

AI-Powered Document Generation

via

Copilot in Sales



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“An AI assistant in Dynamics 365 Sales enhances productivity by offering a chat interface for sellers, utilizing natural language or set prompts.”

Features:

- ✉ Email assistance: Compose Emails
- 📄 Record summarization: e.g Account overview
- 🔍 Information assistance: D365 + Sharepoint
- 👤 Meeting Preparation: Based on D365 data
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- 📄 Generate Documents 😊

The screenshot displays the Dynamics 365 Sales Hub interface. The main content area shows the account record for 'AlpenTech Solutions', including fields for Account Name, Phone, Email, and Fax. The Copilot chat interface is overlaid on the right side, featuring a chat window with a welcome message and three suggested actions: 'Get info', 'Ask questions', and 'Stay ahead'. The chat input field at the bottom contains the prompt: 'Ask a question about the data in the app. Use / to reference data'.



Copilot Studio



Power Automate



DocumentsCorePack

1. A topic, e.g. "Create document" triggers a Power Automate flow



2. The flow sends the record ID to DocumentsCorePack



3. The „Create document“ action generates the document



5. The Copilot agent displays the generated document



4. The generated document is returned to Copilot



Live Demo:

- Generate an invoice via Copilot in Sales
- Step-by-Step:
 - Configure a Topic
 - Setup a flow that communicates to Copilot



Copilot Studio

1. A topic, e.g. "Create document"
Calls DocumentsCorePack

3. The Copilot agent displays the
generated document



Power Automate

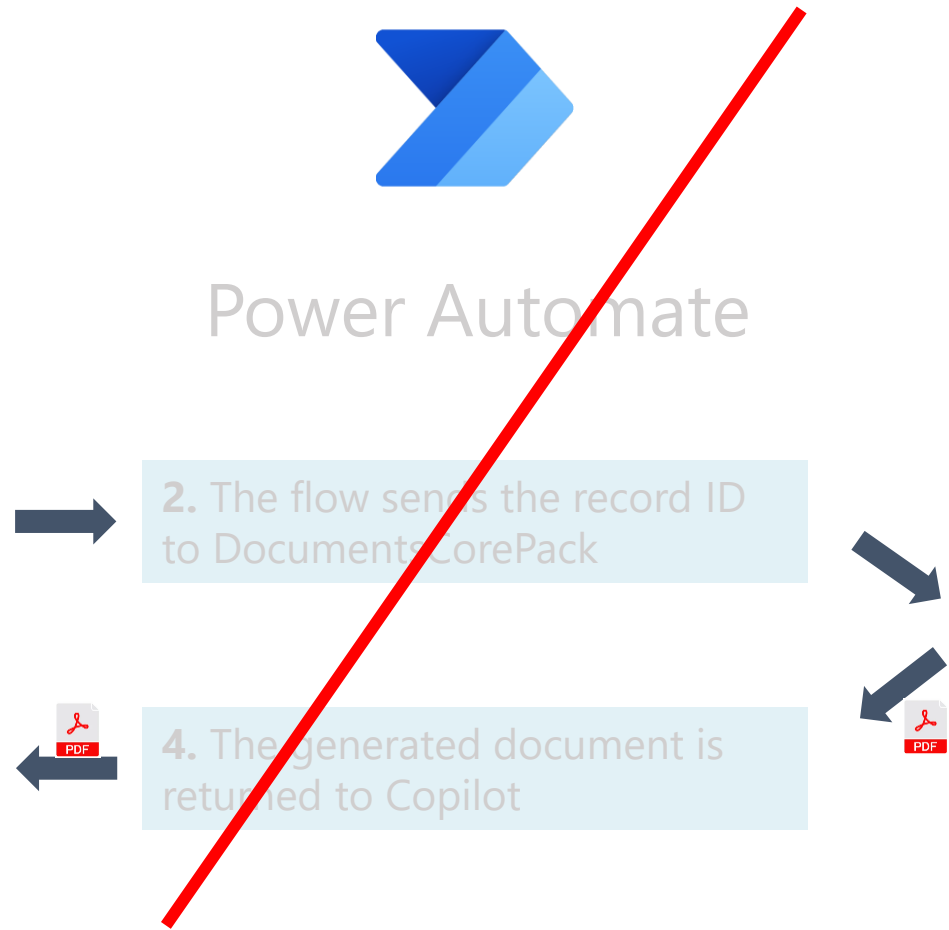
2. The flow sends the record ID
to DocumentsCorePack

4. The generated document is
returned to Copilot

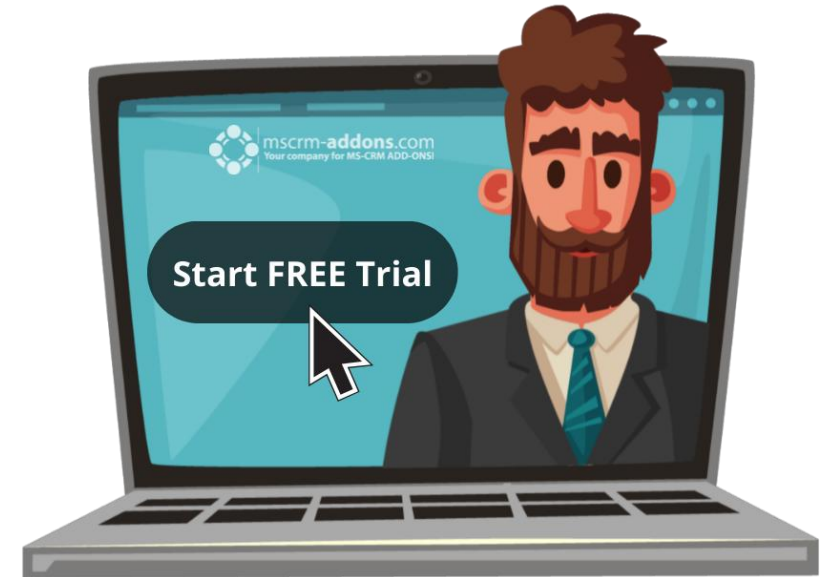


DocumentsCorePack

2. The „Create document“ action
generates the document



- **Free Trials Available** for all Add-Ons
- No functional limitations
- Fully supported
- ~"30" minutes to get started



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