

For Dynamics 365 Users

# Dynamics 365 – Wave 2 – 2024

Marc-Andre Jones

# Wave Summary

In 2024 Wave 2, we focus on the following capabilities:

- Natural language Copilot experiences that allow sellers to summarize information across multiple entities and find the most impactful work.
- A new full-screen Copilot Home page that provides curated insights and actions specific to the role of the user, whether a seller or sales manager.
- Helping sellers find high-quality leads using AI-powered insights.
- Empowering sales managers with insights about their sales pipeline.

# Table of Contents

- AI and Copilot for Sales
- Enhanced User Experiences
- Automatic Document Summarization

# AI and Copilot for Sales

## **Copilot full-screen experience**

- Get real-time insights across different entities.
- Find out about any follow-up activities from their emails.
- Receive notifications and prepare for their upcoming meetings.
- Be aware of key changes in their opportunities and leads.
- Get a summary of their opportunities and leads.

# AI and Copilot for Sales

The screenshot displays the Dynamics 365 Sales Hub interface with the Copilot feature active. The left sidebar shows navigation options like Home, Recent, Pinned, My work, Customers, Sales, and Collateral. The main area features a 'Copilot Preview' header and a predictive score chart. The chart plots 'Predictive sco' (0 to 50) against 'Est close date' (3/01/23 to 10/01/23). Below the chart is a legend for deal grades: Grade A (80-100), Grade B (50-80), Grade C (30-50), and Closed. A list of deals follows, including '20 Coffee machines for Fabrikam' (Contoso, Est. rev \$28000), '50 Café A-100 Automatic for Northwind' (Minolta, Est. revenue \$34000), '18 Airpot Coffee Makers for Northwind Traders' (Fabrikam, Est. revenue \$76000), '2 Café Duo Espresso Machines for Fabrikam' (Northwind Traders, Est. revenue \$35000), and '9 Café PG-1 Grinders for A. Datum' (Contoso, Est. revenue \$54000). A 'Show more' dropdown and an 'Open all in pipeline view' button are also visible. At the bottom, there is a text input field for asking sales questions and a disclaimer: 'Make sure AI-generated content is accurate and appropriate before using. See terms'.

Dynamics 365 Sales Hub

Search

Copilot Preview

Predictive sco

Est close date

Grade A (80-100) Grade B (50-80) Grade C (30-50) Closed

20 Coffee machines for Fabrikam  
Contoso - Est. rev \$28000

50 Café A-100 Automatic for Northwind  
Minolta - Est. revenue \$34000

18 Airpot Coffee Makers for Northwind Traders  
Fabrikam - Est. revenue \$76000

2 Café Duo Espresso Machines for Fabrikam  
Northwind Traders - Est. revenue \$35000

9 Café PG-1 Grinders for A. Datum  
Contoso - Est. revenue \$54000

Show more

Open all in pipeline view

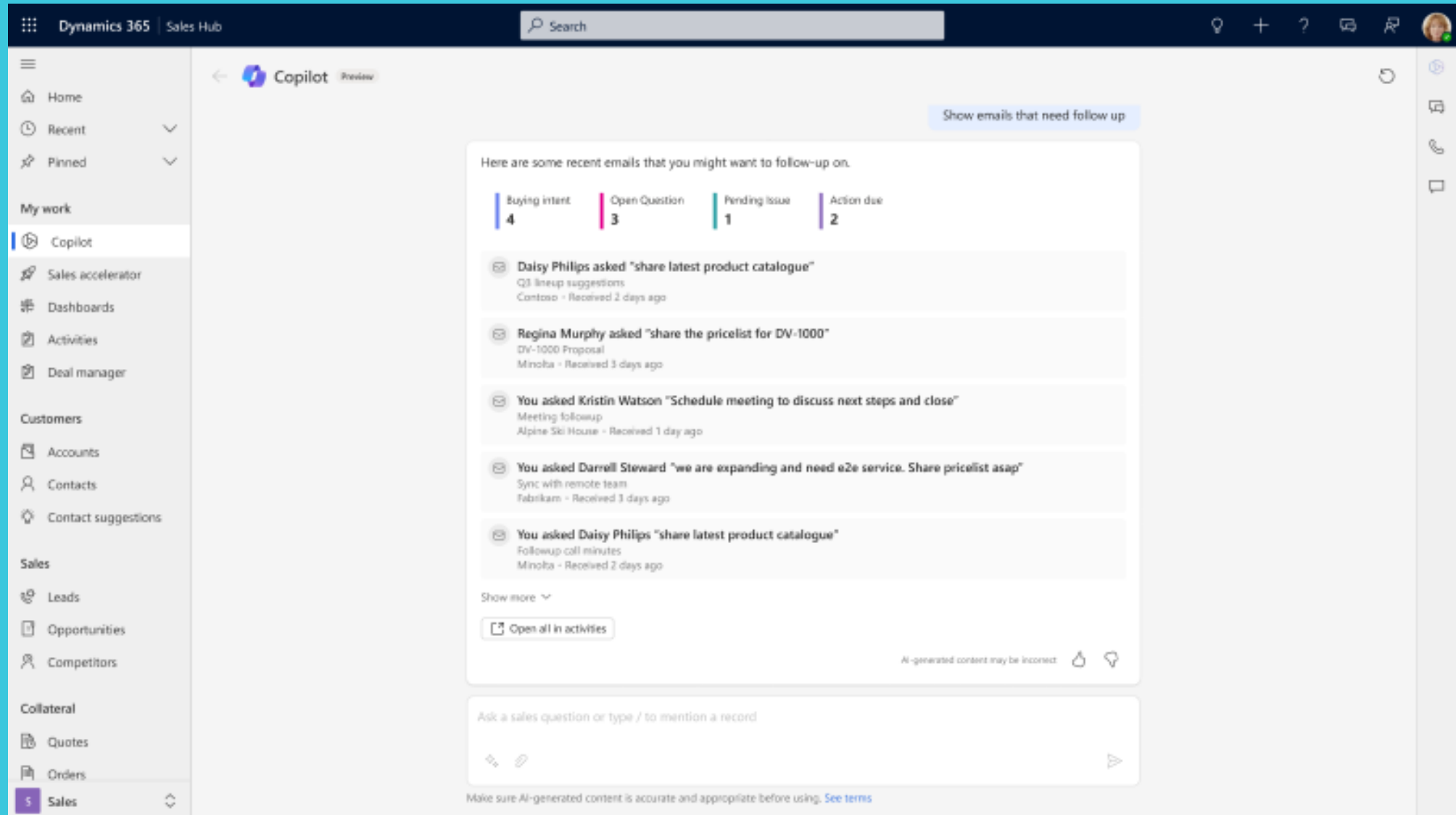
AI-generated content may be incorrect

Ask a sales question or type / to mention a record

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

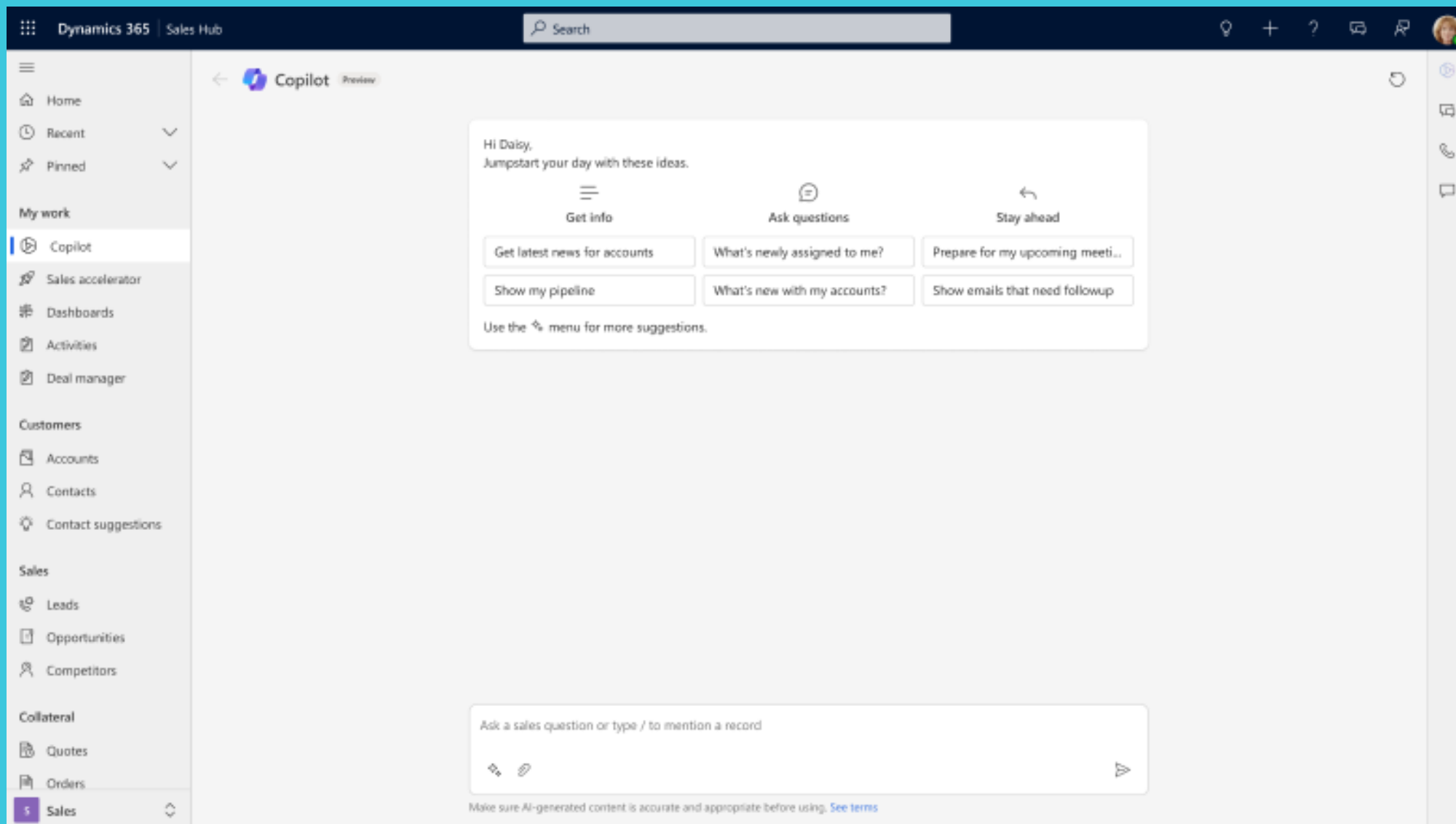
Copilot full-screen experience

# AI and Copilot for Sales



## Copilot full-screen experience

# AI and Copilot for Sales



## Copilot full-screen experience

# AI and Copilot for Sales

The screenshot displays the Dynamics 365 Sales Hub interface. The main window shows an email draft titled "Intro - Eco Espresso Machines - Fabrikam:Fourth Coffee" from Serena Davis. The "Adjust with Copilot" menu is open, showing options for Length (Short, Medium, Long) and Tone (Friendly, Formal). The right-hand pane shows the AI-generated draft content, which is a personalized email for Maya. The draft includes a greeting, a reference to the recipient's interest in Eco Espresso machines, a mention of a new eco-friendly self-cleaning mechanism, and a request to schedule a meeting next week to discuss further. The draft also includes a closing and the sender's name, Serena.

**Adjust with Copilot**

- Length
  - Short
  - Medium
  - Long
- Tone
  - Friendly
  - Formal

**Review suggested content**

Describe the changes you want...

\* Suggested content is AI generated—please make sure it's accurate and appropriate before sending. [Learn more](#)

Dear Maya,

I hope you are doing well. Regarding your recent interest in the Eco Espresso machines, let's schedule a meeting to cover recent updates and address any questions you may have.

We have a new eco-friendly self-cleaning mechanism that minimizes water usage for clean coffee machines. We have three machine sizes to meet your business needs. Let's schedule a meeting next week to discuss further. Would July 18th suit you at say 11am? You can see a live demonstration and explore how the Eco Espresso range aligns with your business. Let me know your availability, and I'll accommodate your schedule.

Best regards,  
Serena

[Copy to email](#) [Try again](#)

Copilot Email Assistance: Helps draft personalized emails quickly.



# AI and Copilot for Sales

The screenshot displays a Microsoft Dynamics 365 interface. On the left is a list of recent emails. The main pane shows an email thread titled "[EXTERNAL] New loan options" between Martha Jane and John Wilson. Martha Jane's email (dated Thu 7/8/2024 11:09 AM) expresses interest in a proposal. John Wilson's reply (dated Thu 7/7/2024 12:09 AM) provides details of a \$1,500,000 loan proposal. On the right, the Copilot sidebar is open, showing a generated opportunity card titled "Adding new store - financing". The card includes fields for Topic, Est. Revenue (set to \$1,500,000), Close date (7/18/2024), Sales stage (Develop), Account (Tailwind Traders), and Owner (John Wilson). A mouse cursor is pointing at the revenue field, and an "Update" button is visible at the bottom of the card.

Copilot for Opportunity Creation: Automatically creates opportunities from meeting summaries and CRM data.

# AI and Copilot for Sales

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface. The main content area shows the account summary for A. Datum Corporation, which includes financial data such as annual revenue of \$35,000,000 and 2,000 employees. The interface is divided into several sections: Account information, Contact information, Up next tasks, and a Timeline of recent activities. A Copilot chat window on the right provides a comprehensive, AI-generated account summary, including a line chart showing stock price changes and a list of recent changes and key information.

**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. Actions: Email, Mark complete.

**Timeline:**

- Created: 5/25/2023 02:30 PM. Appointment (Active). From: Jeremy Johnson. Discuss the warranty offered before deal close. Opportunity: 10 Cafe BG-1 for Northwind Traders.
- Created: 5/23/2023 11:15 AM. Email (Status). From: (Persona name). Subject: [truncated]

**Copilot Chat:**

Here is the account summary for A. Datum Corporation:

**Account summary:** ADC, A. Datum Corp..., \$13.97 (+1.41%)

**Recent changes:**

- A new lead interested in coffee grinders was added to the account 3 days ago.
- Est close date was updated to January 15th for 5 Cafe BG Pro.

**Key info:**

- A. Datum Corporation has been a customer since 2020 and have spent over \$80,000 with us in total.
- A. Datum Corporation operates in the financial industry sector and provides a wide selection of products in its stores and online.
- Their most recent purchase was for 10,000 widgets for \$12,000 5 months ago.
- Year end sale campaign was run and Christmas sale offer email was sent on October 25th.

Ask a sales question or type / to mention a record.

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

AI-Generated Account Summary: Get a comprehensive, automated view of customer accounts.

# AI and Copilot for Sales

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface. The main content area shows the account summary 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 account summary and a donut chart showing 5 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)
- 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
- Discuss the warranty offered before deal close
- View more
- Opportunity: 10 Cafe BG-1 for Northwind Traders
- Created: 5/23/2023 11:15 AM
- Email (Status)
- From: (Persona name)

**Copilot Chat:**

- Here is the account summary for A. Datum Corporation:
- Account summary
- Opportunities (3)
- Leads (2)
- Cases (5)
- Donut chart: 5 cases
- Legend: In progress (green), Researching (blue), On hold (red)
- Waiting for details (grey)
- 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
- Ask a sales question or type / to mention a record
- Make sure AI-generated content is accurate and appropriate before using. See terms

AI-Generated Account Summary: Get a comprehensive, automated view of customer accounts.

# AI and Copilot for Sales

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface. The main content area shows the account details for "A.Datum Corporation". The account information includes:

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

The contact information for Alex Baker, Cafeteria manager, is also visible. The account summary includes an annual revenue of \$35,000,000 and 2000 employees. The "Up next" section shows an "Introduction mail" due by 1/11/2023 10:10 AM. The "Timeline" section shows a recent appointment with Jeremy Johnson to discuss a warranty for a coffee machine.

The Copilot chat window on the right provides an AI-generated account summary for A.Datum Corporation. It includes a donut chart showing the account summary and a list of opportunities:

- 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)

The Copilot chat also shows leads and cases, and includes a prompt to ask a sales question or type / to mention a record.

AI-Generated Account Summary: Get a comprehensive, automated view of customer accounts.

# Enhanced User Experiences

The screenshot displays the Dynamics 365 Sales Copilot interface. On the left, a chat sidebar lists recent interactions with various users, including Copilot for Sales. The main chat window shows a message from Copilot for Sales at 11:42 AM, which is a meeting suggestion card. The card contains the following information:

- 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 Mander (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](#)

At the bottom of the card, there is an **Open meeting** button.

Action Suggestions and Planning: Copilot suggests actions based on recent interactions.

# Enhanced User Experiences

**1** My Open Opportunities

Total deals 10 Pipeline value \$333,058.00 Number of deals in pipeline 10 Won amount N/A Number of won deals 0 Lost > Combo

Deal tracker Sales funnel

Today, 06/09/23

Probability

Est close date

**2**

**3**

| Topic *   | Potentia... * | Est. close date | Est. revenue | Contact       | Account      | Probability | Rating |
|---|---------------|-----------------|--------------|---------------|--------------|-------------|--------|
| <input checked="" type="checkbox"/> 1 Café Grande Espresso Machine for Alpine ... | Alpine Sk...  | 6/28/2023       | \$14,900.00  | Cacilia Vi... | Alpine Sk... | 70          | Col    |
| <input type="checkbox"/> 10 Airpot XL Coffee Makers for Alpine Ski H...           | Alpine Sk...  | 7/5/2023        | \$4,990.00   | Cacilia Vi... | Alpine Sk... | 65          | Col    |
| <input type="checkbox"/> 18 Airpot Coffee Makers for Northwind Trad...            | Northwin...   | 6/26/2023       | \$30,582.00  | Miguel G...   | Northwin...  | 93          | Col    |
| <input type="checkbox"/> 2 Café Corto for Northwind Traders                       | Northwin...   | 7/20/2023       | \$33,800.00  | Miguel G...   | Northwin...  | 80          | Col    |

Sales Insights

1 Café Grande Espresso Machine for Alpine Ski House

**4** Summary

Key details

Topic \* 1 Café Grande Espresso...

Contact Cacilia Viera

Purchase timeframe Unknown

Currency \* US Dollar

Budget amount ---

Purchase process ---

Description Supply coffee machines for their new Building

Grouped Opportunities: Organize and group opportunities based on key criteria like account name or close date.

# Enhanced User Experiences

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 (App Settings). The main content area is titled 'Lead qualification' and includes a sub-section 'Opportunity Closing'. The 'Record type' section has radio buttons for 'Automatic' and 'Seller', with 'Seller' selected for Account, Contact, and Opportunity. The 'Add opportunity fields' section allows adding up to 7 fields, with 'Topic', 'Est. Close date', and 'Budget Amount' checked. There are also checkboxes for 'Let seller create multiple opportunities from a newly qualified lead' and 'Once a seller qualifies a lead, let Copilot create a summary of its key info'. 'Save' and 'Cancel' buttons are at the bottom.

**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](#)

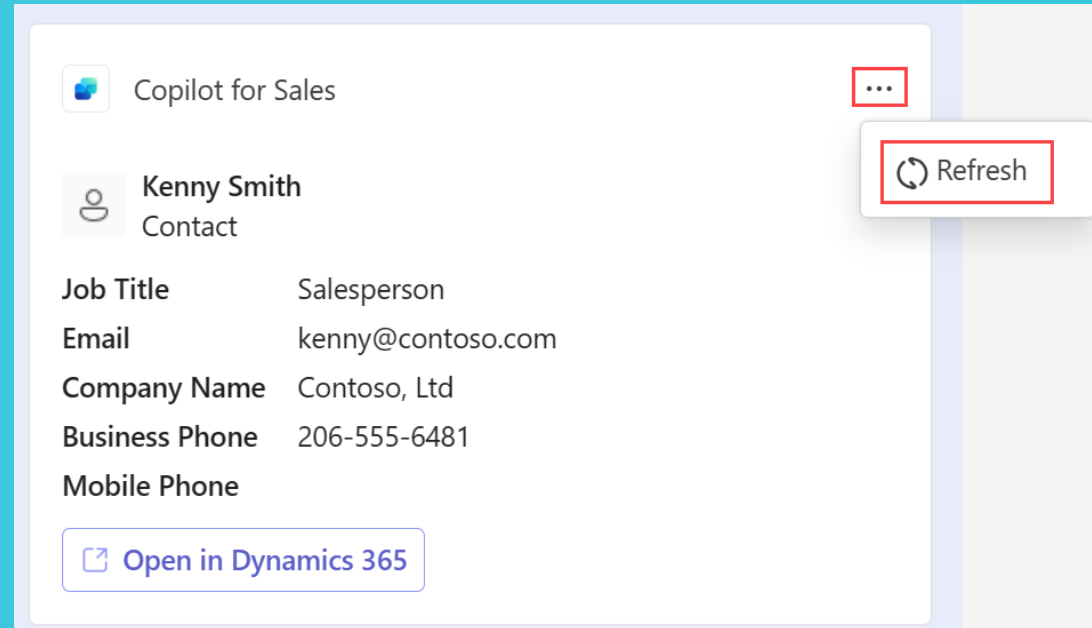
**Lead handover summary**

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

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

Lead Qualification: Faster qualification process tailored to user needs.

# Seamless Integration in Microsoft 365



Copilot in Teams: Access CRM insights without leaving Microsoft Teams.



# Seamless Integration in Microsoft 365

This screenshot shows an Outlook interface for an opportunity record titled "Automatic Coffee Machines". A context menu is open over the record, with the "Edit record" option highlighted by a red box. The record details include:

- Topic: Automatic Coffee Machines
- Potential Customer: Contoso, Ltd
- Status: Open
- Est. close date: 5/31/2023
- Est. revenue: \$70,000.00
- Rating: Warm

This screenshot shows an Outlook contact card for "Kenny Smith". A "Private notes" section is highlighted with a red box, containing the text: "Add notes about this contact that only you can see." Below the notes, the contact details are listed:

- Job Title: Salesperson
- Email: kenny@contoso.com
- Company Name: Contoso, Ltd

This screenshot shows the Outlook sidebar with a list of contacts and accounts. The "Automatic Coffee Machines" opportunity is highlighted, and a context menu is open over it, with the "Open in Dynamics 365" option highlighted by a red box. The sidebar content includes:

- Contacts: Kenny Smith, Monica T, Logan Edwards, Natasha Jones
- Accounts: Contoso, Ltd
- Opportunities: Automatic Coffee Machines, Home PC

Copilot for Outlook: Generate meeting summaries and create opportunities directly from Outlook.

# Automatic Document Summarization

- Automatically summarizes long documents such as proposals and agreements.
- BANT Framework: Summaries are organized around Budget, Authority, Need, and Timeline (BANT).
- Example: Users can receive document summaries to better understand client needs.

Gestisoft