Introduction to Copilot in Microsoft Dynamics 365 Sales Training

Duration: **1 Day**

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Overview

This intensive **1-day {*training}** is designed to introduce Microsoft's next-generation AI assistant,**Copilot**, within the **Dynamics 365 Sales** environment.
Participants will explore how to **configure, implement, and use** Copilot specifically in the Sales application of Dynamics 365.

The course also provides an outlook on **how Copilot integrates with other Dynamics 365 apps**, equipping learners with a broad understanding of Microsoft's AI ecosystem.

Why Attend This Training?

- Ideal for professionals who want to bring**AI-driven innovation** into their Dynamics 365 ecosystem
- Learn how to boost productivity for sales teams using Copilot
- Understand cross-platform usage of Copilot with Power Platform and Teams
- Get real-world configuration knowledge for future projects
- Stay aligned with Microsoft's responsible AI strategy

Prerequisites

- Familiarity with **cloud technologies** is expected.
- Prior exposure to **Microsoft Power Platform** is beneficial.
- **For virtual learners:**
  - You must use **two monitors** for effective hands-on learning.
  - A **modern web browser** (such as Microsoft Edge or Google Chrome) is required.
  - Your browser must support **Incognito or InPrivate mode** (some corporate networks may block this).

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What You Will Learn

By the end of this {*training}, you will have gained knowledge and skills in the following areas:

- Understand what **Microsoft Dynamics 365 Copilot** is
- Learn how to **configure Copilot** for the Sales app
- See how Copilot functions within **Dynamics 365 Sales**
- Get introduced to Copilot in other Dynamics 365 modules
- Understand Microsoft's commitment to **responsible AI practices**

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Outline

Module 1: What is Microsoft Dynamics 365 Copilot?

- Overview of Microsoft Dynamics 365
- Introduction to Microsoft Copilot
- Real-world use cases of Copilot within the Sales module
- Microsoft's principles for responsible and ethical AI

Module 2: Configuring Copilot for Dynamics 365 Sales

- Key steps to install and configure Copilot for Sales
- Integrating Dynamics 365 with Exchange (SSS)
- Setting up Copilot for the Power Platform environment
- Enabling Copilot inside Dynamics 365 Sales
- Configuring Copilot for Microsoft Teams

Module 3: Exploring Copilot in Action (Sales Focus)

- How to use Copilot in real-life Sales scenarios
- Leveraging Copilot within Microsoft Outlook
- Collaborating using Microsoft Teams

Module 4: Expanding Copilot Across Dynamics 365

- Introduction to Copilot in **Dynamics 365 Customer Service**
- Introduction to Copilot in **Dynamics 365 Field Service**