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Study guide | Microsoft | AB-100

Microsoft Certified: Agentic AI Business Solutions Architect Expert

Notes for every domain of the Microsoft Certified: Agentic AI Business Solutions Architect Expert exam, organized by the official exam guide's domains and weights.

By MockCert about 37 min read Updated November 15, 2026

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Domain 1 | 35–40% of the exam | 11 min read

Plan AI-powered business solutions

Overview

Every point below comes from Microsoft's official documentation; each section lists its sources.

Analyze requirements for AI-powered business solutions

Start here

THINK FIRST

Before you build an agent, how would you judge whether the business data it needs is good enough and reachable?

Why it matters: Questions describe business data and integration needs and ask which pattern, store or check makes it fit for AI.

Start from business goals, check that data is high quality and arrives on time, and share it in ways that do not overload Dynamics 365. Connected data then lets reporting, analytics and AI reach the right people at the right time.

Key terms

Term	Meaning
Idempotency	A message sent more than once, such as a retry, is processed only once.
Virtual table	A Dataverse table that reads external data on demand, without storing it.
Dual-write	Keeps data that is the same across apps, like customers and accounts, in step.
Data entity	A flattened view that merges a main table with its related tables in a single row.

Start from business goals

Define business goals first, then match each requirement against them. Integration challenges fall into business, technology and project governance areas. Connected data lets reporting, analytics and AI reach the right people at the right time.

Synchronous or asynchronous

Most recommended integration patterns are asynchronous. They can still feel like real time. Make the receiver idempotent so a retried message is processed only once.

Synchronous and asynchronous exchanges compared

Feature	Synchronous	Asynchronous
Payload size	Small payloads only	Large volumes, such as data packages
Best fit	Low-volume OData exchanges, subject to throttling	Bulk exchange with change tracking, or high-scale events
Example technology	OData, using RESTful web services	Azure Service Bus, a full queueing mechanism

Sharing data across apps

Virtual tables read external data on demand without storing it. Apps such as Sales and Field Service share one data layer, so updates show instantly. Dual-write suits data that is the same across apps, such as customer and account.

EXAM TRAP

Finance and operations virtual tables are not an option on-premises. They work only for cloud implementations; on-premises uses the Data Management REST API.

Data for analytics

Use a dedicated store for reporting, not Dynamics 365 itself. Syncing too much data in for reporting overloads the database. For an aggregated view, Microsoft recommends Azure Data Lake Storage through Export to Azure Data Lake. A data warehouse is a separate platform from the ERP.

EXAM TRAP

Copying everything into one app is not a cheap aggregated view. One organization doing this raised its storage costs.

Events drive automation

Process integration is event-driven, which cuts manual errors. Event Grid lets handlers react to events instead of polling. Dataverse data events cover CRUD and more; business events bind to a table, an API or a custom action. For many events or high-scale processing, consider Azure Service Bus. It gives a full queue but supports only asynchronous steps.

Shaping data with entities

Finance and operations ships more than 2,000 predefined data entities. Each entity combines a main table and related tables into one row. For a faster, simpler interface, copy an entity and remove the fields or logic you do not need.

Where agents can run

Copilot availability depends on country or region, data location and language. Features often launch in English first because each language must be validated. For business-critical work, use supported languages or add extra review of AI output.

EXAM TRAP

A Business Central environment's country or region cannot be changed later. It is set at creation and also sets the Azure region for data residency.

Key takeaways

- Check that grounding data is high quality, timely and available when the agent needs it.
- Prefer asynchronous patterns; keep synchronous OData for small, low-volume exchanges.
- Virtual tables show external data without storing it; dual-write suits data that is the same across apps.
- Send analytics data to Azure Data Lake Storage, not into Dynamics 365.

Sources: Integrate your Dynamics 365 apps with other solutions - Dynamics 365 | Microsoft Learn (opens in a new tab) · Select the ideal platform for your Dynamics 365 apps integration - Dynamics 365 | Microsoft Learn (opens in a new tab) · Choose the right pattern for your integration strategy - Dynamics 365 | Microsoft Learn (opens in a new tab) · Overcome integration challenges in Dynamics 365 projects - Dynamics 365 | Microsoft Learn (opens in a new tab) · Integrate Dynamics 365 apps with other systems - Dynamics 365 | Microsoft Learn (opens in a new tab) · Choose the right design for your Dynamics 365 apps integration - Dynamics 365 | Microsoft Learn (opens in a new tab) · Case study in integration strategy - Dynamics 365 | Microsoft Learn (opens in a new tab) · Copilot and agents country/region availability and supported languages - Business Central | Microsoft Learn (opens in a new tab)

Design overall AI strategy for business solutions

Start here

THINK FIRST

How would you choose between one agent and several, and decide what knowledge and prompts each one gets?

Why it matters: Questions describe a business solution and ask which agent design, knowledge source or prompt guideline fits its rules and constraints.

An AI strategy weighs the shape of the solution: one agent or many, and deterministic or LLM-orchestrated workflows. It also grounds each agent in the right knowledge, limits its access and offers a prompt guide to help people prompt well.

Key terms

Term	Meaning
Deterministic workflow	A workflow type best for well-defined, safety-critical or regulated environments.
Lost in the middle	Long prompts can make an agent ignore information deep in its context.
Knowledge source	Content a maker attaches while building the agent, shared by all of its users.
Human-in-the-loop	Human oversight that a Copilot needs to manage generative AI risks.
Prompt guide	A predefined list of prompts in Business Central that shows users how to prompt well.

Fixed steps or open orchestration

Use deterministic workflows for safety-critical or regulated work. LLM orchestrator workflows suit open-ended, complex domains. Either way, a Copilot needs human oversight to manage generative AI risks.

Choosing knowledge sources

Dataverse is the recommended source for structured records and tables. Knowledge is set at design time, so all users share the same grounding. SharePoint content is picked partly by title, so titles must be clear. ServiceNow search quality depends on ServiceNow itself.

EXAM TRAP

You cannot add several Bing Custom Search sources to one agent. Only one is allowed, and the Bing Custom Search instance must exist first.

Knowledge for conversation agents

Some sources need Change authentication before you can add them. Add and manage knowledge from the Build tab. Sources that need sign-in share one Authentication mode for every agent in the orchestration.

Customer Conversation knowledge sources by sign-in need

Feature	Added directly	Requires authentication
Examples	Public websites, uploaded files, Dynamics 365	SharePoint, Dataverse, Salesforce
Setup	Add straight from the Build tab	Select Change authentication first

EXAM TRAP

Sources that use the end user's credentials do not work in voice. Voice channels cannot sign users in, so those sources work only in chat.

Prompt library guidelines

A prompt guide gives users ready prompts and teaches good prompting. Build it with a PromptGuide action area, one action per prompt. Prompt options go in `area(PromptOptions)` and support only option fields. Safeguards in medical, legal or weapons topics can lower output quality there.

Rules and constraints

Give users and agents only the minimum access their tasks need. Do not save AI proposals to the database until the user chooses to. Business Central Copilot skips fields without a tooltip or with AllowInCustomizations set to false.

> **EXAM TRAP**
>
> An extension field is not visible to the Sales Order Agent automatically. Make it visible in the Sales Order Agent (Copilot) profile first.

Solutions across Dynamics 365 apps

Treat integration projects like extension projects. Involve stakeholders and define a software development lifecycle (SDLC). It runs from requirements through deployment and application lifecycle management (ALM). Start the blueprint with an application integration diagram that shows which systems exchange data. With dual-write, load customers into Supply Chain Management first, then sync to Dataverse.

Key takeaways

- Single agents are simpler to test and deploy; multi-agent designs are sensitive to orchestration changes.
- Use deterministic workflows for regulated work and LLM orchestration for open-ended domains.
- Ground structured business data with Dataverse, and give SharePoint files clear titles.
- Apply least privilege and keep a human in the loop for generative AI risks.

Sources: Single-agent and multi-agent architectures - Dynamics 365 | Microsoft Learn (opens in a new tab) · Available knowledge sources for agents (Microsoft Copilot) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Influence Copilot and agents without extending them - Business Central | Microsoft Learn (opens in a new tab) · Design the prompt mode of prompt dialog page - Business Central | Microsoft Learn (opens in a new tab) · What is considered an extension to Copilot? - Business Central | Microsoft Learn (opens in a new tab) · Available knowledge sources for agents (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Add knowledge to an agent (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Design content mode of prompt dialog page - Business Central | Microsoft Learn (opens in a new tab)

Evaluate the costs and benefits of an AI-powered business solution

Start here

THINK FIRST

How would you decide whether to build, buy or extend a component, and show its return on investment?

Why it matters: Questions describe a business gap and ask which option gives the best value once the full cost of ownership is counted.

Every extension costs more than its build: maintenance, a place in application lifecycle management (ALM) and the risk a future release makes it redundant. A good ROI case weighs those costs, and you extend only when it empowers users or adds value.

Key terms

Term	Meaning
Total cost of ownership	One of the ROI criteria to select for an AI-powered business solution.
Fit-to-standard analysis	Compares current processes with the standard Dynamics 365 processes to see how well they meet needs.
Fit-gap analysis	An analysis done once fit-to-standard analysis and configuration are finished.
No-cliffs extension	Start with Dynamics 365 SaaS and extend into Azure PaaS only for the hardest scenarios.
ALM	Application lifecycle management, the process every extension must be included in.

What goes into the ROI case

Total cost of ownership is one of the ROI criteria the exam expects. On the value side, know each extension's effect on decisions, efficiency, automation and user adoption. Extend only when it empowers users or adds business value. On the cost side, weigh the complexity, cost and time of building and maintaining it.

Build, buy or extend

Buy when the gap is large and building it is too complex or costly. A marketplace app from an established vendor saves build, test and maintenance effort. Azure PaaS removes infrastructure management and costs less to maintain than a fully custom build.

Three ways to close a gap, compared

Feature	Buy a marketplace app	Extend with Azure PaaS	Custom code
Best fit	A large gap too complex or costly to build in-house	The hardest scenarios beyond SaaS	Only documented extension patterns, used sparingly

Feature	Buy a marketplace app	Extend with Azure PaaS	Custom code
Effect on cost	Saves build, testing and maintenance effort	Lower upkeep than a fully custom build	Extra maintenance for professional developers

Cheapest options first

Changing app settings is the lowest-risk, least disruptive customization. Try app settings first, then low-code or no-code configuration, which should be used whenever possible. Microsoft advises against extending default finance and operations experiences with code, to lower risk and maintenance.

EXAM TRAP

Customizing the screen is not always the cheapest fix. User training can sometimes replace UX customization and save hundreds of hours of work.

Analyze fit before you build

Run fit-to-standard first, then fit-gap. Fit-gap comes after fit-to-standard analysis and configuration are done. Changing a process to fit the product can need change management. Avoid repurposing standard tables, or you may lose future features.

Integration as a benefit

Integration cuts errors and data silos and raises productivity. Systems sharing one data layer, such as Dataverse, need no transfer or sync code. Virtual tables reach finance and operations data with little integration work. Embedded UI integration saves time, training and user licenses.

Catch problems early

Fixing a problem before check-in is cheaper than fixing it later. Run the solution checker in every release cycle to test against best practice rules. Finance and operations go-live readiness requires a clean Customization Analysis Report.

ROI in real projects

One case study shows large value for a small build cost. At the Singapore Civil Defence Force, Power Platform solutions worth about **$20 million** cost under **$50,000** to build. App development time fell from **2 to 3 years** to **1 to 3 months**. One app took a single person **three months**.

Key takeaways

- Count total cost of ownership: building, maintaining and keeping an extension inside ALM.
- Try app settings, then low-code, then extend into Azure PaaS for the hardest cases.
- Buy a marketplace app when the gap is large and building it is too complex or costly.
- Check roadmaps so you do not build what a future release will provide.

Sources: Optimize your implementation with a fit-to-standard and fit-gap analysis - Dynamics 365 | Microsoft Learn (opens in a new tab) · Extend Dynamics 365 apps without compromising performance - Dynamics 365 | Microsoft Learn (opens in a new tab) · Study guide for Exam AB-100: Agentic AI Business Solutions Architect |

Microsoft Learn (opens in a new tab) · Extensibility strategy and considerations checklist - Dynamics 365 | Microsoft Learn (opens in a new tab) · Customize and extend Dynamics 365 apps - Dynamics 365 | Microsoft Learn (opens in a new tab) · Checklist for implementing cloud solutions - Dynamics 365 | Microsoft Learn (opens in a new tab) · Extend Dynamics 365 finance and operations apps - Dynamics 365 | Microsoft Learn (opens in a new tab) · Customize and extend Dynamics 365 online - Dynamics 365 | Microsoft Learn (opens in a new tab)

Domain 2 | 30–35% of the exam | 13 min read

Design AI-powered business solutions

Overview

Every point below comes from Microsoft's official documentation; each section lists its sources.

Design AI and agents for business solutions

Start here

THINK FIRST

When should an agent follow a fixed topic, and when should it let generative orchestration, Foundry IQ or another agent take over?

Why it matters: Questions describe a service or business scenario and ask which agent type, topic design, channel or grounding option fits it.

Topics are deterministic, node-based flows whose logic and wording the maker fixes, unlike generative responses. Good topic descriptions say what a topic does, and Service Agent's orchestrator uses an agent description to decide when to call a connected agent. Foundry IQ adds permission-aware, cited answers from data across Azure, SharePoint, OneLake and the web.

Key terms

Term	Meaning
Topic	A deterministic, node-based conversation flow whose logic and wording the maker fixes.
Azure CLU	Prebuilt Conversational Language Understanding, chosen to reuse existing Azure models.
Foundry IQ	A managed knowledge layer giving permission-aware, cited answers across Azure, SharePoint, OneLake and the web.
Agent Task Builder	The Business Central codeunit that creates agent tasks.

Designing topics

Topics are fixed flows; generative answers are not. Describe what a topic does, not what the agent should say. Use an Add a tool node to call a connector, flow or other tool from a topic. To let users fix a value, reset it with a Variable management node.

EXAM TRAP

A topic that collects details itself must say so in its description. Otherwise the model asks the user for that information itself.

NLU, CLU or generative

Copilot Studio NLU is the quick, lightweight option. Choose prebuilt Azure CLU on the Topics settings tab when you want to reuse existing Azure models. The exam expects you to decide between standard NLP, CLU and generative orchestration.

Extending Service Agent

Connected Copilot Studio agents become Service Agent capabilities. Its orchestrator calls them based on the description you add. A manual add needs the Agent ID and Environment ID. The maker needs a role with the `prvmsdyn_ServiceAgentMakerCustomize` privilege.

EXAM TRAP

Removing an agent from Service Agent does not delete it. It only stops Service Agent from invoking the original Copilot Studio agent.

Copilot with service data

The Customer Service plugin needs a Microsoft 365 Copilot license. It lets users chat with Dynamics 365 service data in Microsoft 365 Copilot. It mainly supports structured data in tables, not unstructured documents.

Contact center channels

Customer Conversation agents run in standalone channels and contact centers. Bring your own contact center connects any other contact center platform. Genesys is one of the supported contact centers.

Three Customer Conversation channels compared

Feature	Web chat	Teams Phone	Dynamics 365 Contact Center
What it gives	The agent embedded in a custom web app	Calls to the agent on a Teams phone number	Speech and chat with contextual human handoff
Channel type	Standalone	Standalone	Contact center

Grounding with Foundry IQ

Add Foundry IQ under Microsoft IQ on the agent's Build tab. It supports API key, Client Certificate Auth, Service principal and Entra ID Integrated sign-in. Entra ID Integrated needs only the Azure AI Search endpoint. A service principal also needs tenant ID, client ID and client secret.

Designing for languages

GPT Realtime can switch language mid-conversation by itself. Setting `User.Language` to a code such as fr-FR changes later responses. Topics gain most from uploaded translations because their wording is fixed. Download content for translation as JSON or ResX.

EXAM TRAP

GPT-5 Chat (Cascade) does not switch languages on its own. It switches only when the user asks, so its Primary language matters more.

Task agents in Business Central

The Agent Task Builder codeunit creates agent tasks. Each task takes a single task message. An external ID of up to **2048** characters links it to systems such as email. After `SetStatusToReady`, the agent picks the task up shortly.

EXAM TRAP

One builder instance should not create several tasks. The builder keeps state, so use a new instance for each task.

Key takeaways

- Use topics for fixed, repeatable flows and describe what each topic does.
- Service Agent picks connected agents by their description.
- Foundry IQ gives permission-aware, cited answers; Entra ID Integrated needs only the search endpoint.
- GPT Realtime switches language on its own; GPT-5 Chat (Cascade) waits for the user to ask.

Sources: Create a topic (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Configure Copilot Studio agents in Service Agent | Microsoft Learn (opens in a new tab) · Connect to Foundry IQ (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Configure Topics settings (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Codeunit "Agent Task Builder" | Microsoft Learn (opens in a new tab) · Study guide for Exam AB-100: Agentic AI Business Solutions Architect | Microsoft Learn (opens in a new tab) · Chat with case data in Customer Service (preview) | Microsoft Learn (opens in a new tab) · Available channels (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab)

Design extensibility of AI solutions

Start here

THINK FIRST

When would you extend a Copilot Studio agent with a sub-agent, a connected Foundry agent, an MCP tool or a REST API tool?

Why it matters: Questions describe a business need and ask which extension, model or agent behavior fits it

and what it needs to work.

A Copilot Studio agent grows by adding other agents, tools and model behaviors. Each extension has its own setup rule. Most exam traps come from a missing protocol, path, setting or connection.

Key terms

Term	Meaning
Sub-agent	An agent built inside the primary agent that shares its configuration, deployment and ALM.
Connected agent	An independent agent, currently only from Azure AI Foundry, that several primary agents can reuse.
Activity protocol	The protocol Copilot Studio uses to talk to a connected Foundry agent; it is off by default.
MCP tool	A tool from a Model Context Protocol server that links an agent to custom services, databases or APIs.
Deep reasoning	A preview setting that lets an agent use a reasoning model for steps marked with the keyword reason.

Sub-agents and connected agents

Sub-agents live inside one agent; connected agents are reusable. Pick a connected agent when another team owns it or many primary agents need it. The orchestrator routes to it using its name and description, the user's message and the primary agent's instructions.

How sub-agents and connected agents differ

Feature	Sub-agent	Connected agent
Configuration and deployment	Shared with the primary agent	Independent
Reuse across primary agents	No	Yes
Where it comes from	Built in the primary agent	Currently only Azure AI Foundry agents
Can reference other sub-agents	No	No, nor tools, topics, events or variables

EXAM TRAP

A sub-agent cannot reference other sub-agents. Only the primary agent can, so chaining sub-agents inside a sub-agent is not an option.

Connecting a Foundry agent

Turn on the Activity protocol before you connect a Foundry agent. A new Foundry agent exposes only the Responses and A2A endpoints, so calls fail with a **400** error. Publishing a prompt agent to Microsoft 365 or Teams turns the Activity protocol on for you. Only agents from the current Foundry portal connect; older ones return **404 - Version not found**.

EXAM TRAP

Adding the connection succeeding does not prove it works. Without the Activity protocol the connection still saves, but every call to the Foundry agent fails.

MCP servers through the gateway

MCP tools connect an agent to services that publish tools in the MCP standard. Agent 365 Tooling Gateway fronts the Dynamics 365 CX MCP Server and handles Dataverse sign-in. Its server URL needs the `/mcp/environments/` segment, or requests return **404 RouteNotFound**. Its scope needs admin consent in advance because it has no incremental user consent.

EXAM TRAP

Discovery-capable clients such as Visual Studio Code need no manual OAuth values. In Copilot Studio you type them yourself unless the environment supports dynamic OAuth discovery.

REST API tools and connectors

Use a REST API tool when no prebuilt connector or MCP server exists. You import it from an OpenAPI 2.0 or 3.0 file in JSON or YAML of up to **5 MB**. With an API key, the agent asks the user for the key at runtime. A custom connector is the other route for a service with no prebuilt connector.

EXAM TRAP

Authentication set to None does not remove the connection step. A published REST API tool still needs a connection created or selected first.

Workflow tools and data policies

The Workflows tab only lists flows that already exist. Build the flow first, then add it as a tool. The After running setting decides what happens when the flow ends. If the agent skips the tool, refine its name, its description or the agent's instructions. A tool blocked by a data policy cannot be selected.

Deep reasoning

Deep reasoning needs generative orchestration and the preview setting on. Each step that should reason must contain the keyword reason in the instructions. Reasoning models answer slowly, so many reasoning steps can slow the agent a lot. It is limited to the US and the EU without the UK, and both regions run Azure OpenAI o3.

Choosing and governing models

Preview and external models need admin settings before makers can use them. Preview models need the Preview and experimental AI models setting; experimental ones also need Move data across regions. External models are turned on in the Power Platform admin center and each provider is allowed in the Microsoft 365 admin center. If a chosen model becomes unavailable, the agent falls back to the default model.

Skills and memory in conversations

Customer Conversation agents use Generative and Topic skills. Choose a Topic skill for predictable, repeatable logic. Keep Generative skills to about **3,000** characters of instructions and **10** skills per sub-agent. Memory is set once for the whole agent, works in Speech and Chat, and keeps short-term context for **30 days** .

> **EXAM TRAP**
> The 3,000-character and 10-skill figures are recommendations, not hard limits, so a design that exceeds them is not blocked.

Key takeaways

- Use a connected Foundry agent for reuse across primary agents; use a sub-agent when it shares the primary agent's lifecycle.
- A Foundry agent needs the Activity protocol on, or calls fail even though the connection saves.
- Gateway MCP URLs must include `/mcp/environments/`, and the scope needs admin consent ahead of time.
- Deep reasoning needs generative orchestration, the preview setting and the keyword reason in each step.

Sources: Sub-agents overview (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Add a Foundry agent as a connected agent (Microsoft Copilot) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Connect Dynamics 365 CX MCP Server - Service through Agent 365 Tooling Gateway | Microsoft Learn (opens in a new tab) · Add a deep reasoning model for complex tasks (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Add a tool to an agent (Microsoft Copilot) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Add a connected agent (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Available tools for agents (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Add a REST API as a tool (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab)

Orchestrate configuration for prebuilt agents and apps

Start here

THINK FIRST

Which prebuilt Copilot features would you turn on as they are, and which would you extend or ground with more knowledge?

Why it matters: Questions describe a finance, supply chain or service scenario and ask how to configure, extend or ground the prebuilt Copilot features.

Finance and supply chain Copilot features are on by default, and some Copilot experiences can be extended. In finance and operations apps, developers add plugins in Copilot Studio, the orchestration hub. Service Agent is extended by connecting published Copilot Studio agents, while built-in summaries stay as Microsoft designs them.

Key terms

Term	Meaning
Service Agent	Microsoft 365 Copilot agent that admins extend by connecting published Copilot Studio agents.
Smart assist	Suggests knowledge articles related to the representative's case in Copilot Service workspace.
Knowledge source	Grounding the maker sets up while building the agent, the same for all of its users.
Transactionless copy	An environment copy with only configuration and reference data, to save storage.

Copilot in finance and operations

Copilot Studio is the orchestration hub for finance and operations Copilot. It runs AI models or retrieves data from sources such as Dataverse. Developers add plugins in Copilot Studio to teach Copilot tasks, and advanced users can reuse X++ logic. Microsoft 365 chat lets users reach this data from Teams or Outlook.

Built-in finance and supply chain summaries

These Copilot features shipped as generally available and are on by default. Admins switch individual summaries on or off in feature management. The Collections coordinator summary covers aging, payment history and credit status. Confirmed purchase order changes are grouped into low- and high-impact changes.

EXAM TRAP

You cannot customize these summaries. They cannot currently be extended, because Microsoft designs them.

Copilot in Customer Service

A custom app gets Copilot through the Customer Service Copilot Enabled setting. Set the app's value to Yes. To show the case summary on a custom form, add the `msdyn_CopilotCaseSummaryLibrary.js`

web resource. Copilot drafts knowledge articles from cases, with up to **five** revisions through Revise with instructions.

Knowledge for service representatives

Third-party articles are loaded into Dataverse for representatives to search. Smart assist suggests articles that relate to the case. Supervisors use the knowledge search analytics dashboard to spot searches with low success or no results.

Extending Service Agent

Connected Copilot Studio agents become capabilities Service Agent can call. Its orchestrator chooses them by the description you add. Enter maker mode and select Organization as the scope. A manual add needs the Agent ID and Environment ID, plus the `prvmsdyn_ServiceAgentMakerCustomize` privilege.

EXAM TRAP

Removing an agent from Service Agent leaves the original agent in place. It only stops Service Agent from invoking it.

Adding knowledge to agents

Featured sources include SharePoint, Salesforce, ServiceNow and Azure SQL. Give SharePoint files clear titles, because titles help select content. Salesforce and ServiceNow search quality depends on the provider. Sources needing sign-in share one Authentication mode.

Knowledge sources and attachments compared

Feature	Knowledge source	Attachment
Who adds it	The maker, at design time	An end user
Reach	Same grounding for every user	Only the one conversation

EXAM TRAP

An agent cannot hold two Bing Custom Search sources. It allows only one, and the Bing Custom Search instance must exist first.

Environments in the admin center

One environment can hold Dynamics 365 apps, Power Apps and shared integrations. The admin center copies both data and code for finance and operations. A new environment needs at least **1 GB** of operations and Dataverse capacity. Its AI advisor recommends ways to improve performance, security and resources.

EXAM TRAP

A transactionless copy is not a full copy. It brings only configuration and reference data and leaves transactions out.

Key takeaways

- Copilot Studio is the hub for extending Copilot in finance and operations apps with plugins.
- Finance and supply chain summaries are on by default and can be toggled but not extended.
- Extend Service Agent with published Copilot Studio agents that have clear descriptions.
- Knowledge sources give every user the same grounding; attachments serve one conversation.

Sources: TechTalk for copilot capabilities in Dynamics 365 Finance and Supply Chain Management - Dynamics 365 | Microsoft Learn (opens in a new tab) · TechTalk Extending Copilot in Dynamics 365 finance and operations apps - Dynamics 365 | Microsoft Learn (opens in a new tab) · Configure Copilot Studio agents in Service Agent | Microsoft Learn (opens in a new tab) · Overview of knowledge management | Microsoft Learn (opens in a new tab) · Available knowledge sources for agents (Microsoft Copilot) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Modernizing the admin experience for finance and operations apps - Dynamics 365 | Microsoft Learn (opens in a new tab) · Configure copilot features for custom case forms and custom apps | Microsoft Learn (opens in a new tab) · Use Copilot to generate knowledge drafts from cases (preview) | Microsoft Learn (opens in a new tab)

Domain 3 | 20–25% of the exam | 13 min read

Deploy AI-powered business solutions

Overview

Every point below comes from Microsoft's official documentation; each section lists its sources.

Analyze, monitor, and tune AI-powered business solutions

Start here

THINK FIRST

How would you find out why an agent feels slow to users, and what would you change first?

Why it matters: Questions describe an agent or app performance problem and ask which test, metric, telemetry table or tuning step applies.

Monitoring has two halves: load tests that resemble real user behavior, and telemetry stored in Application Insights. Read both, then tune the slow parts, such as cloud flows, repeated API calls or generative AI latency.

Key terms

Term	Meaning
Direct Line API	Carries messages between a client and a Copilot Studio agent over WebSockets or HTTP.
Application Insights	Stores Finance and Supply Chain telemetry; billed on data ingested and how long it is kept.
KQL	Kusto Query Language, used to query telemetry and to write alert conditions.
Performance test target	Either the agent's baseline performance or the anticipated heavy load, never excessive stress.

Planning a performance test

Test baseline or expected heavy load, not extreme stress. A test plan names the objective, scenarios, KPIs, detailed test data and success criteria. Drive multi-turn conversations so the load looks like real users and reaches deeper actions.

EXAM TRAP

More load is not always a better test. Load beyond expected behavior can cause message consumption overage and environment throttling.

Driving load through Direct Line

Load tools use Direct Line to act like users and time responses. Embedded iframe and custom canvas agents use WebSockets, so scripts for them should too. Scripts using HTTP GET must poll the Activities endpoint and wait long enough for slow backend calls.

Measuring response time

Time from the user message to the last agent message. One user message can trigger several agent replies. The protocol has no last-response marker, so scripts assume the agent is done after a quiet timeframe. Agent replies carry `role: bot` and a `replyToId` that matches the user message.

EXAM TRAP

The response to Send Activity is not the agent's answer. It only confirms that the user message was posted.

Tuning agent latency

Cloud flows add latency; call connectors directly or use Send HTTP Request. Cache retrieved data in variables to avoid repeat calls. Do not make flows the main integration for busy, latency-sensitive IVR calls.

Classic NLU and generative AI compared

Feature	Classic NLU	Generative AI
Strength	Works well for specific intents	Handles a wider range of inputs
Weakness	Struggles with complex queries	Can add latency

Reading app telemetry

Telemetry lives in Application Insights and is queried with KQL. Form load times appear in `pageViews`. In Log Analytics the tables are `AppTraces` and `AppPageViews`. Alerts can come from Application Insights, Power BI metrics, Logic Apps or Power Automate. Costs grow with data volume and retention.

Warehouse app telemetry

Warehouse telemetry sits in the `customEvents` table. It needs Supply Chain Management **10.0.29** or later. Microsoft's Power BI reports are the quickest start. Join app events to server telemetry through the session identifier instead of collecting more device data.

EXAM TRAP

Idle time on a page does not mean it is hard to fill in. Only active time indicates that, and abandoned operations are reported too.

Key takeaways

- Load-test with realistic multi-turn conversations at baseline or expected heavy load.
- Measure response time to the last agent message, not to the Send Activity response.
- Replace cloud flows with direct connector calls and cache data in variables to cut latency.
- Query Application Insights telemetry with KQL and alert on it.

Sources: Plan and create a conversational agent performance test - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Analyze and monitor telemetry with KQL - Finance & Operations | Dynamics 365 | Microsoft Learn (opens in a new tab) · Best practices for improving conversational agent performance - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Test conversational agents using Direct Line - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Monitor Warehouse Management usage and performance - Supply Chain Management | Dynamics 365 | Microsoft Learn (opens in a new tab) · Use telemetry-based alerts - Finance & Operations | Dynamics 365 | Microsoft Learn (opens in a new tab)

Manage the testing of AI-powered business solutions

Start here

THINK FIRST

How would you plan testing for a Copilot feature whose answers can change from one run to the next?

Why it matters: Questions describe an AI feature or agent and ask which test process, metric or prompt design practice fits it.

The same prompt can give different results, so tests must allow for it. Score outputs at scale, cover edge cases and prompt injection, rerun suites when models change, and keep people in the loop for high-impact cases.

Key terms

Term	Meaning
Non-determinism	The same prompt to an LLM-based feature can give different results on different runs.
Evaluation	Business Central tooling that automates Copilot testing by checking thousands of prompts.
Human-in-the-loop	People review results; recommended for user-facing or high-impact Copilot scenarios.
Prompt guide	A predefined list of prompt texts users can pick on a Business Central prompt dialog page.

Plan for changing answers

Identical prompts can give different results, so tests must allow for it. Rerun the existing suites when the model is updated, to track changes between versions.

EXAM TRAP

Passing English tests do not prove a multilingual feature works. Testers should not assume English results apply in every language.

Kinds of tests and metrics

Accuracy, safety and regression tests check different risks. Accuracy scores the answers, safety checks defenses against attacks, and regression tracks changes after a model update.

Automate, but keep people involved

Evaluation can verify thousands of prompts automatically. Add both quality and safety tests to the CI/CD pipeline with Evaluation. For user-facing or high-impact scenarios, always add human review as well.

EXAM TRAP

Full automation is not enough on its own. Microsoft recommends human-in-the-loop evaluation for high-impact scenarios even when the pipeline is automated.

Writing realistic test cases

Cover common scenarios and edge cases. Anonymized user logs give representative prompts for realistic test cases. Include safety prompts that try injection and chaining attacks.

Prompt dialog best practices

Keep placeholder text short and specific. Avoid generic text such as Enter description here. A prompt guide is a list of ready prompts users can pick from. Adding a `systemaction(Regenerate)` control lets users regenerate results. With a prompt area, an edit prompt button lets users change their input in content mode.

EXAM TRAP

AI proposals should not be saved straight to the database. Under responsible AI, save them only when the user chooses to. By default, the OK action is captioned Keep it.

Testing agents across apps

Open the Test your agent pane with Test, in the upper-right corner. An agent can reach Business Central through its connector, its MCP server, or both. Either way, it acts with the signed-in user's permissions. Execution logs show tool requests and responses for troubleshooting. Validate user input, such as required fields, before calling Create record.

EXAM TRAP

Changing the Business Central MCP server configuration does not update the agent's tools by itself. Refresh the available tools in Copilot Studio afterward.

Key takeaways

- Score Copilot answers at scale for correctness, relevance and completeness.
- Rerun regression suites whenever the model version changes.
- Use Evaluation in CI/CD for quality and safety, plus human review for high-impact cases.
- Test edge cases and prompt injection, and do not assume English test results apply globally.

Sources: Best Practices for Testing the Copilot Capability in AL - Business Central | Microsoft Learn (opens in a new tab) · Design the prompt mode of prompt dialog page - Business Central | Microsoft Learn (opens in a new tab) · Design content mode of prompt dialog page - Business Central | Microsoft Learn (opens in a new tab) · Create Agents in Copilot Studio that Connect to Business Central - Business Central | Microsoft Learn (opens in a new tab)

Design the ALM process for AI-powered business solutions

Start here

THINK FIRST

How would you move an agent and everything it depends on from development to production without losing anything?

Why it matters: Questions describe moving or changing an agent or Copilot feature and ask which ALM step, role or component is needed.

Agents do not travel by themselves. You package them in solutions with their flows, connectors and variables, knowing some properties do not transfer. Saving, then testing critical scenarios more than once, closes the loop before release.

Key terms

Term	Meaning
Solution	The package used to export and import an agent between environments.
Connections tab	Shared Settings tab listing the connector bindings used across the orchestration.
Managed topic	A Customer Service Copilot Bot topic starting with msdyn_ that cannot be modified.
Foundry IQ	A managed knowledge layer giving permission-aware, cited answers from Azure, SharePoint, OneLake and the web.

Packaging an agent

Agents move between environments only by export and import. Switching environments does not bring the agent along. Use solutions, and add any flows, custom connectors or environment variables the agent uses. Exporting and importing needs at least the System Customizer role.

EXAM TRAP

Managed solutions are not an export option here. Copilot Studio cannot export managed solutions for a Customer Conversation agent.

After the import

Deploy an imported agent before you share it. Keep the demo website out of production and do not give its URL to customers.

EXAM TRAP

Not every property travels with the agent. Conversation ID, environment ID and topic or node comments do not transfer.

Connections and tools

The Connections tab lists connector bindings used across the orchestration. Connections appear there automatically when a topic or tool uses a connector. In Edit tool, the Tool field is read-only, while Connection sets how the tool signs in. By default, tool results go to the primary agent to form a reply.

EXAM TRAP

Prebuilt tools such as Escalate show no X on their chip and might not be removable like added tools. They can show a warning for connector policy issues.

Testing before release

Run critical scenarios more than once, including one long session. After a fix, rerun the other passing scenarios, because instruction changes have side effects.

EXAM TRAP

The Preview pane does not test unsaved edits. It runs the saved agent, so save your Build tab changes first.

Managed Customer Service agents

Copilot in Service Ask a question uses a managed Copilot Studio agent. That agent is the Customer Service Copilot Bot. Extensibility is now managed mainly in Copilot Studio. To change a plugin beyond its connection or description, create a new tool and remove the old one.

EXAM TRAP

Certain managed topics in the bot cannot be edited. Topics whose names start with msdyn_ cannot be modified.

Service Agent and Foundry IQ

Connecting agents to Service Agent needs a specific Dataverse privilege. That is `prvmsdyn_ServiceAgentMakerCustomize`. Removing an agent from Service Agent does not delete it. Foundry IQ connects from Microsoft IQ on the Build tab; Entra ID Integrated sign-in needs only the Azure AI Search endpoint.

Key takeaways

- Move agents with solutions and include their flows, custom connectors and environment variables.
- Deploy an imported agent before sharing it, and expect conversation ID, environment ID and comments not to transfer.
- Save before testing and rerun passing scenarios after every fix.

Sources: Deploy an agent (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Export and import an agent (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Preview and test an agent (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Configure connections (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Extend Copilot with Copilot Studio (preview) | Microsoft Learn (opens in a new tab) · Connect to Foundry IQ (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Manage and delete tools in an agent (Customer Conversation) (preview) - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Configure Copilot Studio agents in Service Agent | Microsoft Learn (opens in a new tab)

Design responsible AI, security, governance, risk management, and compliance

Start here

THINK FIRST

Which controls would you put in place so agents stay secure, governed, compliant and auditable after they go live?

Why it matters: Questions describe a security, compliance or governance need and ask which admin control, setting or log meets it.

Agent safety is layered: data policies and authentication rules govern what agents can do, and access control limits what they see. Data is replicated within one geographic region, and admins can review maker audit logs in Microsoft Purview.

Key terms

Term	Meaning
Microsoft Agent 365	One central place where admins watch over, govern and protect Copilot Studio agents.
Data policy	A Power Platform admin rule that governs agent knowledge, connectors, HTTP requests, channels and triggers.
Customer Lockbox	Lets customers approve or reject Microsoft data access requests; managed environments only.
Power Platform RBAC	Preview role-based access at the Power Platform API layer, separate from Dataverse RBAC.
Global Secure Access	The service that enforces network security policies on forwarded agent traffic, per tenant.

Governing what agents can do

Data policies control agent knowledge, connectors, channels and triggers. Admins set them in the Power Platform admin center. Agent 365 adds one control plane, and agents can be identities in Microsoft Entra. Before blocking a connector, list the affected apps, flows, agents and owners for the change advisory board.

Authentication and network rules

Require Microsoft authentication allows only Authenticate with Microsoft. It blocks no authentication, manual authentication and anonymous access for user-created agents. Agent traffic forwarding to Global Secure Access is turned on per environment or environment group.

EXAM TRAP

Disallowing the authentication setting does not leave existing agents running. A published agent that breaks the new authentication rule cannot publish updates and stops responding until it complies.

Access control with RBAC

Roles given at the tenant flow down to environment groups and environments. Power Platform RBAC works at the API layer, while Dataverse keeps its own RBAC for business data. The Contributor role manages all resources but cannot change role assignments.

EXAM TRAP

You cannot write a custom Power Platform RBAC role. Customers cannot customize or modify the role definitions.

Protecting grounding data

Copilot answers only from data the user can personally access. Copilot in Customer Service follows existing data permissions. It uses SharePoint, websites or custom knowledge bases only when explicitly configured. Microsoft does not train on customer data without consent. Admins can turn features on for specific users through roles.

Harmful content and risky designs

Real-time risk assessment flags data exfiltration issues before publishing. Makers see updated findings while they set up knowledge, tools and actions. Harmful content is rated by severity across set categories. Generated content still needs human review before use.

EXAM TRAP

Admins cannot write a tenant policy that blocks any subject they choose. Copilot Studio moderates only predefined harmful-content categories.

Data residency and encryption

Data is replicated across datacenters in the same geographic region. Outside the United States, admins can stop generative AI data from moving across geographies. Admins can also turn on customer-managed keys for Copilot Studio environments. Copilot in Customer Service runs entirely in the Azure cloud.

Key takeaways

- Use data policies to govern agent connectors, knowledge, channels and triggers.
- Copilot respects the user's own data permissions when it grounds answers.
- Outside the United States, admins can turn off cross-geography data movement for generative AI features. Admins can also enable customer-managed keys.
- Purview logs maker activity, Dataverse auditing logs record changes, Sentinel adds alerts.

Sources: Security and governance - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Configure authentication for agents (preview) - Power Platform | Microsoft Learn (opens in a new tab) · Security FAQs about AI agents | Microsoft Learn (opens in a new tab) · Geographic data residency - Security - Microsoft Copilot Studio | Microsoft Learn (opens in a new tab) · Compliance - Power Platform | Microsoft Learn (opens in a new tab) · Role-based access control for Power Platform admin center (preview) - Power Platform | Microsoft Learn (opens in a new tab) · Global Secure Access for Copilot Studio agents - Power Platform | Microsoft Learn (opens in a new tab) · Governance prompt library for Power Platform Admin in Cowork - Power Platform | Microsoft Learn (opens in a new tab)

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