

Pour les utilisateurs de Dynamics 365

Dynamics 365 – Wave 2 – 2024

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Résumé de la wave

Dans la Wave 2 de 2024, nous nous concentrons sur les capacités suivantes :

- Des expériences Copilot en langage naturel qui permettent aux vendeurs de résumer des informations provenant de plusieurs entités et de trouver le travail le plus impactant.
- Une nouvelle page d'accueil “plein écran” de Copilot qui fournit des informations et des actions personnalisées en fonction du rôle de l'utilisateur, qu'il soit vendeur ou gestionnaire des ventes.
- Aider les vendeurs à trouver des prospects de qualité grâce à des informations alimentées par l'IA.
- Donner aux gestionnaires des ventes des informations sur leur pipeline de vente.

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- AI et Copilot pour les ventes
- Expérience utilisateur améliorée
- Résumé automatique des documents

AI et Copilot pour les ventes

Copilot expérience pleine écran

- Obtenez des informations en temps réel à travers drentes entités.
- Découvrez toutes les activités de suivi à partir de leurs emails.
- Recevez des notifications et préparez-vous pour leurs réunions à venir.
- Soyez informé des changements clés dans leurs opportunités et prospects.
- Obtenez un résumé de leurs opportunités et prospects.

AI et Copilot pour les ventes

The screenshot shows the Dynamics 365 Sales Hub interface with the Copilot AI assistant. The left navigation pane includes sections for Home, Recent, Pinned, My work (with Copilot selected), Sales accelerator, Dashboards, Activities, Deal manager, Customers (Accounts, Contacts, Contact suggestions), Sales (Leads, Opportunities, Competitors), and Collateral (Quotes, Orders, Sales). The main area features a 'Predictive sco' chart showing deal scores over time, a list of deal cards, and a chat interface.

Deal ID	Product	Customer	Est. revenue
20	Coffee machines for Fabrikam	Contoso	\$29000
50	Café A-100 Automatic for Northwind	Minolta	\$34000
18	Airpot Coffee Makers for Northwind Traders	Fabrikam	\$76000
2	Café Duo Espresso Machines for Fabrikam	Northwind Traders	\$35000
9	Café PG-1 Grinders for A. Datum	Contoso	\$54000

Copilot expérience pleine écran

AI et Copilot pour les ventes

Dynamics 365 | Sales Hub

Search

Copilot Preview

Show emails that need follow up

Here are some recent emails that you might want to follow-up on.

Buying intent 4 Open Question 3 Pending issue 1 Action due 2

- Daisy Philips asked "share latest product catalogue"
Q3 lineup suggestions
Contoso - Received 2 days ago
- Regina Murphy asked "share the pricelist for DV-1000"
DV-1000 Proposal
Minolta - Received 3 days ago
- You asked Kristin Watson "Schedule meeting to discuss next steps and close"
Meeting followup
Alpine Ski House - Received 1 day ago
- You asked Darrell Steward "we are expanding and need a2e service. Share pricelist asap"
Sync with remote team
Fabrikam - Received 3 days ago
- You asked Daisy Philips "share latest product catalogue"
Followup call minutes
Minolta - Received 2 days ago

Show more

Open all in activities

AI-generated content may be incorrect

Ask a sales question or type / to mention a record

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

Copilot expérience pleine écran

AI et Copilot pour les ventes

Dynamics 365 Sales Hub

Search

Copilot *Preview*

Hi Daisy,
Jumpstart your day with these ideas.

Get info Ask questions Stay ahead

Get latest news for accounts What's newly assigned to me? Prepare for my upcoming meeti...

Show my pipeline What's new with my accounts? Show emails that need followup

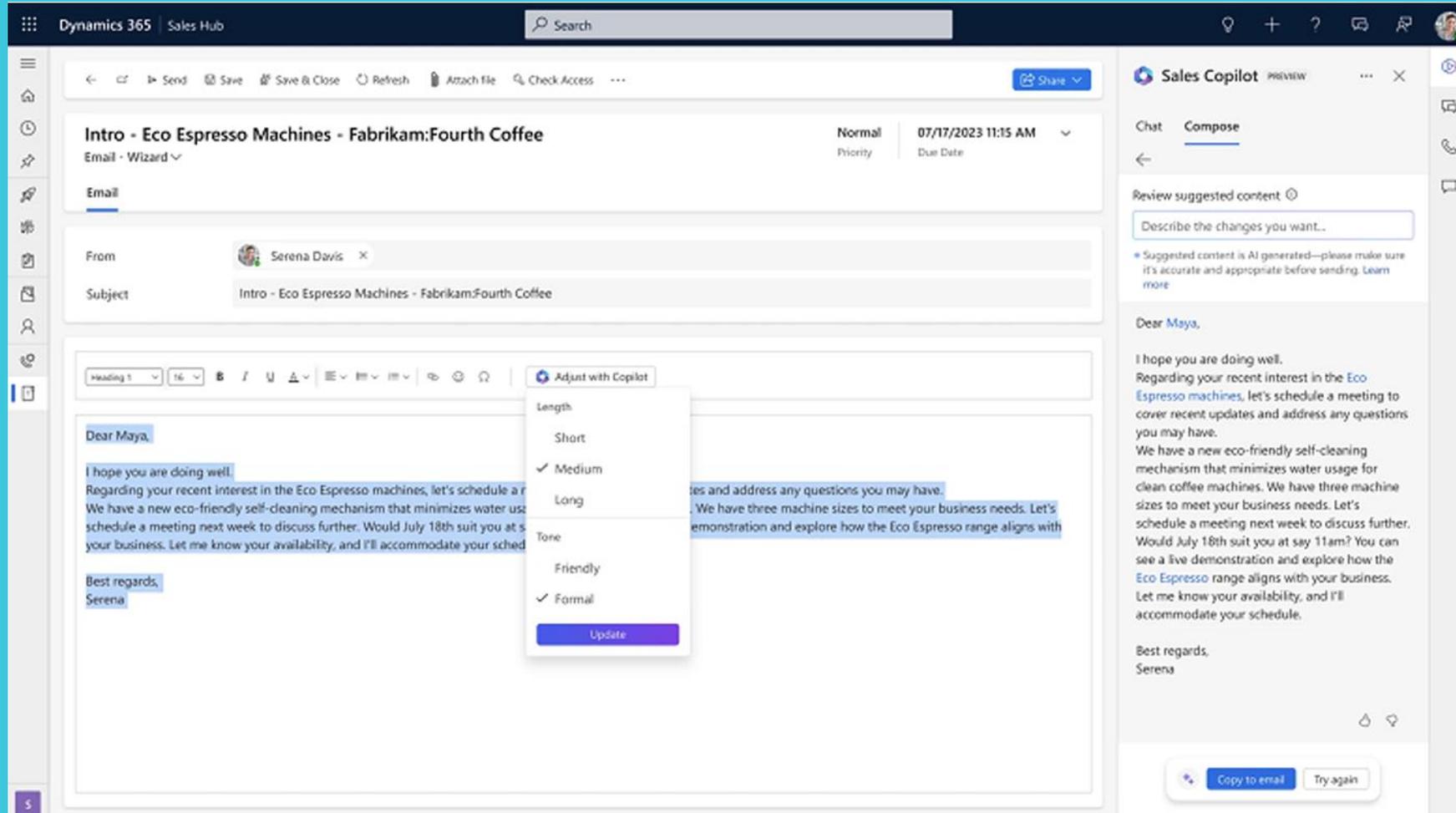
Use the menu for more suggestions.

Ask a sales question or type / to mention a record

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

Copilot expérience pleine écran

AI et Copilot pour les ventes



Copilot Email Assistance : Aide à la rédaction d'emails personnalisés rapidement.

AI et Copilot pour les ventes

The screenshot displays a Microsoft Teams chat interface. The main chat window shows a conversation between Martha Jane and John Wilson regarding a loan proposal. On the right, the Copilot sidebar is open, showing a summary of the chat and an automatically generated sales opportunity.

Chat Content:

[EXTERNAL] New loan options

Martha Jane
To: John Wilson
Thu 7/8/2024 11:09 AM

Hi John,

Thank you for sending this over. After some consideration, David and I have decided to move forward with the proposal! This could be the opportunity we needed to think bigger.

We appreciate all your help and guidance.

Best regards,
Martha Jane
CEO & Co-founder
Tailwind Traders

John Wilson
To: Martha Jane
Thu 7/7/2024 12:09 AM

Dear Martha,

It was great catching up over the call earlier. As discussed, I've sent over the proposal that we discussed on the call together. This is a tailored loan proposal of \$1,500,000 for your ambitious plan to acquire all the stores, rather than just one for \$500,000. I believe this strategic move could significantly amplify your market presence and drive economies of scale, leading to a more robust business model. The proposal outlines the financial structure, terms, and benefits of securing a comprehensive loan with us that supports this expansive approach.

Please find the proposal attached for your review. I've highlighted key points that align with our conversation and your business objectives. I'm confident that this proposal will meet your needs and set the stage for a successful expansion. Looking forward to your thoughts and the next steps. Let's make this happen!

Best regards,

Copilot Sidebar:

Copilot

Sales

Est. revenue seems to have changed. 1

Adding new store - financing
Opportunity

Topic *
Adding new store - financing

Est. Revenue
\$1,500,000
Currently \$500,000

Close date
7/18/2024

Sales stage
Develop

Account
Tailwind Traders

Owner
John Wilson

Update

Copilot pour la Création d'Opportunités : Crée automatiquement des opportunités à partir des résumés de réunions et informations dans le CRM

AI et Copilot pour les ventes

The screenshot displays the Dynamics 365 Sales Hub interface for the account 'A. Datum Corporation'. The account summary includes:

- Annual revenue: \$35,000,000
- Number of employees: 2000
- Owner: Mona Kane

The 'Account information' section lists:

- Account name: A. Datum Corporation
- Phone: 398-535-1992
- Fax: 398-535-1996
- Website: https://...
- Parent account: ---
- Ticker symbol: NWIND

The 'Contact information' section lists:

- First name: Alex
- Last name: Baker
- Job title: Cafeteria manager
- Account name: A. Datum Corpor...
- Email: alex@northwindtraders...

The 'Up next' section shows an 'Introduction mail' with a due date of 1/11/2023 10:10 AM and a 'Mark complete' button.

The 'Timeline' section shows a recent appointment from Jeremy Johnson to discuss a warranty offer, and an opportunity for '10 Cafe BG-1 for Northwind Traders'.

The 'Copilot' chat window on the right provides an AI-generated account summary for A. Datum Corporation, including a stock price of \$13.97 (+1.47%) and recent changes such as a new lead in coffee grinders and an updated close date for a sale offer.

****Résumé AI du Compte**** : Obtenez une vue complète et automatisée des comptes clients.

AI et Copilot pour les ventes

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface. The main view shows the account details for "A. Datum Corporation", including account information, contact information, and a timeline of activities. A Copilot chat window is open on the right, providing an AI-generated summary of the account and listing related opportunities and cases.

Account Information:

- Account name: A. Datum Corporation
- Phone: 398-535-1992
- Fax: 398-535-1996
- Website: https://...
- Parent account: ---
- Ticker symbol: NWIND

Contact Information:

- First name: Alex
- Last name: Baker
- Job title: Cafeteria manager
- Account name: A. Datum Corpor...
- Email: alex@northwindtraders...

Up next:

- Introduction mail (Step 1 - Due by 1/11/2023 10:10 AM)
- Task: Thank for being a valued customer and share details on the interested products/services.
- Buttons: Email, Mark complete

Timeline:

- Created: 5/25/2023 02:30 PM
- Appointment (Active)
- From: Jeremy Johnson
- Subject: Discuss the warranty offered before deal close
- Opportunity: 10 Cafe BG-1 for Northwind Traders

Copilot Chat:

- Here is the account summary for A. Datum Corporation:
- Account summary
- Opportunities (3)
- Leads (2)
- Cases (5)
- Legend: In progress (green), Researching (blue), On hold (red)
- Service request for the coffee mac... (Created on 10/02/23 - In progress)
- Coffee machine not working (Created on 10/05/23 - In progress)
- Vending machine not connecting

****Résumé AI du Compte**** : Obtenez une vue complète et automatisée des comptes clients.

AI et Copilot pour les ventes

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface. The main view is for the account "A. Datum Corporation", showing account information, contact information, and a timeline of activities. A Copilot chat window is open on the right, providing an AI-generated summary of the account and listing opportunities.

Account Information:

- Account name: A. Datum Corporation
- Phone: 398-535-1992
- Fax: 398-535-1996
- Website: https://...
- Parent account: ---
- Ticker symbol: NWIND

Contact Information:

- First name: Alex
- Last name: Baker
- Job title: Cafeteria manager
- Account name: A. Datum Corpor...
- Email: alex@northwindtraders...

Up next:

- Introduction mail (Step 1 - Due by 1/11/2023 10:10 AM)

Timeline:

- Appointment (Active) - Created: 5/25/2023 02:30 PM
- Opportunity: 10 Cafe BG-1 for Northwind Traders

Copilot Chat:

Here is the account summary for A. Datum Corporation:

- Account summary
- Opportunities (3)
- Leads (2)
- Cases (5)

Opportunities Summary:

- 10 coffee machine for airport cou... (Est. close date: 10/25/2023)
- 25 coffee pods for A. Datum Corp... (Est. close date: 11/5/2023)
- 20 vending machine subscription (Est. close date: 11/18/2023)

Leads Summary:

- 10 coffee machine for airport cou... (Est. close date: 10/25/2023)
- 25 coffee pods for A. Datum Corp... (Est. close date: 11/5/2023)
- 20 vending machine subscription (Est. close date: 11/18/2023)

Cases Summary:

- 10 coffee machine for airport cou... (Est. close date: 10/25/2023)
- 25 coffee pods for A. Datum Corp... (Est. close date: 11/5/2023)
- 20 vending machine subscription (Est. close date: 11/18/2023)

AI-generated content:

Ask a sales question or type / to mention a record

Make sure AI-generated content is accurate and appropriate before using. See terms

****Résumé AI du Compte**** : Obtenez une vue complète et automatisée des comptes clients.

Expérience utilisateur améliorée

The screenshot displays the Microsoft Dynamics 365 Copilot for Sales interface. On the left, a chat sidebar lists recent interactions with various contacts. The main window shows a chat with Copilot for Sales, which has generated a meeting suggestion for a business loan. The suggestion includes meeting details, participants, recent meetings, opportunity information, open tasks, notes, and related records.

Chat Sidebar (Recent):

- Copilot for Sales: Get ready for your meeting with Tailwind Tra... (11:42 AM)
- Marie Beaudouin: You: That should definitely appeal to them... (11:40 AM)
- Hilary Reyes: Hahal (11:02 AM)
- Will, Kayo, Eric, +5: Kayo: The review went really well! Can't wa... (11:00 AM)
- Charlotte and Babak: Charlotte: The client was pretty happy with... (10:48 AM)
- Reta Taylor: Ah, ok I understand now. (10:29 AM)
- Joshua VanBuren: Thanks for reviewing! (10:29 AM)
- Daichi Fukuda: You: Thank you!! (10:20 AM)
- Kadji Bell: You: I like the idea, let's pitch it! (10:02 AM)

Copilot for Sales Chat (11:42 AM):

Get ready for your meeting with Tailwind Traders

Meeting for business loan for new store
7/7/24 1:00 PM - 1:30 PM
Suggested opportunity: Adding new store - financing

Meeting participants

- Accepted: Martha Jane (decision maker), David Rodriguez (decision maker) + 1 more
- No response: Daniela Mandra (influencer), Eric Ishida +5 more

Recent meetings

- Yearly check-in. Open recap

Opportunity info Adding new store - financing

- The "Adding new store-financing" opportunity was opened for Tailwind Traders on June 24, 2024. It's currently in the Qualify stage. The expected close date is July 18, 2024.
- Martha emailed showing interest in acquiring one store this year and potentially two in the next four years and have also looked at a proposal from Lamna.

Open tasks

- Send short term and long term loan comparisons - High priority, due on July 2, 2024.

Notes from Dynamics 365

- Long-term customer and really interested in expanding their business.

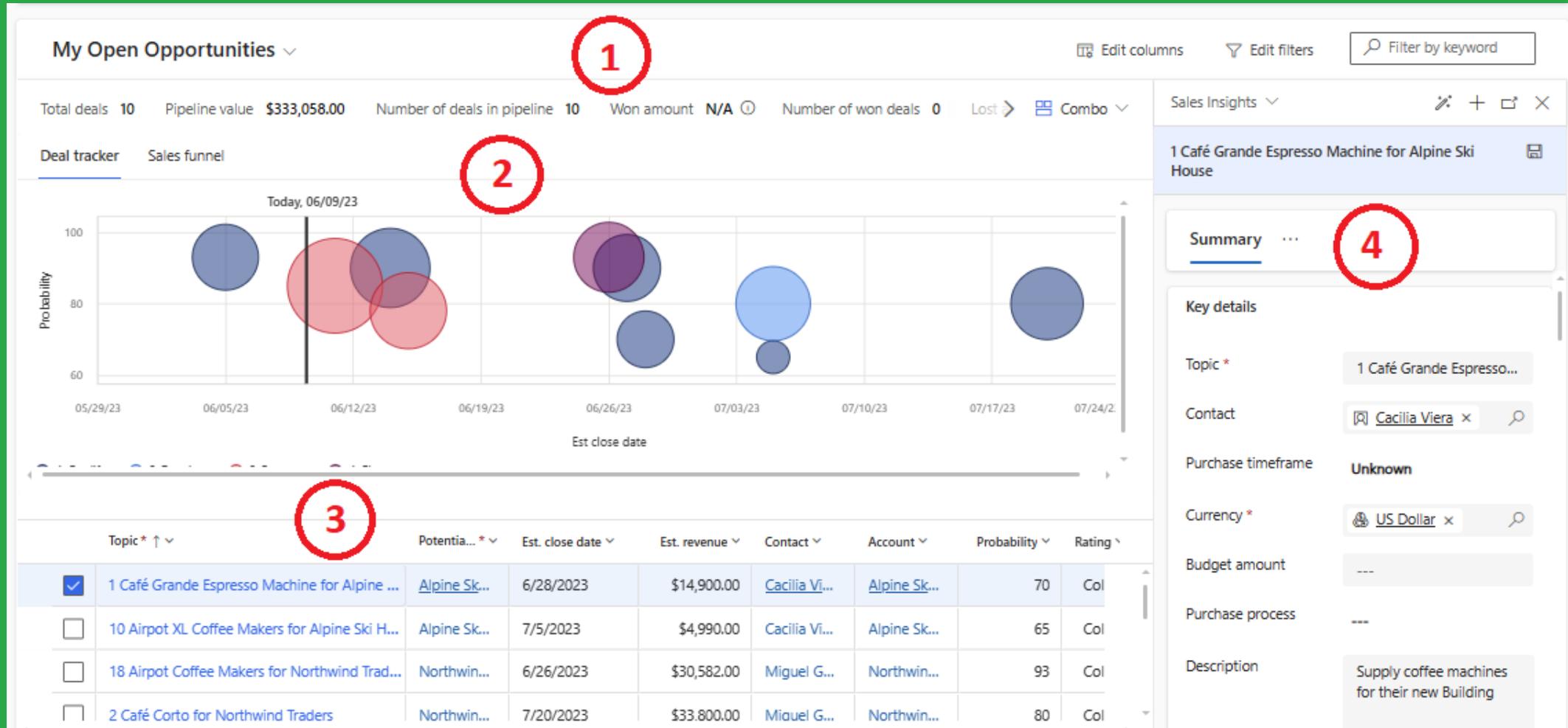
Related records

- 3 other open opportunities. Open list
- 5 open cases. 1 is high priority. Open list

Open meeting

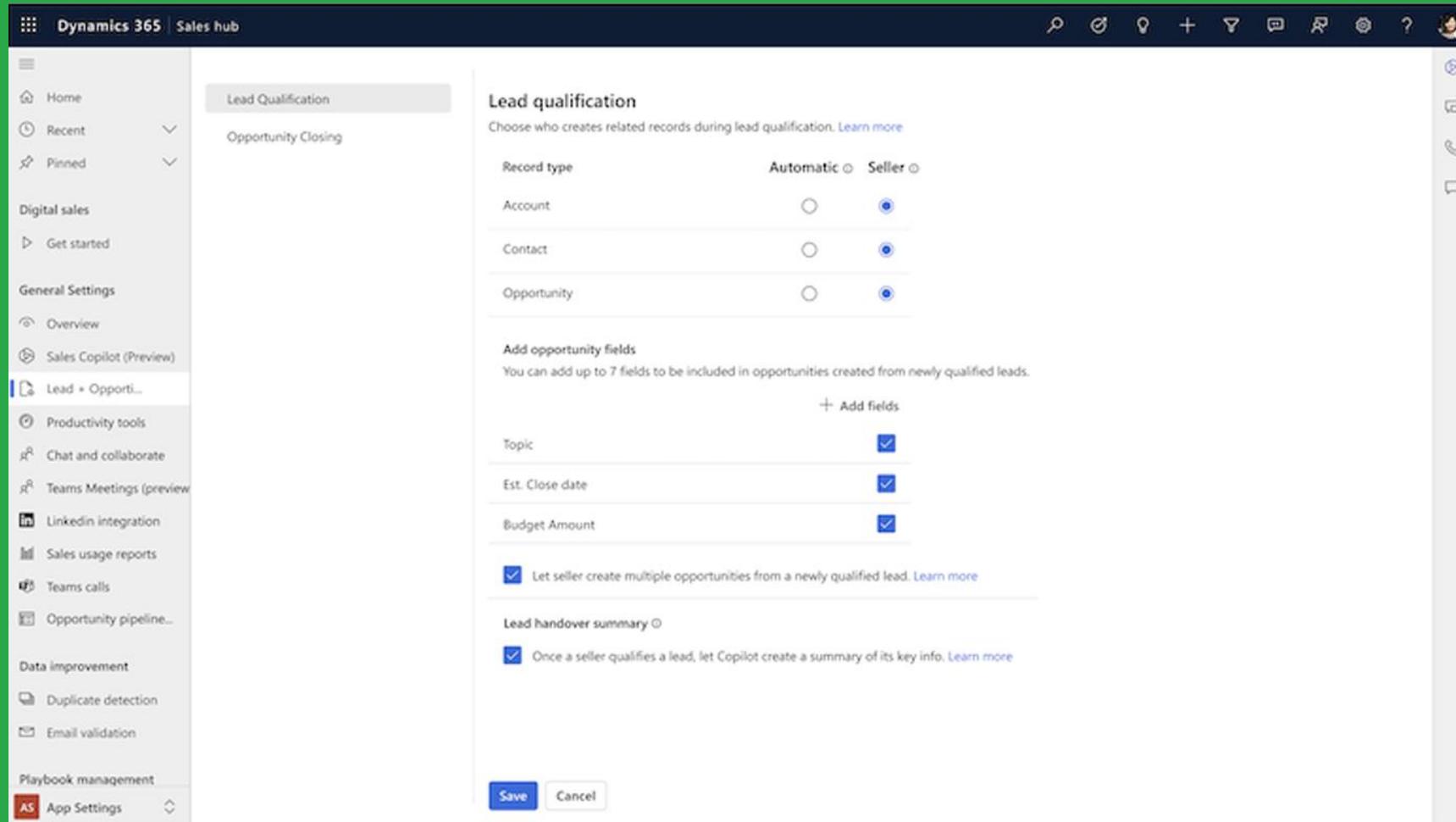
Suggestions d'Actions et planification : Copilot propose des actions basées sur les interactions récentes.

Expérience utilisateur améliorée



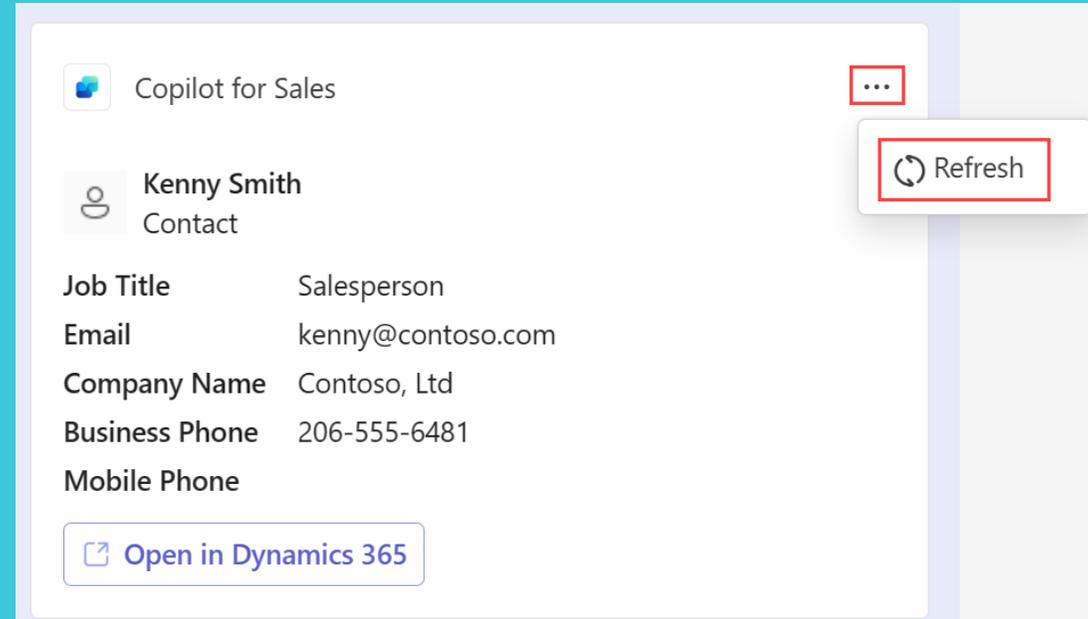
Opportunités Groupées : Organisez et regroupez les opportunités en fonction de critères importants comme le nom du compte ou la date de clôture.

Expérience utilisateur améliorée



Qualification des Prospects : Processus de qualification plus rapide et adapté aux besoins des utilisateurs.

Intégration transparente dans Microsoft 365



Copilot dans Teams : accédez à des informations CRM sans quitter Microsoft Teams.

Intégration transparente dans Microsoft 365

Automatic Coffee Machines
Opportunity

Opportunity details

Topic
Automatic Coffee Machines

Potential Customer
Contoso, Ltd

Status
Open

Est. close date
5/31/2023

Est. revenue
\$70,000.00

Rating
Warm

- Edit record
- Copy link
- Open in Dynamics 365

Kenny Smith
Smith • kenny@contoso.com

Saved contact

Private notes

Add notes about this contact that only you can see.

Contact details

Updated 13 hours ago

Job Title
Salesperson

Email
kenny@contoso.com

Company Name
Contoso, Ltd

Contacts

- Kenny Smith
kenny@contoso.com • Smith
- Monica T
monica@contoso.com • T
- Logan Edwards
logan@contoso.com • Edwards
- Natasha Jones
natasha@contoso.com • Jones

Accounts

- Contoso, Ltd
206-...

Opportunities

- Automatic Coffee Machines
5/31/2023 • \$70,000.00
- Home PC
6/9/2023 • \$50,000.00

- Copy link
- Open in Dynamics 365

Copilot pour Outlook : Générez des résumés de réunions et créez des opportunités directement depuis Outlook.

Résumé automatique des documents

- Résume automatiquement les documents longs comme les propositions et les accords.
- Cadre BANT : Les résumés sont organisés autour des critères Budget, Autorité, Besoin et Délai (BANT).
- Exemple: Les utilisateurs peuvent recevoir des résumés de documents pour mieux comprendre les besoins des clients.

Gestisoft