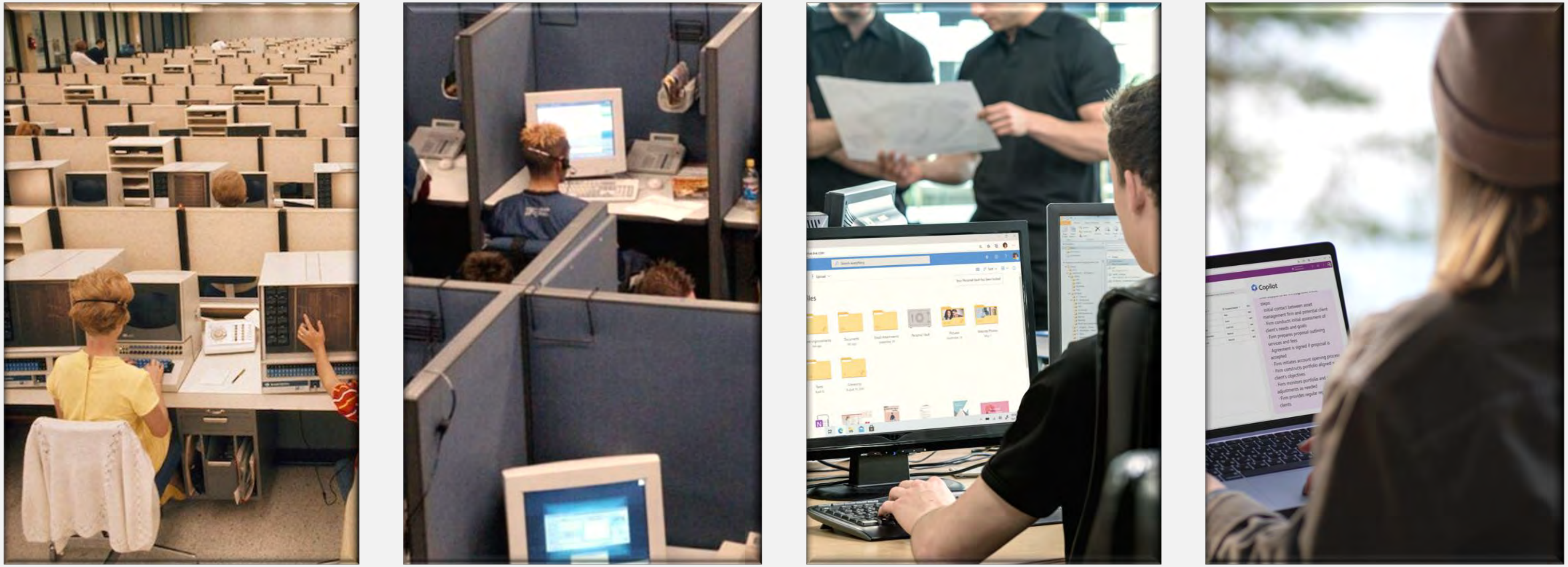
Microsoft

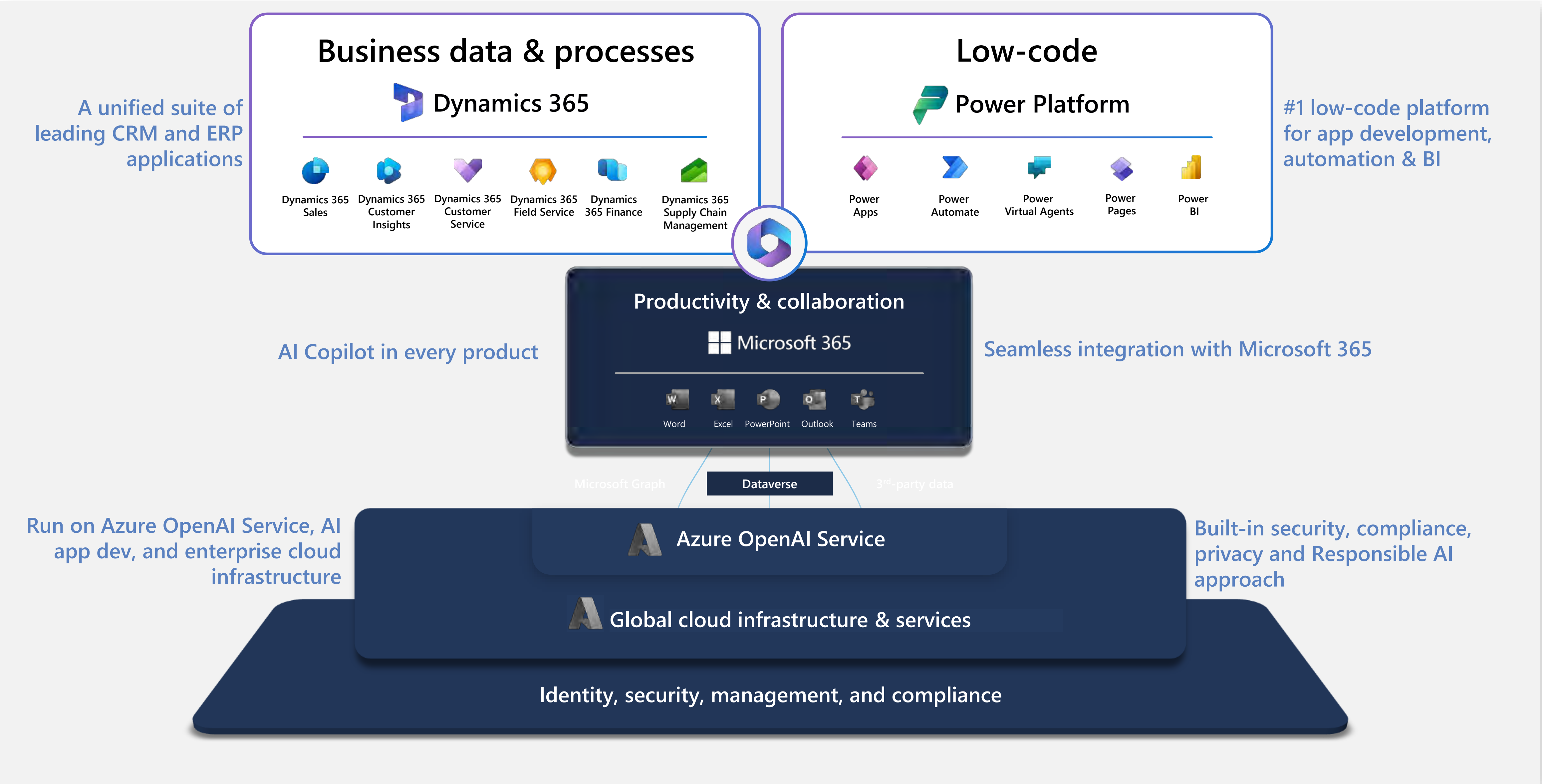
Microsoft Copilot

Vision overview

Mike Ehrenberg

Business applications are being reimagined at their core





A unified suite of leading CRM and ERP applications

Business data & processes

Dynamics 365

- Dynamics 365 Sales
- Dynamics 365 Customer Insights
- Dynamics 365 Customer Service
- Dynamics 365 Field Service
- Dynamics 365 Finance
- Dynamics 365 Supply Chain Management

Low-code

Power Platform

- Power Apps
- Power Automate
- Power Virtual Agents
- Power Pages
- Power BI

#1 low-code platform for app development, automation & BI

AI Copilot in every product

Productivity & collaboration

Microsoft 365

- Word
- Excel
- PowerPoint
- Outlook
- Teams

Seamless integration with Microsoft 365

Microsoft Graph

Dataverse

3rd-party data

Run on Azure OpenAI Service, AI app dev, and enterprise cloud infrastructure

Azure OpenAI Service

Global cloud infrastructure & services

Identity, security, management, and compliance

Built-in security, compliance, privacy and Responsible AI approach

Microsoft Copilot for Business Users

Microsoft Copilot for Service

Microsoft Copilot for Sales

Microsoft Copilot for Finance

Microsoft Copilot Studio

Copilot for Microsoft 365

Retrieval Augmented Generation (RAG)

A technique for enhancing the accuracy and reliability of generative AI models by grounding them with facts retrieved from only authoritative data sources.

Microsoft Copilot for Microsoft 365

Your everyday AI companion assistant at work

Natural Language

Large Language Models (LLMs)

Web grounding

Commercial data protection

The Internet

+

Microsoft Graph grounding

+

Microsoft 365 Apps

+

Enterprise-grade data protection

+

Copilot Studio

Microsoft Copilot for Finance

Your everyday AI assistant at work

for finance professionals

Natural Language

- Large Language Models (LLMs)
- Web grounding
- Microsoft Graph grounding
- Enterprise-grade data protection
- Commercial data protection
- The Internet
- Microsoft 365 Apps
- Copilot Studio

+

ERP and Financial Systems

Microsoft Dynamics 365 Finance

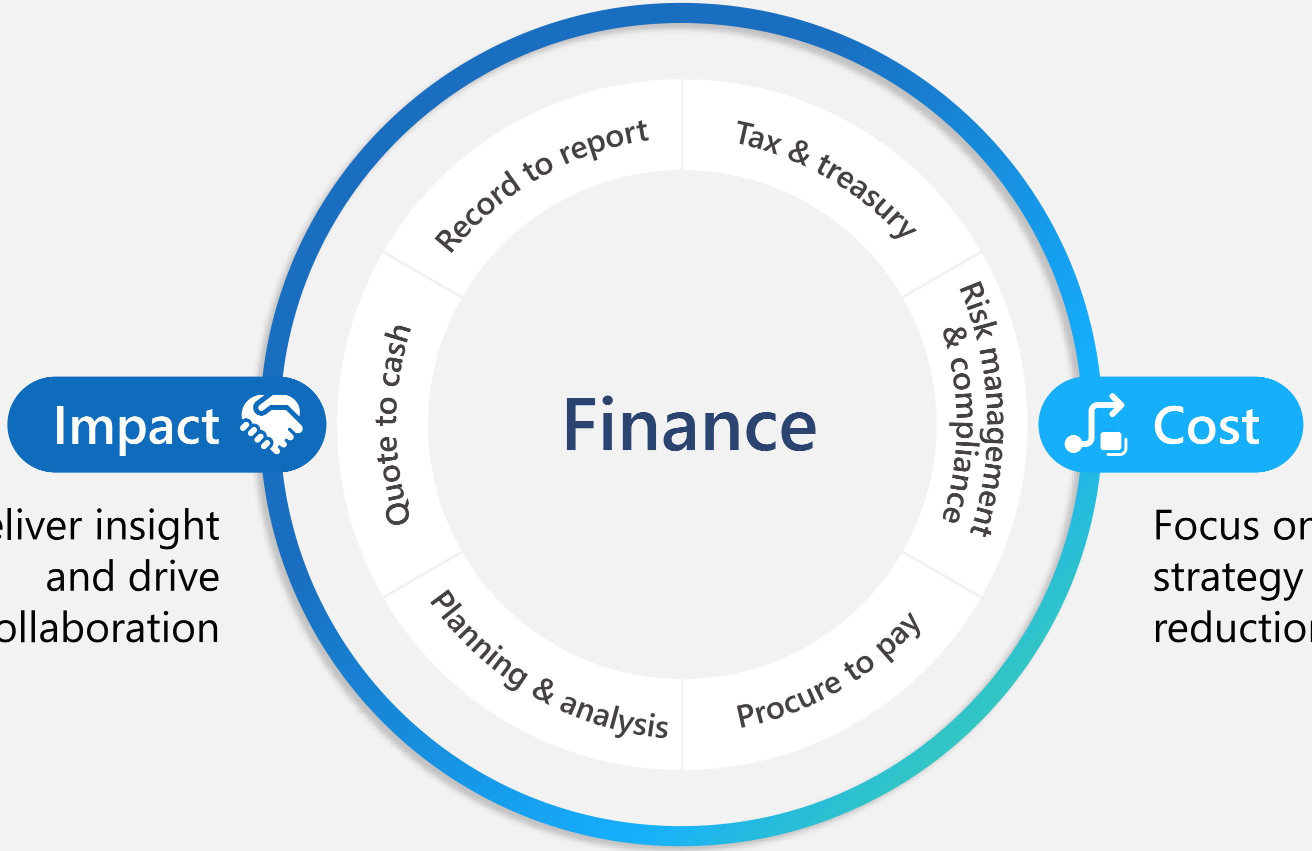
Finance-specific actions, insight, and recommendations

Microsoft

Microsoft Copilot for Finance

Wayne Wilson

The role of Finance is complex and evolving



Finance

Record to report

Tax & treasury

Risk management & compliance

Procure to pay

Planning & analysis

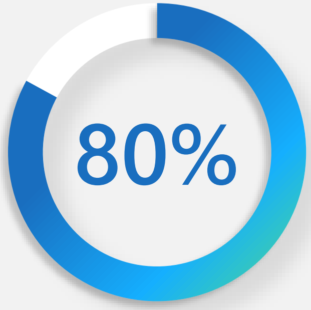
Quote to cash

Impact

Deliver insight and drive collaboration

Cost

Focus on strategy and cost reduction levers



80%

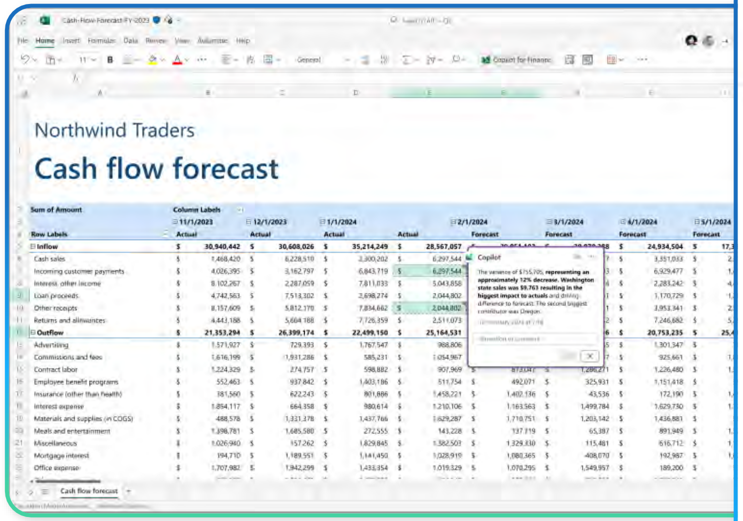
face challenges to take on more strategic work beyond the operational portions of their roles

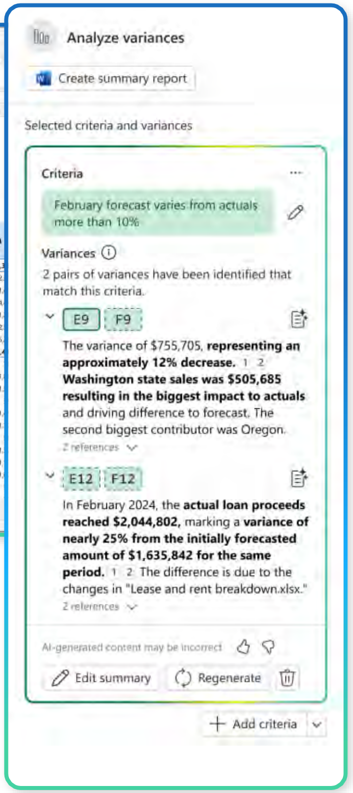
Source: Microsoft: Future of Finance Trends Report

Microsoft Copilot for Finance

Accelerate business impact and reduce cost with a copilot in the flow of work.

Copilot for Finance is experienced in Microsoft 365 and connects to your financial systems





Selected criteria and variances

Criteria

February forecast varies from actuals more than 10%

Variances

2 pairs of variances have been identified that match this criteria.

E9 F9

The variance of $755,705, **representing an approximately 12% decrease. Washington state sales was $505,685 resulting in the biggest impact to actuals** and driving difference to forecast. The second biggest contributor was Oregon. [1] [2]

2 references

E12 F12

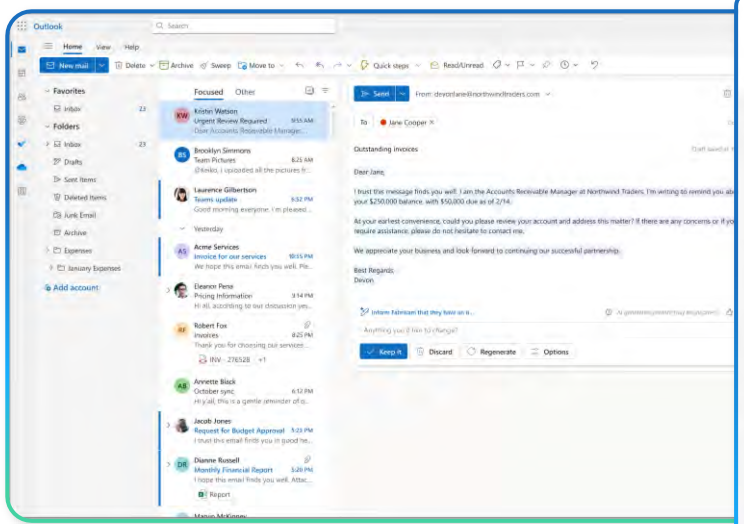
In February 2024, the **actual loan proceeds reached $2,044,802,** marking a **variance of nearly 25% from the initially forecasted amount of $1,635,842 for the same period.** [1] [2] The difference is due to the changes in "Lease and rent breakdown.xlsx."

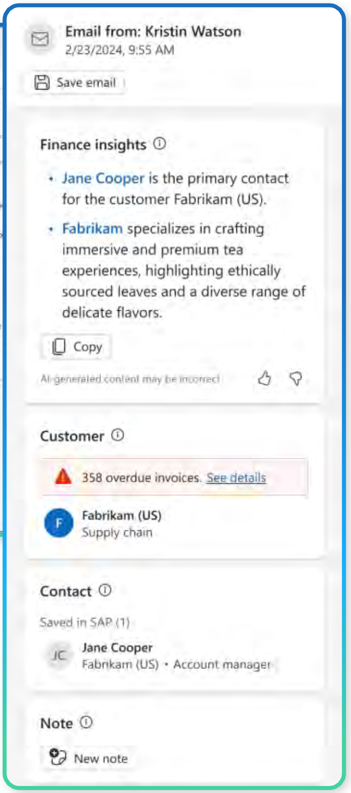
2 references

AI-generated content may be incorrect

Accelerate impact

Deliver new insight and reduce the time it takes to compile and analyze data





Email from: Kristin Watson
2/23/2024, 9:55 AM

Finance insights

- **Jane Cooper** is the primary contact for the customer Fabrikam (US).
- **Fabrikam** specializes in crafting immersive and premium tea experiences, highlighting ethically sourced leaves and a diverse range of delicate flavors.

AI-generated content may be incorrect

Customer

358 overdue invoices. See details

Fabrikam (US)
Supply chain

Contact

Saved in SAP (1)

Jane Cooper
Fabrikam (US) • Account manager

Note

Reduce cost

Drive efficiency by applying AI to optimize manual, labor-intensive processes

Microsoft

> “Based on pilot usage, the data reconciliation capabilities in Microsoft Copilot for Finance saves an average of 20 minutes/account, or a 22% costs savings in average handling time. It’s a huge timesaver for an organization as complex as Microsoft.”
>
> **— Anita Mehra, Corporate Vice President, Global Treasury & Financial Services**

Customer:
- Microsoft

Industry:
- Software

Country:
- United States

Products and services:
- Microsoft Copilot for Finance

Situation:

At Microsoft, there are teams spending, on average, 1-2 hours per week reconciling data, across hundreds of accounts in a month.

Solution:

A group from the Treasury and Financial Planning and Analysis teams at Microsoft piloted Copilot for Finance to automate and simplify the data reconciliation process and improve productivity.

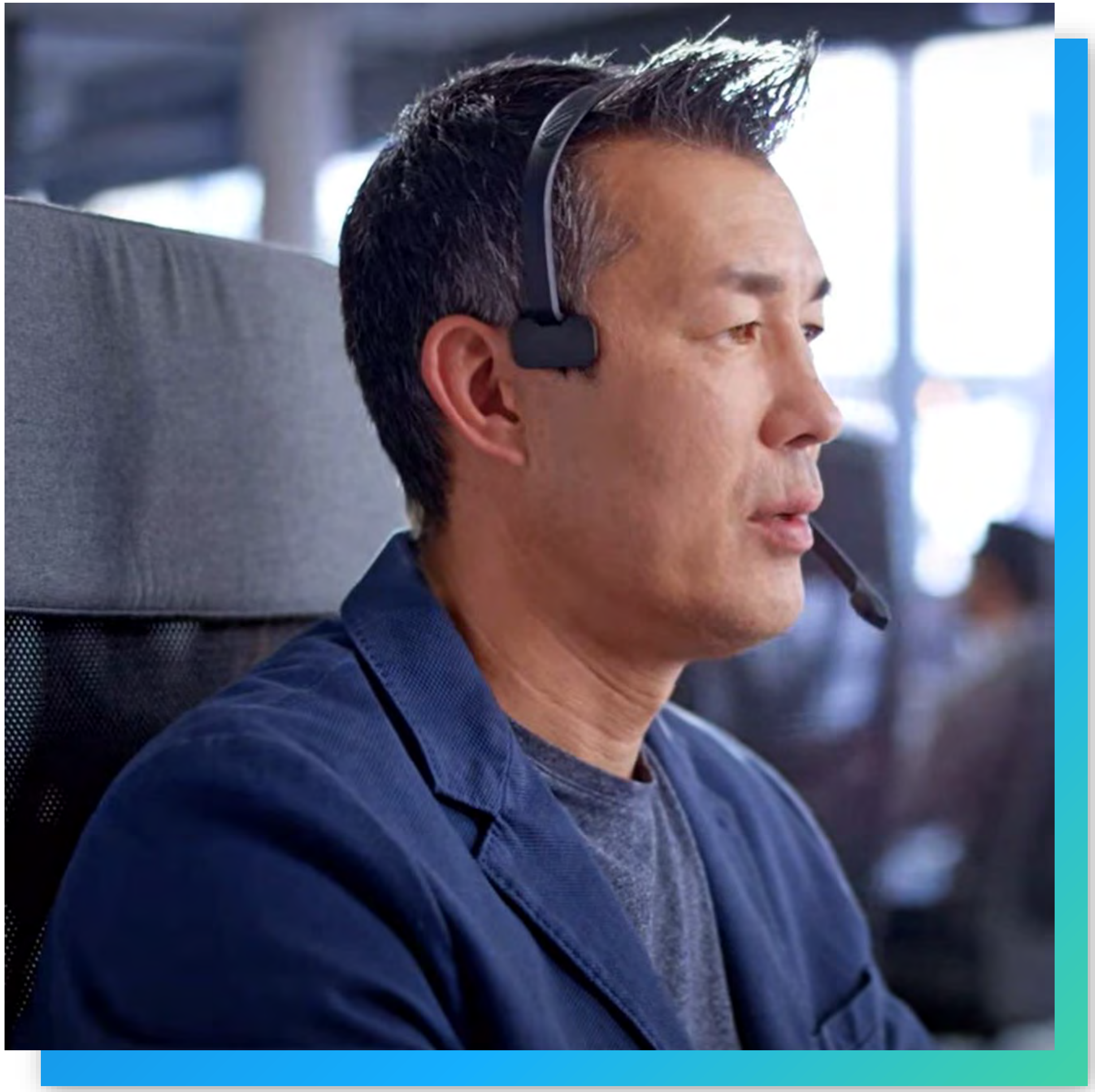
Impact:

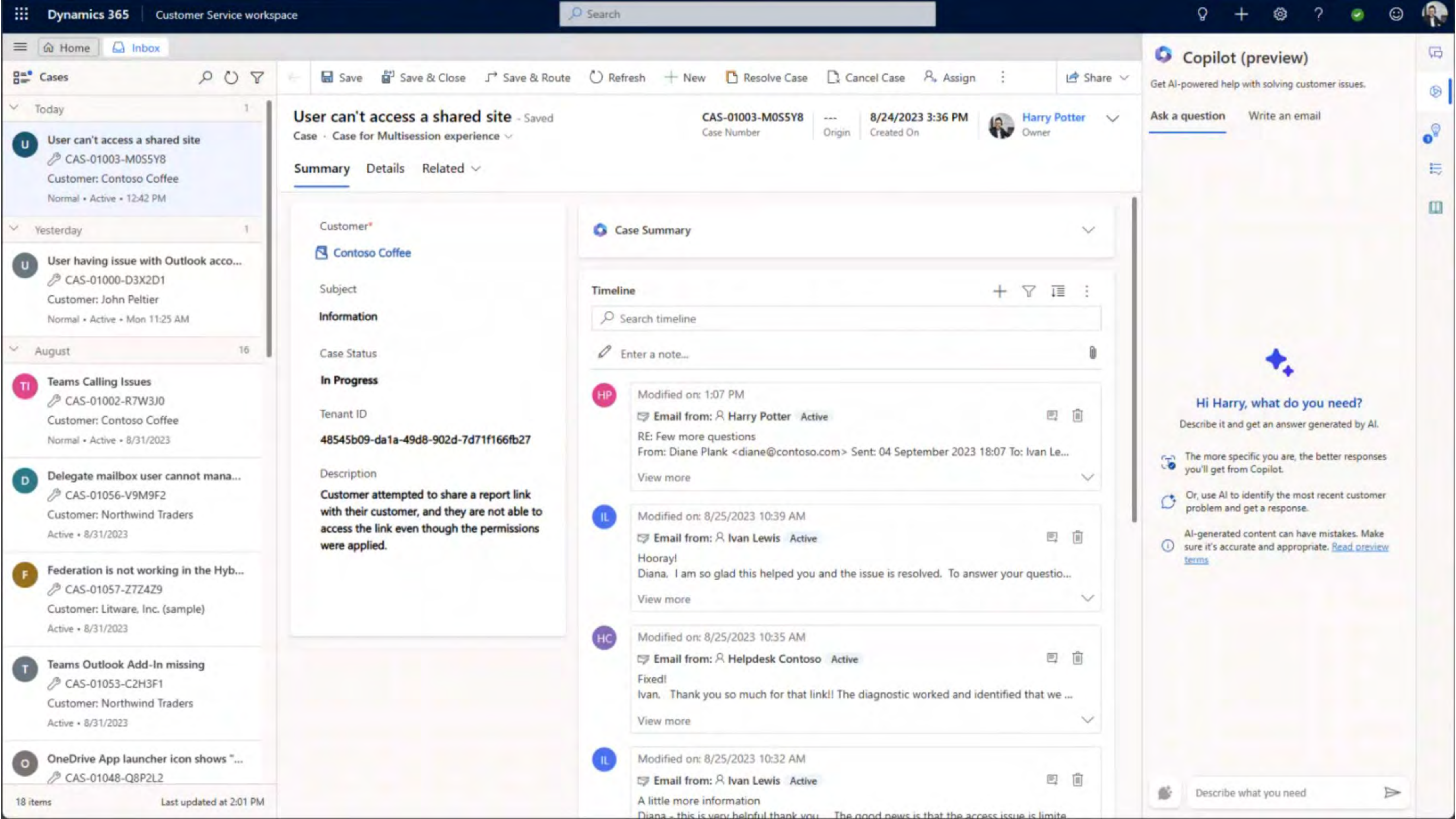
- Reconciliation helps reduce manual plotting of invoices and saves an average of 20 mins/account
- 1-2 hours spent reconciling data is now done in 10 minutes

Microsoft

Dynamics 365 Customer Service

Mike Ehrenberg




Dynamics 365
Customer Service workspace
Search
Home
Inbox
Cases
Save
Save & Close
Save & Route
Refresh
New
Resolve Case
Cancel Case
Assign
Share
Summary
Details
Related
Timeline
Search timeline
Enter a note...
View more
Copilot (preview)
Ask a question
Write an email
Describe what you need

Today 1

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

Yesterday 1

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

August 16

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

18 items
Last updated at 2:01 PM

User can't access a shared site - Saved
Case · Case for Multisession experience

CAS-01003-M0S5Y8
Case Number

Origin

8/24/2023 3:36 PM
Created On

Harry Potter
Owner

Customer*
Contoso Coffee

Subject
Information

Case Status
In Progress

Tenant ID
48545b09-da1a-49d8-902d-7d71f166fb27

Description
Customer attempted to share a report link with their customer, and they are not able to access the link even though the permissions were applied.

Case Summary

Modified on: 1:07 PM
Email from: Harry Potter Active
RE: Few more questions
From: Diane Plank <diane@contoso.com> Sent: 04 September 2023 18:07 To: Ivan Le...

Modified on: 8/25/2023 10:39 AM
Email from: Ivan Lewis Active
Hooray!
Diana, I am so glad this helped you and the issue is resolved. To answer your questio...

Modified on: 8/25/2023 10:35 AM
Email from: Helpdesk Contoso Active
Fixed!
Ivan, Thank you so much for that link!! The diagnostic worked and identified that we ...

Modified on: 8/25/2023 10:32 AM
Email from: Ivan Lewis Active
A little more information
Diana - this is very helpful thank you ... The good news is that the access issue is limite

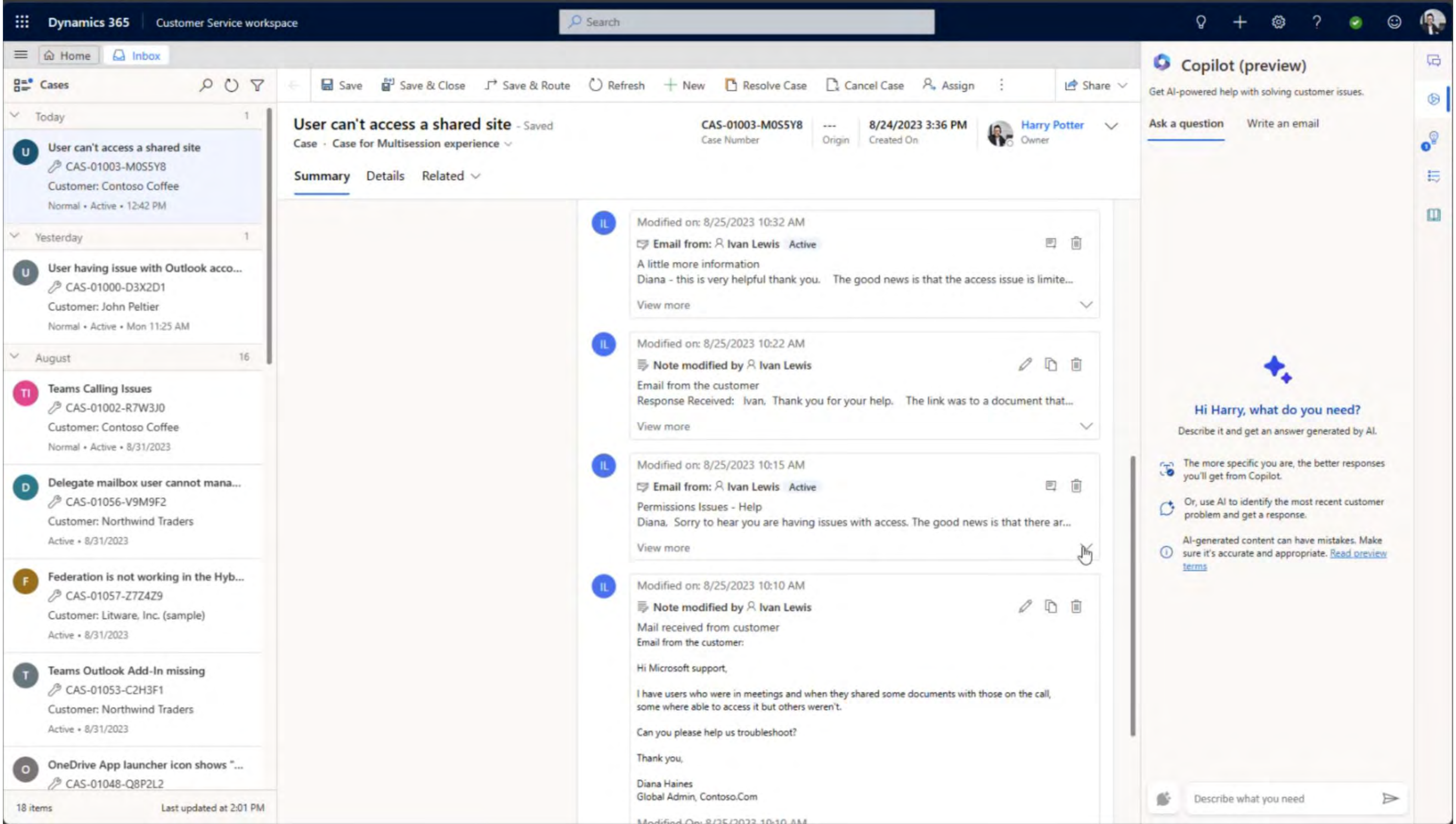
Get AI-powered help with solving customer issues.

Hi Harry, what do you need?
Describe it and get an answer generated by AI.

The more specific you are, the better responses you'll get from Copilot.

Or, use AI to identify the most recent customer problem and get a response.

AI-generated content can have mistakes. Make sure it's accurate and appropriate. Read preview terms


Dynamics 365
Customer Service workspace
Search
Home
Inbox
Cases
Save
Save & Close
Save & Route
Refresh
New
Resolve Case
Cancel Case
Assign
Share
Summary
Details
Related
View more
Copilot (preview)
Ask a question
Write an email
Describe what you need

Today 1

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

Yesterday 1

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

August 16

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

18 items
Last updated at 2:01 PM

User can't access a shared site - Saved
Case · Case for Multisession experience

CAS-01003-M0S5Y8	---	8/24/2023 3:36 PM	Harry Potter
Case Number	Origin	Created On	Owner

Modified on: 8/25/2023 10:32 AM
Email from: Ivan Lewis Active
A little more information
Diana - this is very helpful thank you. The good news is that the access issue is limite...

Modified on: 8/25/2023 10:22 AM
Note modified by Ivan Lewis
Email from the customer
Response Received: Ivan, Thank you for your help. The link was to a document that...

Modified on: 8/25/2023 10:15 AM
Email from: Ivan Lewis Active
Permissions Issues - Help
Diana, Sorry to hear you are having issues with access. The good news is that there ar...

Modified on: 8/25/2023 10:10 AM
Note modified by Ivan Lewis
Mail received from customer
Email from the customer:

Hi Microsoft support,

I have users who were in meetings and when they shared some documents with those on the call, some where able to access it but others weren't.

Can you please help us troubleshoot?

Thank you,

Diana Haines
Global Admin, Contoso.Com

Modified On: 8/25/2023 10:10 AM

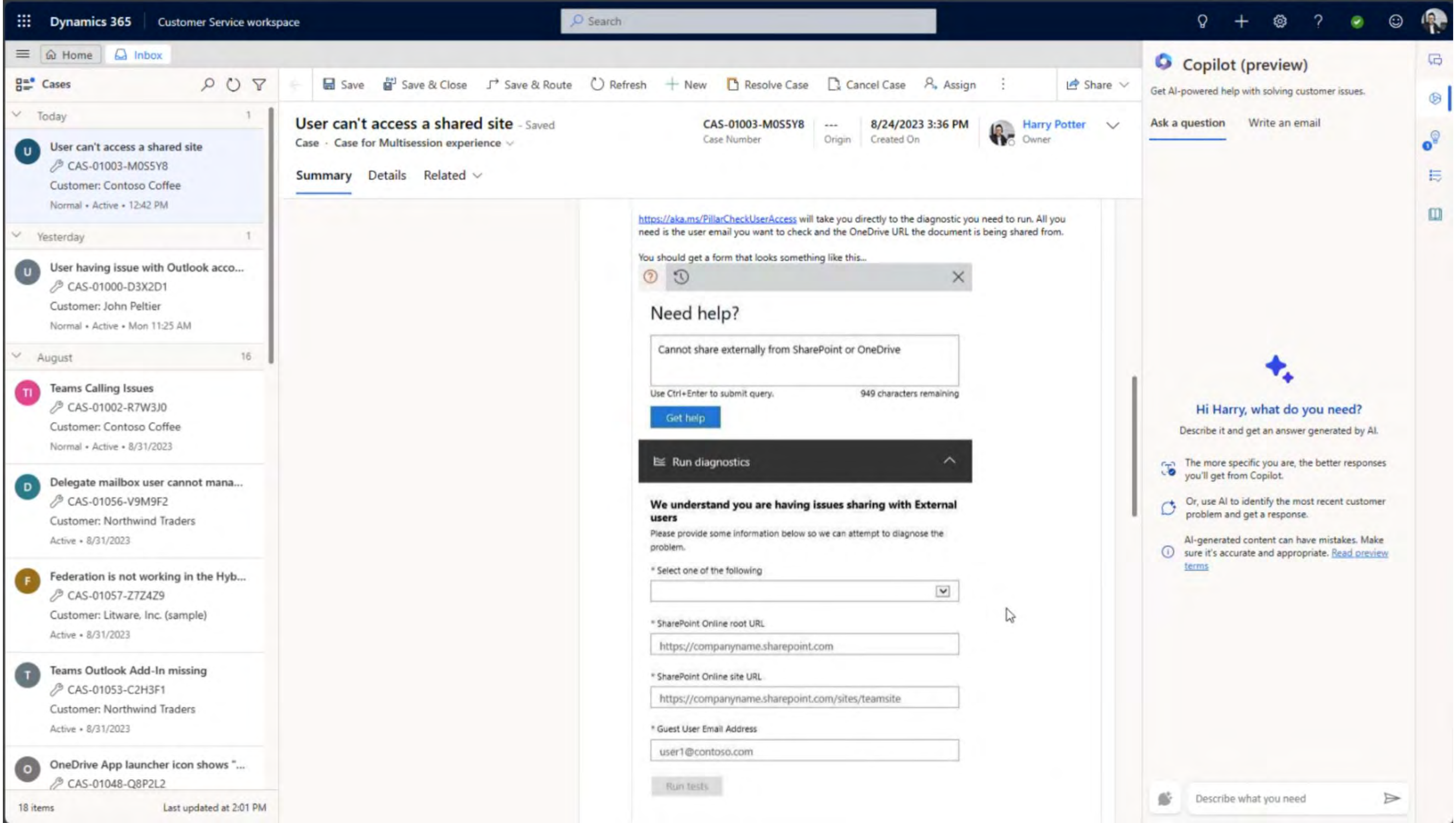
Get AI-powered help with solving customer issues.

Hi Harry, what do you need?
Describe it and get an answer generated by AI.

The more specific you are, the better responses you'll get from Copilot.

Or, use AI to identify the most recent customer problem and get a response.

AI-generated content can have mistakes. Make sure it's accurate and appropriate. Read preview terms


Dynamics 365
Customer Service workspace
Search
Home
Inbox
Cases
Save
Save & Close
Save & Route
Refresh
New
Resolve Case
Cancel Case
Assign
Share
Summary
Details
Related
Copilot (preview)
Ask a question
Write an email
Get help
Run diagnostics
Run tests

Today 1

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

Yesterday 1

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

August 16

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

18 items Last updated at 2:01 PM

User can't access a shared site - Saved
Case · Case for Multisession experience

CAS-01003-M0S5Y8 Case Number
--- Origin
8/24/2023 3:36 PM Created On
Harry Potter Owner

https://aka.ms/PillarCheckUserAccess will take you directly to the diagnostic you need to run. All you need is the user email you want to check and the OneDrive URL the document is being shared from.

You should get a form that looks something like this...

Need help?

Cannot share externally from SharePoint or OneDrive

Use Ctrl+Enter to submit query. 949 characters remaining

We understand you are having issues sharing with External users

Please provide some information below so we can attempt to diagnose the problem.

* Select one of the following

* SharePoint Online root URL
https://companyname.sharepoint.com

* SharePoint Online site URL
https://companyname.sharepoint.com/sites/teamsite

* Guest User Email Address
user1@contoso.com

Get AI-powered help with solving customer issues.

Hi Harry, what do you need?

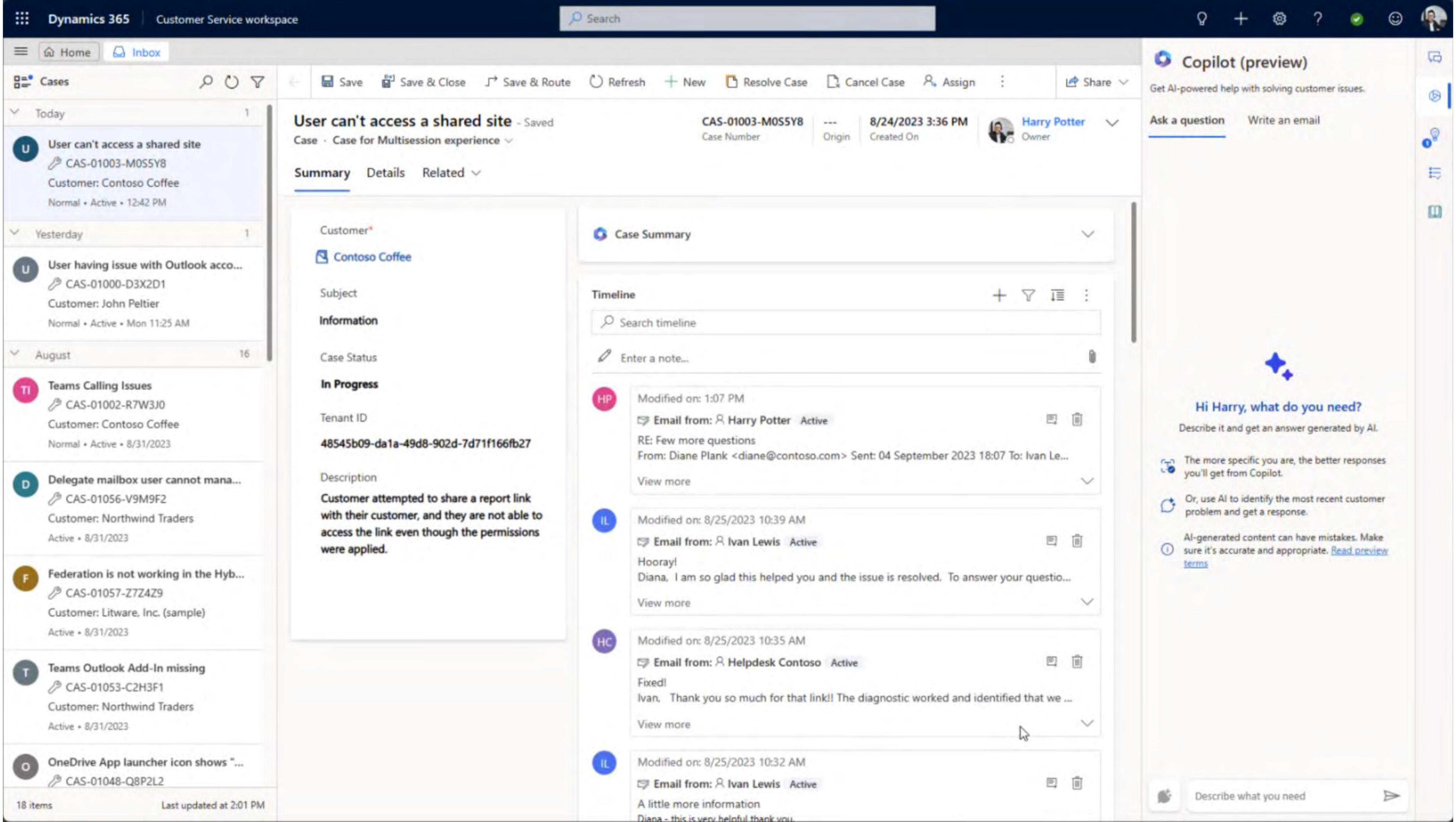
Describe it and get an answer generated by AI.

The more specific you are, the better responses you'll get from Copilot.

Or, use AI to identify the most recent customer problem and get a response.

AI-generated content can have mistakes. Make sure it's accurate and appropriate. Read preview terms

Describe what you need


Dynamics 365
Customer Service workspace
Search
Home
Inbox
Cases
Save
Save & Close
Save & Route
Refresh
New
Resolve Case
Cancel Case
Assign
Share
Summary
Details
Related
Case Summary
Timeline
Search timeline
Enter a note...
View more
Copilot (preview)
Ask a question
Write an email
Describe what you need

Today 1

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

Yesterday 1

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

August 16

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

18 items
Last updated at 2:01 PM

User can't access a shared site - Saved
Case · Case for Multisession experience

CAS-01003-M0S5Y8	---	8/24/2023 3:36 PM	Harry Potter
Case Number	Origin	Created On	Owner

Customer*
Contoso Coffee

Subject
Information

Case Status
In Progress

Tenant ID
48545b09-da1a-49d8-902d-7d71f166fb27

Description
Customer attempted to share a report link with their customer, and they are not able to access the link even though the permissions were applied.

Modified on: 1:07 PM
Email from: Harry Potter Active
RE: Few more questions
From: Diane Plank <diane@contoso.com> Sent: 04 September 2023 18:07 To: Ivan Le...

Modified on: 8/25/2023 10:39 AM
Email from: Ivan Lewis Active
Hooray!
Diana, I am so glad this helped you and the issue is resolved. To answer your questio...

Modified on: 8/25/2023 10:35 AM
Email from: Helpdesk Contoso Active
Fixed!
Ivan, Thank you so much for that link!! The diagnostic worked and identified that we ...

Modified on: 8/25/2023 10:32 AM
Email from: Ivan Lewis Active
A little more information
Diana - this is very helpful thank you.

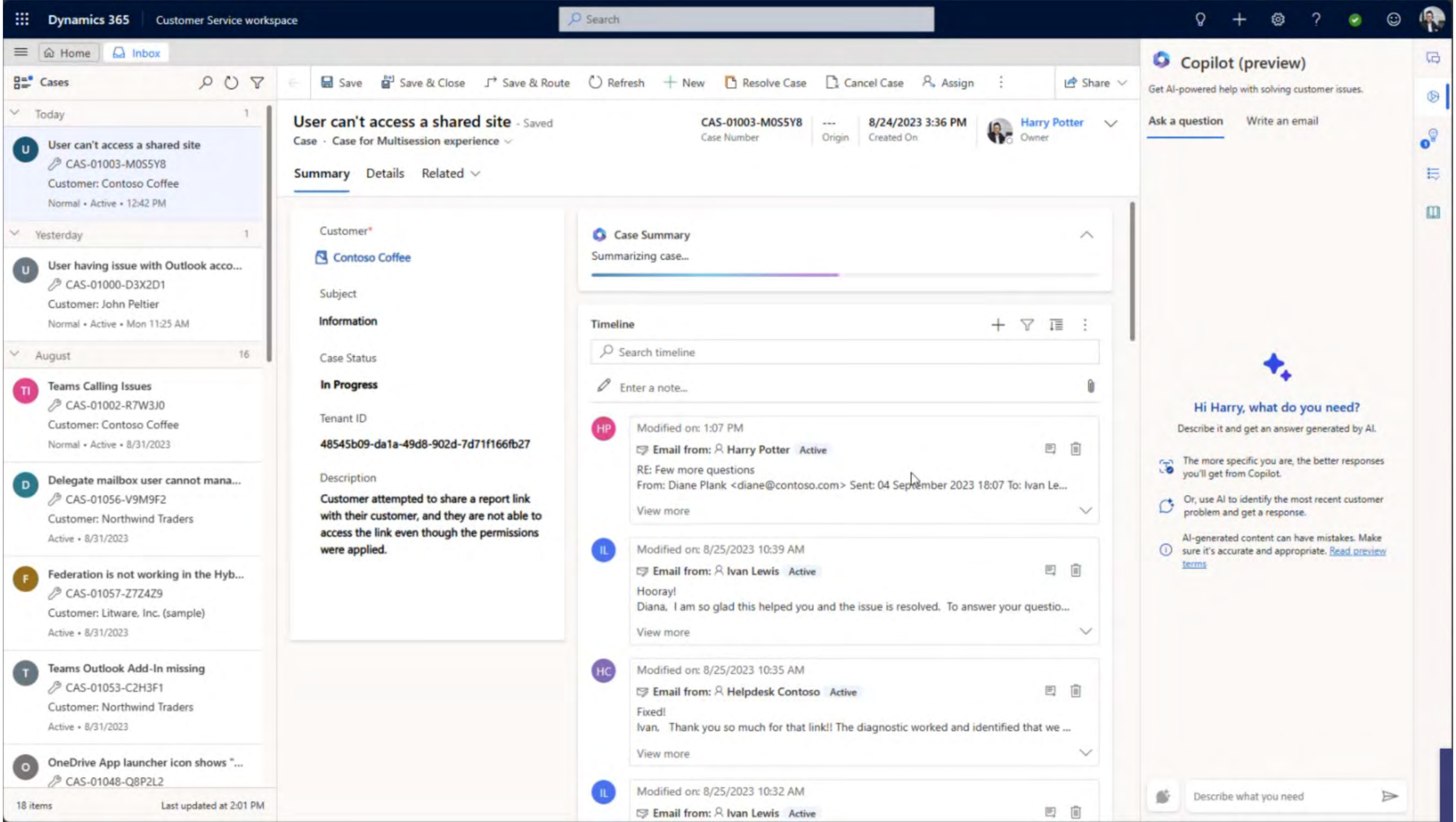
Get AI-powered help with solving customer issues.

Hi Harry, what do you need?
Describe it and get an answer generated by AI.

The more specific you are, the better responses you'll get from Copilot.

Or, use AI to identify the most recent customer problem and get a response.

AI-generated content can have mistakes. Make sure it's accurate and appropriate. Read preview terms


Dynamics 365
Customer Service workspace
Search
Home
Inbox
Cases
Save
Save & Close
Save & Route
Refresh
New
Resolve Case
Cancel Case
Assign
Share
Copilot (preview)
Ask a question
Write an email
Summary
Details
Related
Timeline
Search timeline
Enter a note...
View more
Describe what you need

Today 1

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

Yesterday 1

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

August 16

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

18 items Last updated at 2:01 PM

User can't access a shared site - Saved
Case · Case for Multisession experience

CAS-01003-M0S5Y8 Case Number
--- Origin
8/24/2023 3:36 PM Created On
Harry Potter Owner

Customer*: Contoso Coffee

Subject: Information

Case Status: In Progress

Tenant ID: 48545b09-da1a-49d8-902d-7d71f166fb27

Description: Customer attempted to share a report link with their customer, and they are not able to access the link even though the permissions were applied.

Case Summary
Summarizing case...

Modified on: 1:07 PM
Email from: Harry Potter Active
RE: Few more questions
From: Diane Plank <diane@contoso.com> Sent: 04 September 2023 18:07 To: Ivan Le...

Modified on: 8/25/2023 10:39 AM
Email from: Ivan Lewis Active
Hooray!
Diana, I am so glad this helped you and the issue is resolved. To answer your questio...

Modified on: 8/25/2023 10:35 AM
Email from: Helpdesk Contoso Active
Fixed!
Ivan, Thank you so much for that link!! The diagnostic worked and identified that we ...

Modified on: 8/25/2023 10:32 AM
Email from: Ivan Lewis Active

Get AI-powered help with solving customer issues.

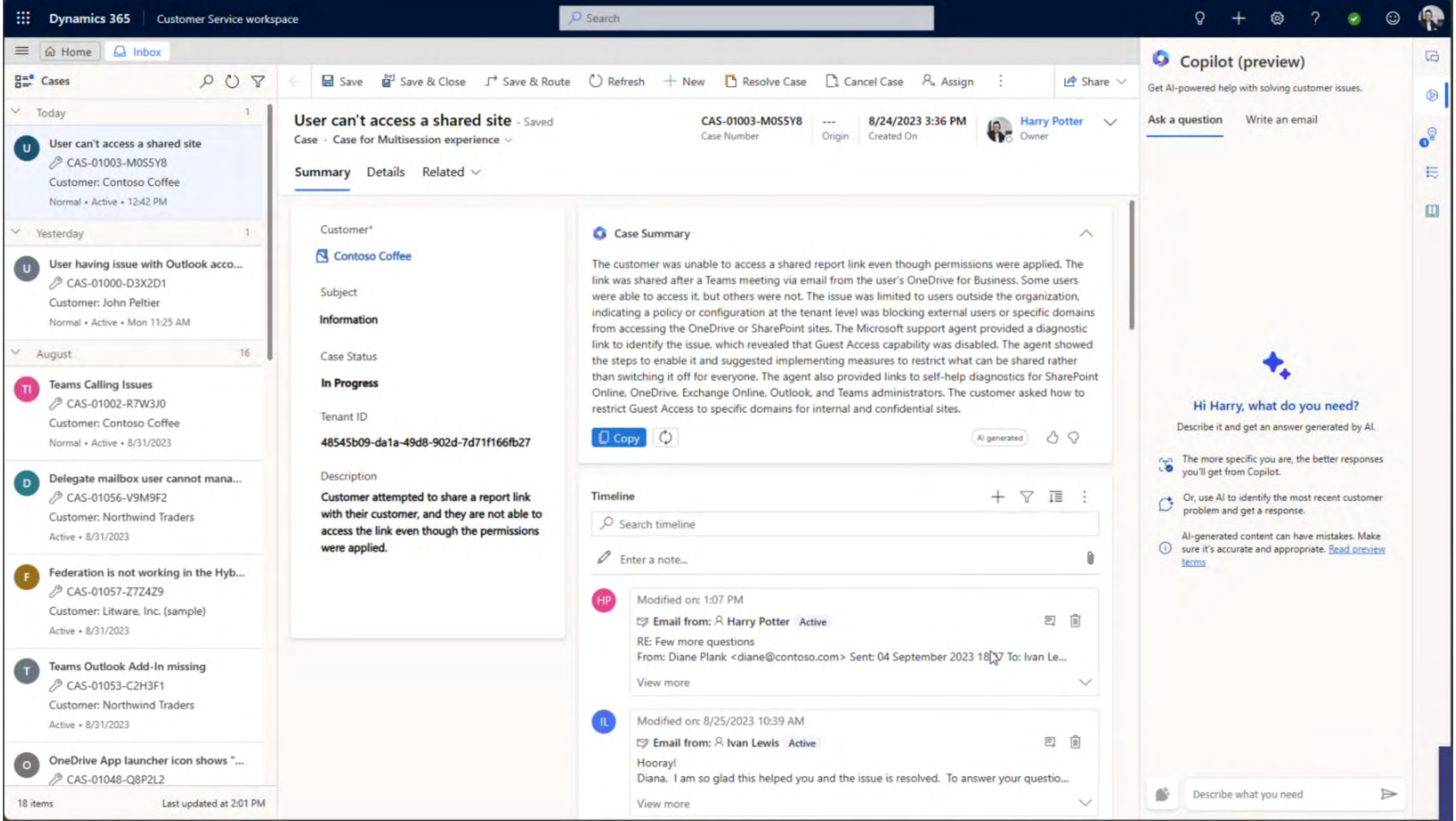
Hi Harry, what do you need?

Describe it and get an answer generated by AI.

The more specific you are, the better responses you'll get from Copilot.

Or, use AI to identify the most recent customer problem and get a response.

AI-generated content can have mistakes. Make sure it's accurate and appropriate. Read preview terms



Cases

Today 1

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

Yesterday 1

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

August 16

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

18 items Last updated at 2:01 PM

User can't access a shared site - Saved
Case · Case for Multisession experience

CAS-01003-M0S5Y8 Case Number
--- Origin
8/24/2023 3:36 PM Created On
Harry Potter Owner

Summary Details Related

Customer*
Contoso Coffee

Subject
Information

Case Status
In Progress

Tenant ID
48545b09-da1a-49d8-902d-7d71f166fb27

Description
Customer attempted to share a report link with their customer, and they are not able to access the link even though the permissions were applied.

Case Summary

The customer was unable to access a shared report link even though permissions were applied. The link was shared after a Teams meeting via email from the user's OneDrive for Business. Some users were able to access it, but others were not. The issue was limited to users outside the organization, indicating a policy or configuration at the tenant level was blocking external users or specific domains from accessing the OneDrive or SharePoint sites. The Microsoft support agent provided a diagnostic link to identify the issue, which revealed that Guest Access capability was disabled. The agent showed the steps to enable it and suggested implementing measures to restrict what can be shared rather than switching it off for everyone. The agent also provided links to self-help diagnostics for SharePoint Online, OneDrive, Exchange Online, Outlook, and Teams administrators. The customer asked how to restrict Guest Access to specific domains for internal and confidential sites.

Copy AI generated

Timeline

Search timeline
Enter a note...

Modified on: 1:07 PM
Email from: Harry Potter Active
RE: Few more questions
From: Diane Plank <diane@contoso.com> Sent: 04 September 2023 18:17 To: Ivan Le...
View more

Modified on: 8/25/2023 10:39 AM
Email from: Ivan Lewis Active
Hooray!
Diana, I am so glad this helped you and the issue is resolved. To answer your questio...
View more

Copilot (preview)

Get AI-powered help with solving customer issues.

Ask a question Write an email

Hi Harry, what do you need?

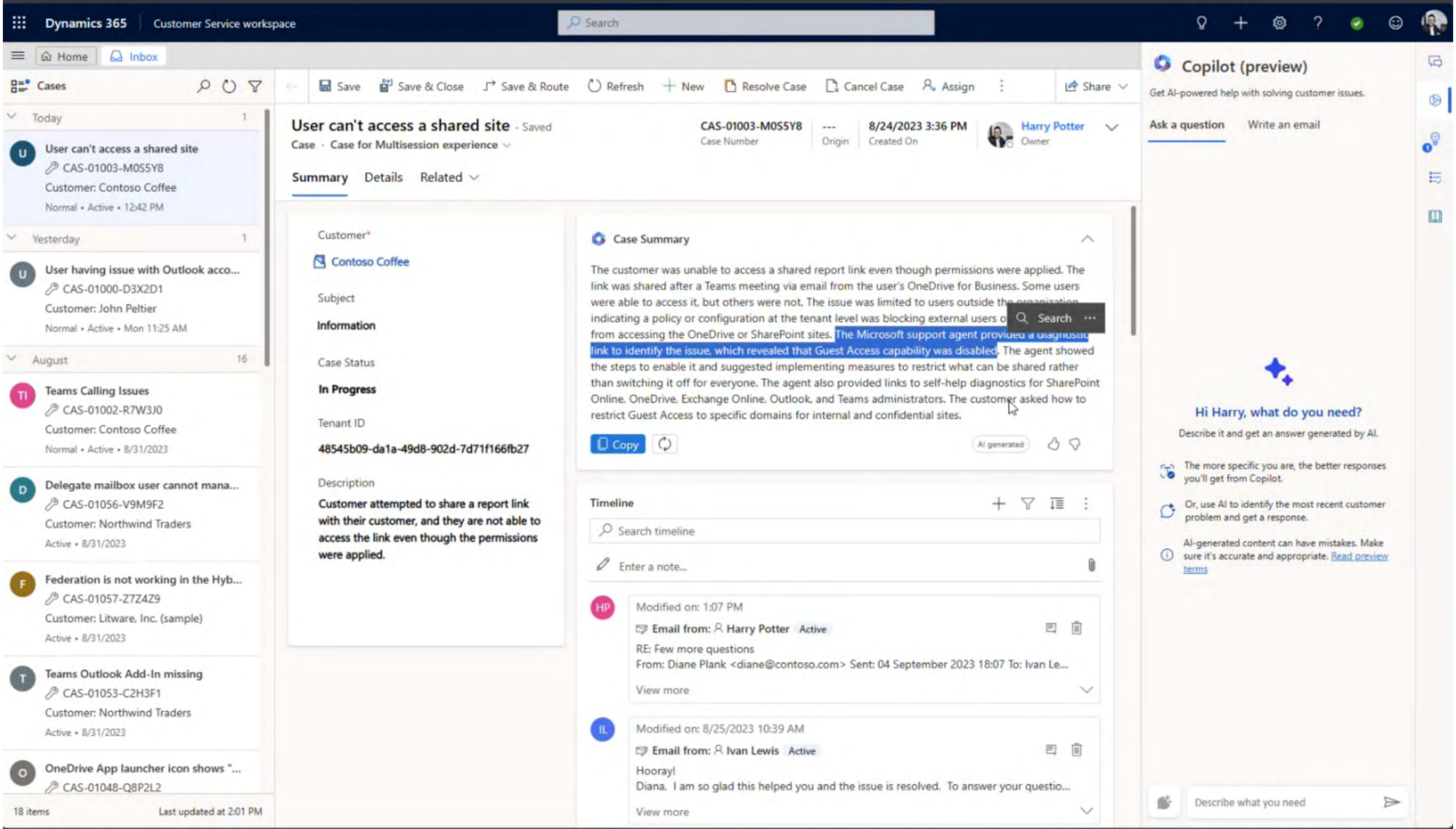
Describe it and get an answer generated by AI.

The more specific you are, the better responses you'll get from Copilot.

Or, use AI to identify the most recent customer problem and get a response.

AI-generated content can have mistakes. Make sure it's accurate and appropriate. Read preview terms

Describe what you need



Today 1

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

Yesterday 1

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

August 16

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

User can't access a shared site - Saved
Case · Case for Multisession experience

CAS-01003-M0S5Y8 Case Number
--- Origin
8/24/2023 3:36 PM Created On
Harry Potter Owner

Customer*: Contoso Coffee

Subject: Information

Case Status: In Progress

Tenant ID: 48545b09-da1a-49d8-902d-7d71f166fb27

Description: Customer attempted to share a report link with their customer, and they are not able to access the link even though the permissions were applied.

Case Summary

The customer was unable to access a shared report link even though permissions were applied. The link was shared after a Teams meeting via email from the user's OneDrive for Business. Some users were able to access it, but others were not. The issue was limited to users outside the organization indicating a policy or configuration at the tenant level was blocking external users from accessing the OneDrive or SharePoint sites. The Microsoft support agent provided a diagnostic link to identify the issue, which revealed that Guest Access capability was disabled. The agent showed the steps to enable it and suggested implementing measures to restrict what can be shared rather than switching it off for everyone. The agent also provided links to self-help diagnostics for SharePoint Online, OneDrive, Exchange Online, Outlook, and Teams administrators. The customer asked how to restrict Guest Access to specific domains for internal and confidential sites.

Timeline

Search timeline

Enter a note...

Modified on: 1:07 PM
Email from: Harry Potter Active
RE: Few more questions
From: Diane Plank <diane@contoso.com> Sent: 04 September 2023 18:07 To: Ivan Le...
View more

Modified on: 8/25/2023 10:39 AM
Email from: Ivan Lewis Active
Hooray!
Diana, I am so glad this helped you and the issue is resolved. To answer your questio...
View more

Copilot (preview)

Get AI-powered help with solving customer issues.

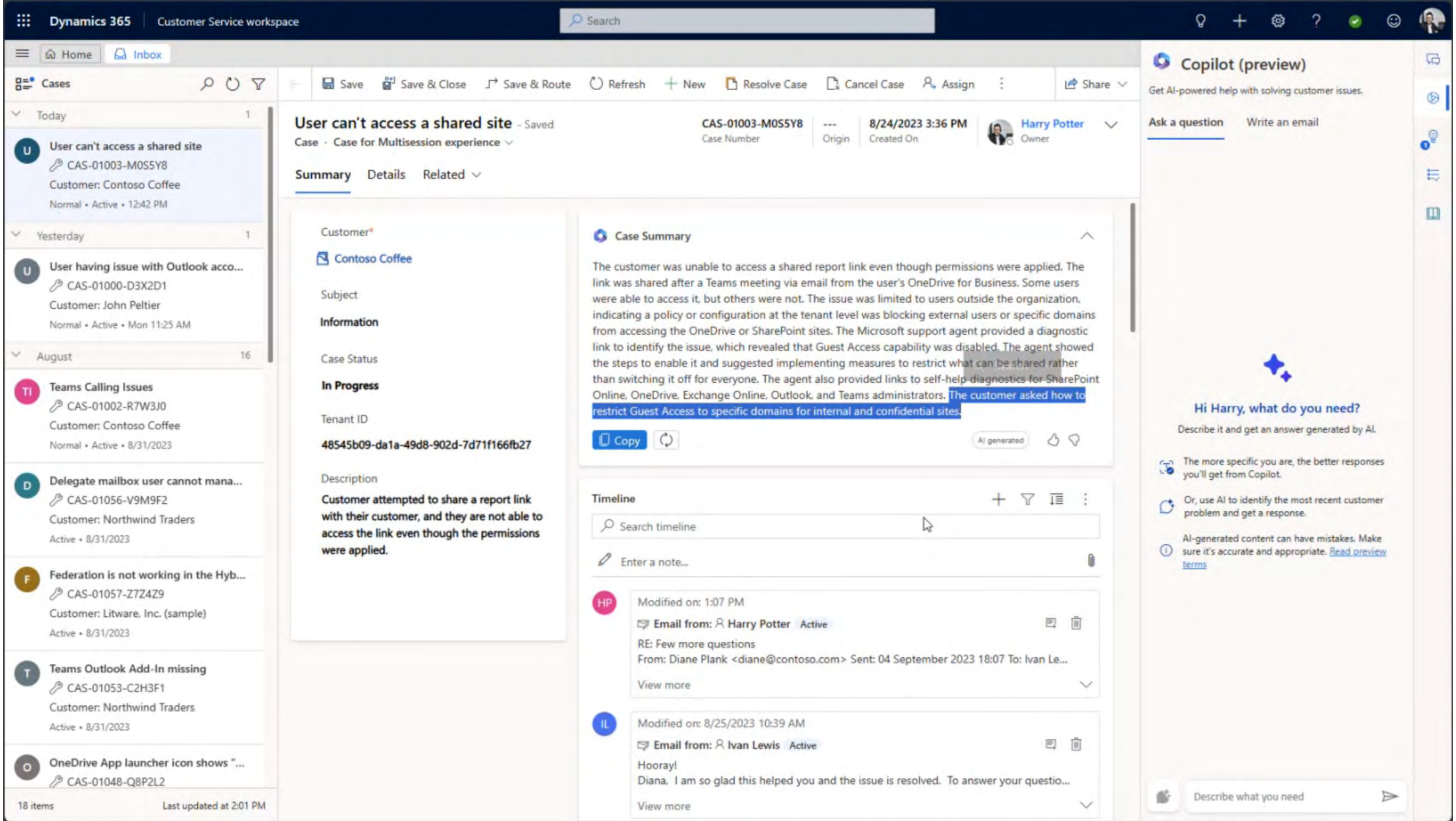
Hi Harry, what do you need?

Describe it and get an answer generated by AI.

The more specific you are, the better responses you'll get from Copilot.

Or, use AI to identify the most recent customer problem and get a response.

AI-generated content can have mistakes. Make sure it's accurate and appropriate. Read preview terms


Dynamics 365
Customer Service workspace
Search
Home
Inbox
Cases
Save
Save & Close
Save & Route
Refresh
New
Resolve Case
Cancel Case
Assign
Share
Summary
Details
Related
Copy
AI generated
Timeline
Search timeline
Enter a note...
View more
Copilot (preview)
Ask a question
Write an email
Describe what you need

Today 1

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

Yesterday 1

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

August 16

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

18 items Last updated at 2:01 PM

User can't access a shared site - Saved
Case · Case for Multisession experience

CAS-01003-M0S5Y8 Case Number
--- Origin
8/24/2023 3:36 PM Created On
Harry Potter Owner

Customer*
Contoso Coffee

Subject
Information

Case Status
In Progress

Tenant ID
48545b09-da1a-49d8-902d-7d71f166fb27

Description
Customer attempted to share a report link with their customer, and they are not able to access the link even though the permissions were applied.

Case Summary

The customer was unable to access a shared report link even though permissions were applied. The link was shared after a Teams meeting via email from the user's OneDrive for Business. Some users were able to access it, but others were not. The issue was limited to users outside the organization, indicating a policy or configuration at the tenant level was blocking external users or specific domains from accessing the OneDrive or SharePoint sites. The Microsoft support agent provided a diagnostic link to identify the issue, which revealed that Guest Access capability was disabled. The agent showed the steps to enable it and suggested implementing measures to restrict what can be shared rather than switching it off for everyone. The agent also provided links to self-help diagnostics for SharePoint Online, OneDrive, Exchange Online, Outlook, and Teams administrators. The customer asked how to restrict Guest Access to specific domains for internal and confidential sites.

Modified on: 1:07 PM
Email from: **Harry Potter** Active
RE: Few more questions
From: Diane Plank <diane@contoso.com> Sent: 04 September 2023 18:07 To: Ivan Le...

Modified on: 8/25/2023 10:39 AM
Email from: **Ivan Lewis** Active
Hooray!
Diana, I am so glad this helped you and the issue is resolved. To answer your questio...

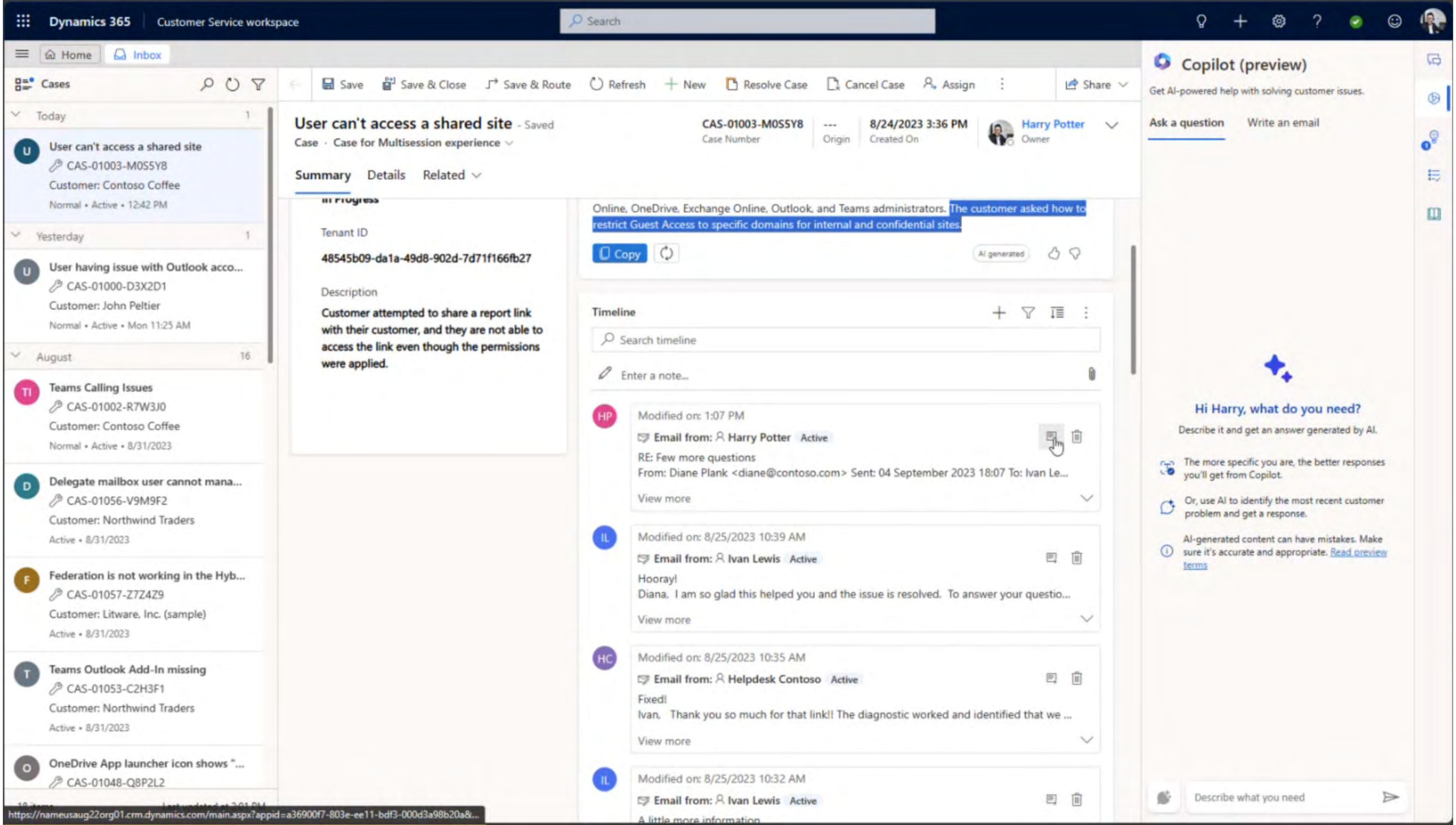
Get AI-powered help with solving customer issues.

Hi Harry, what do you need?
Describe it and get an answer generated by AI.

The more specific you are, the better responses you'll get from Copilot.

Or, use AI to identify the most recent customer problem and get a response.

AI-generated content can have mistakes. Make sure it's accurate and appropriate. Read preview terms


Dynamics 365
Customer Service workspace
Search
Home
Inbox
Cases
Save
Save & Close
Save & Route
Refresh
New
Resolve Case
Cancel Case
Assign
Share
Summary
Details
Related
Copy
AI generated
Timeline
Search timeline
Enter a note...
View more
Copilot (preview)
Ask a question
Write an email
Describe what you need

Today 1

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

Yesterday 1

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

August 16

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

https://nameusaug22org01.crm.dynamics.com/main.aspx?appid=a36900f7-803e-ee11-bdf3-000d3a98b20a&...

User can't access a shared site - Saved
Case · Case for Multisession experience

CAS-01003-M0S5Y8
Case Number

Origin

8/24/2023 3:36 PM
Created On

Harry Potter
Owner

In Progress

Tenant ID
48545b09-da1a-49d8-902d-7d71f166fb27

Description
Customer attempted to share a report link with their customer, and they are not able to access the link even though the permissions were applied.

Online, OneDrive, Exchange Online, Outlook, and Teams administrators. The customer asked how to restrict Guest Access to specific domains for internal and confidential sites.

Modified on: 1:07 PM
Email from: Harry Potter Active
RE: Few more questions
From: Diane Plank <diane@contoso.com> Sent: 04 September 2023 18:07 To: Ivan Le...

Modified on: 8/25/2023 10:39 AM
Email from: Ivan Lewis Active
Hooray!
Diana, I am so glad this helped you and the issue is resolved. To answer your questio...

Modified on: 8/25/2023 10:35 AM
Email from: Helpdesk Contoso Active
Fixed!
Ivan, Thank you so much for that link!! The diagnostic worked and identified that we ...

Modified on: 8/25/2023 10:32 AM
Email from: Ivan Lewis Active
A little more information

Get AI-powered help with solving customer issues.

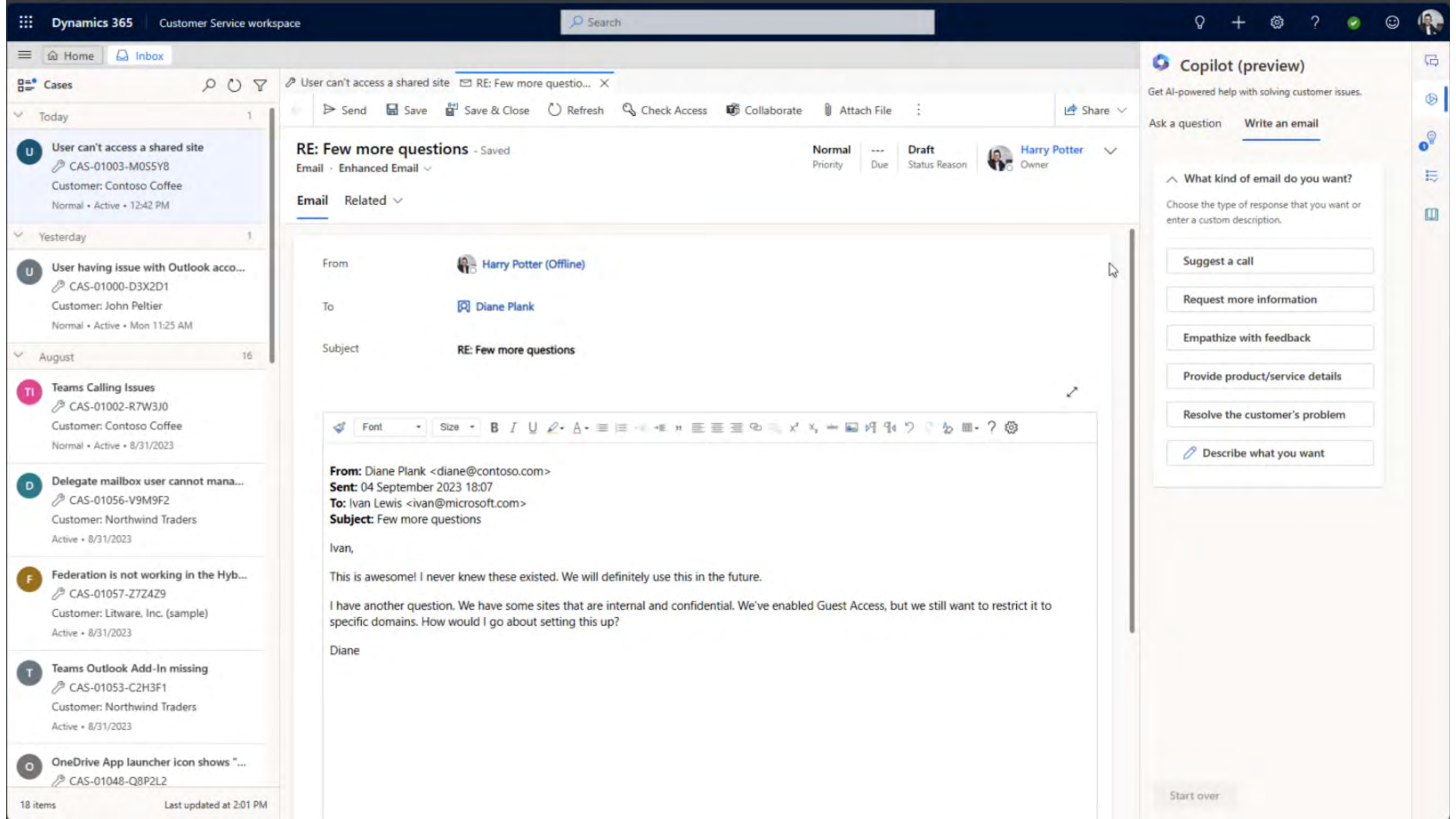
Hi Harry, what do you need?

Describe it and get an answer generated by AI.

The more specific you are, the better responses you'll get from Copilot.

Or, use AI to identify the most recent customer problem and get a response.

AI-generated content can have mistakes. Make sure it's accurate and appropriate. Read preview terms


Dynamics 365
Customer Service workspace
Search
Home
Inbox
Cases
Today 1
Yesterday 1
August 16
18 items
Last updated at 2:01 PM
User can't access a shared site
RE: Few more questio...
Send
Save
Save & Close
Refresh
Check Access
Collaborate
Attach File
Share
Email
Related
Font
Size
Copilot (preview)
Get AI-powered help with solving customer issues.
Ask a question
Write an email
Start over

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

RE: Few more questions - Saved

Email · Enhanced Email

Normal Priority · --- Due · Draft Status Reason · Harry Potter Owner

From: Harry Potter (Offline)

To: Diane Plank

Subject: RE: Few more questions

From: Diane Plank <diane@contoso.com>
Sent: 04 September 2023 18:07
To: Ivan Lewis <ivan@microsoft.com>
Subject: Few more questions

Ivan,

This is awesome! I never knew these existed. We will definitely use this in the future.

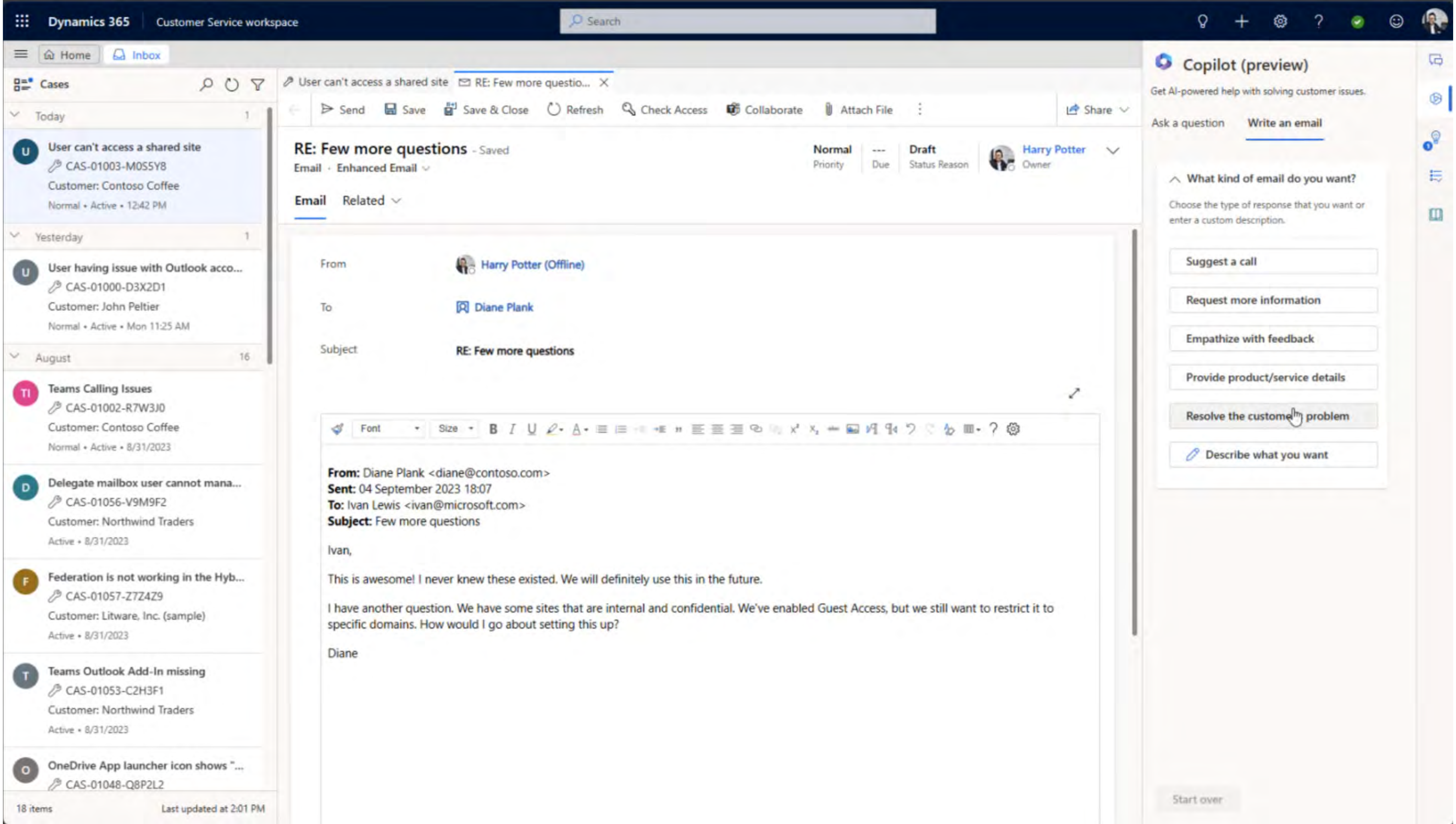
I have another question. We have some sites that are internal and confidential. We've enabled Guest Access, but we still want to restrict it to specific domains. How would I go about setting this up?

Diane

What kind of email do you want?

Choose the type of response that you want or enter a custom description.

- Suggest a call
- Request more information
- Empathize with feedback
- Provide product/service details
- Resolve the customer's problem
- Describe what you want


Dynamics 365
Customer Service workspace
Search
Home
Inbox
Cases
Today 1
User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM
Yesterday 1
User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM
August 16
Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023
Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023
Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023
Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023
OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2
18 items
Last updated at 2:01 PM
User can't access a shared site
RE: Few more questio...
Send
Save
Save & Close
Refresh
Check Access
Collaborate
Attach File
Share
RE: Few more questions - Saved
Email · Enhanced Email
Normal
Priority

Due
Draft
Status Reason
Harry Potter
Owner
Email
Related
From
Harry Potter (Offline)
To
Diane Plank
Subject
RE: Few more questions
Font
Size
Copilot (preview)
Get AI-powered help with solving customer issues.
Ask a question
Write an email
What kind of email do you want?
Choose the type of response that you want or enter a custom description.
Suggest a call
Request more information
Empathize with feedback
Provide product/service details
Resolve the customer problem
Describe what you want
Start over

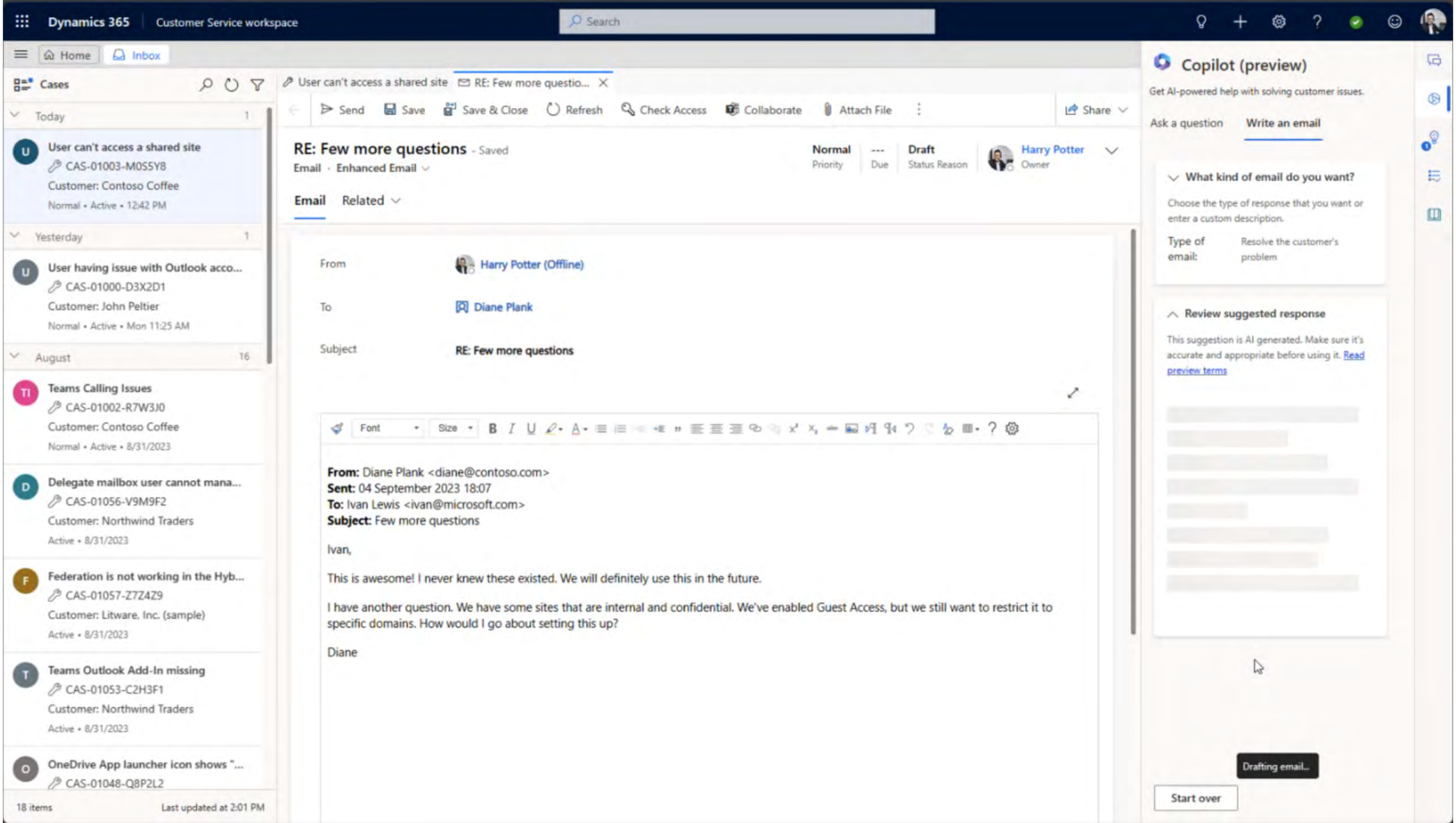
From: Diane Plank <diane@contoso.com>
Sent: 04 September 2023 18:07
To: Ivan Lewis <ivan@microsoft.com>
Subject: Few more questions

Ivan,

This is awesome! I never knew these existed. We will definitely use this in the future.

I have another question. We have some sites that are internal and confidential. We've enabled Guest Access, but we still want to restrict it to specific domains. How would I go about setting this up?

Diane


Dynamics 365
Customer Service workspace
Search
Home
Inbox
Cases
User can't access a shared site
RE: Few more questio...
Send
Save
Save & Close
Refresh
Check Access
Collaborate
Attach File
Share
Email
Related
Font
Size
Copilot (preview)
Ask a question
Write an email
Drafting email...
Start over

Today 1

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

Yesterday 1

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

August 16

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

18 items Last updated at 2:01 PM

RE: Few more questions - Saved
Email · Enhanced Email

Normal	---	Draft	Harry Potter
Priority	Due	Status Reason	Owner

From: Harry Potter (Offline)

To: Diane Plank

Subject: RE: Few more questions

From: Diane Plank <diane@contoso.com>
Sent: 04 September 2023 18:07
To: Ivan Lewis <ivan@microsoft.com>
Subject: Few more questions

Ivan,

This is awesome! I never knew these existed. We will definitely use this in the future.

I have another question. We have some sites that are internal and confidential. We've enabled Guest Access, but we still want to restrict it to specific domains. How would I go about setting this up?

Diane

Get AI-powered help with solving customer issues.

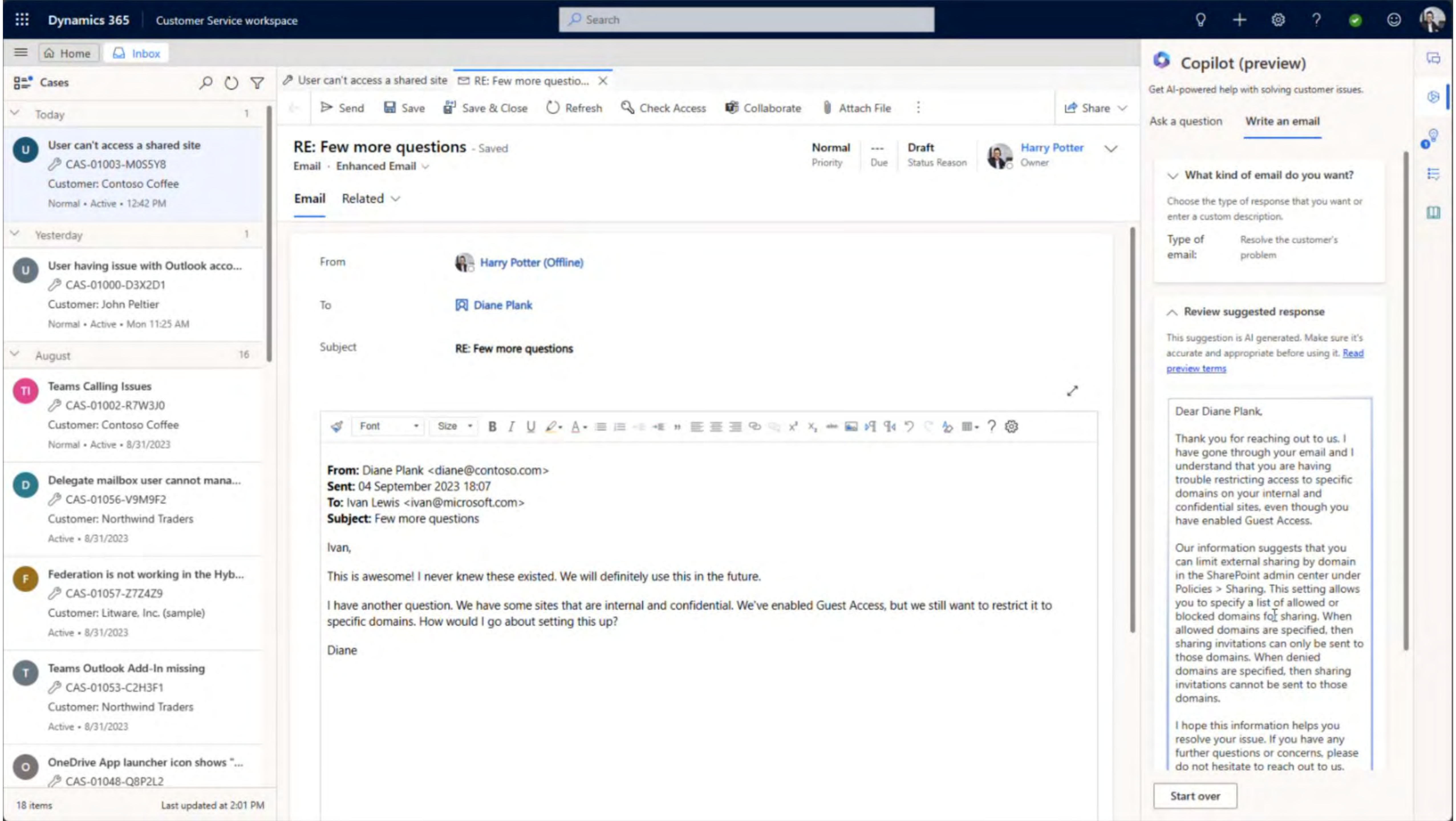
What kind of email do you want?

Choose the type of response that you want or enter a custom description.

Type of email: Resolve the customer's problem

Review suggested response

This suggestion is AI generated. Make sure it's accurate and appropriate before using it. Read preview terms


Dynamics 365
Customer Service workspace
Search
Home
Inbox
Cases
Today 1
Yesterday 1
August 16
18 items
Last updated at 2:01 PM
User can't access a shared site
RE: Few more questio...
Send
Save
Save & Close
Refresh
Check Access
Collaborate
Attach File
Share
Email
Related
Font
Size
Copilot (preview)
Ask a question
Write an email
Start over

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

RE: Few more questions - Saved
Email · Enhanced Email

Priority	Due	Status Reason	Owner
Normal	---	Draft	Harry Potter

From: Harry Potter (Offline)
To: Diane Plank
Subject: RE: Few more questions

From: Diane Plank <diane@contoso.com>
Sent: 04 September 2023 18:07
To: Ivan Lewis <ivan@microsoft.com>
Subject: Few more questions

Ivan,

This is awesome! I never knew these existed. We will definitely use this in the future.

I have another question. We have some sites that are internal and confidential. We've enabled Guest Access, but we still want to restrict it to specific domains. How would I go about setting this up?

Diane

Get AI-powered help with solving customer issues.

What kind of email do you want?

Choose the type of response that you want or enter a custom description.

Type of email: Resolve the customer's problem

Review suggested response

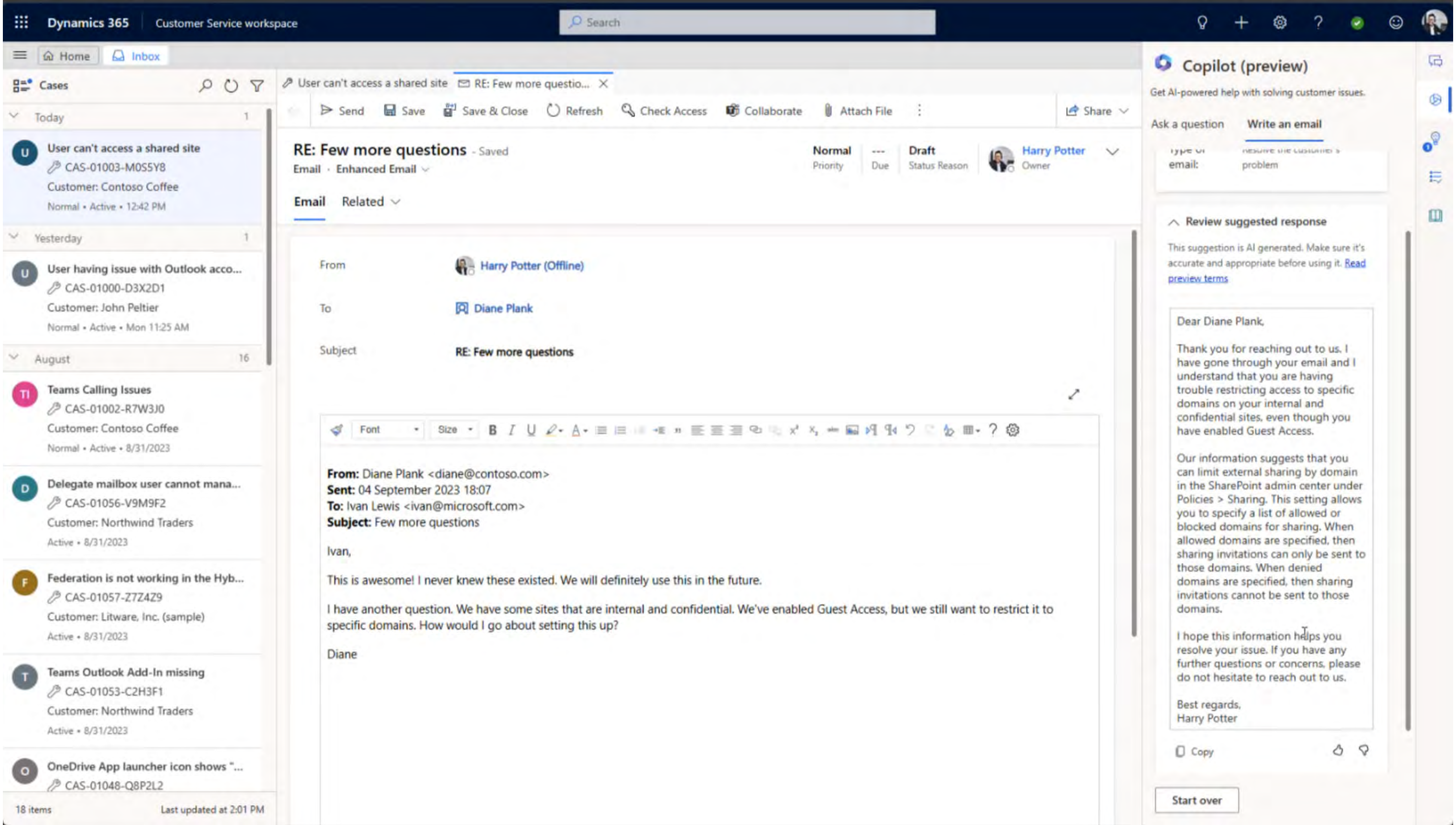
This suggestion is AI generated. Make sure it's accurate and appropriate before using it. Read preview terms

Dear Diane Plank,

Thank you for reaching out to us. I have gone through your email and I understand that you are having trouble restricting access to specific domains on your internal and confidential sites, even though you have enabled Guest Access.

Our information suggests that you can limit external sharing by domain in the SharePoint admin center under Policies > Sharing. This setting allows you to specify a list of allowed or blocked domains for sharing. When allowed domains are specified, then sharing invitations can only be sent to those domains. When denied domains are specified, then sharing invitations cannot be sent to those domains.

I hope this information helps you resolve your issue. If you have any further questions or concerns, please do not hesitate to reach out to us.


Dynamics 365
Customer Service workspace
Search
Home
Inbox
Cases
Today 1
Yesterday 1
August 16
18 items
Last updated at 2:01 PM
User can't access a shared site
RE: Few more questio...
Send
Save
Save & Close
Refresh
Check Access
Collaborate
Attach File
Share
Email
Related
Font
Size
Copilot (preview)
Get AI-powered help with solving customer issues.
Ask a question
Write an email
Review suggested response
Copy
Start over

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

RE: Few more questions - Saved
Email · Enhanced Email

Normal Priority
--- Due
Draft Status Reason
Harry Potter Owner

From: Harry Potter (Offline)
To: Diane Plank
Subject: RE: Few more questions

From: Diane Plank <diane@contoso.com>
Sent: 04 September 2023 18:07
To: Ivan Lewis <ivan@microsoft.com>
Subject: Few more questions

Ivan,

This is awesome! I never knew these existed. We will definitely use this in the future.

I have another question. We have some sites that are internal and confidential. We've enabled Guest Access, but we still want to restrict it to specific domains. How would I go about setting this up?

Diane

Type of email: Resolve the customer's problem

This suggestion is AI generated. Make sure it's accurate and appropriate before using it. Read preview terms

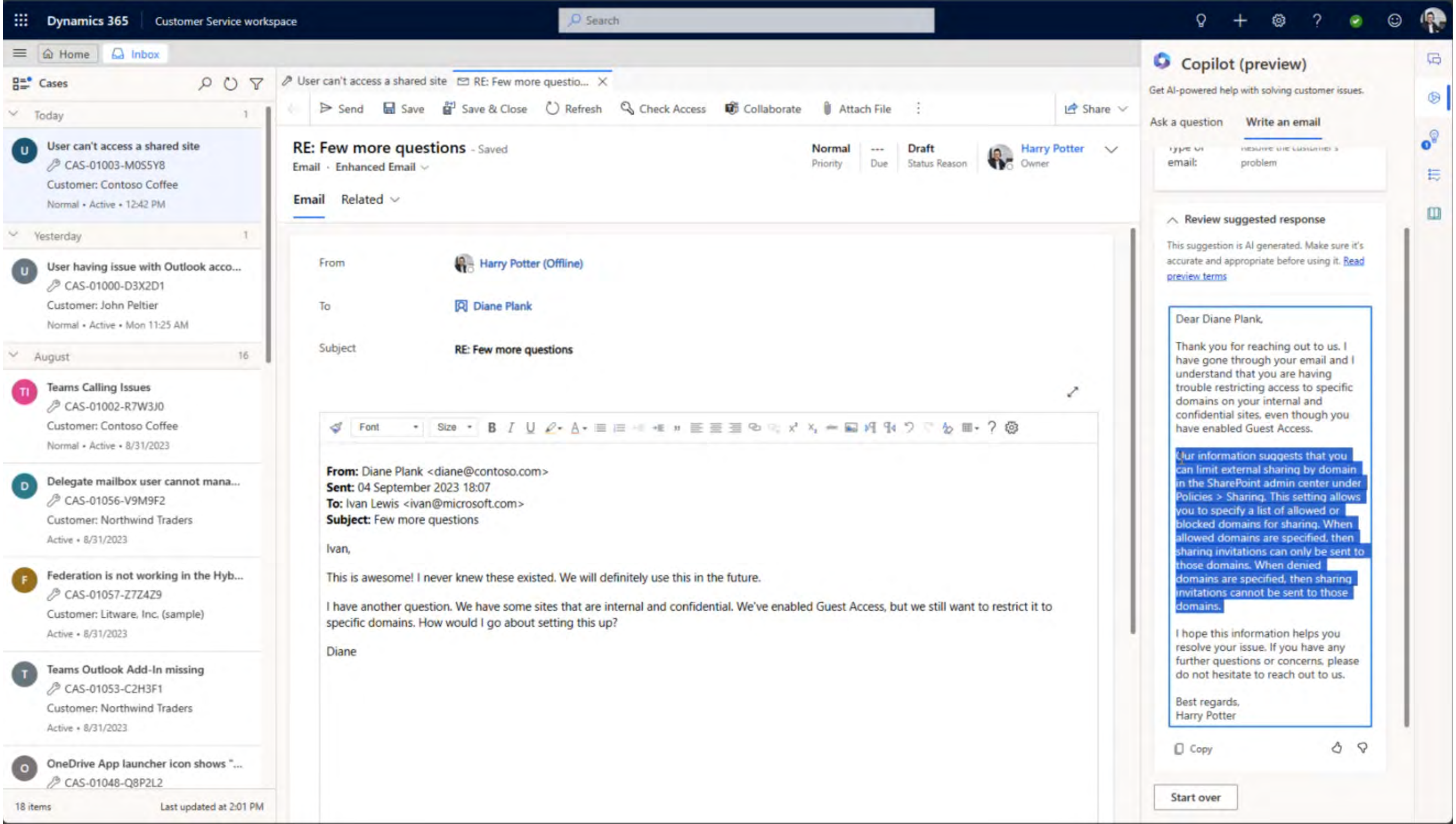
Dear Diane Plank,

Thank you for reaching out to us. I have gone through your email and I understand that you are having trouble restricting access to specific domains on your internal and confidential sites, even though you have enabled Guest Access.

Our information suggests that you can limit external sharing by domain in the SharePoint admin center under Policies > Sharing. This setting allows you to specify a list of allowed or blocked domains for sharing. When allowed domains are specified, then sharing invitations can only be sent to those domains. When denied domains are specified, then sharing invitations cannot be sent to those domains.

I hope this information helps you resolve your issue. If you have any further questions or concerns, please do not hesitate to reach out to us.

Best regards,
Harry Potter


Dynamics 365
Customer Service workspace
Search
Home
Inbox
Cases
Today 1
Yesterday 1
August 16
18 items
Last updated at 2:01 PM
User can't access a shared site
RE: Few more questio...
Send
Save
Save & Close
Refresh
Check Access
Collaborate
Attach File
Share
Email
Related
Font
Size
Copilot (preview)
Get AI-powered help with solving customer issues.
Ask a question
Write an email
Review suggested response
Copy
Start over

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

RE: Few more questions - Saved
Email · Enhanced Email

Normal	---	Draft	Harry Potter
Priority	Due	Status Reason	Owner

From: Harry Potter (Offline)

To: Diane Plank

Subject: RE: Few more questions

From: Diane Plank <diane@contoso.com>
Sent: 04 September 2023 18:07
To: Ivan Lewis <ivan@microsoft.com>
Subject: Few more questions

Ivan,

This is awesome! I never knew these existed. We will definitely use this in the future.

I have another question. We have some sites that are internal and confidential. We've enabled Guest Access, but we still want to restrict it to specific domains. How would I go about setting this up?

Diane

Type of email: Resolve the customer's problem

This suggestion is AI generated. Make sure it's accurate and appropriate before using it. Read preview terms

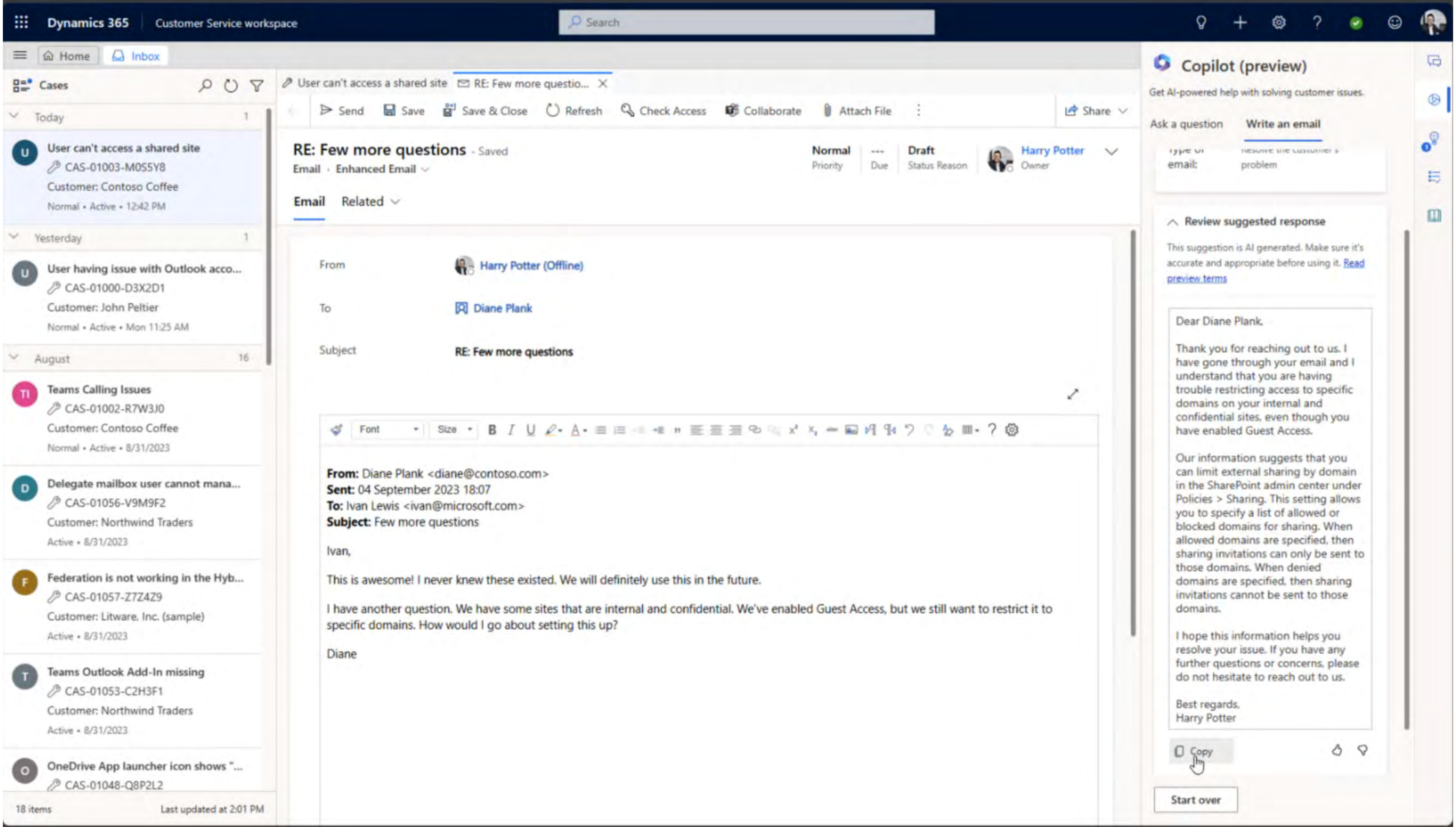
Dear Diane Plank,

Thank you for reaching out to us. I have gone through your email and I understand that you are having trouble restricting access to specific domains on your internal and confidential sites, even though you have enabled Guest Access.

Our information suggests that you can limit external sharing by domain in the SharePoint admin center under Policies > Sharing. This setting allows you to specify a list of allowed or blocked domains for sharing. When allowed domains are specified, then sharing invitations can only be sent to those domains. When denied domains are specified, then sharing invitations cannot be sent to those domains.

I hope this information helps you resolve your issue. If you have any further questions or concerns, please do not hesitate to reach out to us.

Best regards,
Harry Potter


Dynamics 365
Customer Service workspace
Search
Home
Inbox
Cases
User can't access a shared site
RE: Few more questio...
Send
Save
Save & Close
Refresh
Check Access
Collaborate
Attach File
Share
Email
Related
Font
Size
Copilot (preview)
Get AI-powered help with solving customer issues.
Ask a question
Write an email
Review suggested response
Copy
Start over

Today 1

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

Yesterday 1

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

August 16

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

18 items Last updated at 2:01 PM

RE: Few more questions - Saved
Email · Enhanced Email

Normal Priority | --- Due | Draft Status Reason | Harry Potter Owner

From: Harry Potter (Offline)

To: Diane Plank

Subject: RE: Few more questions

From: Diane Plank <diane@contoso.com>
Sent: 04 September 2023 18:07
To: Ivan Lewis <ivan@microsoft.com>
Subject: Few more questions

Ivan,

This is awesome! I never knew these existed. We will definitely use this in the future.

I have another question. We have some sites that are internal and confidential. We've enabled Guest Access, but we still want to restrict it to specific domains. How would I go about setting this up?

Diane

Type of email: Resolve the customer's problem

This suggestion is AI generated. Make sure it's accurate and appropriate before using it. Read preview terms

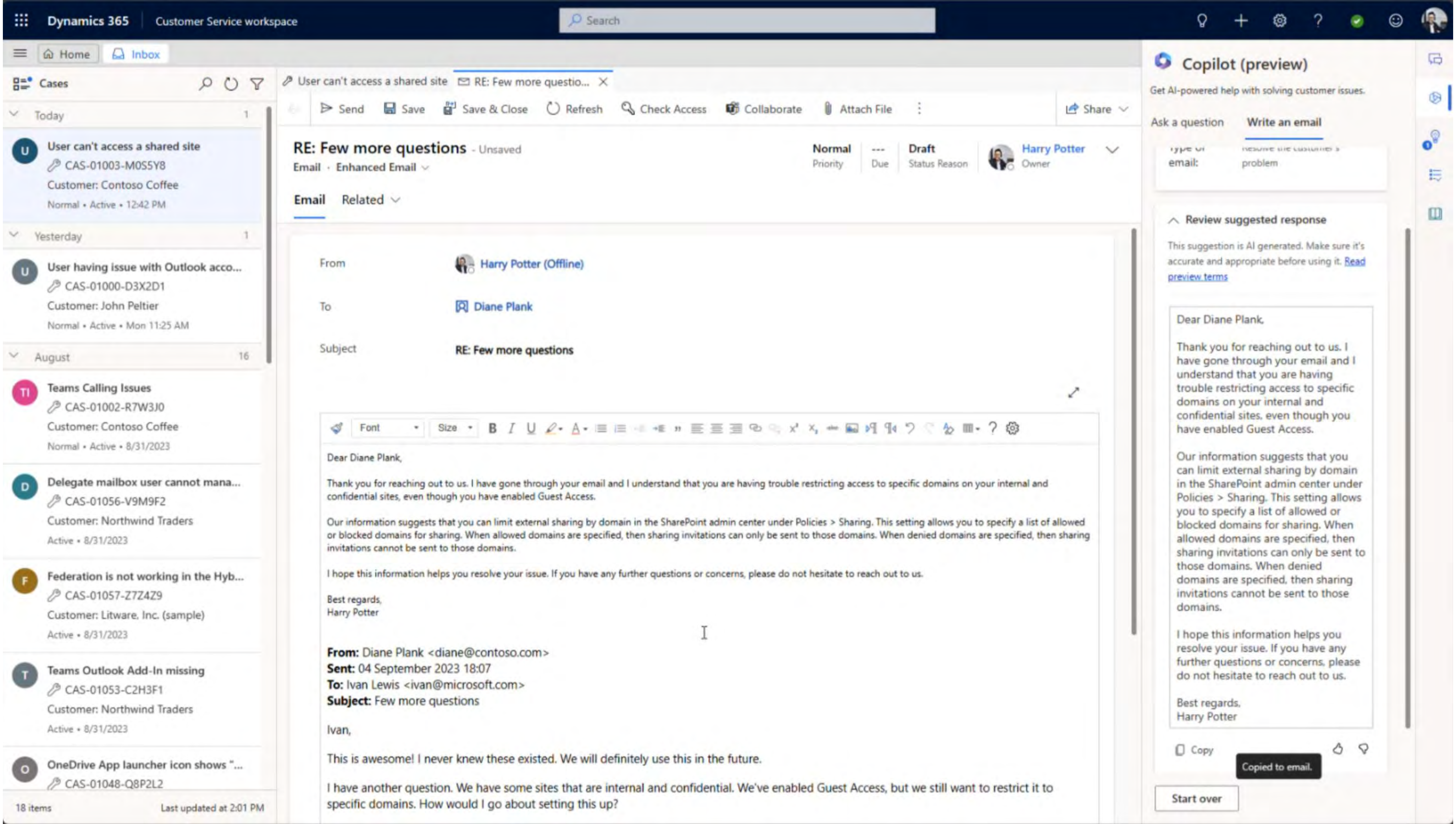
Dear Diane Plank,

Thank you for reaching out to us. I have gone through your email and I understand that you are having trouble restricting access to specific domains on your internal and confidential sites, even though you have enabled Guest Access.

Our information suggests that you can limit external sharing by domain in the SharePoint admin center under Policies > Sharing. This setting allows you to specify a list of allowed or blocked domains for sharing. When allowed domains are specified, then sharing invitations can only be sent to those domains. When denied domains are specified, then sharing invitations cannot be sent to those domains.

I hope this information helps you resolve your issue. If you have any further questions or concerns, please do not hesitate to reach out to us.

Best regards,
Harry Potter


Dynamics 365
Customer Service workspace
Search
Home
Inbox
Cases
Today 1
Yesterday 1
August 16
User can't access a shared site
RE: Few more questio...
Send
Save
Save & Close
Refresh
Check Access
Collaborate
Attach File
Share
Email
Related
Font
Size
Copilot (preview)
Get AI-powered help with solving customer issues.
Ask a question
Write an email
Review suggested response
Copy
Copied to email.
Start over
18 items
Last updated at 2:01 PM

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

RE: Few more questions - Unsaved
Email · Enhanced Email

Normal Priority · --- Due · Draft Status Reason · Harry Potter Owner

From: Harry Potter (Offline)
To: Diane Plank
Subject: RE: Few more questions

Dear Diane Plank,

Thank you for reaching out to us. I have gone through your email and I understand that you are having trouble restricting access to specific domains on your internal and confidential sites, even though you have enabled Guest Access.

Our information suggests that you can limit external sharing by domain in the SharePoint admin center under Policies > Sharing. This setting allows you to specify a list of allowed or blocked domains for sharing. When allowed domains are specified, then sharing invitations can only be sent to those domains. When denied domains are specified, then sharing invitations cannot be sent to those domains.

I hope this information helps you resolve your issue. If you have any further questions or concerns, please do not hesitate to reach out to us.

Best regards,
Harry Potter

From: Diane Plank <diane@contoso.com>
Sent: 04 September 2023 18:07
To: Ivan Lewis <ivan@microsoft.com>
Subject: Few more questions

Ivan,

This is awesome! I never knew these existed. We will definitely use this in the future.

I have another question. We have some sites that are internal and confidential. We've enabled Guest Access, but we still want to restrict it to specific domains. How would I go about setting this up?

Type of email: Resolve the customer's problem

This suggestion is AI generated. Make sure it's accurate and appropriate before using it. Read preview terms

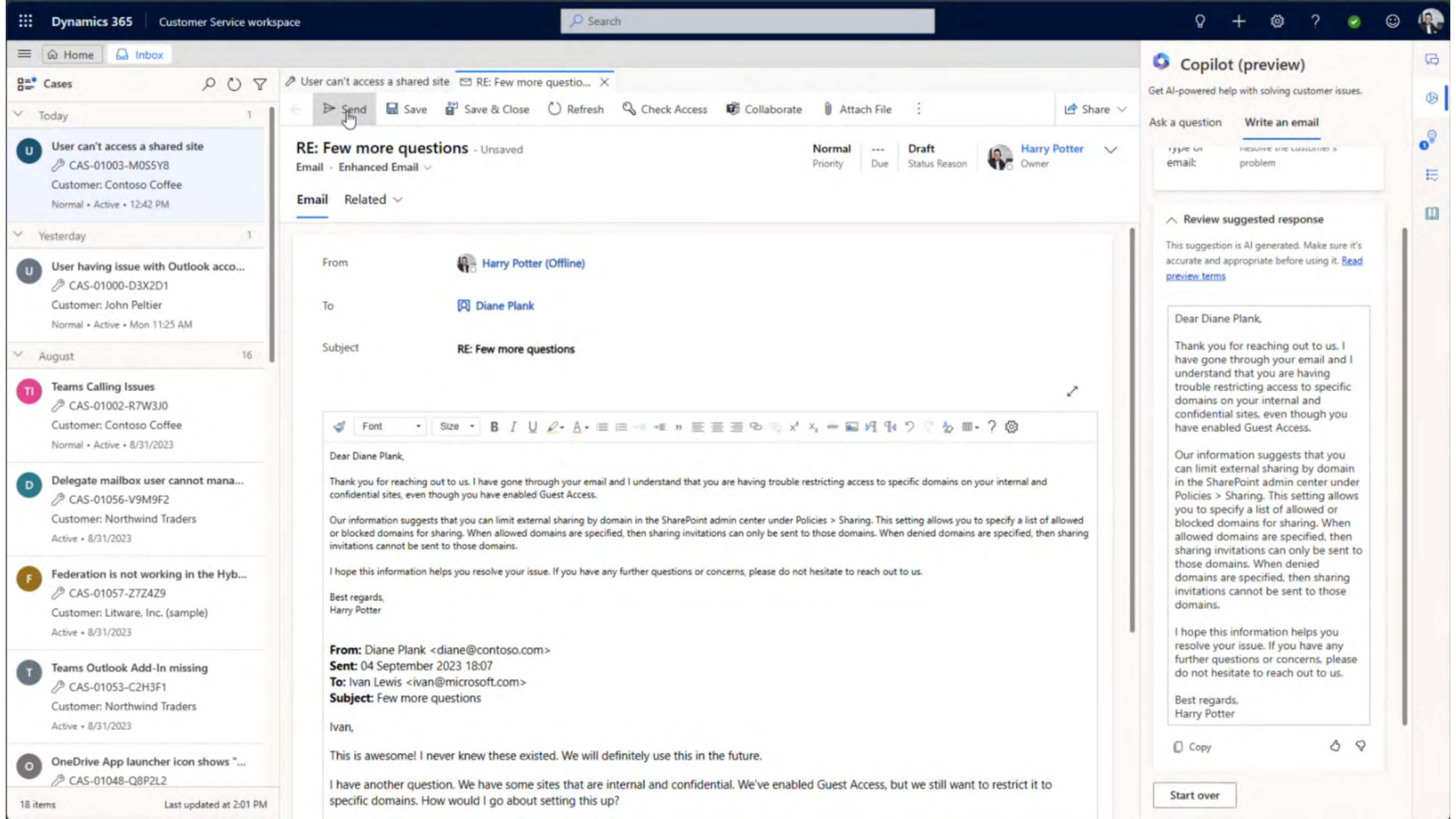
Dear Diane Plank,

Thank you for reaching out to us. I have gone through your email and I understand that you are having trouble restricting access to specific domains on your internal and confidential sites, even though you have enabled Guest Access.

Our information suggests that you can limit external sharing by domain in the SharePoint admin center under Policies > Sharing. This setting allows you to specify a list of allowed or blocked domains for sharing. When allowed domains are specified, then sharing invitations can only be sent to those domains. When denied domains are specified, then sharing invitations cannot be sent to those domains.

I hope this information helps you resolve your issue. If you have any further questions or concerns, please do not hesitate to reach out to us.

Best regards,
Harry Potter



Today 1

User can't access a shared site
CAS-01003-M0S5Y8
Customer: Contoso Coffee
Normal • Active • 12:42 PM

Yesterday 1

User having issue with Outlook acco...
CAS-01000-D3X2D1
Customer: John Peltier
Normal • Active • Mon 11:25 AM

August 16

Teams Calling Issues
CAS-01002-R7W3J0
Customer: Contoso Coffee
Normal • Active • 8/31/2023

Delegate mailbox user cannot mana...
CAS-01056-V9M9F2
Customer: Northwind Traders
Active • 8/31/2023

Federation is not working in the Hyb...
CAS-01057-Z7Z4Z9
Customer: Litware, Inc. (sample)
Active • 8/31/2023

Teams Outlook Add-In missing
CAS-01053-C2H3F1
Customer: Northwind Traders
Active • 8/31/2023

OneDrive App launcher icon shows "...
CAS-01048-Q8P2L2

18 items Last updated at 2:01 PM

RE: Few more questions - Unsaved
Email · Enhanced Email

Normal Priority · --- Due · Draft Status Reason · Harry Potter Owner

From: Harry Potter (Offline)
To: Diane Plank
Subject: RE: Few more questions

Dear Diane Plank,

Thank you for reaching out to us. I have gone through your email and I understand that you are having trouble restricting access to specific domains on your internal and confidential sites, even though you have enabled Guest Access.

Our information suggests that you can limit external sharing by domain in the SharePoint admin center under Policies > Sharing. This setting allows you to specify a list of allowed or blocked domains for sharing. When allowed domains are specified, then sharing invitations can only be sent to those domains. When denied domains are specified, then sharing invitations cannot be sent to those domains.

I hope this information helps you resolve your issue. If you have any further questions or concerns, please do not hesitate to reach out to us.

Best regards,
Harry Potter

From: Diane Plank <diane@contoso.com>
Sent: 04 September 2023 18:07
To: Ivan Lewis <ivan@microsoft.com>
Subject: Few more questions

Ivan,

This is awesome! I never knew these existed. We will definitely use this in the future.

I have another question. We have some sites that are internal and confidential. We've enabled Guest Access, but we still want to restrict it to specific domains. How would I go about setting this up?

Copilot (preview)
Get AI-powered help with solving customer issues.

Type of email: Resolve the customer's problem

Review suggested response

This suggestion is AI generated. Make sure it's accurate and appropriate before using it. Read preview terms

Dear Diane Plank,

Thank you for reaching out to us. I have gone through your email and I understand that you are having trouble restricting access to specific domains on your internal and confidential sites, even though you have enabled Guest Access.

Our information suggests that you can limit external sharing by domain in the SharePoint admin center under Policies > Sharing. This setting allows you to specify a list of allowed or blocked domains for sharing. When allowed domains are specified, then sharing invitations can only be sent to those domains. When denied domains are specified, then sharing invitations cannot be sent to those domains.

I hope this information helps you resolve your issue. If you have any further questions or concerns, please do not hesitate to reach out to us.

Best regards,
Harry Potter

Copilot delivers material wins for Microsoft Support

In one business, Copilot increased number of cases and chats managed by support agents by 9%-12%

KEY TAKEAWAY

Serve more customers
with the help of Copilot

Several businesses observed Copilot to decrease AHT for agents handling chat cases by 12% - 16%

KEY TAKEAWAY

Serve customers faster
with the help of Copilot

Across all groups, Copilot decreased the need for expert help to resolve a case by 13%

KEY TAKEAWAY

Jr. agents become Super agents
with the help of Copilot

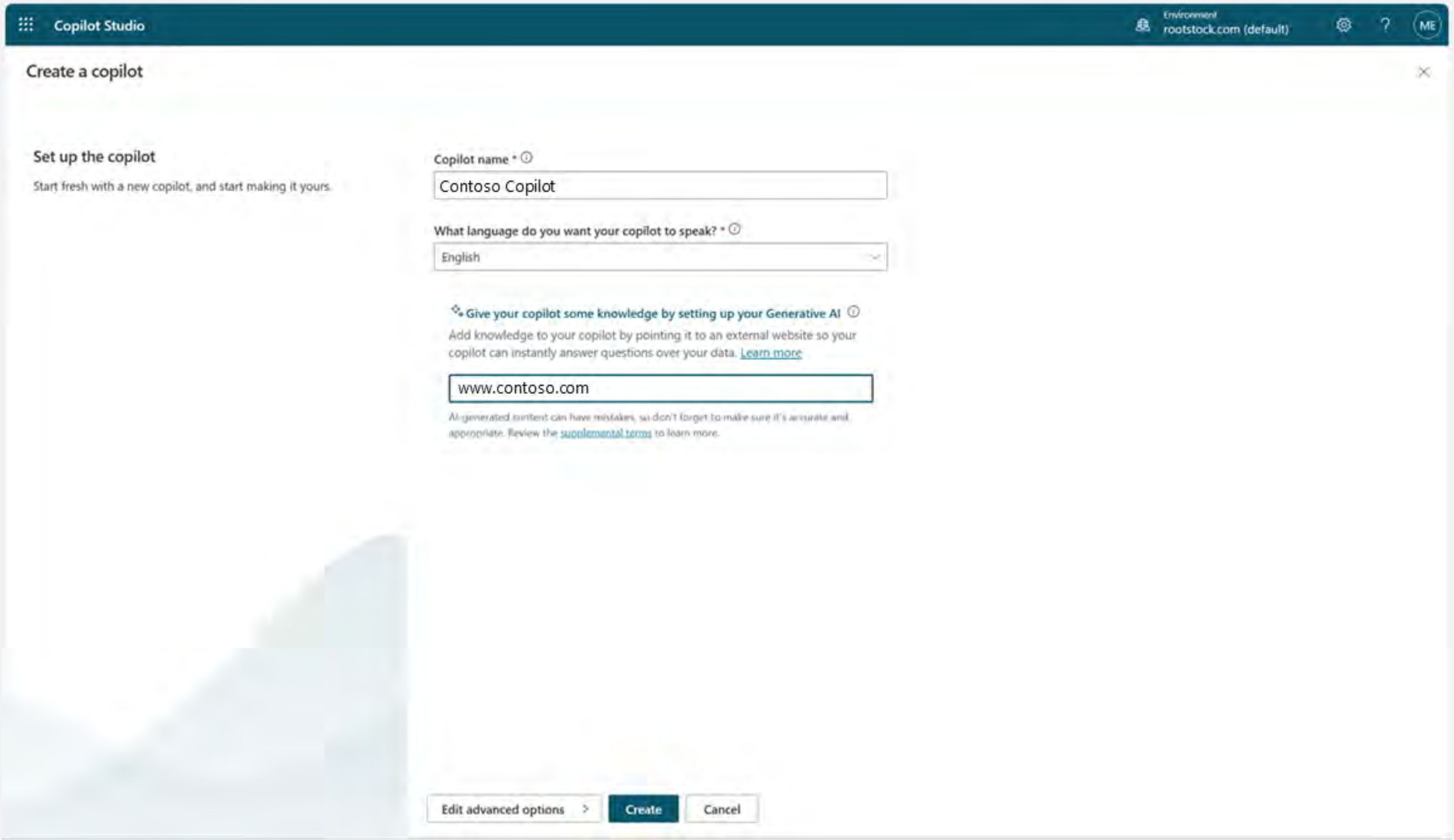
* These results are statistically significant at the 95th percent confidence interval

Microsoft

Microsoft Copilot Studio

Mike Ehrenberg

Explore GenAI with Microsoft Copilot Studio


Copilot Studio
Environment
rootstock.com (default)
ME

Create a copilot

Set up the copilot

Start fresh with a new copilot, and start making it yours.

Copilot name * Contoso Copilot

What language do you want your copilot to speak? * English

Give your copilot some knowledge by setting up your Generative AI

Add knowledge to your copilot by pointing it to an external website so your copilot can instantly answer questions over your data. Learn more

www.contoso.com

AI-generated content can have mistakes, so don't forget to make sure it's accurate and appropriate. Review the supplemental terms to learn more.

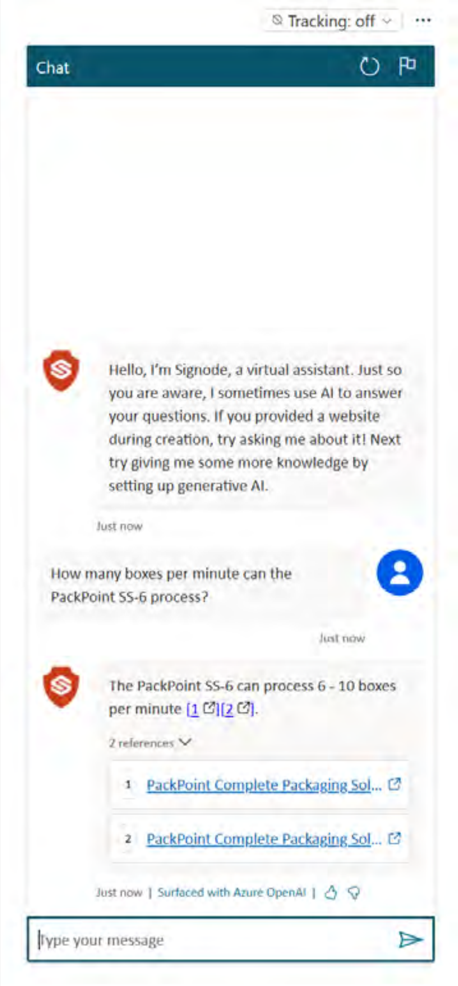
Edit advanced options
Create
Cancel

Trial at

https://www.microsoft.com/en-us/copilot/microsoft-copilot-studio

Just point at your web site, and you have a useful bot.

Explore GenAI with Microsoft Copilot Studio



Hello, I'm Signode, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

How many boxes per minute can the PackPoint SS-6 process?

Just now

The PackPoint SS-6 can process 6 - 10 boxes per minute [1][2].

2 references

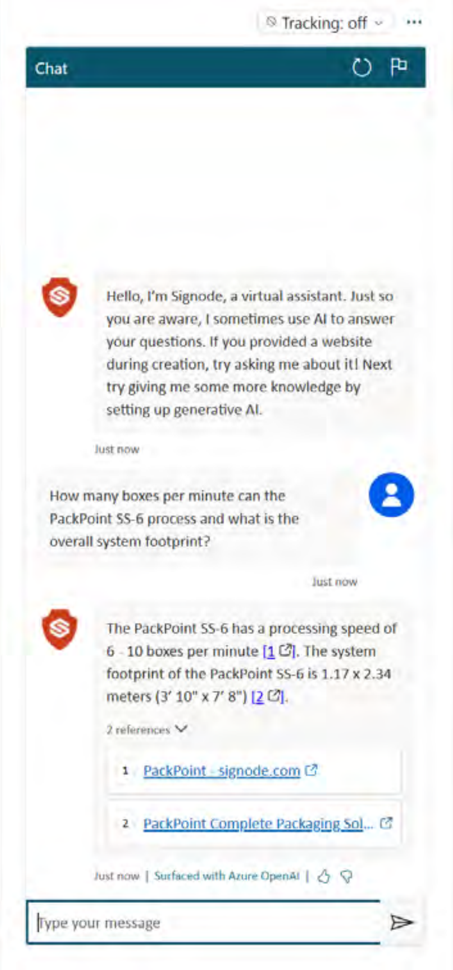
1 PackPoint Complete Packaging Sol...

2 PackPoint Complete Packaging Sol...

Just now | Surfaced with Azure OpenAI |

Copilot Studio immediately provides a useful Bot able to answer questions from the web site content and show citations.

Explore GenAI with Microsoft Copilot Studio



Hello, I'm Signode, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

How many boxes per minute can the PackPoint SS-6 process and what is the overall system footprint?

Just now

The PackPoint SS-6 has a processing speed of 6 - 10 boxes per minute [1]. The system footprint of the PackPoint SS-6 is 1.17 x 2.34 meters (3′ 10" x 7′ 8") [2].

2 references

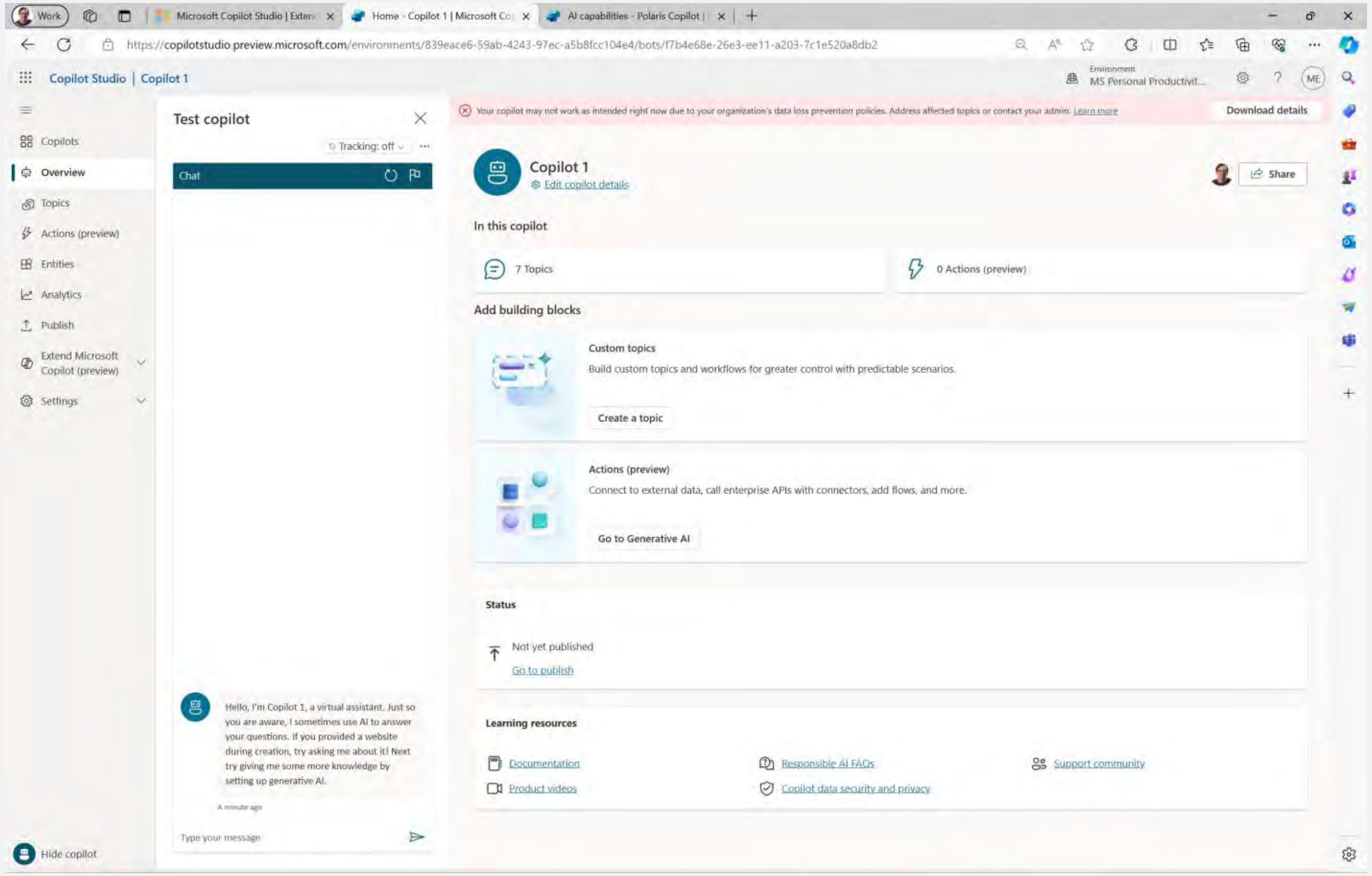
1 PackPoint - signode.com

2 PackPoint Complete Packaging Sol...

Just now | Surfaced with Azure OpenAI |

Copilot Studio can even handle compound questions, providing multi-part answers.

Explore GenAI with Microsoft Copilot Studio


Work
Microsoft Copilot Studio | Extern
Home - Copilot 1 | Microsoft Co
AI capabilities - Polaris Copilot
https://copilotstudio.preview.microsoft.com/environments/839eace6-59ab-4243-97ec-a5b8fcc104e4/bots/f7b4e68e-26e3-ee11-a203-7c1e520a8db2
Copilot Studio | Copilot 1
Environment
MS Personal Productivit...
ME
Copilots
Overview
Topics
Actions (preview)
Entities
Analytics
Publish
Extend Microsoft Copilot (preview)
Settings
Hide copilot
Test copilot
Tracking: off
Chat
Download details
Copilot 1
Edit copilot details
Share
In this copilot
7 Topics
0 Actions (preview)
Add building blocks
Custom topics
Create a topic
Actions (preview)
Go to Generative AI
Status
Not yet published
Go to publish
Learning resources
Documentation
Product videos
Responsible AI FAQs
Copilot data security and privacy
Support community
Type your message

Your copilot may not work as intended right now due to your organization's data loss prevention policies. Address affected topics or contact your admin. Learn more

Build custom topics and workflows for greater control with predictable scenarios.

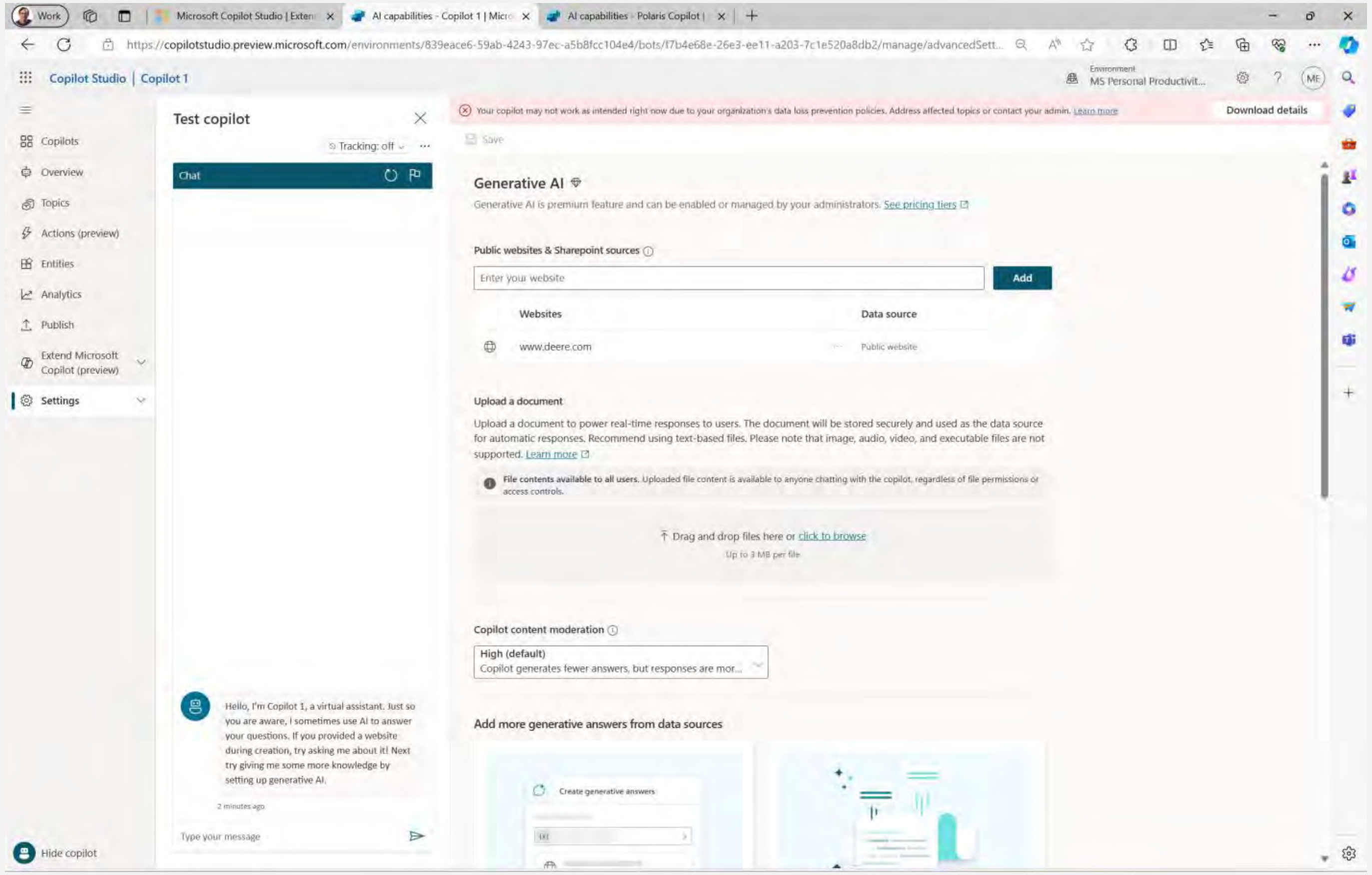
Connect to external data, call enterprise APIs with connectors, add flows, and more.

Hello, I'm Copilot 1, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

A minute ago

You can still script specific high-value chat topics (Custom topics) or register additional documents or actions with Copilot (Actions).

Explore GenAI with Microsoft Copilot Studio


Work
Microsoft Copilot Studio | Exten
AI capabilities - Copilot 1 | Micro
AI capabilities - Polaris Copilot |
https://copilotstudio.preview.microsoft.com/environments/839eace6-59ab-4243-97ec-a5b8fcc104e4/bots/f7b4e68e-26e3-ee11-a203-7c1e520a8db2/manage/advancedSett...
Copilot Studio | Copilot 1
Environment
MS Personal Productivit...
ME
Copilots
Overview
Topics
Actions (preview)
Entities
Analytics
Publish
Extend Microsoft Copilot (preview)
Settings
Hide copilot
Test copilot
Tracking: off
Chat
Download details
Save
Add
Create generative answers

Your copilot may not work as intended right now due to your organization's data loss prevention policies. Address affected topics or contact your admin. Learn more

Generative AI

Generative AI is premium feature and can be enabled or managed by your administrators. See pricing tiers

Public websites & Sharepoint sources

Enter your website

Websites	Data source
www.deere.com	Public website

Upload a document

Upload a document to power real-time responses to users. The document will be stored securely and used as the data source for automatic responses. Recommend using text-based files. Please note that image, audio, video, and executable files are not supported. Learn more

File contents available to all users. Uploaded file content is available to anyone chatting with the copilot, regardless of file permissions or access controls.

Drag and drop files here or click to browse
Up to 3 MB per file

Copilot content moderation

High (default)
Copilot generates fewer answers, but responses are mor...

Add more generative answers from data sources

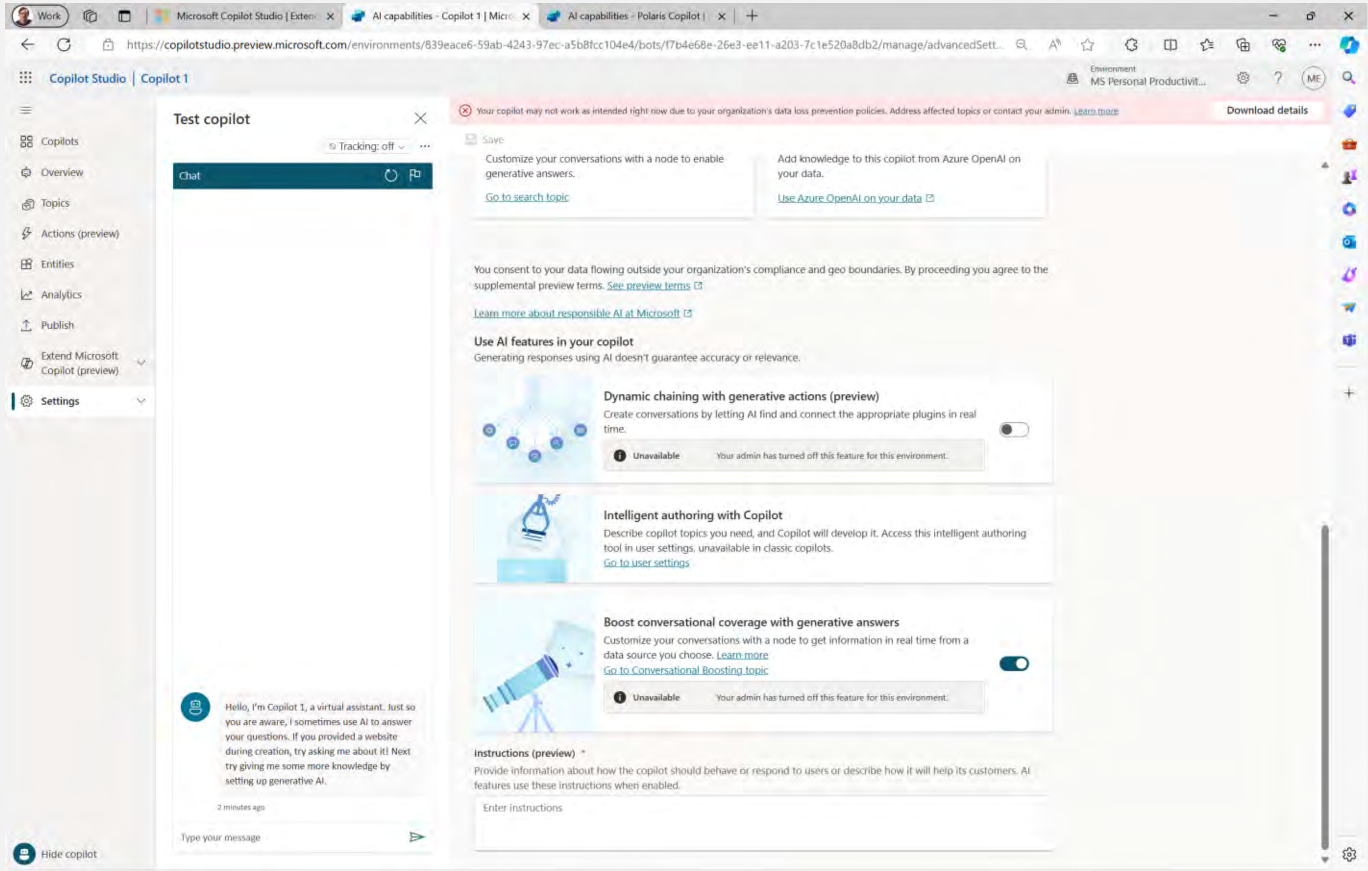
Hello, I'm Copilot 1, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

2 minutes ago

Type your message

Easily give Copilot access to more unstructured data such as authoritative web sites, SharePoint repositories or individual files, or even structured data (e.g. Dataverse).

Explore GenAI with Microsoft Copilot Studio



Work
Microsoft Copilot Studio | Exten
AI capabilities - Copilot 1 | Micr
AI capabilities - Polaris Copilot |
https://copilotstudio.preview.microsoft.com/environments/839eace6-59ab-4243-97ec-a5b8fcc104e4/bots/f7b4e68e-26e3-ee11-a203-7c1e520a8db2/manage/advancedSett...
Copilot Studio | Copilot 1
Environment
MS Personal Productivit...
ME
Copilots
Overview
Topics
Actions (preview)
Entities
Analytics
Publish
Extend Microsoft Copilot (preview)
Settings
Hide copilot
Test copilot
Tracking: off
Chat
Type your message
Download details
Save
Go to search topic
Use Azure OpenAI on your data
See preview terms
Learn more about responsible AI at Microsoft
Go to user settings
Learn more
Go to Conversational Boosting topic
Enter instructions

Hello, I'm Copilot 1, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

2 minutes ago

Your copilot may not work as intended right now due to your organization's data loss prevention policies. Address affected topics or contact your admin. Learn more

Customize your conversations with a node to enable generative answers.

Add knowledge to this copilot from Azure OpenAI on your data.

You consent to your data flowing outside your organization's compliance and geo boundaries. By proceeding you agree to the supplemental preview terms. See preview terms

Use AI features in your copilot

Generating responses using AI doesn't guarantee accuracy or relevance.

Dynamic chaining with generative actions (preview)

Create conversations by letting AI find and connect the appropriate plugins in real time.

Unavailable Your admin has turned off this feature for this environment.

Intelligent authoring with Copilot

Describe copilot topics you need, and Copilot will develop it. Access this intelligent authoring tool in user settings, unavailable in classic copilots.

Boost conversational coverage with generative answers

Customize your conversations with a node to get information in real time from a data source you choose.

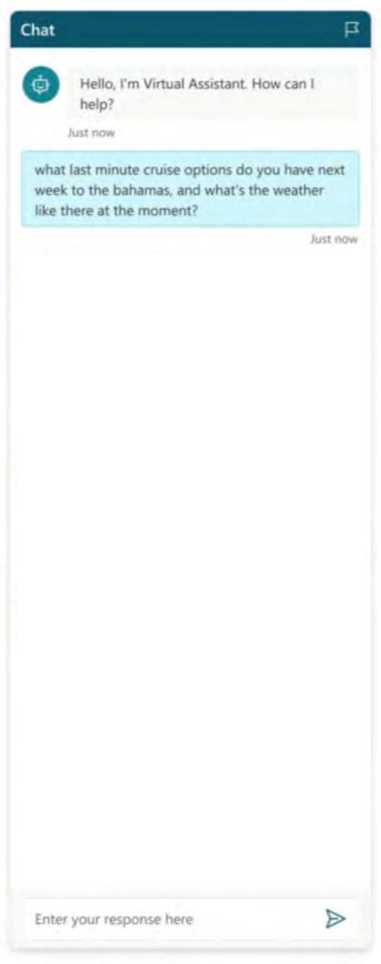
Unavailable Your admin has turned off this feature for this environment.

Instructions (preview) *

Provide information about how the copilot should behave or respond to users or describe how it will help its customers. AI features use these instructions when enabled.

Access advanced settings to shape Copilot behavior and orchestrate actions.

Explore GenAI with Microsoft Copilot Studio



Chat

Hello, I'm Virtual Assistant. How can I help?

Just now

what last minute cruise options do you have next week to the bahamas, and what's the weather like there at the moment?

Just now
Enter your response here

what last minute cruise options do you have next week to the bahamas, and what's the weather like there at the moment?

Generative AI powers more natural user interaction.

Explore GenAI with Microsoft Copilot Studio

Chat

Hello, I'm Virtual Assistant. How can I help?

Just now

what last minute cruise options do you have next week to the bahamas, and what's the weather like there at the moment?

Just now
Enter your response here

what last minute cruise options do you have next week to the bahamas, and what's the weather like there at the moment?

Generative AI powers more natural user interaction.

Explore GenAI with Microsoft Copilot Studio

Chat
Just now
Just now
Enter your response here

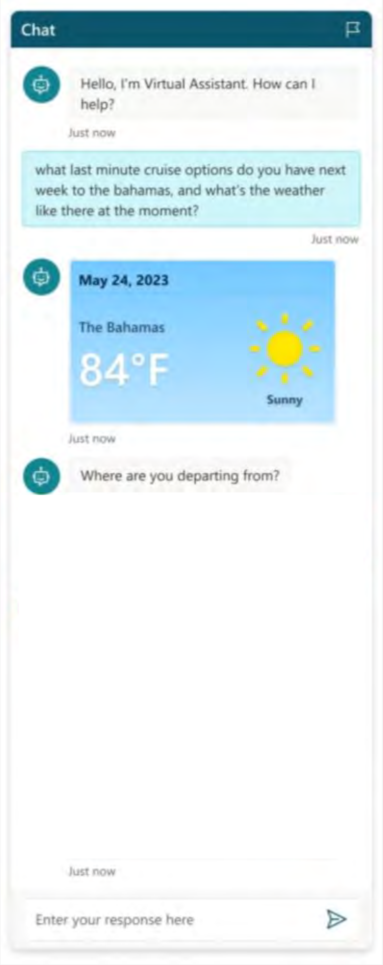
Hello, I'm Virtual Assistant. How can I help?

what last minute cruise options do you have next week to the bahamas, and what's the weather like there at the moment?

what last minute **cruise options** do you have **next week** to the **bahamas**, and what's the **weather** like there at the moment?

Generative AI powers more natural user interaction.

Explore GenAI with Microsoft Copilot Studio



Chat

Hello, I'm Virtual Assistant. How can I help?

Just now

what last minute cruise options do you have next week to the bahamas, and what's the weather like there at the moment?

Just now

May 24, 2023

The Bahamas

84°F

Sunny

Just now

Where are you departing from?

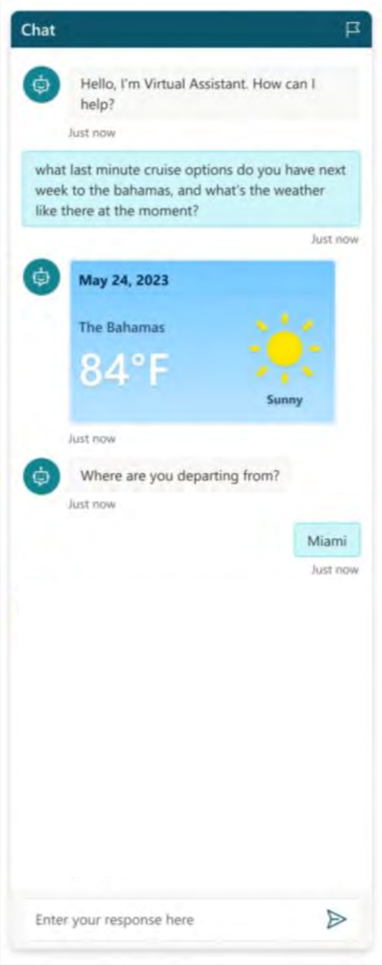
Just now

Enter your response here

what last minute **cruise options** do you have **next week** to the **bahamas**, and what's the **weather** like there at the moment?

Generative AI powers more natural user interaction.

Explore GenAI with Microsoft Copilot Studio



Hello, I'm Virtual Assistant. How can I help?

Just now

what last minute cruise options do you have next week to the bahamas, and what's the weather like there at the moment?

Just now

May 24, 2023

The Bahamas

84°F

Sunny

Just now

Where are you departing from?

Just now

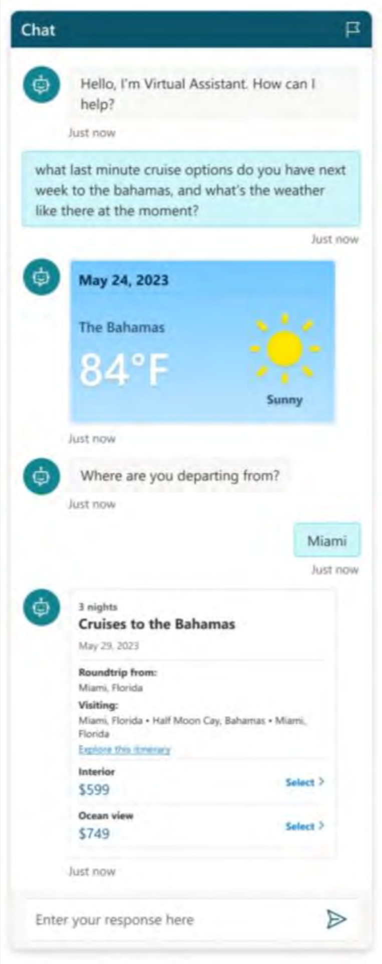
Miami

Just now

what last minute **cruise options** do you have **next week** to the **bahamas**, and what's the **weather** like there at the moment?

Generative AI powers more natural user interaction.

Explore GenAI with Microsoft Copilot Studio



Hello, I'm Virtual Assistant. How can I help?

Just now

what last minute cruise options do you have next week to the bahamas, and what's the weather like there at the moment?

Just now

May 24, 2023

The Bahamas

84°F

Sunny

Just now

Where are you departing from?

Just now

Miami

Just now

3 nights

Cruises to the Bahamas

May 29, 2023

Roundtrip from:

Miami, Florida

Visiting:

Miami, Florida • Half Moon Cay, Bahamas • Miami, Florida

Explore this itinerary

Interior

$599

Ocean view

$749

Just now

what last minute **cruise options** do you have **next week** to the **bahamas**, and what's the **weather** like there at the moment?

Generative AI powers more natural user interaction.