ServerSys

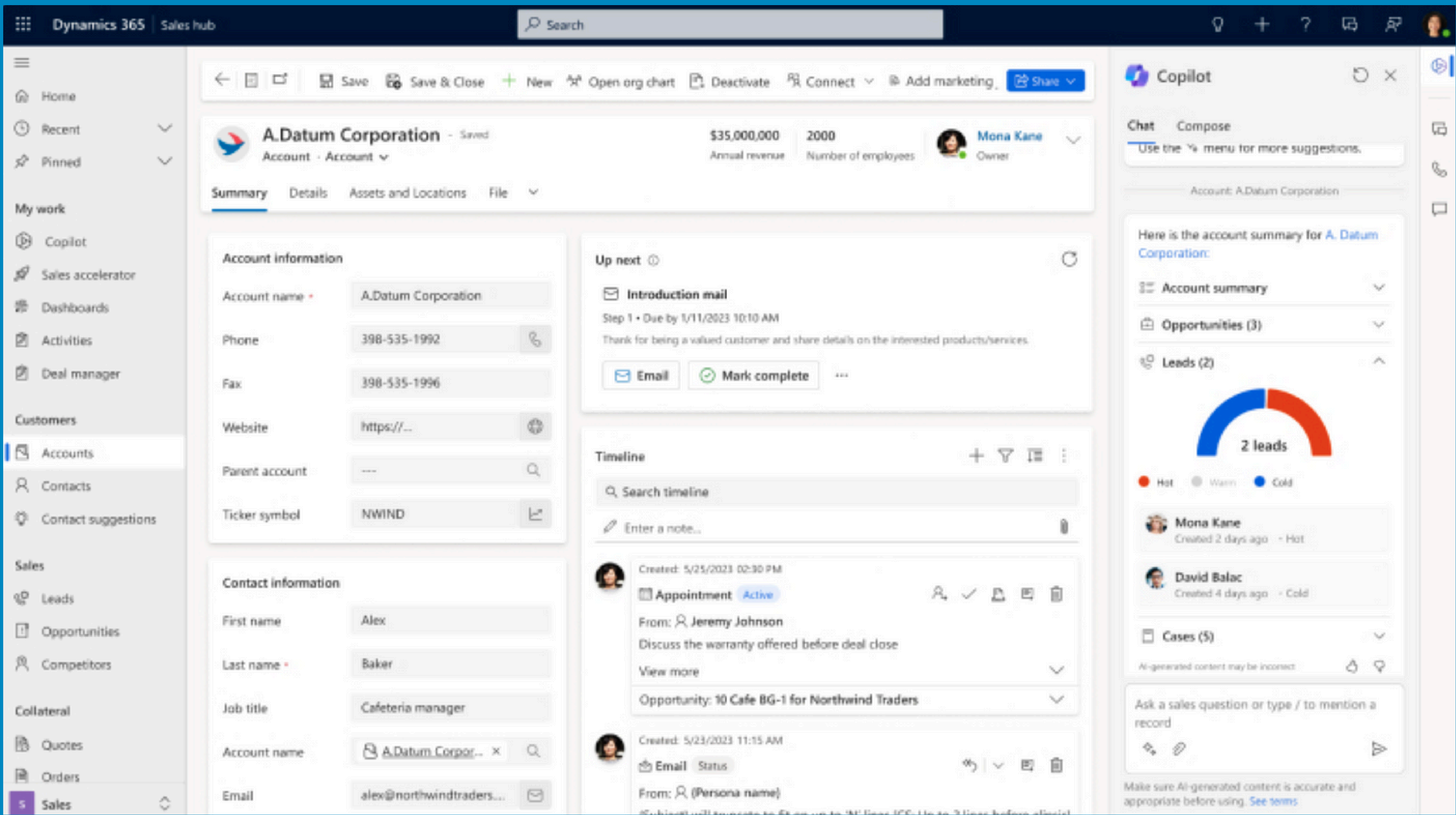
What's new for **Dynamics 365 Sales**

Early access features available to test in August

What's new for Dynamics 365 Sales

AI-Generated Account Summaries

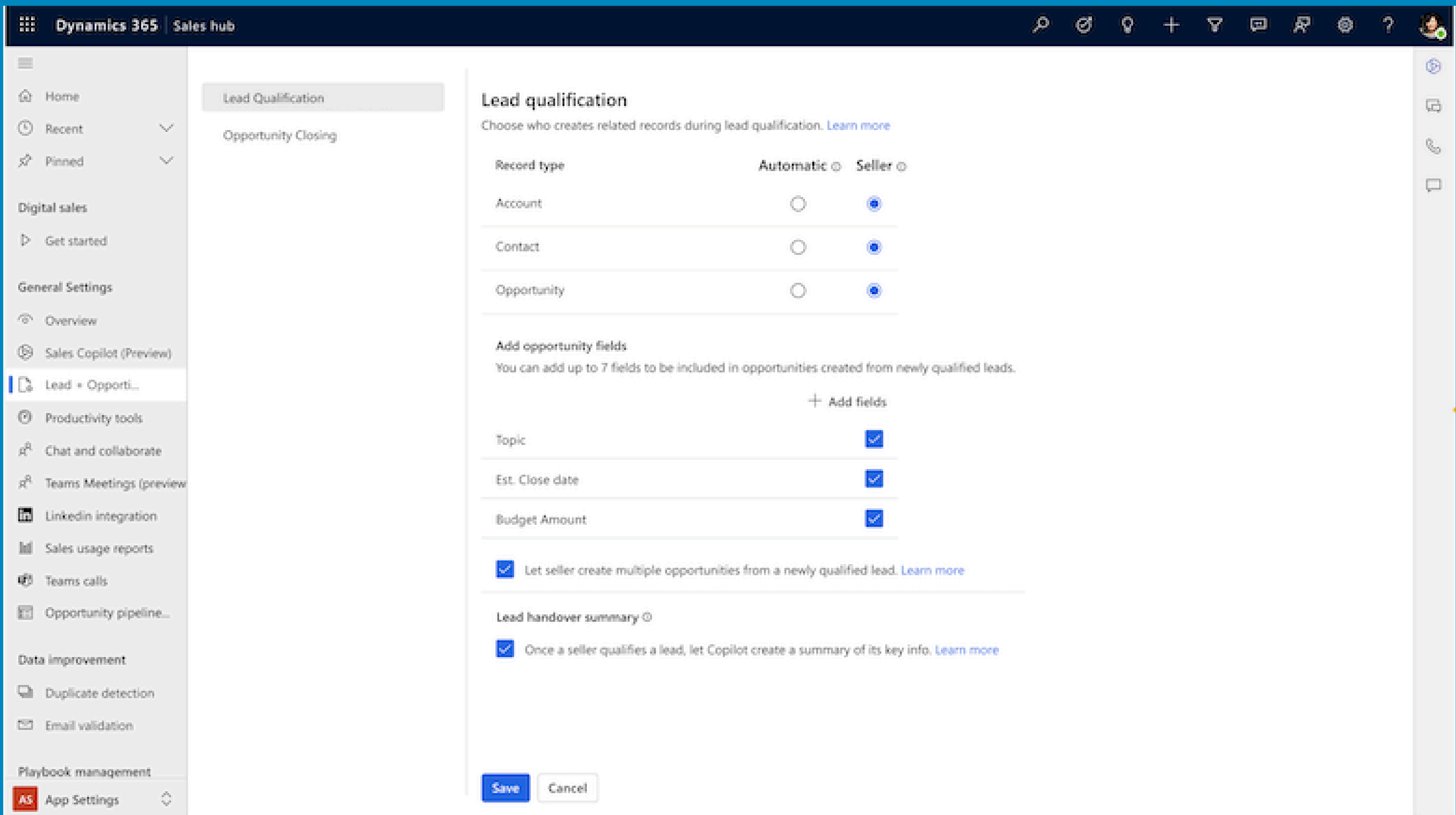
Gain insights across related leads, opportunities, cases, and more at a glance to help sellers manage their accounts.



What’s new for Dynamics 365 Sales

Customise Lead Qualification

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



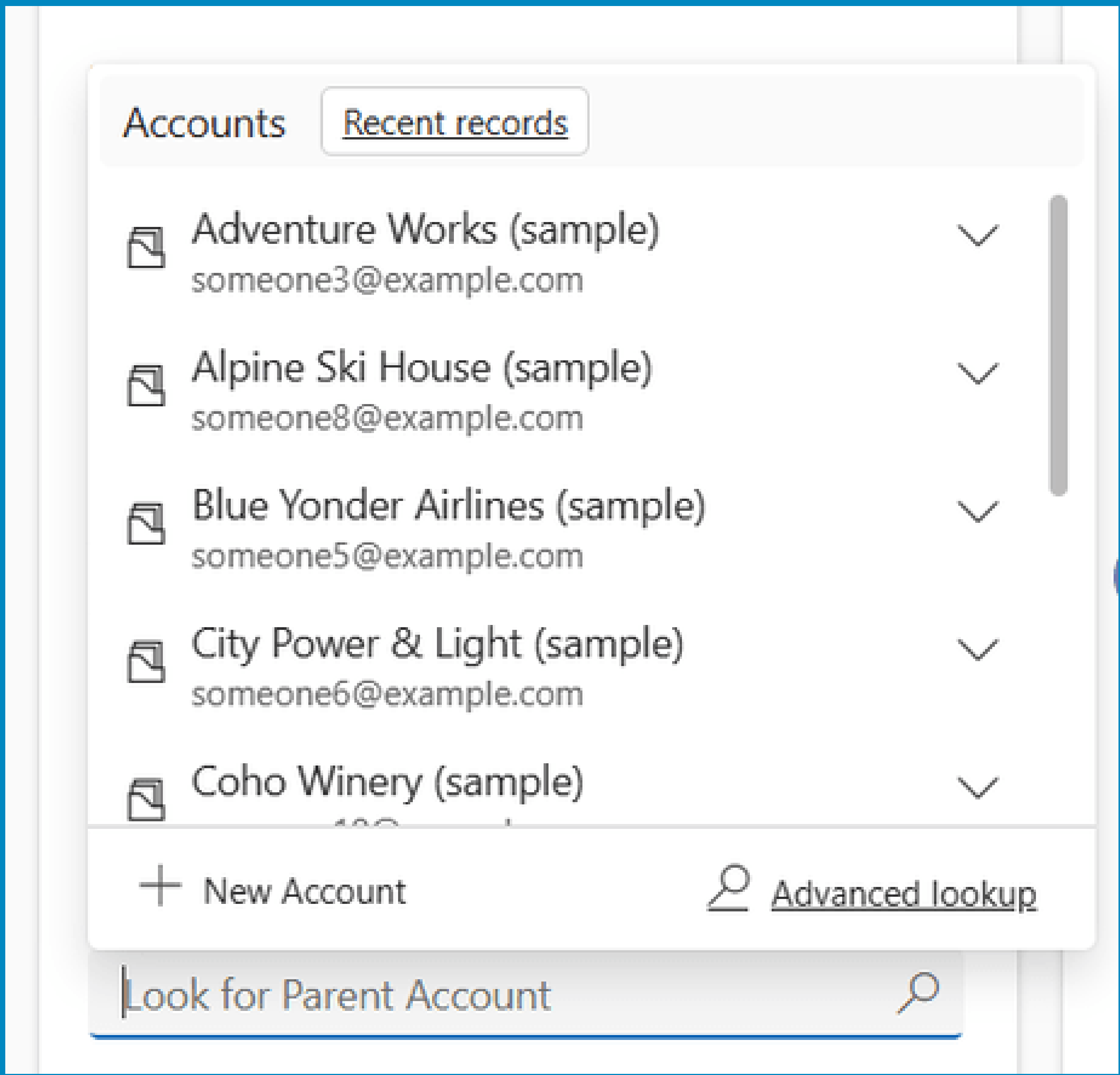
Group and Aggregate Opportunities

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.

Faster selection from record look-ups

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



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.

Want to make Dynamics 365 work better for your organisation?

Let's Talk