

What's new for Dynamics 365 Sales



Early access features
available to test in August



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AI-Generated Account Summaries

Gain insights across related leads, opportunities, cases, and more at a glance to help sellers manage their accounts.

The screenshot displays the Dynamics 365 Sales Hub interface for the account "A. Datum Corporation". The account summary shows an annual revenue of \$35,000,000 and 2,000 employees, with Mona Kane as the owner. The interface is divided into several sections:

- Account Information:** Fields for Account name (A. Datum Corporation), Phone (398-535-1992), Fax (398-535-1996), Website (https://...), Parent account (---), and Ticker symbol (NWIND).
- Contact Information:** Fields for First name (Alex), Last name (Baker), Job title (Cafeteria manager), Account name (A. Datum Corpor...), and Email (alex@northwindtraders...).
- Up next:** A task titled "Introduction mail" with a due date of 1/11/2023 10:10 AM. The task description is "Thank for being a valued customer and share details on the interested products/services." Actions include "Email" and "Mark complete".
- Timeline:** A section for tracking activities, including an "Appointment" created on 5/25/2023 02:30 PM by Jeremy Johnson, with the subject "Discuss the warranty offered before deal close" and an opportunity of "10 Cafe BG-1 for Northwind Traders".
- Copilot Chat:** A chat window on the right provides an AI-generated account summary for A. Datum Corporation. It includes a "2 leads" gauge with a legend for Hot (red), Warm (grey), and Cold (blue). The leads listed are Mona Kane (Created 2 days ago - Hot) and David Balac (Created 4 days ago - Cold). It also shows "Cases (5)" and a prompt to "Ask a sales question or type / to mention a record".

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Customise Lead Qualification

Extra controls to manage lead qualification processes, including enabling Copilot handover summaries and creating multiple opportunities from a single lead.

The screenshot shows the Dynamics 365 Sales hub interface. The left sidebar contains navigation options: Home, Recent, Pinned, Digital sales, Get started, General Settings, Overview, Sales Copilot (Preview), Lead + Opporti..., Productivity tools, Chat and collaborate, Teams Meetings (preview), LinkedIn integration, Sales usage reports, Teams calls, Opportunity pipeline..., Data improvement, Duplicate detection, Email validation, and Playbook management. The main content area is titled 'Lead Qualification' and includes a sub-section 'Opportunity Closing'. The 'Lead qualification' settings are displayed, allowing users to choose who creates related records during lead qualification. The 'Record type' table shows 'Automatic' and 'Seller' options for Account, Contact, and Opportunity. Below this, the 'Add opportunity fields' section allows users to select fields to include in opportunities created from newly qualified leads. The 'Lead handover summary' section includes a checkbox to enable Copilot summaries.

Lead qualification
Choose who creates related records during lead qualification. [Learn more](#)

Record type	Automatic	Seller
Account	<input type="radio"/>	<input checked="" type="radio"/>
Contact	<input type="radio"/>	<input checked="" type="radio"/>
Opportunity	<input type="radio"/>	<input checked="" type="radio"/>

Add opportunity fields
You can add up to 7 fields to be included in opportunities created from newly qualified leads.

+ Add fields

Topic	<input checked="" type="checkbox"/>
Est. Close date	<input checked="" type="checkbox"/>
Budget Amount	<input checked="" type="checkbox"/>

Let seller create multiple opportunities from a newly qualified lead. [Learn more](#)

Lead handover summary

Once a seller qualifies a lead, let Copilot create a summary of its key info. [Learn more](#)

[Save](#) [Cancel](#)

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Group and Aggregate Opportunities

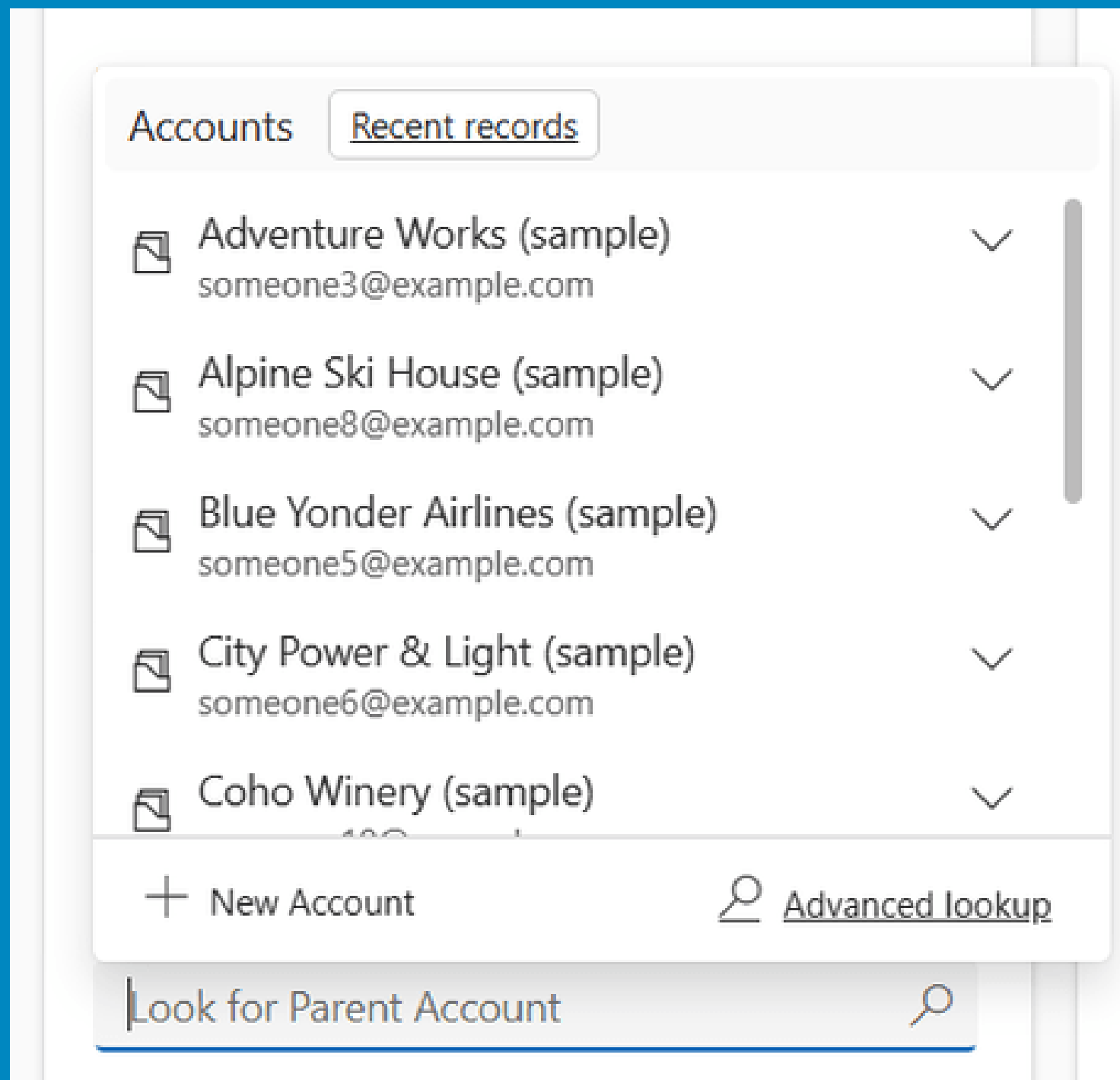
This feature will extend the opportunity pipeline view by enabling sellers to group opportunities by account, owner, close date/close month and other relevant fields.

The estimated values and actual revenue amounts will be aggregated to allow segmentation according to your selected criteria.

What's new for Dynamics 365 Sales

Faster selection from record look-ups

Save time when selecting the first item in a look-up control by using the Enter key. 🙌



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AI-Powered Action Suggestions

Administrations can enable additional Copilot action recommendations for sellers that appear in the Dynamics user interface.

Example recommendations can include nudges to update records, post-meeting actions and following up on newly assigned leads or opportunities.

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