



Microsoft Sales Copilot

Architecture Overview

Version 1.1 - Last Updated September 12th, 2023

Content

| | |
|--|-----------|
| Sales Copilot Architecture Overview..... | 6 |
| Component Overview..... | 6 |
| Client Layer | 7 |
| Service Layer | 7 |
| Data Layer | 7 |
| Storage and security | 8 |
| M365 / Office Data | 8 |
| CRM Data..... | 8 |
| Sales Copilot Data..... | 9 |
| Dynamics 365 Connected | 9 |
| Salesforce® Connected..... | 9 |
| Application Lifecycle Management..... | 9 |
| Release Cycle..... | 9 |
| Component Overview..... | 10 |
| Availability | 10 |
| Updates | 11 |
| Sales Copilot client add-in / apps | 11 |
| Monitoring..... | 11 |
| User Experiences | 12 |
| Launching the Sales Copilot Client Experiences | 12 |

| | |
|--|----|
| Sales Copilot for Microsoft Outlook Add-In | 12 |
| Surface Area Overview | 12 |
| Command Surfaces | 15 |
| Event-Based Activation | 15 |
| Sales Copilot for Microsoft Teams App..... | 16 |
| App for Teams Meetings and Calls..... | 16 |
| Personal Tab | 16 |
| Bot | 17 |
| Message Extension | 17 |

Security.....18

Authentication18

| | |
|--|----|
| Dynamics 365 Connected | 18 |
| Sales Copilot for Microsoft Outlook Add-In | 19 |
| Sales Copilot for Microsoft Teams App | 20 |
| Salesforce CRM Connected..... | 20 |
| Sales Copilot for Microsoft Outlook Add-In | 21 |
| Sales Copilot for Microsoft Teams App | 22 |

Data Access.....22

| | |
|--------------------------------|----|
| M365 / Office Data | 22 |
| CRM Data..... | 23 |
| Dynamics 365 Connected | 23 |
| Salesforce CRM Connected | 23 |
| Sales Copilot Data..... | 23 |
| Entity Definitions..... | 23 |
| Permissions | 24 |

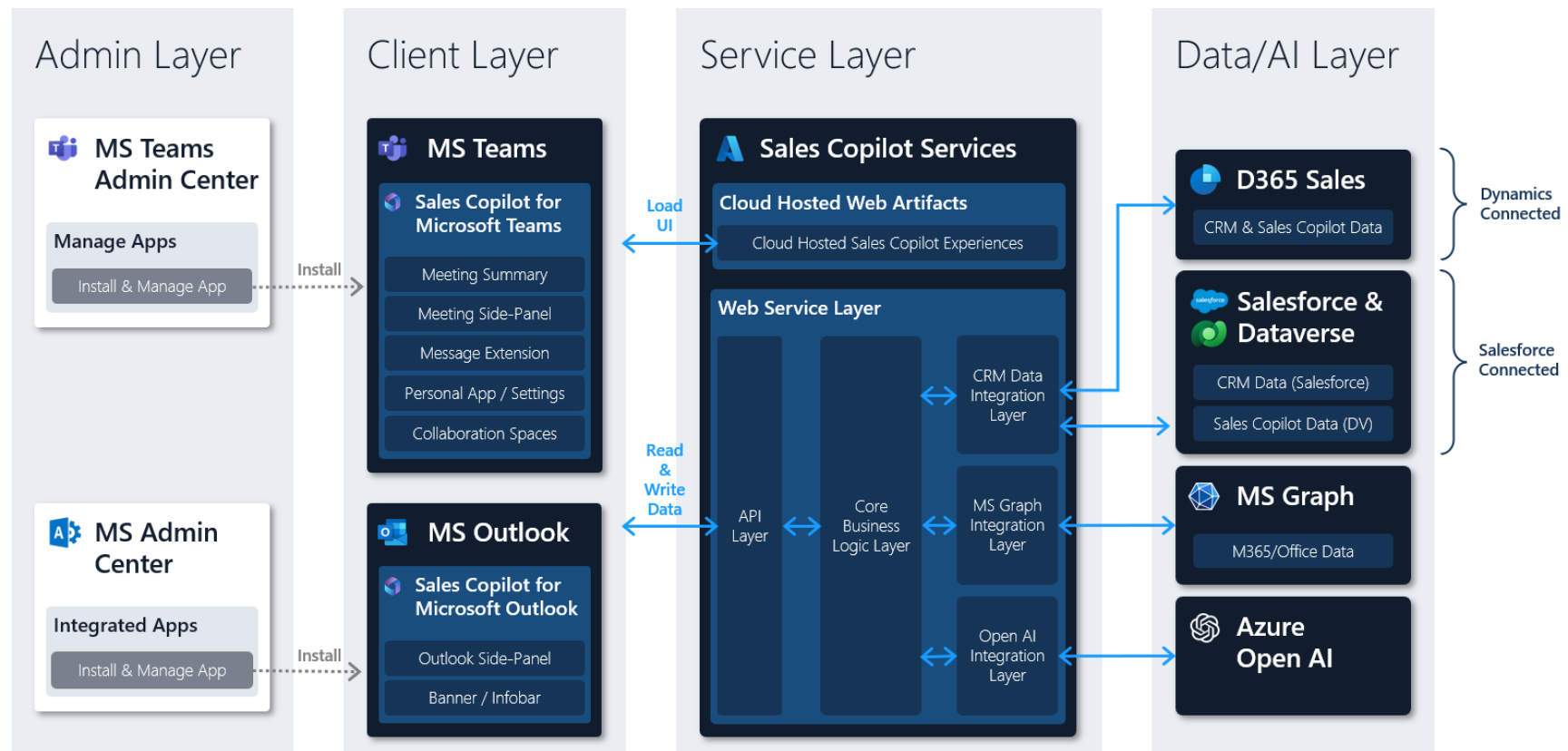
Data Management.....25

| | |
|---|-----------|
| Data Security, Privacy, Compliance, and Retention..... | 25 |
| Data Residency | 26 |
| Overview | 26 |
| Dynamics 365 Connected | 27 |
| Salesforce Connected | 28 |
| CRM and M365 / Office Data at Rest..... | 28 |
| Sales Copilot Data at Rest..... | 29 |
| Dynamics 365 Connected | 29 |
| Salesforce CRM Connected | 29 |
| Geo Location Mapping | 29 |
| Data in Transit | 30 |
| Dynamics 365 Connected | 30 |
| Salesforce CRM Connected | 30 |
| Data Inventory | 31 |
| Data Generation | 31 |
| Data Movement | 32 |
| AI Feature Overview | 32 |
| Open AI Feature Overview | 32 |
| Suggested E-Mail Content in Outlook | 33 |
| Initial E-Mail Generation Data Flow..... | 33 |
| Meeting Summary E-Mail Generation in Outlook..... | 35 |
| Initial E-Mail Generation Data Flow..... | 35 |
| Sales Conversational Intelligence | 37 |
| Teams Meeting Summary | 37 |
| Adding Sales Copilot to Teams Meeting..... | 37 |

| | |
|---|-----------|
| Teams Meeting Summary Data Flow | 39 |
| CRM Customizations Overview | 41 |
| CRM Customization Setup..... | 41 |
| CRM Customization Setup Data Flow..... | 41 |
| Required Permissions..... | 43 |
| CRM Customization Rendering | 44 |
| CRM Customizations Rendering Data Flow | 44 |
| Frequently Asked Questions | 46 |
| Data Management..... | 46 |
| AI Data Usage | 46 |
| How does Sales Copilot handle my data in AI scenarios? | 46 |
| Which data sources does Sales Copilot use for AI scenarios? | 46 |
| What OpenAI endpoint is Suggested email replies and other Copilot capabilities using? | 47 |
| Environment Setup | 47 |
| Does the Sales Copilot "Trial" Dataverse instance for Salesforce customers expire? | 47 |
| Document Version History | 48 |

Sales Copilot Architecture Overview

Component Overview



Client Layer

Sales Copilot consists of two distinct client experiences, namely the **Sales Copilot for Microsoft Outlook Add-In** and the **Sales Copilot for Microsoft Teams App**. The Outlook experience is developed as a [third-party Outlook add-in](#) and the Teams experience is developed as a [third-party Teams app](#).

Both consist of a manifest, which describes how the add-in and app integrate into Outlook and Teams, and JavaScript/HTML, which makes up the UI of the experience. The UI for both experiences is cloud-hosted and fully managed by Microsoft. None of the UI or business logic for Sales Copilot is shipped as client-side code in Teams or Outlook. Therefore, customers do not need to manage any of the application lifecycle for the Sales Copilot client or server-side components. See the [Application Lifecycle Management](#) section for more details.

The Sales Copilot clients only store minimal setup and settings data in the local browser-based application storage and no personal or other customer data outside of settings is persisted locally.

Service Layer

The Sales Copilot service layer consists of the **Cloud Hosted Sales Copilot Experiences**, which are served to the Sales Copilot client experiences, and **Core Business Logic Layer**, which processes and combines CRM data, MS Graph Data (e.g., E-Mails, Meetings), Open AI generated data. All Sales Copilot services are hosted on the [Microsoft Azure cloud](#) to provide a resilient foundation to help meet organizational compliance, reliability, availability, and disaster recovery needs.

Data Layer

The Sales Copilot data layer consists of three distinct sets of data:

- **MS Graph Data:** The end user's existing M365/Office Data (E-Mails, Meetings, etc.) are stored in Microsoft Graph.
- **CRM Data:** The customer's CRM data is only stored in the existing CRM system (Dynamics 365 or Salesforce), which serves as the system of record for all CRM entities.
- **Sales Copilot Data:** The customer's Sales Copilot data is generated through Sales Copilot feature flows and does not fall into the above definition for "Office Data" or "CRM Data", e.g., Sales Copilot settings or Sales Copilot generated insights data.

Storage and security

Sales Copilot always respects the data privacy, data security, data retention, and compliance boundaries of the underlying data store for data at rest and uses Transport Layer Security (TLS) to protect data in transit and does not store data outside any of the data stores described above.

M365 / Office Data

The end-user's M365 / Office data is always accessed in the end user's auth context and referenced in three distinct ways:

- **Read in real-time to enable insights scenarios**, for example Generative AI e-mail replies, AI generated e-mail summaries, or Teams' meeting summaries. The M365 / Office data is only read in these scenarios and discarded after it has been processed.
- **Read in real-time to enable value in the customer's CRM system**, for example when e-mail and meeting data is copied from the Microsoft Graph to the customer's CRM as activities or meeting transcripts are copied to Dataverse to enable extensibility scenarios.
- **Updated or generated in real-time to enable Sales Copilot capabilities**, for example when the Sales Copilot Teams app is added to a meeting to enable Teams' Meeting summary.

CRM Data

All CRM data access (read and write access) in Sales Copilot is managed via **real-time integrations** with the underlying CRM system. **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. When mapping CRM data to Sales Copilot data, only the unique identifiers from the CRM system are being referenced. Sales Copilot fully respects the existing retention policies and compliance boundaries of the existing CRM system.

Sales Copilot is designed and intended to work with a single CRM connection at a time. Sales Copilot does not connect to multiple CRM orgs or CRM instances at the same time, nor synchronize data between them. The data accessed and stored via Sales Copilot is always scoped to the CRM that the end user is currently connected to.

Currently, Sales Copilot only supports **Dynamics 365** and **Salesforce**® as external CRM systems.

Sales Copilot Data

Dynamics 365 Connected

For Dynamics 365 customers, Sales Copilot uses the existing Dynamics 365 [Dataverse](#) instance (org) to store any Sales Copilot specific data. Users can switch connections between different Dynamics 365 orgs, at which point Sales Copilot will also use the underlying Dataverse instance to store and retrieve any Sales Copilot data.

Salesforce® Connected

For Salesforce¹ CRM customers, a new [Microsoft Dataverse](#) instance is provisioned when the first user from a given AAD tenant launches the **Sales Copilot for Microsoft Outlook Add-In** and connects to their Salesforce org. Sales Copilot will provision a new Dataverse instance per tenant to be leveraged across all connected Salesforce environments and orgs after the first user is logged in to Sales Copilot via the Sales Copilot for Microsoft Outlook Add-In.

Application Lifecycle Management Release Cycle

There are two sets of release cycles for Sales Copilot:

- **Monthly product releases**, which include major product capabilities.
- **Ongoing service updates**, which include product hotfixes and minor product changes.

Refer to the “**What’s New**” section of the [Sales Copilot Documentation](#) for additional details about net new capabilities for each monthly product release.

¹ Microsoft isn’t affiliated with or endorsed by Salesforce in any way.

Component Overview

There are two distinct components that are relevant to the Sales Copilot application lifecycle management:

- **Sales Copilot client add-in / app manifests**, which are deployed as [third-party Outlook add-in](#) and [third-party Teams app](#) and describe the behavior of the add-in / app.
- **Sales Copilot service layer**, which is hosted the UI experiences for all Sales Copilot add-ins / apps and the core service layer, containing front-end APIs, core business logic, data integration layer, and AI services.

Availability

Sales Copilot is available for installation through the following channels:

| Install Type | Deployment Channels | | | |
|-----------------------|--|-------------------|--|--------------|
| | Sales Copilot for Microsoft Outlook Add-In | | Sales Copilot for Microsoft Teams App | |
| Admin-managed Install | Microsoft App Source | Full Support | Microsoft App Source | Full Support |
| | M365 Admin Center | Full Support | Microsoft Teams Store | Full Support |
| User-managed Install | Microsoft App Source | Partial Support * | Microsoft App Source | Full Support |
| | Microsoft Outlook Add-Ins | Partial Support * | Microsoft Teams Admin Center | Full Support |

* The following capabilities are currently unavailable when the Sales Copilot for Microsoft Outlook Add-In is deployed via user-managed installations. Existing user-managed installs can be converted to admin-managed install if the admin conducts the corresponding installation (no uninstall or other steps are required by the end-user).

- **Infobars** (banners) that are displayed when drafting or reading an e-mail from an external contact.

- **Automatically adding the Sales Copilot Teams App to a meeting** when external contact from the CRM is present on the meeting invite when sent via Outlook.

In addition to the gaps in functionality, user-managed installs will be blocked if admins disable **Optional Connected Experiences** are turned off as described in the [Privacy and security for Office Add-ins](#) article. Admins can also explicitly block end-user installations via the corresponding admin portals. However, admin-managed installs will continue to work.

Updates

Sales Copilot client add-in / apps

The manifests for the **Sales Copilot for Microsoft Outlook Add-In** and the **Sales Copilot for Microsoft Teams App** require occasional updates when new capabilities are introduced. These updates are rolled out by Microsoft as part of the monthly product releases and will be automatically pushed to all users who have the add-in / app installed without the need for an admin or end-user to take any action.

In rare circumstances, Microsoft will introduce new permissions as part of a monthly release, which will require explicit consent and update from the admin or end-user. In these circumstances, admins and users will see that a new update is available via the **M365 Admin Center** or **Teams Store**. Additionally, Microsoft will inform admins via the “**What’s New**” section of the [Microsoft Sales Copilot](#) documentation, and via the [Microsoft Viva Blog](#) (<https://aka.ms/SalesCopilotUpdates>). Customer’s will not be able to take advantage of the latest Sales Copilot capabilities when they do not apply the updates to the add-in / app.

Monitoring

Sales Copilot only supports native Microsoft Outlook and Microsoft Teams usage monitoring. Admins can view the **Sales Copilot for Microsoft Outlook Add-In** usage metrics via [Microsoft 365 Reports](#) and the **Sales Copilot for Microsoft Teams App** usage metrics via the [Microsoft Teams app usage report](#).

User Experiences

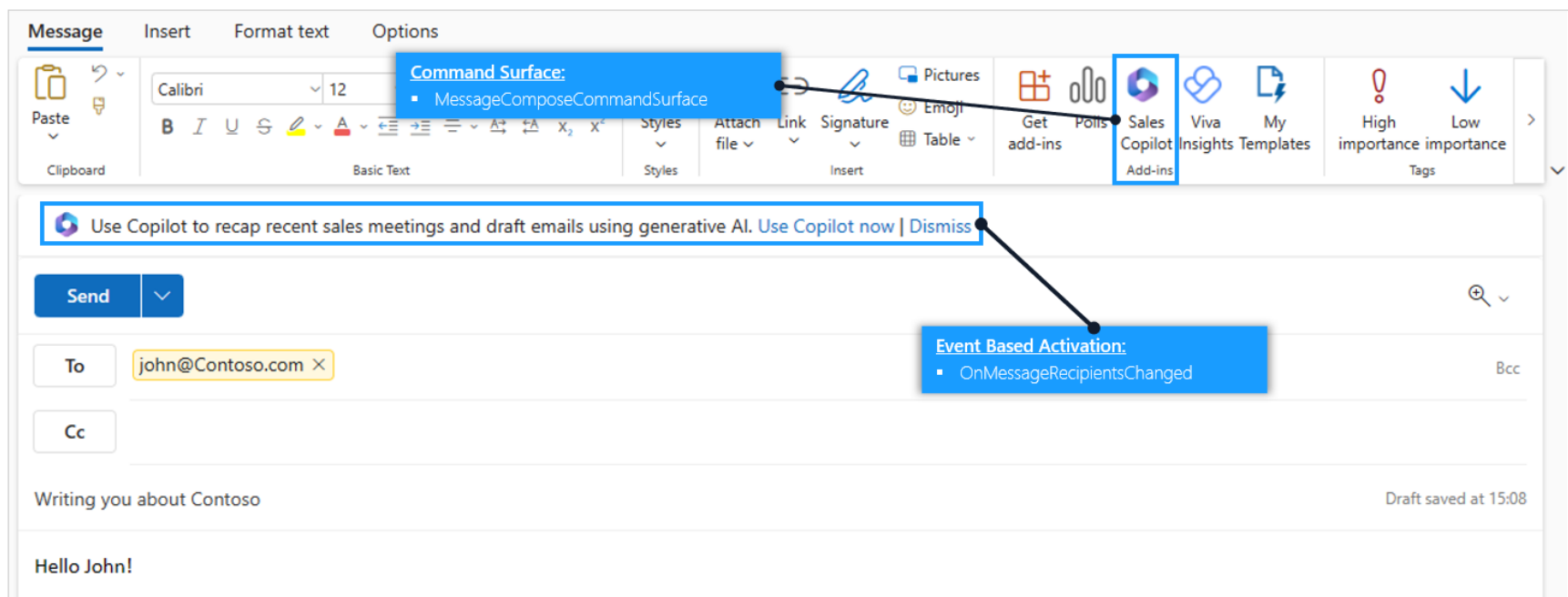
Launching the Sales Copilot Client Experiences

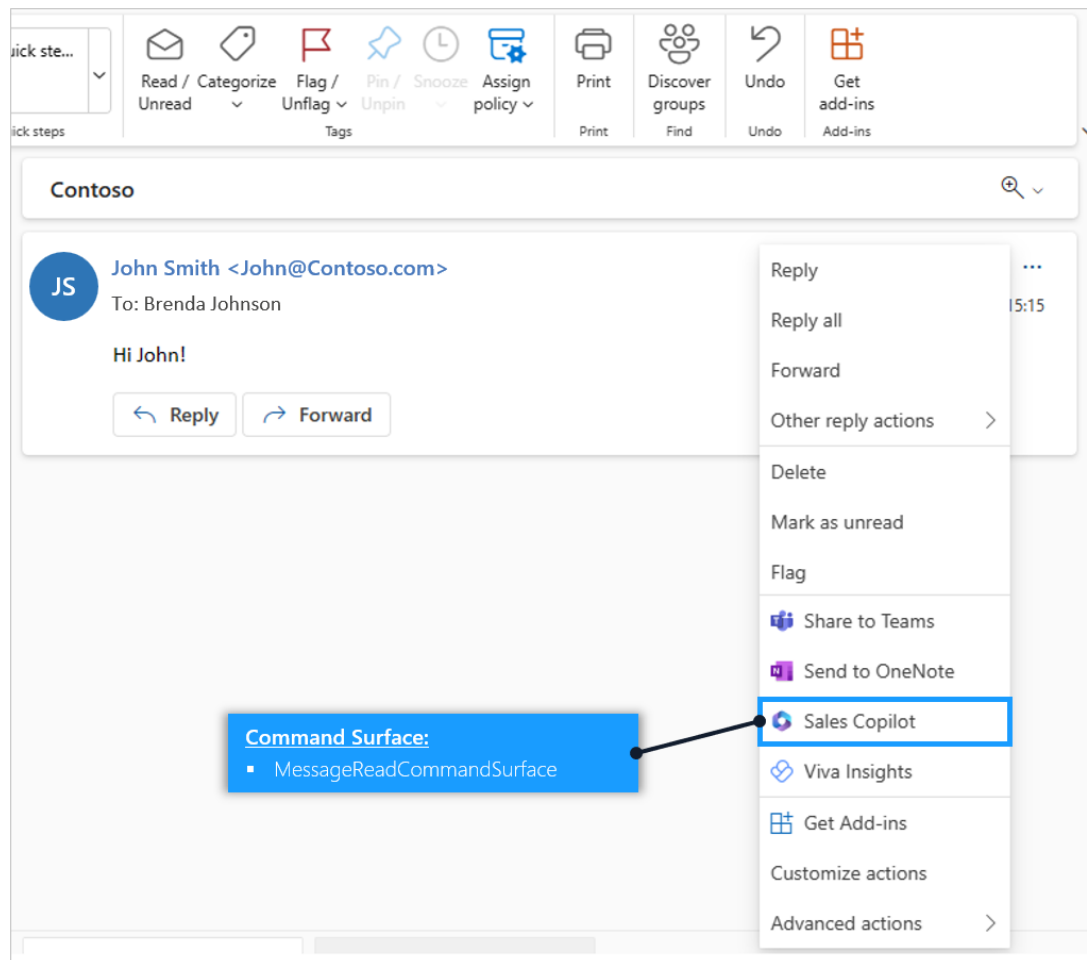
Sales Copilot for Microsoft Outlook Add-In

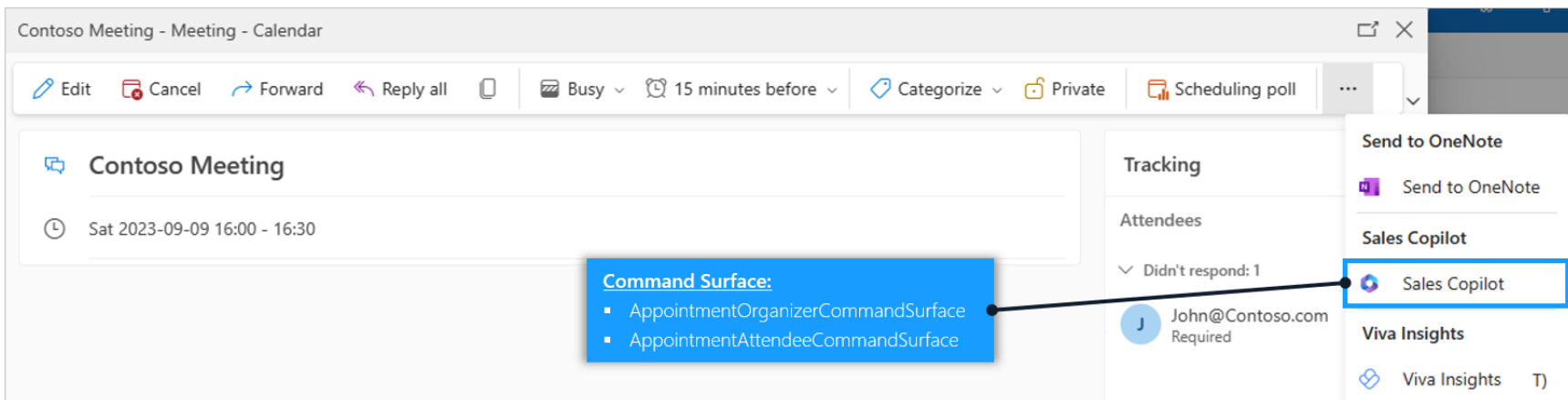
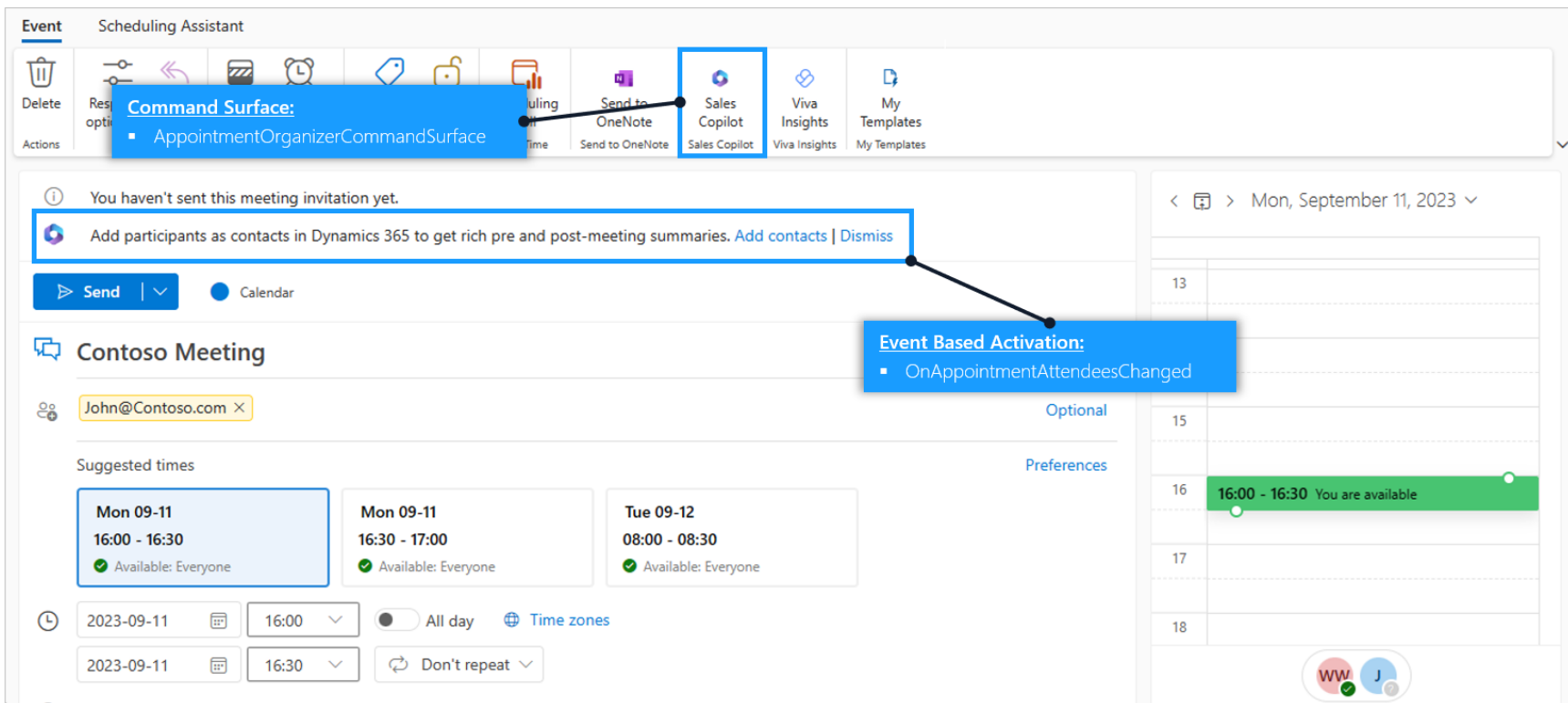
The Sales Copilot for Microsoft Outlook Add-In can be launched by the end-user through several [command surfaces](#) and [event-based activation](#).

Surface Area Overview

The following describes a high-level overview of the surface areas to launch the Sales Copilot for Microsoft Outlook.







Command Surfaces

The following describes the full list of Outlook command surfaces for Sales Copilot:

| Command Surface Name | Command Surface Description |
|---|--|
| MessageReadCommandSurface | Put buttons in the command surface for the mail read view. In Outlook desktop, this appears in the ribbon. |
| MessageComposeCommandSurface | Put buttons on the ribbon for add-ins using mail compose form. |
| AppointmentOrganizerCommandSurface | Put buttons on the ribbon for the form that's displayed to the organizer of the meeting. |
| AppointmentAttendeeCommandSurface | Put buttons on the ribbon for the form that's displayed to the attendee of the meeting. |

Event-Based Activation

The following describes the full list of Outlook event-based activations for Sales Copilot:

| Event Name | Event Description | Sales Copilot Usage |
|-----------------------------------|--|--|
| OnNewMessageCompose | On composing a new message (including reply, reply all, and forward) but not on editing, for example, a draft. | Shows the Sales Copilot Infobar (banner) if an external contact is present in the list of recipients of the e-mail. |
| OnNewAppointmentOrganizer | On creating a new appointment but not on editing an existing one. | Shows the Sales Copilot Infobar (banner) if an external contact is present in the list of recipients of the meeting invite. |
| OnMessageRecipientsChanged | On adding or removing recipients while composing a message. | Shows the Sales Copilot Infobar (banner) if an external contact is present in the list of recipients of the e-mail. |

| | | |
|--------------------------------------|---|---|
| OnAppointmentAttendeesChanged | On adding or removing attendees while composing an appointment. | Shows the Sales Copilot Infobar (banner) if an external contact is present in the list of recipients of the meeting invite. |
| OnAppointmentSend | On sending an appointment item. | Automatically adds the Sales Copilot Teams App to the meeting, which enables Sales Conversational Intelligence during the call. |

Sales Copilot for Microsoft Teams App

The Sales Copilot for Microsoft Teams App is integrated as an [App for Teams meetings and calls](#), [Personal Tab](#), [Bot](#), and [Message Extension](#).

App for Teams Meetings and Calls

The following describes the list of meeting contexts that the Sales Copilot app integrates with:

| Event Name | Event Description | Sales Copilot Usage |
|--------------------------|---|---|
| meetingChatTab | A tab in the header of a group chat between a set of users for a scheduled meeting. | Shows the Sales Copilot Conversational Intelligence Meeting Summary after the meeting is meeting has been successfully processed. |
| meetingDetailsTab | A tab in the header of the meeting details view of the calendar. | Shows the Sales Copilot Conversational Intelligence Meeting Summary after the meeting is meeting has been successfully processed. |
| meetingSidePanel | An in-meeting panel opened through the unified bar (U-bar). | Placeholder experience to show that the Sales Copilot App is added to the meeting. |

Personal Tab

The following describes the list of personal tabs in the Sales Copilot app:

| Home | Sales Copilot Usage |
|------|---------------------|
|------|---------------------|

| | |
|-----------------|---|
| Home | An experience with quick access links to key seller documentation and getting started guides for Outlook and Teams. |
| Settings | Settings experiences to Customize forms and fields and Set up e-mail insights . |

Bot

The following describes the list of bots in the Sales Copilot app:

| Home | Sales Copilot Usage |
|------------------|--|
| chat | Allows users to search for CRM records and add a Sales Copilot Adaptive Card into a chat between two users via searching of the record or via link unfurling. |
| groupChat | Allow users to search for CRM records and add a Sales Copilot Adaptive Card into a chat between multiple users. |

Message Extension

The following describes the list of message extensions in the Sales Copilot app:

| Message Extension Type | Message Extension Name | Sales Copilot Usage |
|------------------------|------------------------|---|
| Action | Share Feedback | Allows users to share feedback about Sales Copilot. |
| Link | N/A | Allows the unfurling of Sales Copilot CRM record links into adaptive cards. |
| Search | All | Allow users to perform a search across CRM entities (e.g., Contacts, Accounts, Opportunities) and paste the selected record as an adaptive card. |

| | | |
|--|----------------------|--|
| | Contacts | Allows users to perform a search across the contact entity and paste the selected record as an adaptive card. |
| | Opportunities | Allows users to perform a search across the opportunity entity and paste the selected record as an adaptive card. |
| | Accounts | Allows users to perform a search across the account entity and paste the selected record as an adaptive card. |

Security

Authentication

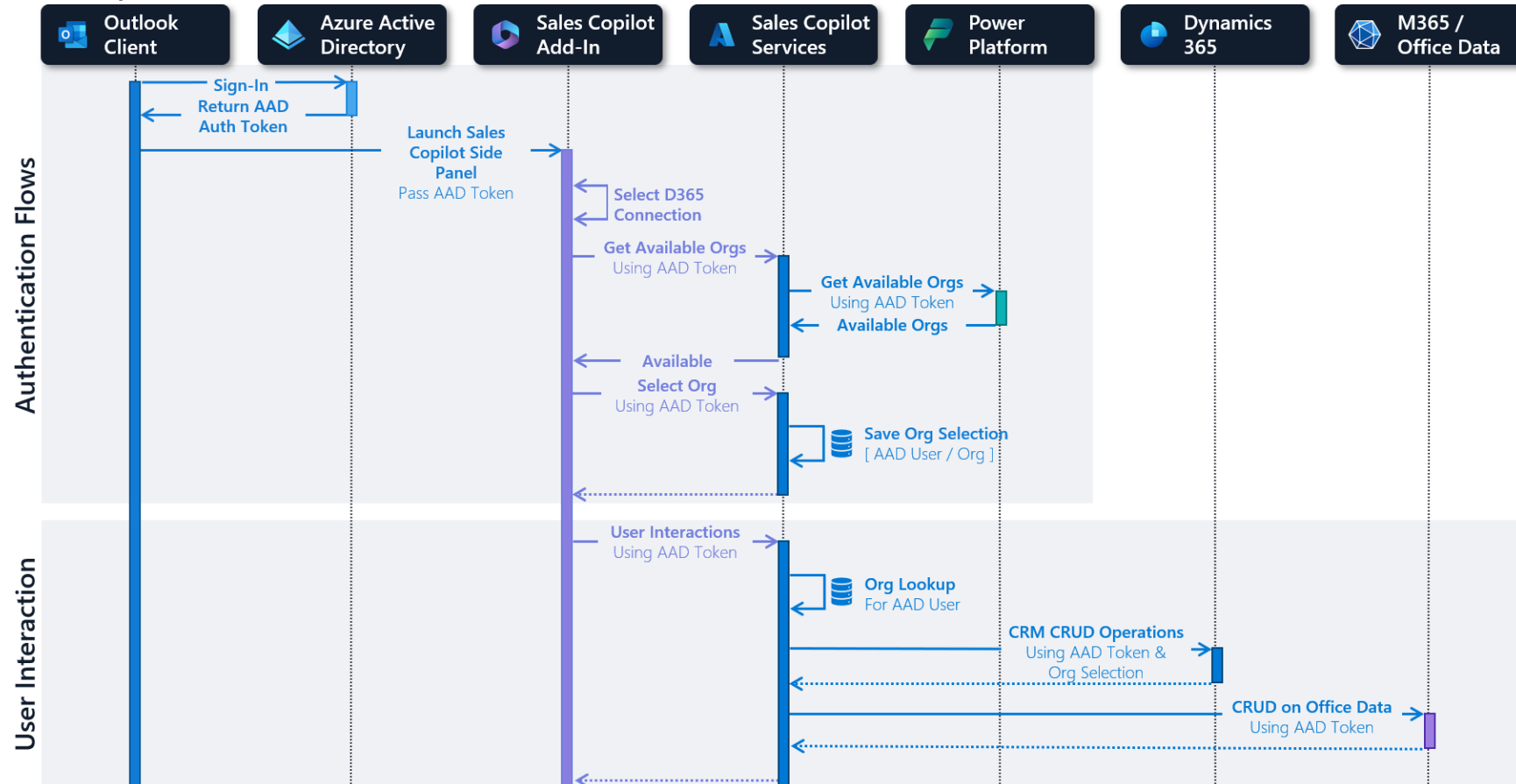
To interact with any of the Sales Copilot client experiences, all users must be authenticated through AAD, which happens when users initially sign-in to the Outlook and Teams clients. To determine subsequent authentication flows, users must first select the CRM system to connect to upon the initial launch of the **Sales Copilot for Microsoft Outlook Side-Panel**, where users are prompted to select the CRM, i.e., "Dynamics 365" or "Salesforce".

The section below describes the detailed authentication flows based on which CRM system the user chooses to connect to.

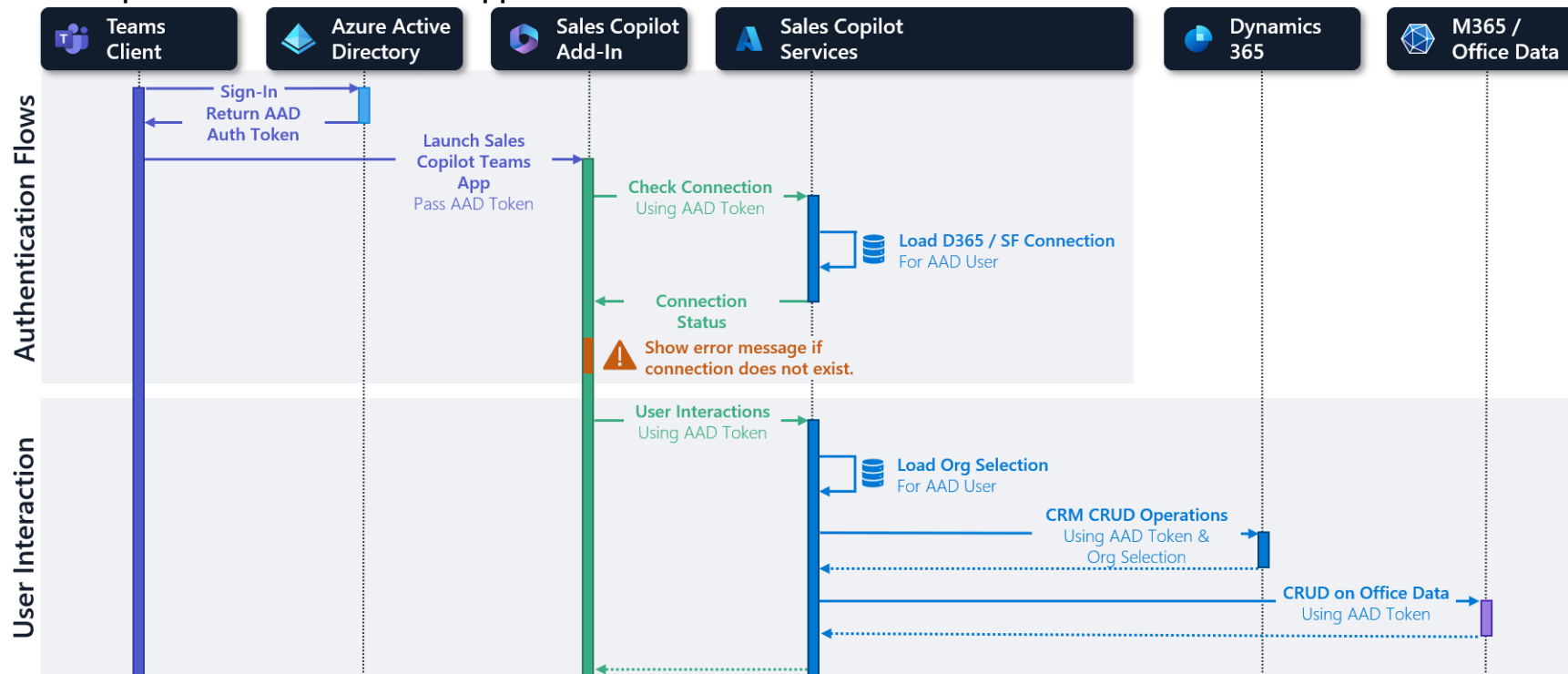
Dynamics 365 Connected

This section describes the Sales Copilot authentication flow for Dynamics 365 connected experiences.

Sales Copilot for Microsoft Outlook Add-In



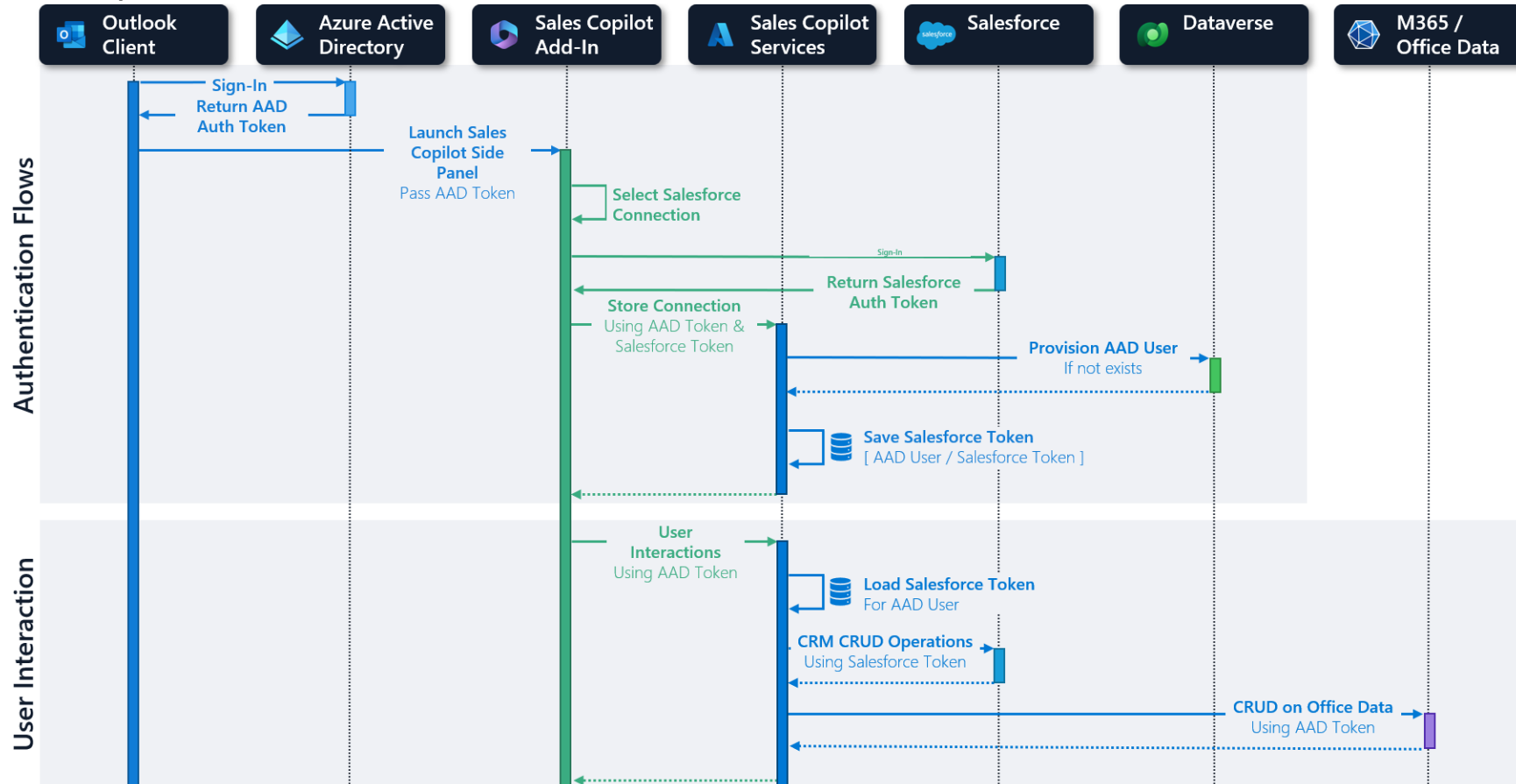
Sales Copilot for Microsoft Teams App



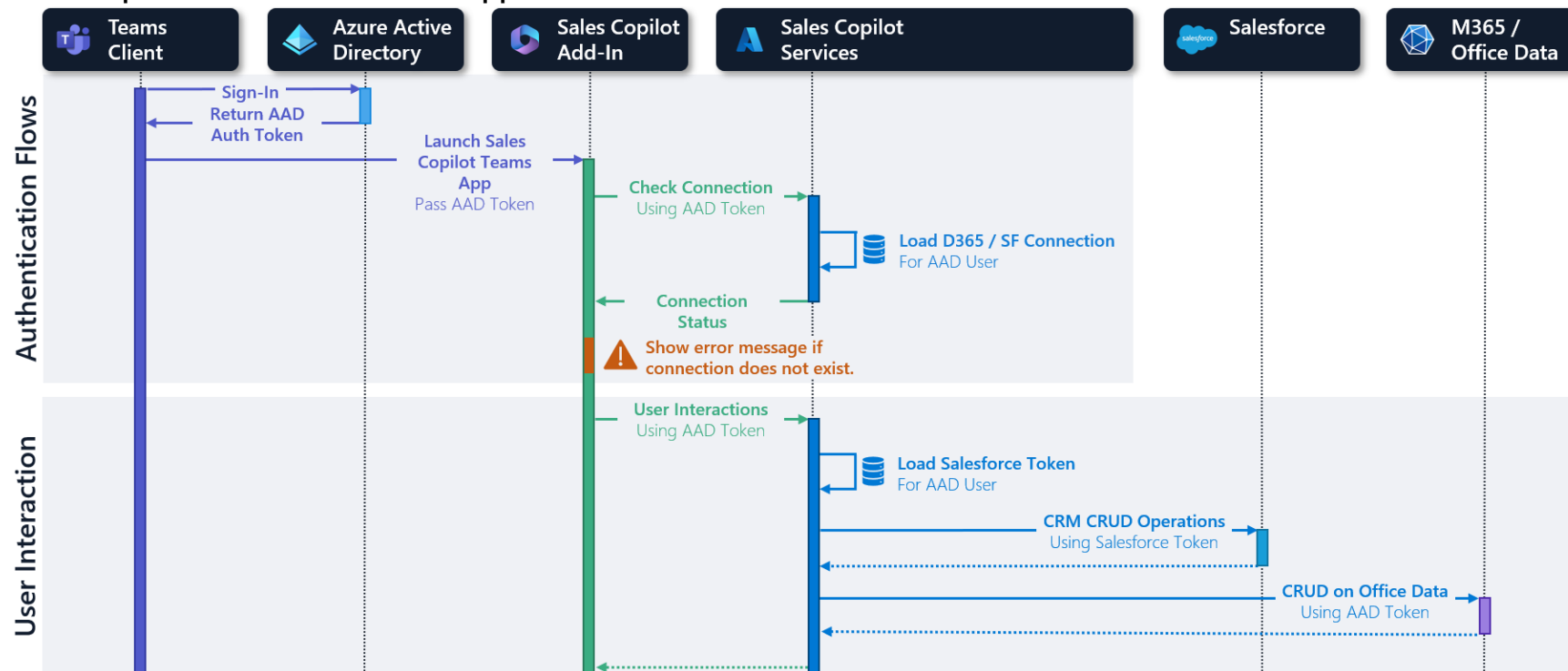
Salesforce CRM Connected

The following flow describes the Sales Copilot authentication flow for Salesforce CRM connected experiences:

Sales Copilot for Microsoft Outlook Add-In



Sales Copilot for Microsoft Teams App



Data Access

M365 / Office Data

All M365 / Office data is accessed via the end-user's authentication context, i.e., Azure Active Directory (AAD) login. Access to M365 / Office data is granted to the **Sales Copilot for Microsoft Outlook Add-In** and **Sales Copilot for Microsoft Teams App** by the admin (during admin-managed installations) or the end-user (during user-managed installations) via an explicit consent.

CRM Data

All CRM data access is managed via the existing end-user authentication and authorization scheme of the underlying CRM system.

Dynamics 365 Connected

For Dynamics 365 users, Sales Copilot accesses CRM data in the context of the logged in AAD user. All data access is based on the **AAD user's permissions** on the existing CRM data through [predefined](#) or configured security roles. Additionally, customers can manage user permissions and data access directly on the underlying Dataverse instance via Power Platform. View [Security concepts in Microsoft Dataverse](#) and [Security roles and privileges](#) for additional details.

Salesforce CRM Connected

For Salesforce CRM Customers, Sales Copilot accesses CRM data in the context of the logged in **Salesforce User** and the **Microsoft Power Platform Connected App**. All data access is based on the Salesforce user's [object permissions](#) on the existing CRM data and the [access available to the connected app](#).

When Sales Copilot users log in to their Salesforce account, they are prompted to consent for the Microsoft Power Platform Connect App to access their CRM data in Salesforce. Once the consent is granted, Sales Copilot can access the CRM data the user has access.

The **Microsoft Power Platform Connected App** is enabled by default, by Salesforce system administrators can block the app per environment, at which point none of the Sales Copilot users will be able to access any CRM data.

Sales Copilot Data

This section describes all Sales Copilot specific entities stored in Dataverse and the corresponding permissions associated with each entity. View the [data operations and access rights documentation](#) for additional details.

Entity Definitions

This list defines each of the Sales Copilot specific entities in Dataverse.

| Entity Name | Description |
|----------------------------------|---|
| msdyn_collabspaceteamassociation | Contains the association between a CRM entity and a Collaboration Space . |

| | |
|----------------------------|---|
| msdyn_crmconnection | Contains the information of the CRM connection of a Dynamics 365 or Sales force user, including the CRM org the user is connected to. |
| msdyn_taggedrecord | Contains the list of Contacts that are connected to the CRM via Sales Copilot. |
| msdyn_vivaorgextensioncred | Contains credential details for a connection to an external extension. |
| msdyn_vivaorgsetting | Contains org wide settings for Sales Copilot, including CRM Customization settings . |

Permissions

This list defines the permissions associated with each of the Sales Copilot entities in Dataverse.

| Entity Name | Roles | | | | |
|----------------------------------|---|---|---|-----------------------------|---|
| | Sales Manager | Salesperson | Vice President of Sales | Sales Copilot Administrator | Sales Copilot User |
| msdyn_collabspaceteamassociation | <i>None</i> | <i>None</i> | <i>None</i> | <i>None</i> | <i>None</i> |
| msdyn_crmconnection | CREATE READ WRITE DELETE APPEND APPENTDO | CREATE READ WRITE DELETE APPEND APPENTDO | CREATE READ WRITE DELETE APPEND APPENTDO | <i>None</i> | CREATE READ WRITE DELETE APPEND APPENTDO |
| msdyn_taggedrecord | CREATE READ WRITE DELETE APPEND APPENTDO | CREATE READ WRITE DELETE APPEND APPENTDO | CREATE READ WRITE DELETE APPEND APPENTDO | <i>None</i> | CREATE READ WRITE DELETE APPEND APPENTDO |

| | | | | | |
|----------------------------|-------------|-------------|-------------|---|-------------|
| msdyn_vivaorgextensioncred | <i>None</i> | <i>None</i> | <i>None</i> | CREATE READ WRITE DELETE APPEND APPENDDO | <i>None</i> |
| msdyn_vivaorgsetting | READ | READ | READ | CREATE READ WRITE DELETE APPEND APPENDDO | READ |

Data Management

Data Security, Privacy, Compliance, and Retention

Sales Copilot strictly follows the data privacy, data security, data retention, and compliance boundaries of the underlying data store. Below is a reference table for common documentation for each of the data stores. When data is copied from one data source to another the storage and governance constraints of the target data store are always respected.

For general information on how Microsoft manages security, privacy and compliance, refer to the [Microsoft Trust Center](#).

Below are references to the data storage and governance concerns for the various data sources used in Sales Copilot. For Salesforce related information please refer to the official Salesforce public documentation.

| 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 |

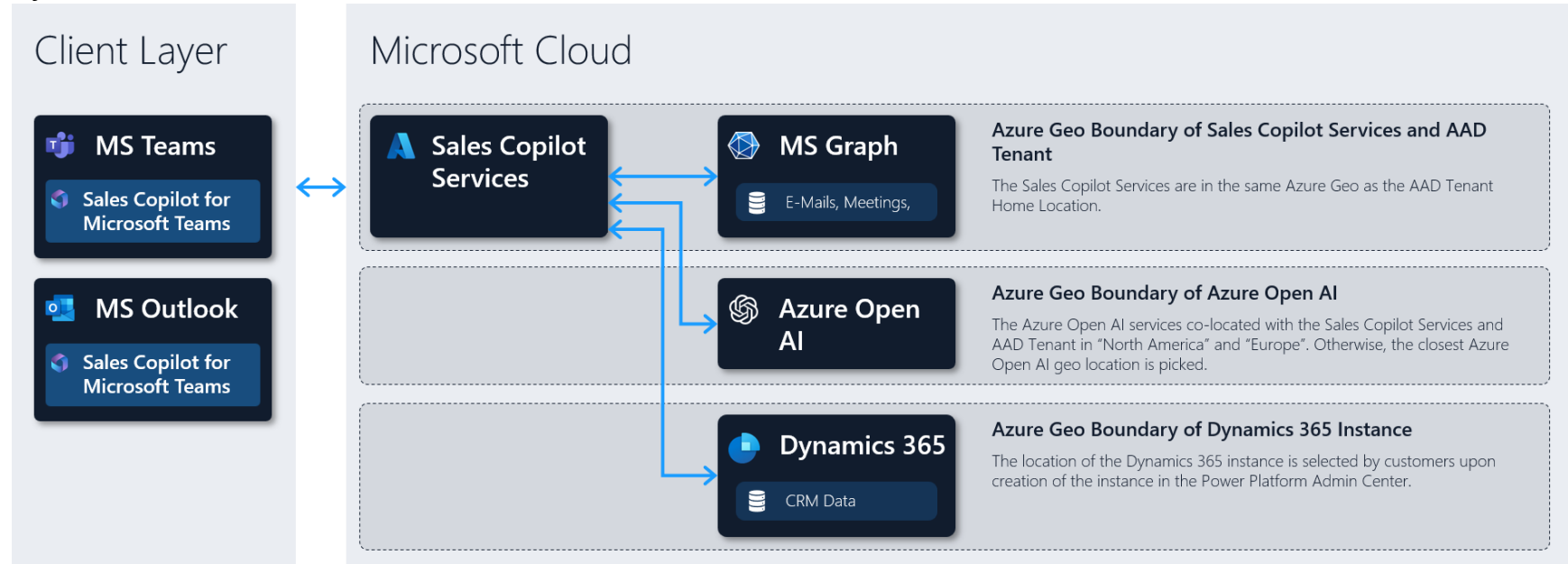
Data Residency

The following section describes the data residency for Sales Copilot.

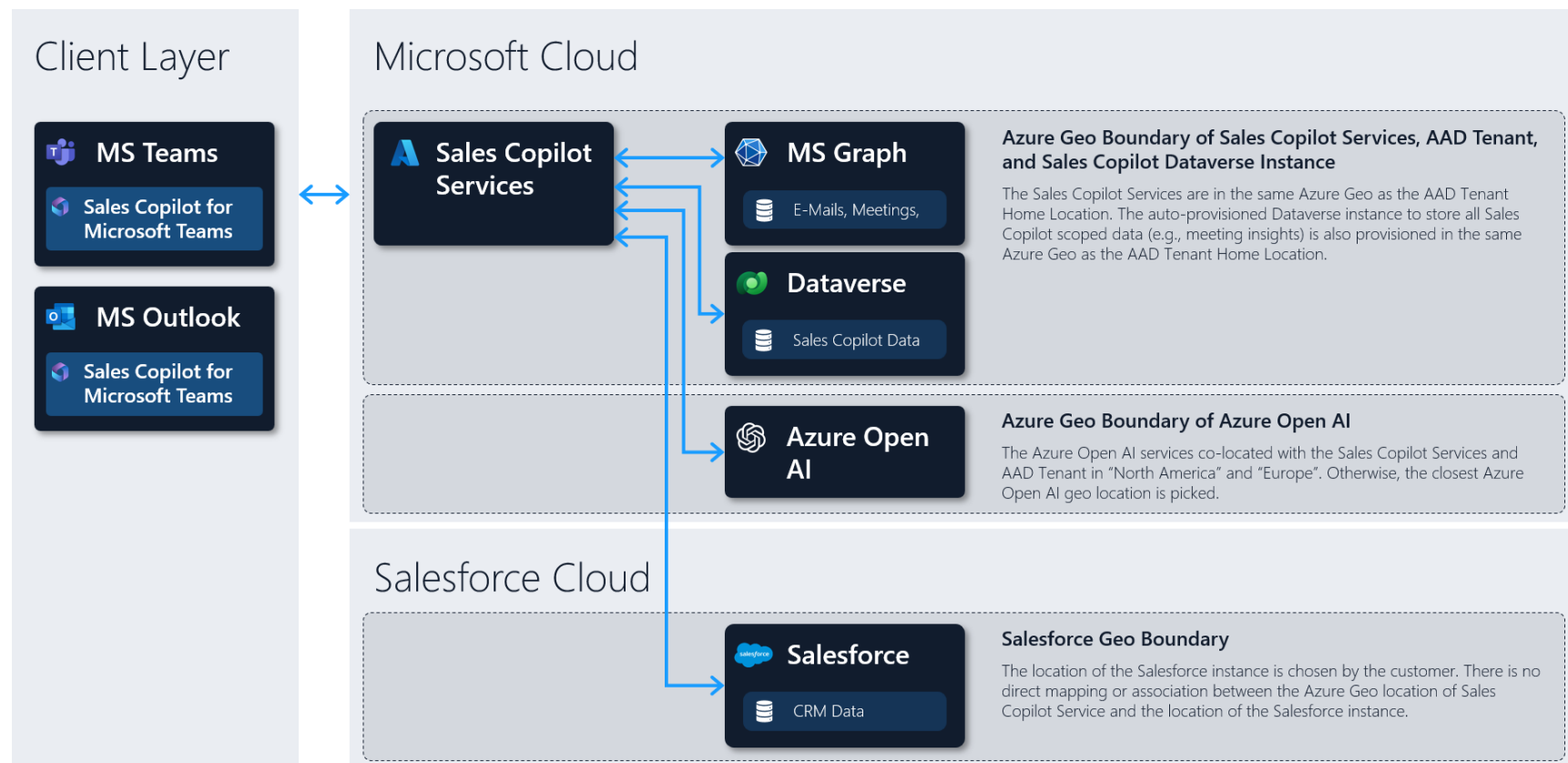
Overview

The following describes the high-level overview of all data at rest and data in transit for Sales Copilot.

Dynamics 365 Connected



Salesforce Connected



CRM and M365 / Office Data at Rest

For all CRM and M365 / Office data, Sales Copilot respects the data residency of the existing data stores and does not move or copy data into any new data stores or geographies.

Sales Copilot Data at Rest

Dynamics 365 Connected

For Dynamics 365 customers, Sales Copilot stores all Sales Copilot specific data in the Dynamics 365 Dataverse instance for the organization selected by the end user when signing in via the Sales Copilot for Microsoft Outlook Add-In. This ensures that Sales Copilot aligns to the pre-existing data residency of the customer's Dynamics 365 instance.

Salesforce CRM Connected

For Salesforce CRM customers, Sales Copilot provisions the Dataverse instance for Sales Copilot specific data in the region closest to the closest to the default region of the Azure AD tenant. For additional details, refer to the [Power Platform default environment](#).

Geo Location Mapping

The following table describes the Geo Location mapping of the various data stores and services used by Sales Copilot. For a detailed mapping of Azure Geographies to Azure Regions view the [Azure Geographies](#) documentation.

| Sales Copilot Services | | AAD Tenant Home Location | Azure Open AI Service Endpoint | All Services Located in Same Azure Geography |
|------------------------|----------------------|--------------------------|--------------------------------|--|
| Azure Geography | Azure Region | Azure Geography | Azure Geography | |
| Asia | East Asia | Asia | Europe | No |
| Brazil | Brazil South | Brazil | United States | No |
| Canada | Canada Central | Canada | United States | No |
| Europe | North Europe | Europe | Europe | Yes |
| France | France Central | France | Europe | No |
| Germany | Germany West Central | Germany | Europe | No |

| | | | | |
|----------------------|---------------------|----------------------|---------------|-----|
| India | Central India | India | Europe | No |
| Japan | Japan East | Japan | Europe | No |
| Korea | Korea Central | Korea | Europe | No |
| Norway | Norway East | Norway | Europe | No |
| Oceania | Australia Southeast | Oceania | Europe | No |
| South Africa | South Africa North | South Africa | Europe | No |
| Switzerland | Switzerland North | Switzerland | Europe | No |
| United Arab Emirates | UAE North | United Arab Emirates | Europe | No |
| United Kingdom | UK South | United Kingdom | Europe | No |
| United States | East US | United States | United States | Yes |

Data in Transit

Dynamics 365 Connected

When the customer's AAD Home Location and Dynamics 365 are both located in the United States or Europe Azure Geography, all data in transit will not cross any Azure Geo Boundaries across all AI and Non-AI Scenarios. Otherwise, data might cross Azure Geo boundaries.

Salesforce CRM Connected

For Salesforce connected scenarios, customers should review the architecture of their setup and confirm how data crosses Geo boundaries based on different scenarios.

Data Inventory

The following section describes the detailed data inventory for Sales Copilot.

Data Generation

The following section describes the data generated and stored by Sales Copilot.

| Type | Description | End-User Flow | Target Data Store |
|------------------------------|--|---|----------------------------------|
| CRM Entities | Net new CRM entities and field data . | Generated in the Sales Copilot for Microsoft Outlook Add-In via the Side-Panel when records are created or modified. | Customer's CRM System |
| Collaboration Space Mappings | Mapping of CRM Entities and corresponding Collaboration Spaces created by Sales Copilot. | Generated in the Sales Copilot for Microsoft Outlook Add-In when a user created a new Collaboration Space. | Sales Copilot Dataverse Instance |
| Teams Meeting Insights | Teams meeting insights data , including meeting summary, sentiment analysis, follow up items, and the raw meeting transcript. | Generated when the Sales Copilot for Microsoft Teams App is added to a Teams Meeting after the meeting is completed. | Sales Copilot Dataverse Instance |
| Sales Copilot Settings | Org and Tenant level settings configured by the CRM admin. | Updated in the Sales Copilot for Microsoft Teams App Settings page. | Sales Copilot Dataverse Instance |

! NOTE

Meeting insights, including meeting summary, sentiment analysis, and follow ups are currently stored in the Microsoft Graph but are moving to Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences) as part of the **November 2023 release**. The diagram above already illustrates migration of the data.

Data Movement

The following section describes the data copied between data stores by Sales Copilot.

| Type | Description | End-User Flow | Source Data Store | Target Data Store |
|--------------------------|--|--|-------------------------------|-----------------------|
| E-Mails and Appointments | E-Mail and Meetings data generated in Office. | Tracked to the CRM system through the Sales Copilot for Microsoft Outlook Add-In side-panel when through explicit end-user tagging. | End-User's M365 / Office Data | Customer's CRM System |

AI Feature Overview

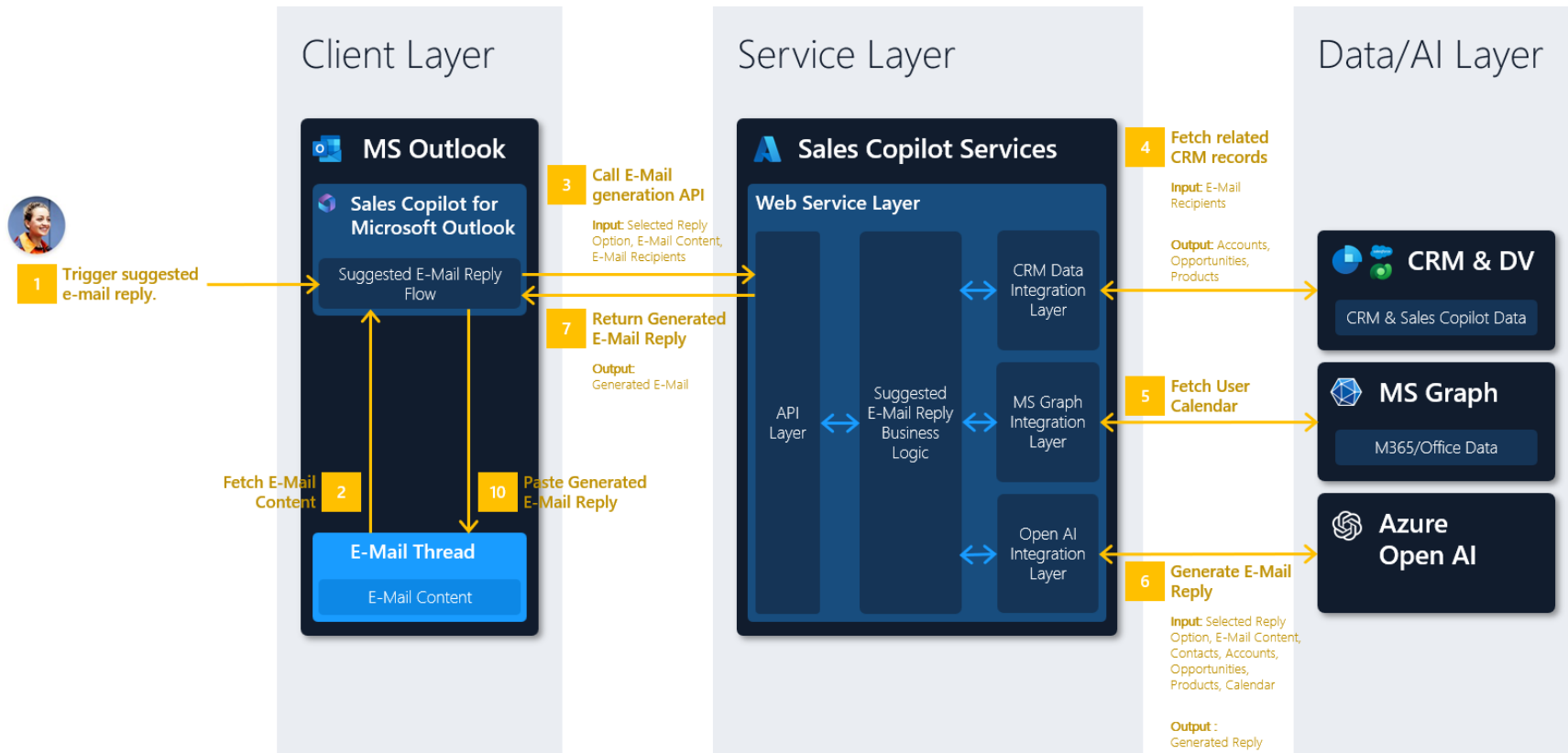
Open AI Feature Overview

The following section describes the technical and architectural details for generative AI capabilities in Sales Copilot.

Suggested E-Mail Content in Outlook

Initial E-Mail Generation Data Flow

The following describes the data flow during the initial e-mail generation flow.



| # | Title | Description |
|---|-------|-------------|
|---|-------|-------------|

| | | |
|----|--------------------------------|---|
| 1. | Trigger Suggested E-Mail Reply | All AI scenarios are invoked directly by the end user in the compose mode of the e-mail. All generative AI data flow occurs in real-time when the flow is invoked by the end user and no data is being processed via background jobs. |
| 2. | Fetch E-Mail Content | The existing e-mail content is retrieved from the e-mail body to be used as input for the AI flow. |
| 3. | Call E-Mail Generation API | <p>All e-mail generation occurs on the Sales Copilot service layer. The Sales Copilot client code invokes the corresponding server-side APIs including the following parameters:</p> <ul style="list-style-type: none"> ▪ Selected Reply Option, which provides context on the type of reply to generate. ▪ E-Mail Content, retrieved from the e-mail body of the e-mail currently in compose mode. ▪ E-Mail Recipients, retrieved from the e-mail. |
| 4. | Fetch Related CRM Records | Based on the E-Mail Recipients on the e-mail thread, the Accounts , Opportunities , and Products data associated with the Contacts (e-mail recipients) on the e-mail thread is returned. |
| 5. | Fetch User Calendar | To provide meeting schedule suggestions the calendar availability of the current user is retrieved from Microsoft graph. |
| 6. | Generate E-Mail Reply | <p>Based on the Selected Reply Options, E-Mail Content, Contacts, Accounts, Opportunities, Products, and end-user calendar availability Azure Open AI Services is invoked to generate an e-mail reply. The Azure Open AI returns the generated e-mail reply to the main Sales Copilot core service layer.</p> <p>The entire flow is stateless, and no background jobs are processed to train the model currently.</p> |
| 7. | Return Generated E-Mail Reply | The Sales Copilot core services layer returns the generated e-mail reply to the Sales Copilot client experiences. |

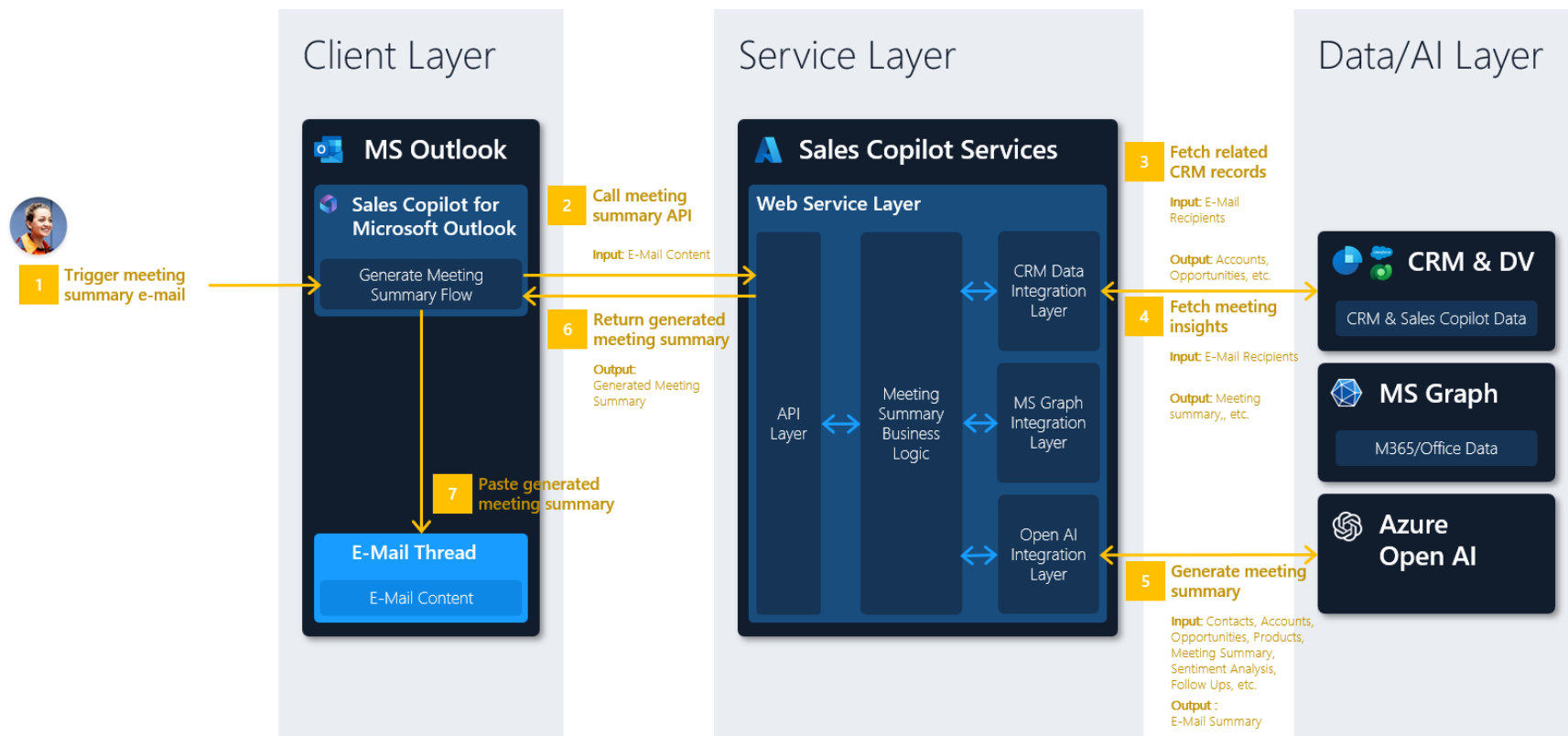
8. Paste Generated E-Mail Reply

The end-user can either paste the **generated e-mail reply** directly into the body of the e-mail or manually copy the response. The end-user can chose when to send the reply.

Meeting Summary E-Mail Generation in Outlook

Initial E-Mail Generation Data Flow

The following describes the data flow during the initial e-mail generation flow.



| # | Title | Description |
|----|--------------------------------------|--|
| 1. | Trigger meeting summary e-mail | <p>All AI scenarios are invoked directly by the end user in the compose mode of the e-mail. All AI data flow occurs in real-time when the flow is invoked by the end user and no data is being processed via background jobs.</p> <p>The meeting summary e-mail generation is only triggered when E-Mail Recipients are available on the e-mail compose area.</p> |
| 2. | Call API to generate meeting summary | All e-mail generation occurs on the Sales Copilot service layer. The Sales Copilot client code invokes an API on the Sales Copilot server side using the E-Mail Recipients on the e-mail tread. |
| 3. | Fetch related CRM records | Based on the E-Mail Recipients on the e-mail thread, the Accounts, Opportunities, and Products data associated with the Contacts (e-mail recipients) on the e-mail thread is returned. |
| 4. | Fetch meeting insights | Based on the E-Mail Recipients on the e-mail thread, the latest e-mail meeting insights are fetched from the Sales Copilot AI service layer that the E-Mail Recipients have access to. The meeting insights, including meeting summary, sentiment analysis, and follow ups are returned from Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences). |
| 5. | Generate E-Mail reply | <p>Based on the Contacts, Accounts, Opportunities, Products, meeting summary, sentiment analysis, and follow ups Azure Cognitive Services is invoked to generate an e-mail reply.</p> <p>The entire flow is stateless, and no background jobs are processed to train the model currently.</p> |
| 6. | Return Generated E-Mail Reply | The Sales Copilot AI services layer returns the generated e-mail reply to the Sales Copilot core services layer. |
| 7. | Return Generated E-Mail Reply | The Sales Copilot core services layer returns the generated e-mail reply to the Sales Copilot client experiences. |

8. Paste Generated E-Mail Reply

The end-user can either paste the **generated e-mail reply** directly into the body of the e-mail or manually copy the response.

! NOTE

Meeting insights, including meeting summary, sentiment analysis, and follow ups are currently stored in the Microsoft Graph but are moving to Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences) as part of the **May 2023 release**. The diagram above already illustrates migration of the data.

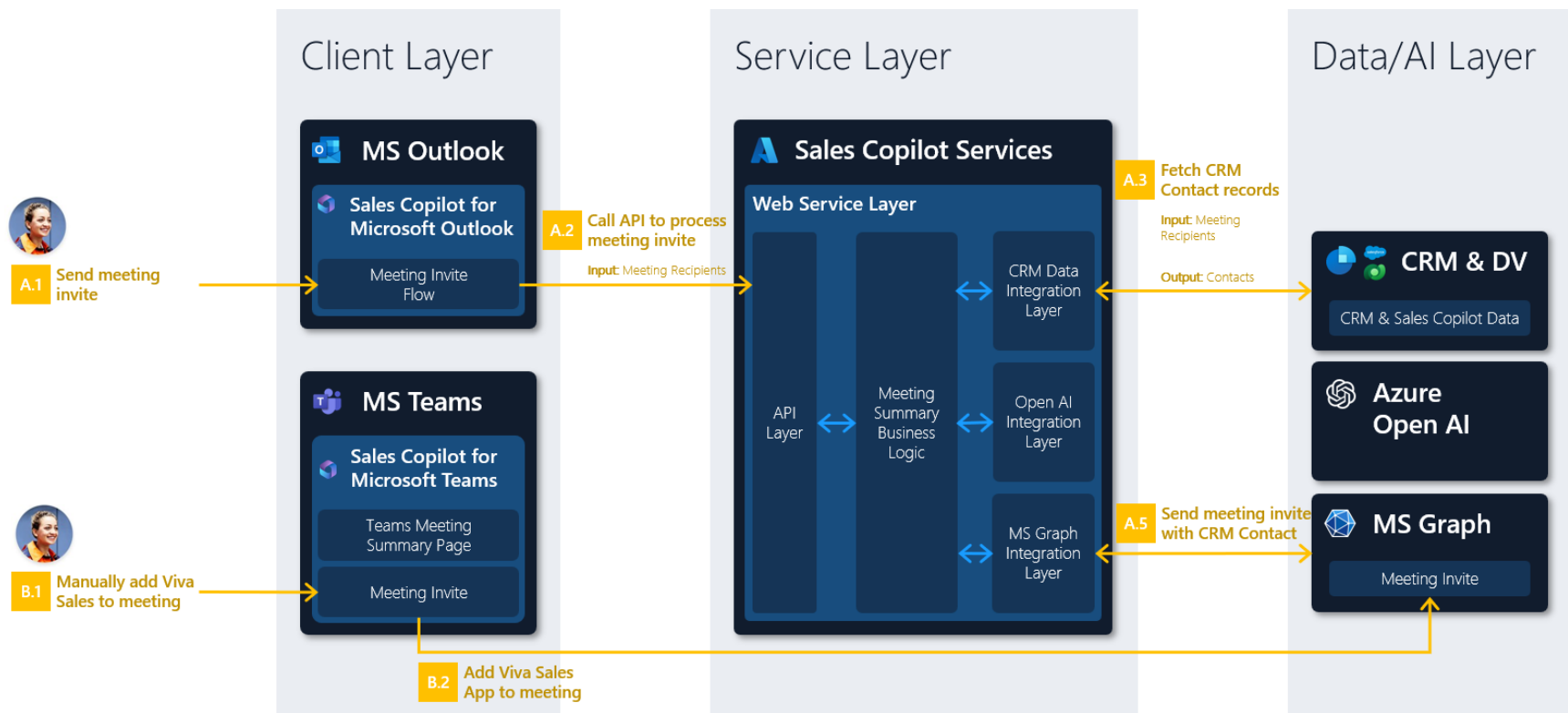
Sales Conversational Intelligence

The following section describes the technical and architectural details for Sales Conversational Intelligence capabilities in Sales Copilot.

Teams Meeting Summary

Adding Sales Copilot to Teams Meeting

The following describes the flow of adding Sales Copilot to a Teams Meeting.

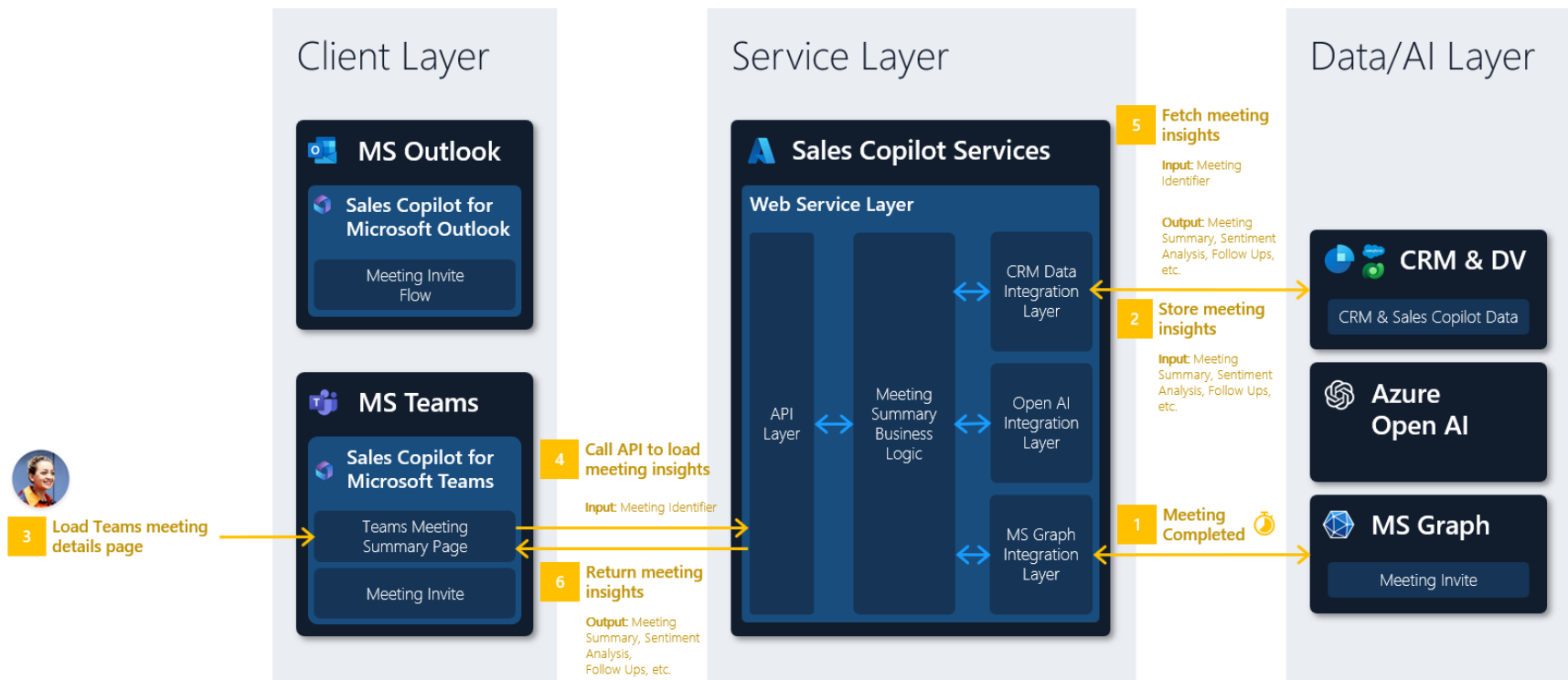


| # | Title | Description |
|-----|------------------------------------|--|
| A | Adding Meeting via Outlook | |
| A.1 | Send Meeting Invite | Adding Sales Copilot to a Teams Meeting, which in turn generates the Meeting Summary, can be triggered when a new meeting is being sent via Outlook. |
| A.2 | Call API to process meeting invite | When the invite is sent, an API call is made to the Sales Copilot core services with the list of Meeting Recipients to identify whether the Sales Copilot App should be added to the Teams meeting. |

| | | |
|-----|---------------------------------------|---|
| A.3 | Fetch CRM Contact records | During the processing of the meeting invite, a request is made to confirm whether any of the Meeting Recipients are Contacts in the CRM. |
| A.4 | Return CRM Contact records | The list of CRM Contacts is returned based on the list of Meeting Recipients on the meeting invite. |
| A.5 | Return Related CRM Records | If any of the Meeting Recipients are Contacts in the CRM the Sales Copilot App is added to the Teams Meeting. |
| B | Adding Meeting via Teams | |
| B.1 | Manually add Sales Copilot to meeting | There are several ways on which users can add the Sales Copilot Teams App to a meeting. View the use apps in Teams meetings for a complete list of scenarios. |
| B.2 | Add Sales Copilot to meeting | When the user manually adds the Sales Copilot App the meeting invite will be tagged appropriately in the Microsoft Graph for further processing. |

Teams Meeting Summary Data Flow

The following describes the data flow when the Teams' meeting summary is generated and loaded in the Sales Copilot for Microsoft Teams App.



| # | Title | Description |
|----|------------------------|---|
| 1. | Meeting completed | <p>An event is triggered when the meeting transcript is available, which invokes an API call on the Sales Copilot AI Services to process the meeting data and generate meeting insights.</p> <p>The meeting processing logic on the Sales Copilot AI Services layer fetches the meeting transcript and meeting metadata from Microsoft Graph.</p> |
| 2. | Store meeting insights | <p>The meeting data is processed and the resulting meeting insights, including meeting summary, sentiment analysis, follow ups, etc are stored in Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences).</p> |

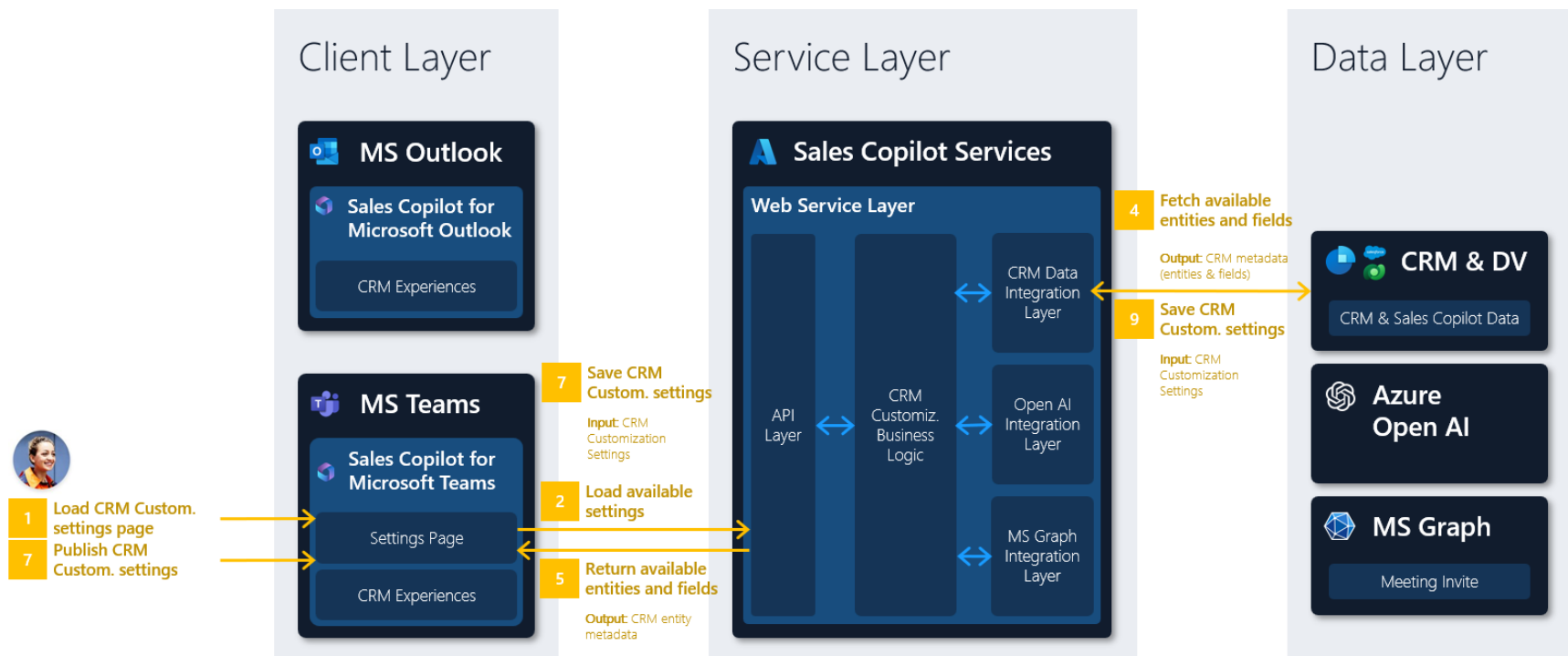
| | | |
|----|-----------------------------------|--|
| 3. | Load Teams meeting details page | The Teams' meeting insights are loaded when the user navigates to the Sales Copilot App in the Teams meeting summary view. |
| 4. | Call API to load meeting insights | An API call is triggered to load the Teams' meeting insights given a unique meeting identifier . |
| 5. | Fetch meeting insights | The Teams' meeting insights are fetched from Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences) if available using the unique meeting identifier . |
| 6. | Return meeting insights | The Teams' meeting insights, including the meeting summary, sentiment analysis, and follow ups, etc are returned from Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences). |
| 7. | Return meeting insights | The Teams meeting insights, including the meeting summary, sentiment analysis, and follow ups, etc are returned from Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences) and rendered in the Teams' meeting details page. |

CRM Customizations Overview

CRM Customization Setup

CRM Customization Setup Data Flow

The following describes the data flow for the CRM Customizations Setup experience.



| # | Title | Description |
|----|-------------------------------------|--|
| 1. | Load settings page | The Forms Admin Settings page (CRM Customization settings) is loaded when an admin navigates to the Settings Tab in the Sales Copilot for Microsoft Teams App . See the Required Permissions below for details on who can access the CRM Customizations Settings experience. |
| 2. | Load available settings | When the settings experience is loaded, an API call is made to the Sales Copilot core services to load the available CRM entities and fields to be configured for the CRM Customizations setup along with the default CRM Customizations configuration. |
| 3. | Fetch available entities and fields | During the processing of the CRM Customizations, a request is made to the CRM (Dynamics 365 or Salesforce) to retrieve the list of available CRM entities and fields . |

| | | |
|----|--------------------------------------|---|
| | | <p>For Dynamics 365 connected experiences, Saved Queries are used to retrieve the list of custom entities.</p> <p>For Salesforce connected experiences, Forms are used to retrieve the list of custom entities.</p> |
| 4. | Return available entities and fields | Upon the first launch of the CRM Customization settings, the default settings are loaded. The list of available CRM entities and fields are returned from the CRM. |
| 5. | Return available entities and fields | The list of available CRM entities and fields are returned to the client and shows on the CRM Customizations settings experience. |
| 6. | Publish CRM Customization settings | Administrators can configure the CRM Customization settings (e.g., available entities and fields) and publish the changes to take effect immediately across all Sales Copilot experiences. |
| 7. | Save CRM Customization settings | When the user publishes the CRM customization settings, an API call is made to the Sales Copilot core services to save the selected CRM Customization settings . |
| 8. | Save CRM Customization settings | <p>The CRM Customization settings are stored in Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences).</p> <p>The CRM Customization settings are stored per tenant and org.</p> |

Required Permissions

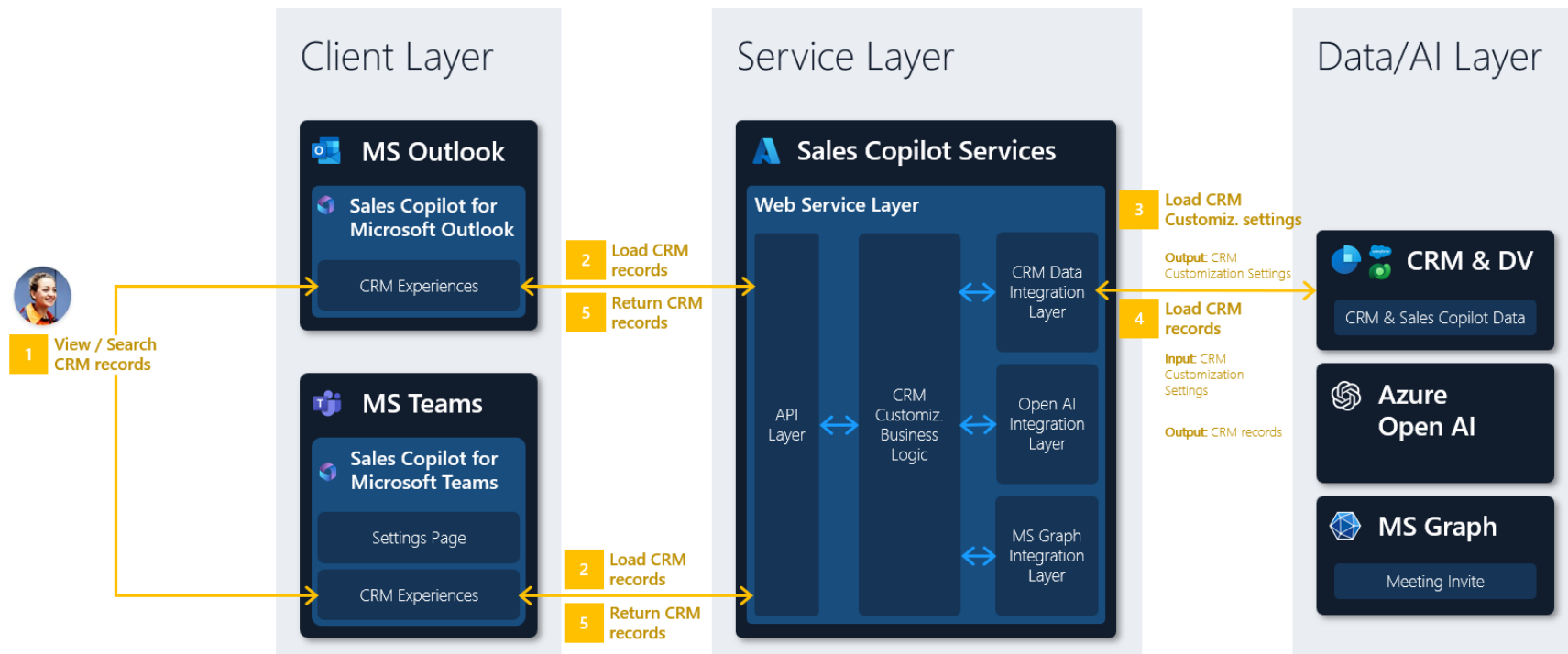
The following permissions are required to manage the CRM Customization settings:

| Connected CRM | Requirement Type | Required Role / Permission |
|---------------|------------------|---|
| Dynamics 365 | Security Role | System Administrator or System Customizer |
| Salesforce | Permission | Modify All Data or |

CRM Customization Rendering

CRM Customizations Rendering Data Flow

The following describes the data flow for the CRM Customizations rendering flows.



| # | Title | Description |
|----|----------------------------------|---|
| 1. | View / Search CRM records | End users can view or search for CRM records in the side-panel in the Microsoft Dynamics 365 for Outlook Add-In or the adaptive cards in the Microsoft Dynamics 365 for Teams App. |
| 2. | Load CRM records | When browsing or searching through the different end-user-facing experiences in Sales Copilot, API calls are being made to the Sales Copilot core services to load the configured CRM records . |
| 3. | Load CRM Customizations settings | <p>To determine the list of entities and fields to return to the Sales Copilot client experiences, the CRM Customization settings are being loaded from Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences).</p> <p>If the stored CRM Customization settings are not found the default settings are being loaded. This can occur if a user navigates to any view or performs a search for CRM records before the admin has set up the CRM Customizations.</p> |
| 4. | Load CRM records | Based on the CRM Customization settings the underlying CRM Records are being fetched from the underlying CRM. |
| 5. | Return CRM records | The CRM Records are returned and rendered in the Sales Copilot client experiences. |

Frequently Asked Questions

Data Management

AI Data Usage

How does Sales Copilot handle my data in AI scenarios?

Sales Copilot does not use any customer data to train any AI models. Sales Copilot also does not copy your data into any AI systems for the purpose of generating insights. Sales Copilot processes all your data within geo network boundaries to generate insights in real time. These insights are either served in real-time to the end user and can be discarded once the user interaction is complete, for example as part of the AI capabilities, or are stored within the existing geo boundaries of your data as described in the [Data Residency](#) section.

! NOTE

Meeting insights, including meeting summary, sentiment analysis, and follow ups are currently stored in the Microsoft Graph but are moving to Dynamics 365 (for Dynamics 365 connected experiences) or Dataverse (for Salesforce connected experiences) as part of the **May 2023 release**. The diagram above already illustrates migration of the data.

Which data sources does Sales Copilot use for AI scenarios?

Sales Copilot only leverages the CRM data from the environment and org the end user is connected to and e-mail content that the end user has access to produce AI replies, meeting summaries, or sales conversational insights. No other data is being leveraged for Sales Copilot AI scenarios.

What OpenAI endpoint is Suggested email replies and other Copilot capabilities using?

Suggested Email replies uses an OpenAI endpoints in Microsoft Azure. The traffic never leaves the Microsoft Network or geo boundaries of the service.

Environment Setup

Does the Sales Copilot "Trial" Dataverse instance for Salesforce customers expire?

No. The default expiration time on Dataverse "Trial" instances is set to 180 days. However, we periodically extend the "Trial" expiration date for all Sales Copilot Salesforce customers to prevent data loss or loss of support for Sales Copilot. The "Trial" Dataverse instance gets converted to a "Production" instance for all licenses Salesforce customers.

This does not apply to Dynamics 365 customers as Sales Copilot does not provision a new Dataverse instance for the Sales Copilot specific data but instead use the existing Dataverse instance for the connected Dynamics 365 environment and org.

Document Version History

| Version | Changes | Publish Date |
|---------|--|-----------------------------------|
| 1.0 | Initial Version | April 3 rd , 2023 |
| 1.1 | Updates for all new features shipped between April and September 2023. | September 12 th , 2023 |