



Microsoft Sales Copilot

Top 10 Architecture Questions

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Introduction

This document answers the top 10 most frequent architecture questions about Sales Copilot and is a companion document to the **Sales Copilot – Architecture Overview**, which describes the Sales Copilot architecture in more detail.

1. How does Sales Copilot work?

Sales Copilot consists of a set of end-user experiences available via a **Microsoft Outlook Add-In** and **Microsoft Teams App**, which connects in real-time to your organization's CRM data and end-user's M365 / Office data to bring insights and productivity capabilities directly into the seller's flow of work.

2. What customer data does Sales Copilot access and update?

Sales Copilot accesses three sets of data:

- **Your organization's CRM data**, including out-of-box CRM entities, such as Contacts, Accounts, and Opportunities. Starting in May 2023 the list of CRM entities will be configurable and can contain out-of-box and custom entities.
- **End user's M365 / Office data**, including e-mail content and meeting data (e.g., meeting transcripts).
- **Sales Copilot specific data**, such as settings or insights generated as of the setup and end-user flows in Sales Copilot.

3. Where does Sales Copilot store my data?

All CRM data is created and updated directly in the CRM system via real-time access. **Sales Copilot does not copy any CRM data to other systems** except when unique identifiers are used for the purpose of mapping CRM org and entities to Sales Copilot specific data, for example Sales Copilot settings data or Sales Copilot generated insights data.

All M365 / Office data is created and updated directly in the [Microsoft Graph](#). In certain scenarios, M365 / Office data, such as e-mail and meeting content, is copied to the customer's CRM system for activity tracking purposes or into Dataverse as supplemental data for Sales Copilot generated insights data.

All Sales Copilot specific data, which does not fall into the two categories above, are stored in Microsoft Dataverse. For example, private notes are always stored in Dataverse, either in the existing Dynamics 365 instance for Dynamics 365 customers or the newly provisioned instances for Salesforce customers.

Irrespective of the data source, Sales Copilot never copies any of your organization's data or end-user data outside the boundaries of your tenant.

4. How does Sales Copilot connect to my CRM?

For connections to Dynamics 365, Sales Copilot uses the existing AAD authentication tokens issued when the end user logs into Microsoft Outlook or Microsoft Teams.

For connections to Salesforce, Sales Copilot prompts the end-user to log in to Salesforce using their existing credentials, which generates a Salesforce authentication token, which is leveraged by Sales Copilot to connect to Salesforce.

In all scenarios, Sales Copilot respects the end-user authentication and authorization context for all connections to the underlying CRM, which guarantees that the permissions setup for the end-user in the underlying CRM are fully respected for all read, write, updated, and delete operations (CRUD).

5. Who enables the Sales Copilot experiences?

M365 tenant admins install the Sales Copilot for Microsoft Outlook Add-In via the M365 Admin Center and the Sales Copilot for Microsoft Teams App via the Teams Admin center. This is generally referred to as an admin-managed install.

End-users can also install the Sales Copilot for Microsoft Outlook Add-In via Microsoft App Source or the embedded Microsoft Outlook Add-In installation flows and the Sales Copilot for Microsoft Teams App via the Microsoft Teams Store. This is generally referred to as a user-managed install. E-Mail notification banners and automatically adding the Sales Copilot for Microsoft Teams app to meetings does not work in these installations. However, tenant admins can explicitly block the app for end-user install via the corresponding admin portals.

CRM admins can configure Sales Copilot, e.g., configuring CRM entities and fields that are enabled in Sales Copilot for a given organization, and enable individual features, e.g., generative AI capabilities. Refer to the [Administrator settings for Sales Copilot](#) documentation on how to access the settings and the required permissions to change settings.

6. How do I manage the application lifecycle of Sales Copilot?

Sales Copilot is offered as a SaaS service and is fully managed by Microsoft. Once the Sales Copilot for Microsoft Outlook Add-In and Sales Copilot for Microsoft Teams App are installed, **Microsoft will fully manage updates to all components across the Sales Copilot stack.**

In rare circumstances, the Sales Copilot Add-In/App will require explicit admin consent during an update when new permissions are granted to Sales Copilot. In these circumstances, a notification will be sent to all admins via the [Message Center in Microsoft 365 Admin Center](#) to update the corresponding application.

7. Is Sales Copilot secure?

Yes! Sales Copilot strictly follows the data privacy, data security, data retention, and compliance boundaries of the underlying data stores, i.e., **Microsoft Graph** for M365 / Outlook data, **Dynamics 365** and **Salesforce** for CRM data, and **Dataverse** for Sales Copilot specific data. All data in transit is encrypted via Transport Layer Security (TLS). All Sales Copilot endpoints are authenticated via AAD and scoped to the end-user's permissions.

The following table provides links to various resources that describe security and compliance for data sources leveraged in Sales Copilot.

Type	M365 / Office Data	CRM Data Dynamics 365	Sales Copilot Data Dataverse

Data Security		Dynamics 365 security	Security in Microsoft Dataverse
Data Encryption	Encryption in the Microsoft Cloud	Enhance security by encrypting your data	About data encryption in Dataverse
Data Retention	Learn about data lifecycle management	Dataverse long term data retention overview	Dataverse long term data retention overview
Compliance and Data Privacy	Privacy & data management overview	Privacy and personal data for Microsoft Dynamics 365	Compliance and data privacy

8. What technologies does Sales Copilot use for CoPilot scenarios?

The Copilot capabilities in Sales Copilot are enabled through Azure Open AI services and are based on the latest developments in large language models (GPT 3.5). With Azure OpenAI, you get the security capabilities of Microsoft Azure while running the same models as OpenAI. Sales Copilot CoPilot seamlessly integrates your organization's CRM data and the end user's M365 / Office data with OpenAI to generate suggestions in real-time.

9. Does AI in Sales Copilot use my data?

Sales Copilot does not use any of your data to train AI models. Sales Copilot reads your CRM and M365 / Office data in real-time to generate power AI scenarios, does not store the data outside the three data sources described above, and discards the data after it is used in the runtime to generate insights. All the generated insights data is stored in Dataverse. All access to the underlying CRM and M365 / Office data happens in the context of the signed-in user and respects their permissions to the underlying data in the existing data stores.

10. Does Sales Copilot impact my existing workflow performance, cost, and storage?

Sales Copilot impact on performance, cost, and storage is equivalent to standard end-user connectivity and usage of your underlying CRM and is generally considered negligible.

Document Version History

Version	Changes	Publish Date
1.0	Initial Version	April 3 rd , 2023
1.1	Updated product name references from "Viva Sales" to "Sales Copilot".	September 12 th , 2023