitlement • Case CAS-10432
Add the cable kit to the work order for the technician to verify.
Copilot
Done. I added the touchpad cable kit (FN14-TPC-02) to the work order, marked for the technician to verify before installation. Here's the updated work order to approve:
Create work order
Approval needed
Part
Touchpad assembly (FN14-TPA-01)
Added part
Onsite warranty repair with parts, 3-day
Service
Laptop break/fix
Address
Morgan Reed, 48 Harbor Road, Portland, ME 04101
The catalog doesn't confirm the cable kit fits this touchpad, so it's marked for the technician to verify before installation. Do you approve of me creating the work order with the following details?
Work order service • Write operation
Approve
Message Copilot
AI-generated content may be incorrect


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Information provided
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Kristin Patterson
Search Timeline
Enter a note...
Highlights
Upcoming actions (1)
Recent
Note
By Kristin Patterson
Work order WO-20517 and material order MO-71476 created
Work order WO-20517 (Onsite warranty repair with parts, 3-day) create...
12/10/2026 at 10:21 AM
View more
Note
By Kristin Patterson
Work order draft updated: cable kit added
The representative added the touchpad cable kit (FN14-TPC-02) after ch...
12/10/2026 at 10:35 AM
View more
Add the cable kit to the work order for the technician to verify.
Copilot
Done. I added the touchpad cable kit (FN14-TPC-02) to the work order, marked for the technician to verify before installation. Here's the updated work order to approve:
Create work order
Approval needed
Part
Touchpad assembly (FN14-TPA-01)
Added part
Onsite warranty repair with parts, 3-day
Service
Laptop break/fix
Address
Morgan Reed, 48 Harbor Road, Portland, ME 04101
The catalog doesn't confirm the cable kit fits this touchpad, so it's marked for the technician to verify before installation. Do you approve of me creating the work order with the following details?
Work order service • Write operation
Approved
Copilot
Work order WO-20517 s created for an onsite warranty repair at Morgan's address. Material order MO-71476 covers the touchpad assem and the touchpad cable kit, which the technician ver efore installing. Both are linked to case CAS-10432.
Next, update the case in Next Best Action to record the troubleshooting results and the work order.
Message Copilot
AI-generated content may be incorrect


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12/10/2026 at 10:35 AM
View more
Next Best Action
Touchpad not working
Suggested plan
Contoso Electronics Notebook 14
Work order WO-20517 created for the onsite repair. Update the case to wrap up.
Plan progress
2 of 3 steps complete
Send remote troubleshooting steps
Order the touchpad assembly and onsite repair
Wrap up and update case
Details
Add the troubleshooting results and the UEFI failure ID to the case description.
Add the work order and material order references.
Keep the case open until the technician completes the repair.
Update case
Approval needed
Case
CAS-10432
Description
Troubleshooting exhausted: the touchpad still fails after the settings checks, a hard reset, updates and a Windows reset, and the UEFI Mouse/Touchpad test returns failure ID TPD-4F2A-91C3. Work order WO-20517 created for onsite replacement of the touchpad assembly and cable kit (material order MO-71476).
Work order WO-20517 is created. Do you approve of me adding the troubleshooting results and the work order to the case description?
Work order service • Write operation
About this suggestion
Pause
Approve
Modify


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View more
Next Best Action
Touchpad not working
Suggested plan
Contoso Electronics Notebook 14
The case is updated with the troubleshooting results and work order WO-20517. The plan is complete.
Plan progress
3 of 3 steps complete
Send remote troubleshooting steps
Order the touchpad assembly and onsite repair
Wrap up and update case
Pause
Modify

Customer conversation harness

Now in Public Preview

What it is and how it answers
the three challenges

The platform

One platform. Several harnesses.

Every agent in Copilot Studio is built on a harness: the architecture underneath it. It shapes how the agent reasons, where it can be published, and what it costs to run.

Why more than one

Different business needs call for different architectures, so Copilot Studio gives you a harness built for each one. Whatever you are building, there is a fit.

What stays the same

Every harness lives inside Copilot Studio. Same knowledge sources and connectors, same governance model, one platform to build and manage on.

What differs

The architecture underneath: how the agent reasons, where it publishes, what it costs to run. Authoring is tuned per harness, not identical.

Now in preview

The customer conversation harness in Copilot Studio

Build agents your customers want to talk to – by voice or chat. Publish them to every channel your customers reach you on.

Copilot Studio gives you one place to build customer-facing voice and chat agents that are grounded, governed, and ready for the contact center.



Under the hood

A team of specialists in one agent

Every new conversational agent works across voice and chat by default, understands multiplelanguages out of the box, and is context-aware.

01 **Primary agent + specialized subagents**

A primary agent hands each need to subagents, each with its own knowledge, tools and job.

02 **Foundry agents as subagents**

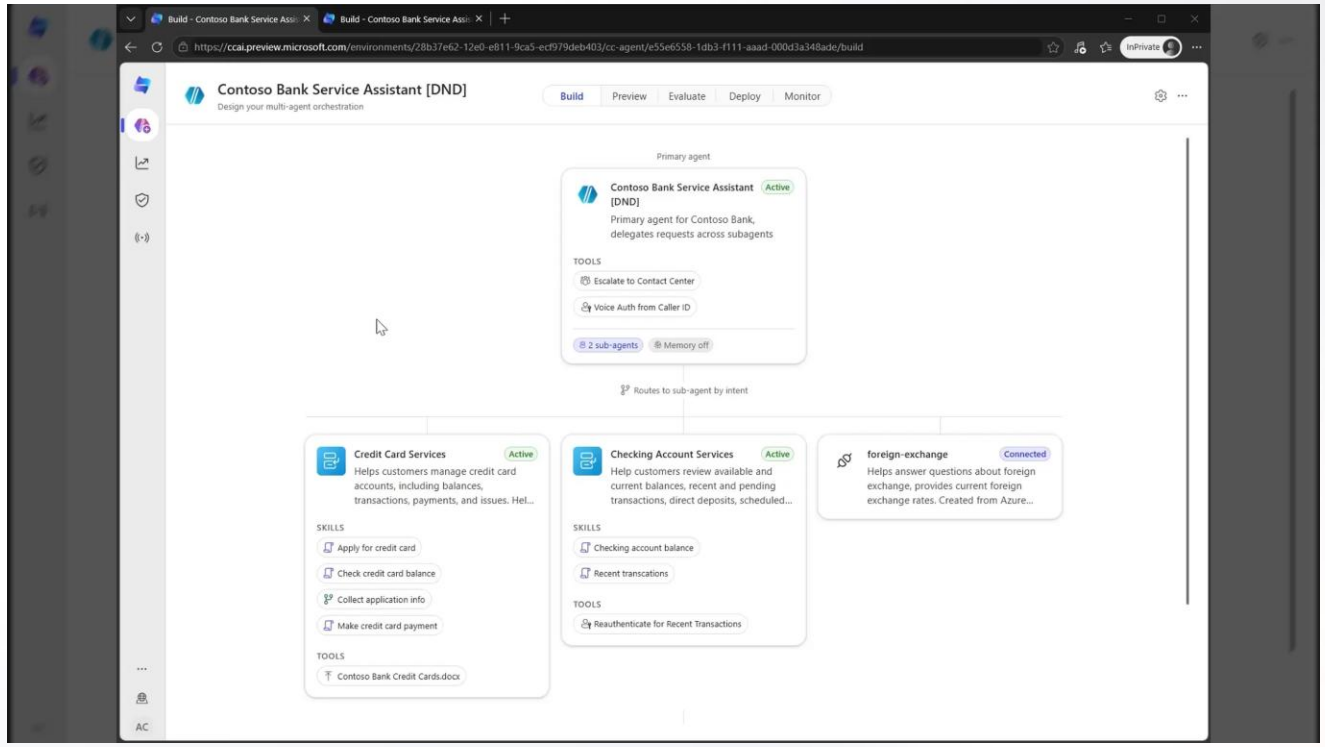
Add pro-code Microsoft Foundry agents as specialized subagents in a few clicks.

03 **Knowledge and tools**

Ground answers in Microsoft IQ, including Foundry IQ, Fabric IQ and Work IQ, and connect your tools.

04 **Consistent across channels**

Maintain and update agents with the same shared business knowledge and conversation logic everywhere



Under the hood

Generative and deterministic, together

Each job runs the way it should: generative where flexibility helps, deterministic where every step must be exact. Now both work in the same system.

01

Generative jobs

Describe the job in a prompt, such as "go and gather the credit card information," and let the model use its judgment

02

Deterministic topics

Define step-by-step topics for steps that must happen in the same order every time.

03

Both in one system

In the past you chose one or the other. Now combine both in the same agent.

04

A model per agent

Each agent can use its own model. Some tasks call for deep reasoning; others benefit from models optimized for cost and latency.

Under the hood

Voice as a first-class experience

Shape how the agent sounds and behaves on the phone, then measure end-to-end conversational quality.

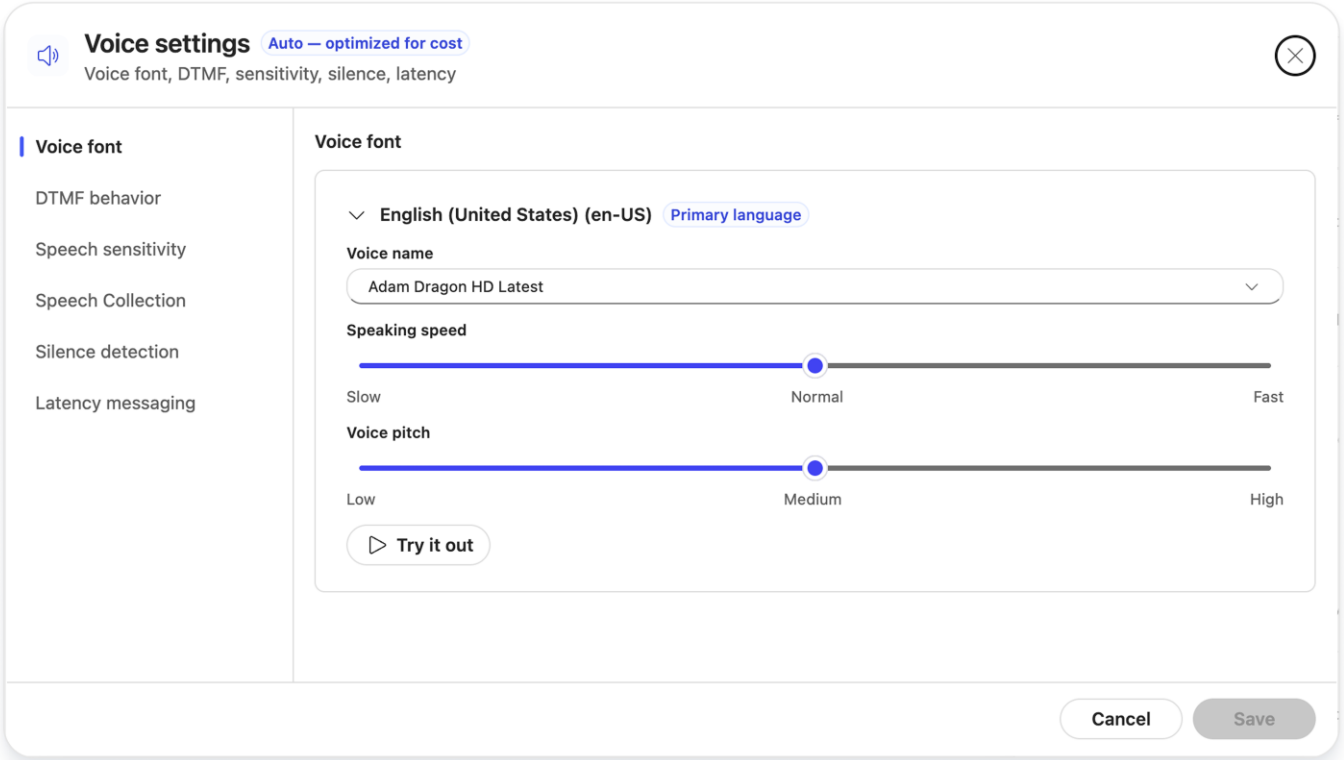
01 Voice fonts and speech instructions for tone, style and delivery

02 DTMF, speech sensitivity, and latency messaging

03 Speech-to-speech model choice; acquire and deploy phone numbers

04 Voice-specific instructions, plus language switching within a conversation

05 Voice evaluations for expression, empathy, and naturalness, as well as turn-by-turn reasoning and tool execution



Under the hood

Secure, frictionless authentication

Voice biometrics verify the caller in real time from natural conversation, while the customer explains why they called. Available through supported Contact Center Intelligence configurations (Gatekeeper voice biometrics).

Authenticate while they talk

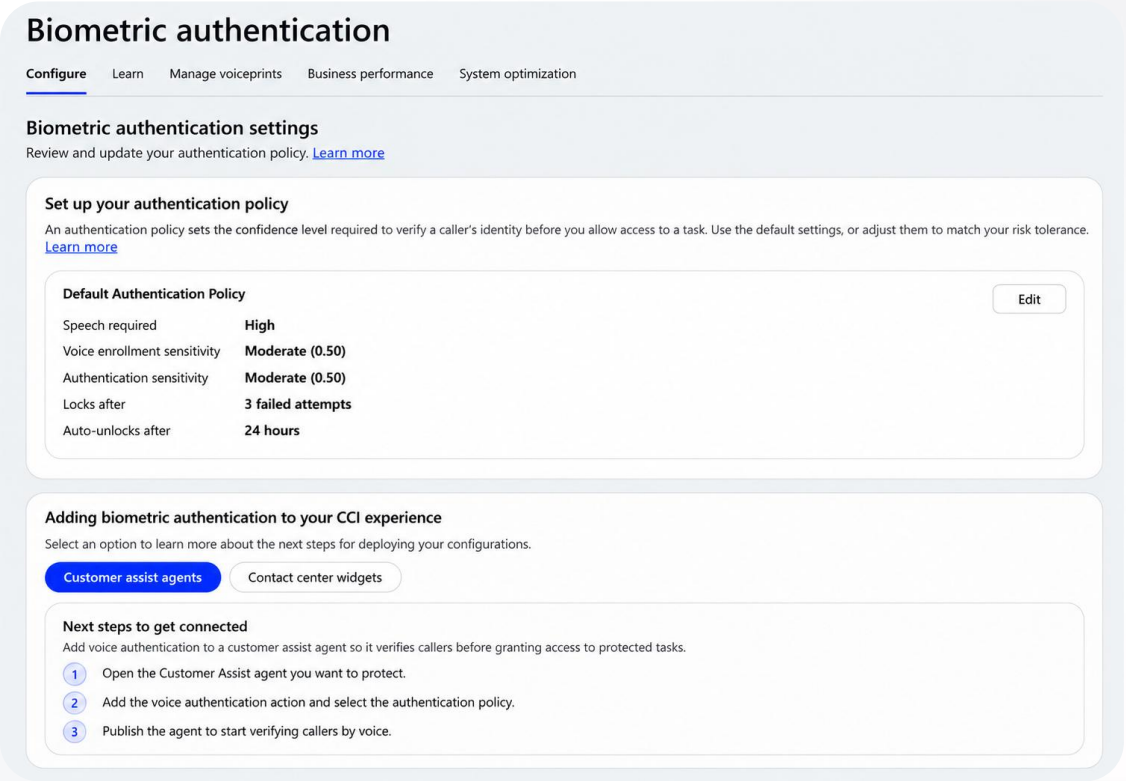
Verification runs in the background as the customer explains the reason for the call.

Defend against fraud

Detect spoofing, deepfakes, synthetic speech and replay attacks, with fraud monitoring and reporting.

One flow for the customer

Customers explain their issue once; authentication happens in the same conversation.



Under the hood

A modern, branded chat experience

An upgraded, brandable chat widget turns answers into actions customers can see, tap and complete.

01

Rich cards and carousels

Adaptive cards, product carousels and rich links.

02

Media, files and citations

Share media, accept file uploads and show citations for answers.

03

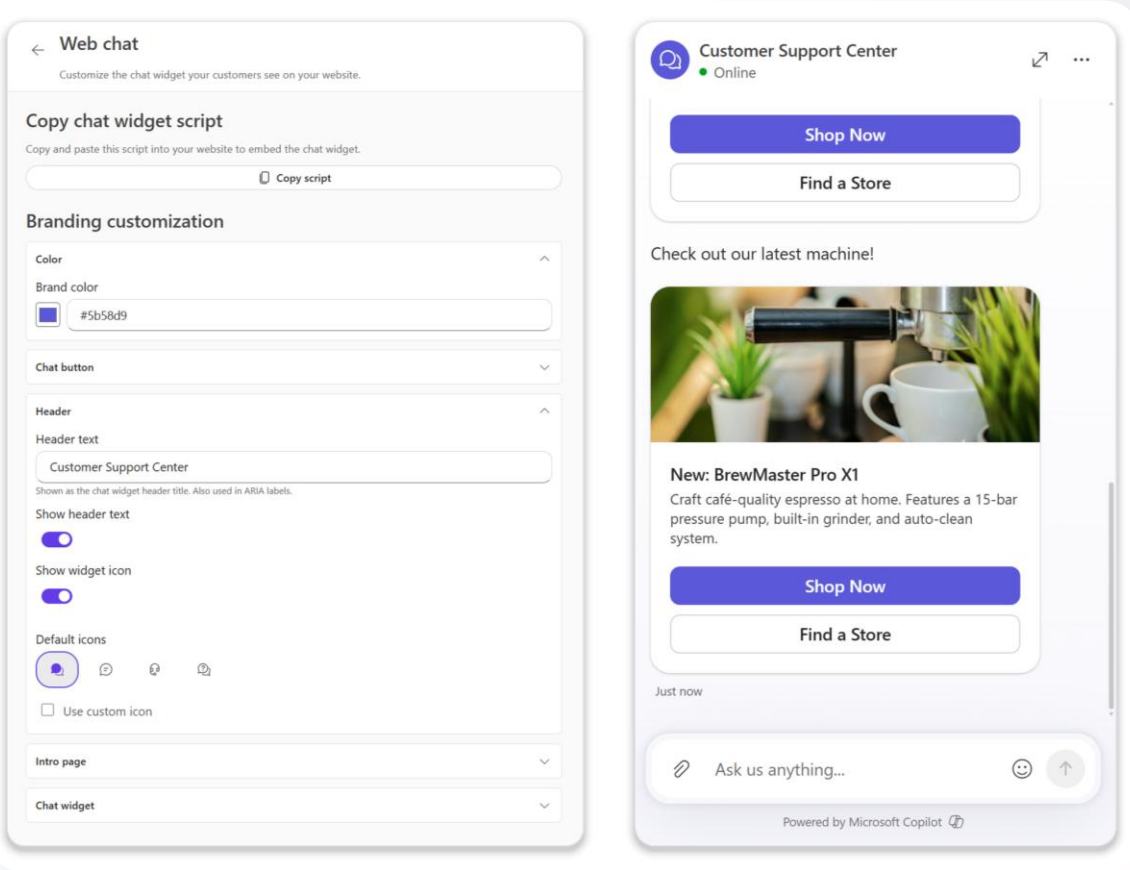
Guided replies

Quick replies, calendars and store locators help customers finish tasks.

04

Feedback built in

Collect feedback and run surveys inside the conversation.



Contact center

Extend your agent into your contact center

Through Microsoft Contact Center Intelligence, connect customer conversation harness agents to any contact center, such as Genesys or Dynamics 365 Contact Center.

Modernize in days

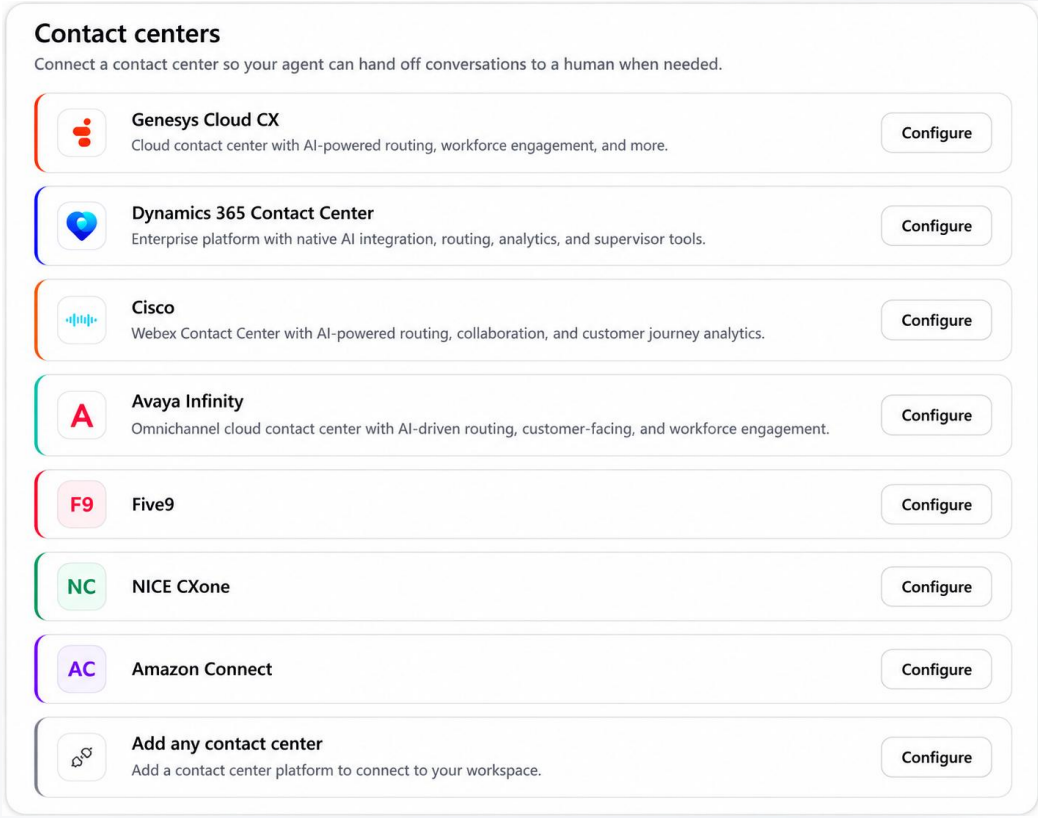
Keep existing telephony and routing by configuring a few parameters, rather than a multi-month integration.

Route and hand off with context

Use contact-center routing to connect customers with the right representative, preserving conversation context for a seamless handoff.

Authenticate and oversee

Use Gatekeeper voice biometrics for customer authentication and supervisor analytics for operational visibility.



Microsoft Contact Center Intelligence

Transform existing contact centers into agentic systems of action — without rip-and-replace

Innovate on the contact center you already have

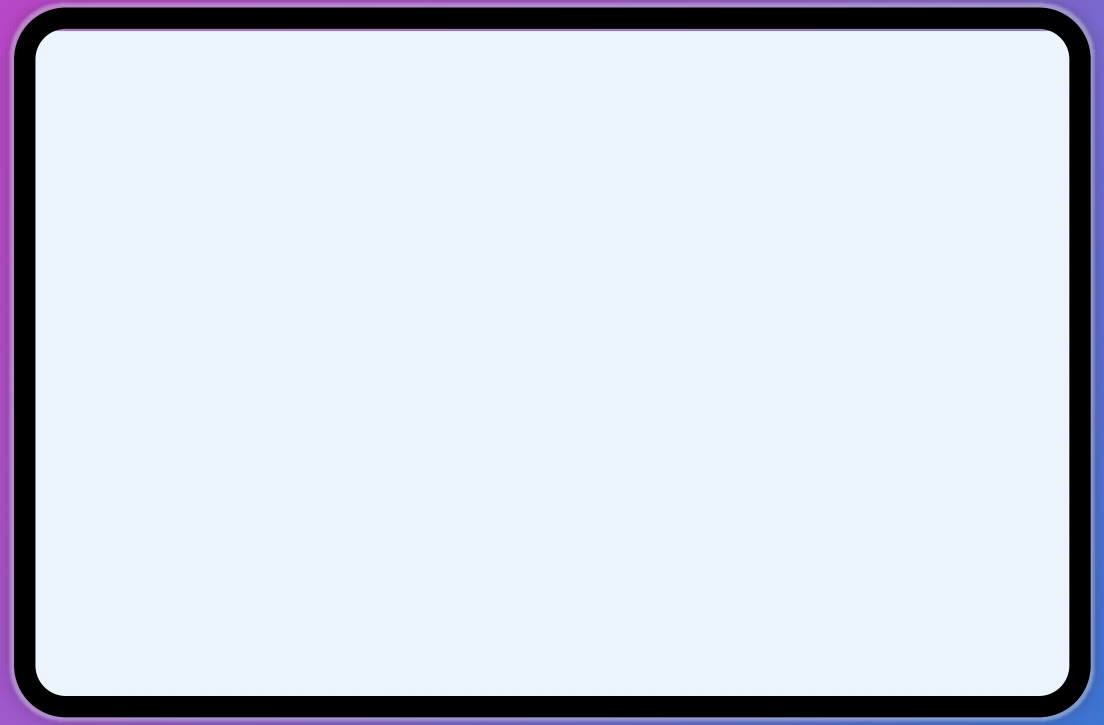
Add purpose-built Microsoft agents to existing contact centers. Start capturing value across use-cases without waiting for platform transformation.

Connect every conversation to context and action

Ground in customer context and enterprise knowledge via WorkIQ. Understand what the customer needs and take action with 1700+ Power Platform connectors.

Build and scale on an enterprise foundation

Add quality assurance and analytics designed to support the modern contact center alongside Microsoft security and governance you know and trust.



General Available

Microsoft Contact Center Intelligence

Transform existing contact centers into agentic systems of action — without rip-and-replace



Who touches what

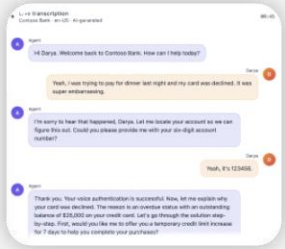
Personas and their CCI experience

One platform, five day-to-day experiences.

End customer

Self-service across voice and digital

- Conversational self-service across channels
- Can escalate to a human when needed



Supervisor / Ops leader

Quality dashboards and analytics

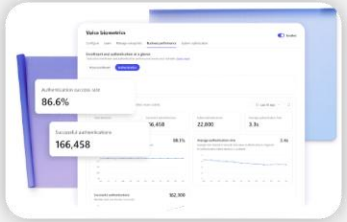
- Conversation monitoring and alerts
- Easier to offer quality management across the org



Contact center rep

Stays in the existing desktop

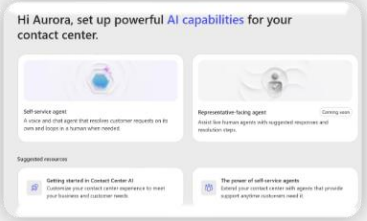
- No change to the platform they know
- Context and identity arrive with the call



Admin

The new CCI experience

- Integrates to contact center
- Manages quality policies and guardrails
- Manage authentication and fraud policies
- Governs via A365



Builder

The new conversational canvas

- Builds, orchestrates, tests and deploys agents
- Multi-agent builder
- Deterministic topics, omnichannel
- Extends in Microsoft Foundry



TWO WAYS TO GET THERE

Add intelligence to the contact center you have — or modernize the contact center itself.

Same ambition: precise, context-aware service. Different starting point, different scope of change.

MICROSOFT CONTACT CENTER INTELLIGENCE

Agents on your existing contact center

- Enterprise agents now — no rip and replace
- Extends the routing, desktop and reporting you already run
- Modernize the platform you have

BOTH OPTIONS

- Purpose-built for the contact center
- An enterprise agentic platform
- Data and application context layer
- Governance and control

DYNAMICS 365 CONTACT CENTER

Modernize the platform itself

- Microsoft-owned telephony, routing and channels
- End-to-end analytics and agent experience
- Self-optimizing operations

WHAT THE FULL PLATFORM OWNS END TO END

Routing
Work distribution across every channel

Analytics
One record of the whole interaction

Rep desktop
The surface agents work in all day

Supervisor
Live oversight, coaching, quality

Self-improving ops
The loop that tunes the operation

Dynamics 365 Activate

Accelerating discovery, implementation, and migration to from Salesforce to Dynamics 365

Realize value faster compared to traditional migrations

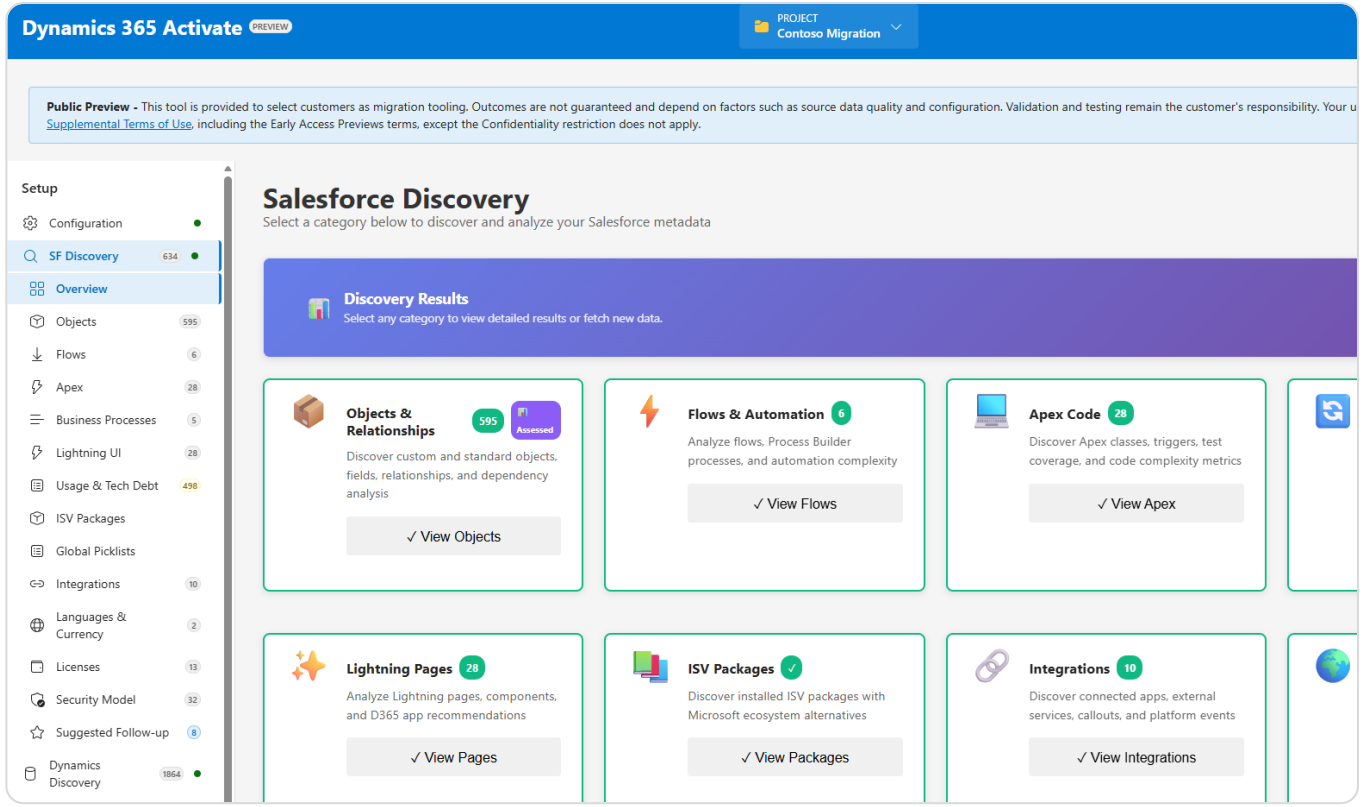
By reducing the time and effort required, organizations can modernize and begin realizing value quicker.

Reduce risk and migrate with confidence

Leverage consolidated visibility, consistency, and control in one tool throughout the migration journey, reducing the likelihood of costly delays, rework, and project failure.

Lower migration costs

Potentially reduce costs by automating discovery, mapping, and migration execution, enabling organizations to modernize more efficiently.



Generally Available

Nyttige lenker for å holde seg oppdatert

What's new in Dynamics 365 Sales and Customer Service (MS Ignite)

Dynamics CE roadmap (Erstatter Release Planner)

Dynamics 365 Blog

Microsoft Dynamics 365 Community

Microsoft Dynamics 365 – YouTube

Dynamics 365 and Power Platform Release Schedules | Microsoft Learn

Microsoft

Takk for meg!

Nyheter i D365 Customer Engagement

DynUG Høstkonferanse, 24. november 2026



O. Stian Lundquist
Microsoft