



**Dynamics 365 &
Power Platform**
UK User Groups

The Shifting Landscape of the Dynamics 365 UI/UX Part 2

Presented by | Sharon Smith
12-Jan-25



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TODAY'S AGENDA

1. Who am I?
2. Where were we in Part 1?
3. Where are we in Part 2?
4. The D365 Customer Service FastTrack Solution Architects' 'revolutionary' optimization tools
5. Transforming Seller Effectiveness with D365 Sales Copilot
6. Copilots + Agents + Asynch: Agents, Agents, Agents!
7. Dynamics 365 Contact Center
8. Merging Sales & Customer Insights certs - then what?
9. Questions

SPEAKER



Sharon Smith

— Dynamics 365 Solution Architect —
ANS Group



www.linkedin.com/in/heuristicdev

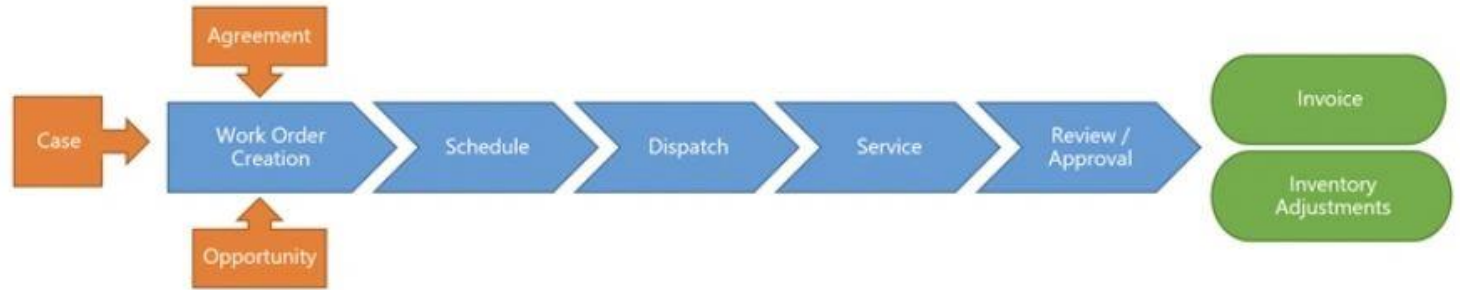


<https://heuristicdev.co.uk>

Where were we in Part 1?

BPFs v's DBCs

Replacement of Business Process Flow with
Dynamic Booking Card



Dynamic Booking Card: Scheduled

Anybody from Microsoft out there?

Details

Status

Scheduled

Priority

High

Service account *

Contoso Ltd. X

Work order type *

Diagnose and repair X

Incident type

HVAC full system diagnosis and repair X

Trade

Electrical X

Agreement

3 year HVAC maintenance X

Summary

Assess the ductwork, air handler, coils, heat pump, and thermostats. Run all firmware upgrades. Replace filters over 6 months old.

Conduct repairs as needed and under NTE. Quote approval required above.

Account instructions

Maintenance entrance is located on alley between NE 80th St. and Cleveland St. Call via keypad to enter.

Copilot recap PREVIEW ⓘ

Booking

Kadji Bell

HVAC Technician

Tue Aug 30, 2022

10:00 AM – 12:00 PM

+1 310 555 0813

2h duration

kadji.bell@adatum.com

20min travel time

Message

Scheduled

...

Rebook

More bookings

JW

Joanna Wozniak

HVAC Technician

Thu Sep 1, 2022

3:00 PM – 3:30 PM

Comitted

30min duration

25min travel time

Kadji Bell

HVAC Technician

Fri Aug 16, 2022

9:00 AM – 11:00 PM

Completed

2h duration

Show 2 more



Plan and perform assigned tasks with preview of sequence steps

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface. The top navigation bar shows the 'Dynamics 365 Sales Hub' and a search bar. The main content area is divided into several sections:

- Contact Information:** A card for 'Kate Larsson' with fields for First Name, Last Name, Email, and Business Phone.
- Up next:** A section titled 'Request for another meeting' with a due date of 11:21 AM. It includes a description: 'Recap details of first contact, send catalog and personal contact info, suggest meeting in the future.' and buttons for 'Email' and 'Mark complete'.
- Timeline:** A section showing a list of activities, including 'Email from Grace Owens' and 'Email to Grace Owens'.
- Sequence details:** A panel on the right showing the sequence workflow. It includes a progress bar (Step 1 of 4) and a flowchart with steps: 'Send an email - current step', 'Request for another meeting', 'Advanced email condition', 'Make a phone call', 'Call to request for another...', 'Advanced phone condition', and 'Set next time'.

A 'Sequence preview' dialog box is open in the bottom left corner, showing a preview of the sequence steps and a button to 'View future steps and traverse branches'.



Customer Insights – Journeys: Project Board

Transformational?

The screenshot displays the Dynamics 365 Customer Insights Journeys Project Board. The interface includes a left-hand navigation pane with categories such as Recent, Pinned, Get started, Projects, Engagement, Audience, Lead management, and Channels. The main content area is titled 'Build your project with Copilot' and features a text input field for describing a project. A sample prompt is provided: 'create a campaign to generate 100 new retail leads, educate them on the market potential of non-alcoholic ales in their region, and convince them to allocate shelf space to the new beverage line'. Below this, there are three suggested prompts: 'Create a lead generation campaign for our anniversary pilsner targeting owners in Europe', 'Plan a hybrid campaign with Seattle beer festivals to test our AI-powered beverage kiosks', and 'Build a Copilot referral campaign for Maryland retail buyers'. A 'Regenerate prompts' button is also visible. The 'Recent projects' section shows a project titled 'Alcohol-free TAM lead generation campaign' with a description: 'The objective of this campaign is to generate leads, drive sales and promote brand awareness for our new non-alcoholic ales'. The interface is clean and modern, with a dark blue header and a light blue background.

Customer Insights – Journeys: Project Board

Target Audiences, Segments, Journeys, Content, Assets, Images, Branding...

The screenshot displays the Dynamics 365 Customer Insights Journeys interface. The left sidebar contains navigation options: Recent, Pinned, Get started, Projects (selected), Engagement, Journeys, Analytics, Triggers, Audience, Segments, Contacts, Consent center, Lead management, Leads, Scoring models, Qualification, Channels, Emails, Forms, Push notifications, Text messages, More channels, Assets, Library, and Real-time journeys.

The main content area is titled "VanArsdel: Lead generation campaign" under the "Brief" section. The objective is: "The objective of this campaign is to generate 100 new retail leads, educate them on the market potential of non-alcoholic ales in their region, and convince them to allocate shelf space to the new beverage line."

The "Audiences (2)" section shows two existing segments: "BUYERS FOR SUPERMARKET CHAINS" (25k) and "BUYERS FOR RESTAURANT GROUPS" (1.6k). Below these are "More suggestions to choose" including "DISTRIBUTORS - ENTERTAINMENT" (1.1k), "DISTRIBUTORS - RESTAURANTS" (2.3k), and "DISTRIBUTORS - OFFICE AND CORP" (1.1k).

The "Assets" section shows a gallery of assets generated in accordance with brand guidelines, including images of a beer glass and a person.

The "Project execution" section shows "Journeys (1)" and "Emails (6)". It includes a "Promotion" journey and "More suggestions to choose" such as "Welcome series" and "Event registration".

A toast message at the bottom states: "Here's your project board for VanArsdel: Lead generation campaign! Some parts may still be loading but feel free to take a look around!" with a "Describe what you want to do next" button.

2024 Wave 1 Release: Lead Qualification

An “Agile” (™ Microsoft) customizable Lead Qualification process?

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, Playbook management, and App Settings. The main content area is titled 'Lead Qualification' and includes a sub-section 'Opportunity Closing'. The 'Lead qualification' section allows users to choose who creates related records during lead qualification, with options for 'Automatic' and 'Seller'. Below this, there is a section for 'Add opportunity fields' where users can select up to 7 fields to be included in opportunities created from newly qualified leads. The fields listed are Topic, Est. Close date, and Budget Amount, all of which are 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', both of which are checked. The page ends with 'Save' and 'Cancel' buttons.

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](#)


#TeamANS #BizAppsSquad

Thank you Phil !



Windows Workflow Foundation and the Power Platform -
(philcole.org)

Windows Workflow Foundation and the Power Platform

 Phil Cole  2021-06-24  Solutions



About Phil Cole

Phil Cole is a Dynamics 365 and Power Platform consultant with an interest in tech, spaceflight and electric cars.

Microsoft Project Sophia (in preview)

adoption.microsoft.com/files/project-sophia/Microsoft-Project-Sophia-demo.mp4

The screenshot displays the Microsoft Project Sophia interface, which is a workspace for analyzing data. At the top, there's a header with a home icon, a '+ New workspace' button, and a 'Data' tab. Below the header, a prompt asks to 'Help me optimize the sales performance with a focus on sales representat...'. The main workspace is divided into several panels:

- Overview:** A panel on the left providing a 'Quick Overview' of the 'Sales Performance' Excel file, mentioning 50 accounts across various industries. It also includes an 'Analysis' section with bullet points highlighting top accounts in the Education, Energy, Finance, and Healthcare industries.
- Relationship between Annual Revenue and Pipeline Value for each Sales ...:** A scatter plot showing the relationship between Annual Revenue (x-axis, 0 to 40M) and Pipeline Value (y-axis, 0 to 300M). Data points are represented by various colored shapes.
- Annual Revenue of Each Account Grouped by Sales Rep:** A horizontal bar chart showing the annual revenue for different sales representatives. The chart lists several sales reps and their corresponding revenue values.
- Suggested next steps:** A panel on the right offering four suggestions for further analysis, such as 'Generate email draft using the conte...', 'Analyze the correlation between Ann...', 'Identify key challenges and objective...', and 'Evaluate the performance of each sal...'.
- AI cursor:** A chat window at the bottom center with the prompt 'What are some of the reasons Lena is outperforming?'. It has a 'Generate' button and a dropdown menu with options like 'Generate as new blueprint' and 'Generate in place of existing block'.

At the bottom right, a small text note states: 'This feature is in preview. See terms'.

Where are we in Part 2?

The D365 Customer Service FastTrack Solution Architects' 'revolutionary' optimization tools

Step-by-step instructions to help minimize human error and provide consistent service



D365PPUG UK

Agent Scripts Steps

Build out the steps for your Agent Script

The screenshot shows the Dynamics 365 Customer Service admin center interface. The left sidebar contains navigation options: Get started (Home, Search admin sett..., Guided channel s...), Customer support (Overview, User management, Bots, Channels, Queues, Routing, Workstreams, Case settings, Customer settings), and Agent experience (Overview, Workspaces, Productivity). The main content area displays the 'Case trial agent script' configuration page. The 'General' tab is active, showing fields for Name (Case trial agent script), Unique Name (msdyn_caseTrialAgentScript), Owner (Sharon Smith (Offline)), Language (English (United States)), and Description. The 'Agent script steps' table lists three steps: Greet Customer (Text, Order 1), Update case (Macro, Order 2), and Resolve case (Macro, Order 3). The top navigation bar includes 'New look' and various icons.

Agent scripts

Case trial agent script

▼ Greet Customer

Hi Maria Campbell (sample), Thank you for contacting Contoso Coffee Support. We will work together to find a solution that works for you.

> Update case

> Resolve case

The screenshot shows the Dynamics 365 Customer Service admin center interface. The left sidebar contains navigation options: Get started (Home, Search admin sett..., Guided channel s...), Customer support (Overview, User management, Bots, Channels, Queues, Routing, Workstreams, Case settings, Customer settings), and Agent experience (Overview, Workspaces, Productivity). The main content area displays the 'Greet Customer' configuration page. The 'General' tab is active, showing fields for Name (Greet Customer), Unique Name (msdyn_caseGreetCustomer), Owner (Sharon Smith (Offline)), Agent script (Case trial agent script), Order (1), Action type (Text), and Text instructions (Hi {anchor._customerid_value@OData.Community.Display.V1.FormattedValue}, Thank you for contacting Contoso Coffee Support. We will work together to find a solution that works for you.). The top navigation bar includes 'New look' and various icons.

Associate your Agent Script with a session template

Dynamics 365Customer Service admin center

Get started

Home

Search admin sett...

Guided channel s...

Customer support

Overview

User management

Bots

Channels

Queues

Routing

Workstreams

Case settings

Customer settings

This is a system session template and can't be edited.

←

Save

Save & Close

New

Deactivate

Delete

Refresh

Check Access

Assign

Flow

Word Templates

Case Session Trial Template - Saved

Session Template

GeneralAgent scriptsRelated

Agent scripts

☐Name ↑

☐Case trial agent script

Rows: 1

Case trial agent script

> Greet Customer

Hi Maria Campbell (sample), Thank you for contacting Contoso Coffee Support. We will work together to find a solution that works for you.

> Update case

> Resolve case

Add Existing Agent scr...

Refresh

Created On

6/1/2024 5:28 PM

Case trial agent script

> Greet Customer

Hi Maria Campbell (sample), Thank you for contacting Contoso Coffee Support. We will work together to find a solution that works for you.

> Update case

> Resolve case

Abc

Add Existing Agent scr...

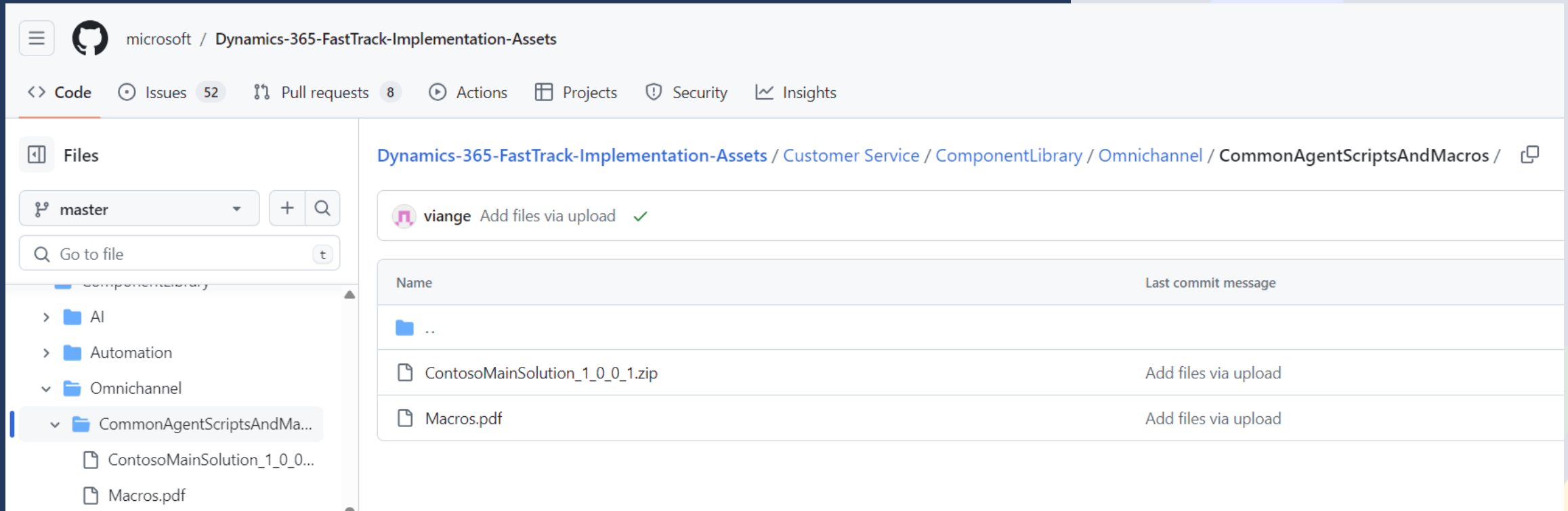
Refresh

Created On

6/1/2024 5:28 PM

Customer Service Workspace in a Day

[Dynamics-365-FastTrack-Implementation-Assets/Customer Service/ComponentLibrary/Omnichannel/CommonAgentScriptsAndMacros at master · microsoft/Dynamics-365-FastTrack-Implementation-Assets \(github.com\)](#)



The screenshot shows the GitHub repository page for `microsoft / Dynamics-365-FastTrack-Implementation-Assets`. The repository is at the `master` branch. The file structure is as follows:

- ComponentLibrary
 - Omnichannel
 - CommonAgentScriptsAndMacros
 - ContosoMainSolution_1_0_0_1.zip
 - Macros.pdf

The table below shows the files in the `CommonAgentScriptsAndMacros` directory:

Name	Last commit message
..	
ContosoMainSolution_1_0_0_1.zip	Add files via upload
Macros.pdf	Add files via upload

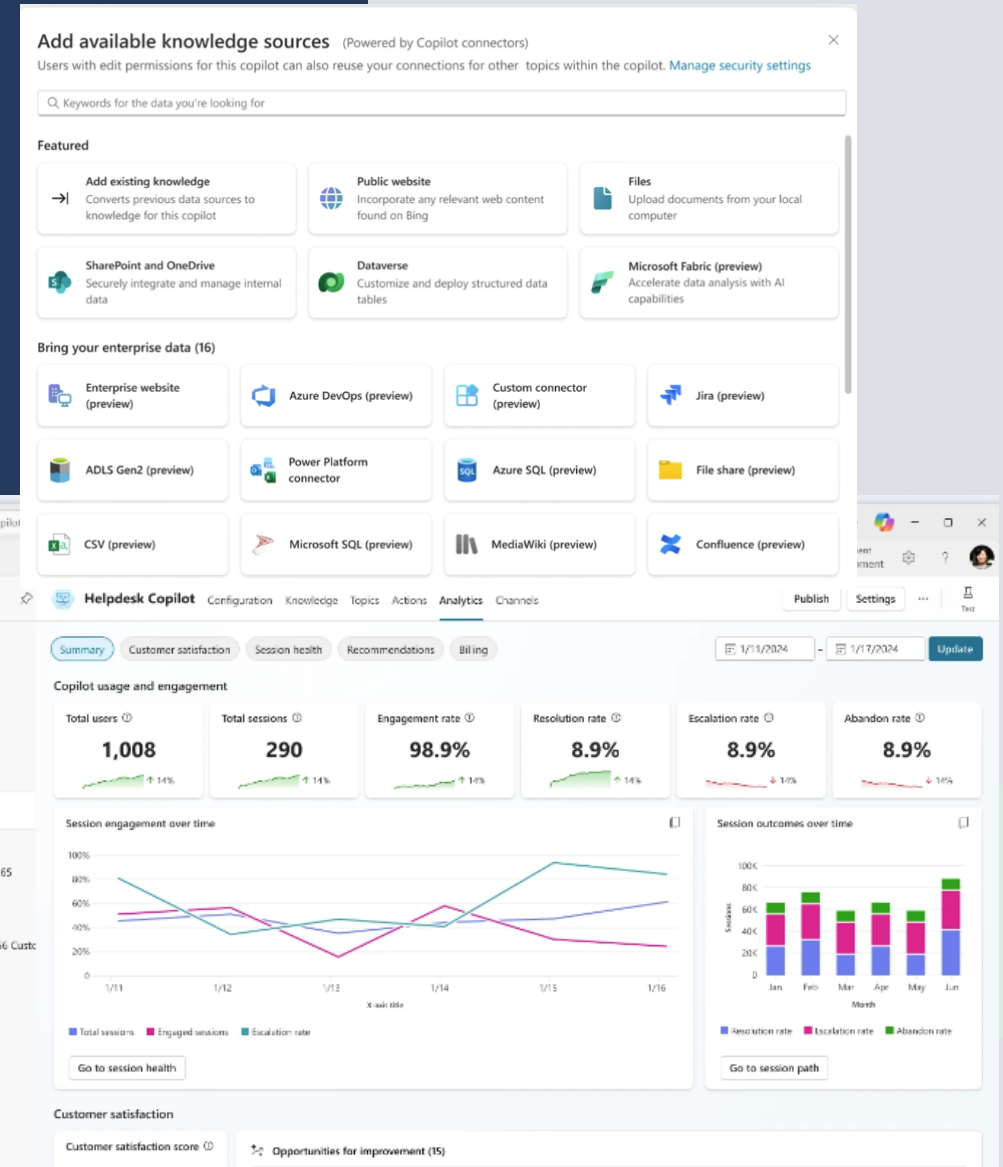
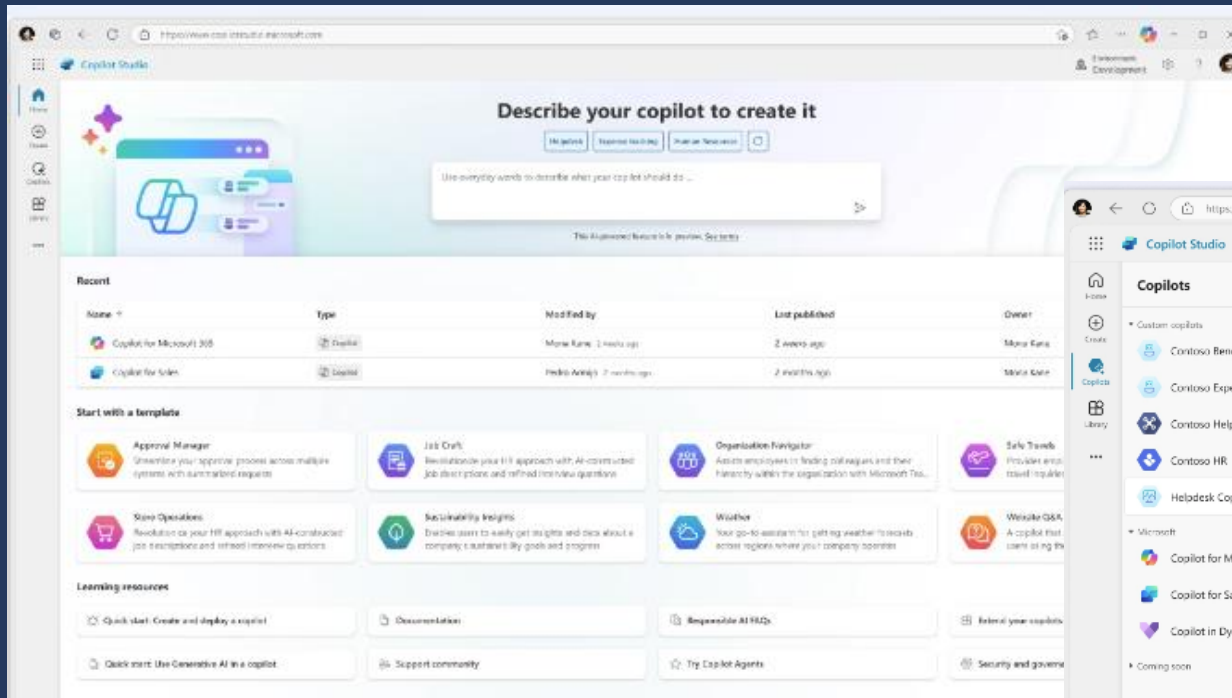
Microsoft Copilot Studio: Building copilots with Agent capabilities

Microsoft Copilot Studio: the Additional innovations

Additional innovations with Copilot Studio

There's a lot more to share at Microsoft Build with Copilot Studio, and we'll touch on just a few of our new capabilities here. To learn more—just sign up and [try it out for yourself here](#).

It's easier than ever to create copilots. With Copilot Studio, creating and testing



Microsoft Copilot Studio: Building copilots with Agent capabilities

Copilots + Agents + Asynchronous Orchestration
A replacement for Business Process Flows?

Early Access Preview

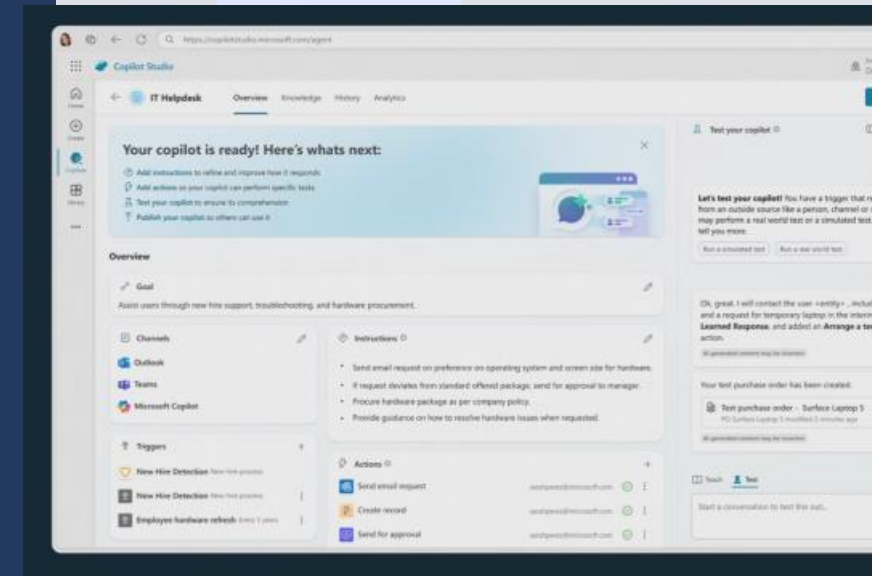
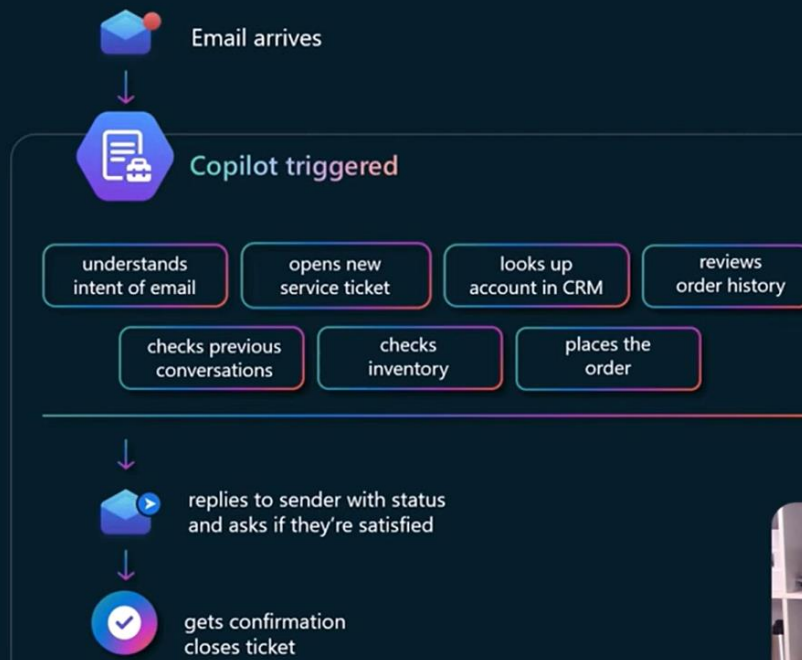
Copilots with agent capabilities

Can be triggered by events – not just conversation

Automates and orchestrates long running, asynchronous copilots

Follows human guardrails and asks for help

Monitor, learns and improves with each interaction



Microsoft Copilot Studio: #Employeecreator

Or for the need to onboard additional Contact Center Agents?

Instructions

- Send introduction message with onboarding plan.
- Meeting facilitation.
- Assign buddy based on preferences and skillset.
- Produce training plan.

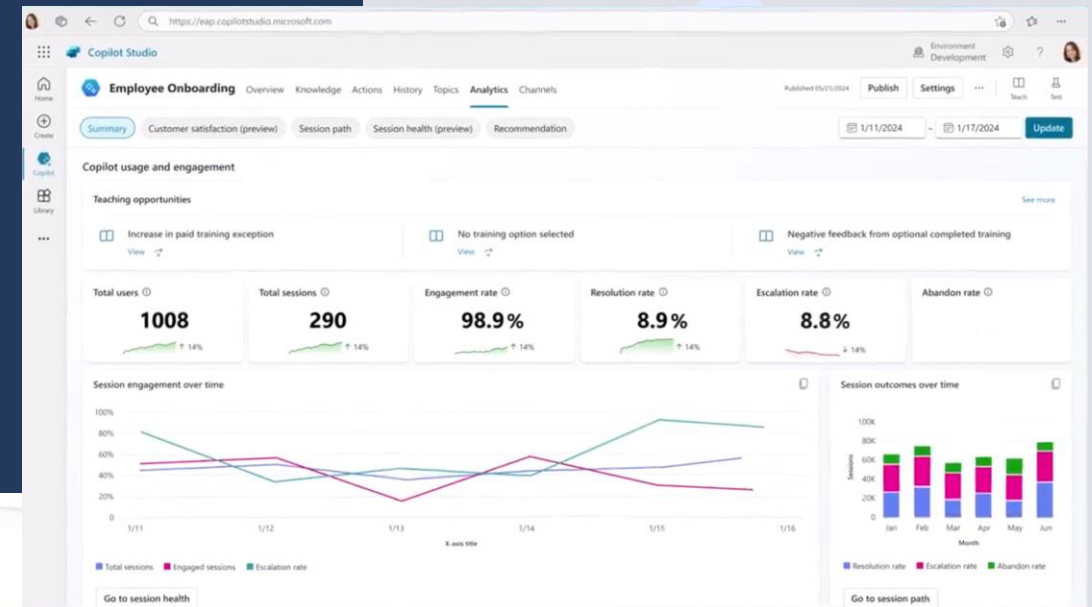
Triggers

New Hire Detection New hire process

Knowledge

LinkedIn - Learning

Contoso HR - HRweb



Training Opportunities

Generated based on your preferences.

Advanced Sales Strategy

Create advanced strategies for understanding customer needs, and customizing software.

Viva Learning

Enroll

Technology and Product Mastery

Gain deep technical knowledge of the software products being sold, including features and benefits.

LinkedIn Learning

Enroll

Negotiation and Deal Closure

Enhance negotiation skills to effectively close deals while maximizing revenue and ensuring customer satisfaction.

LinkedIn Learning

Enroll

3 references

2 of 30 responses AI-generated content may be incorrect

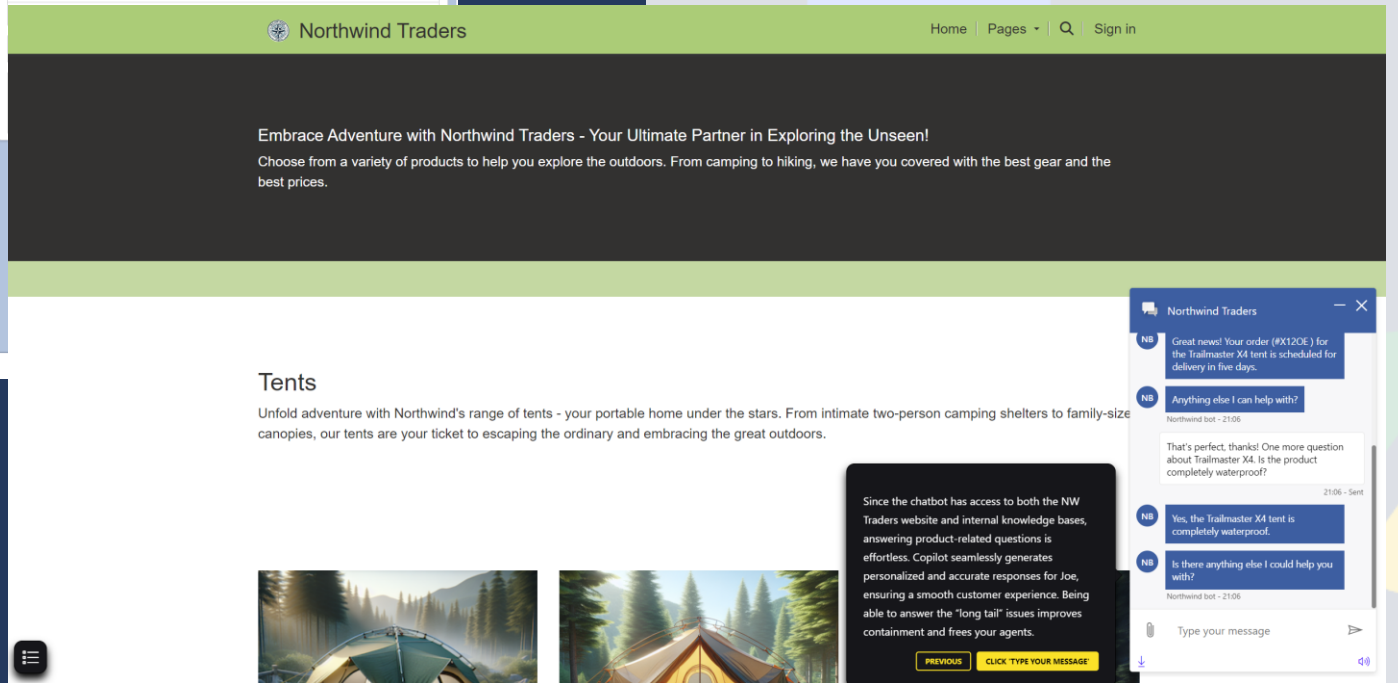
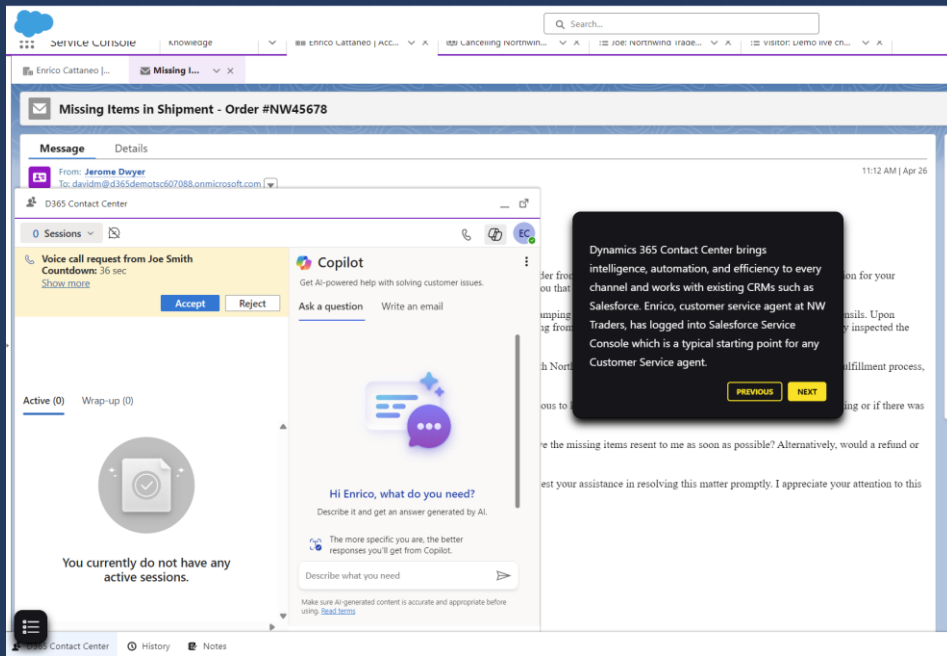
Great choice! You're now registered.

I'll send you the pre-course materials a week before and follow up with a survey afterwards.

CCAS: Contact Center as a Service: The Dynamics 365 Contact Center

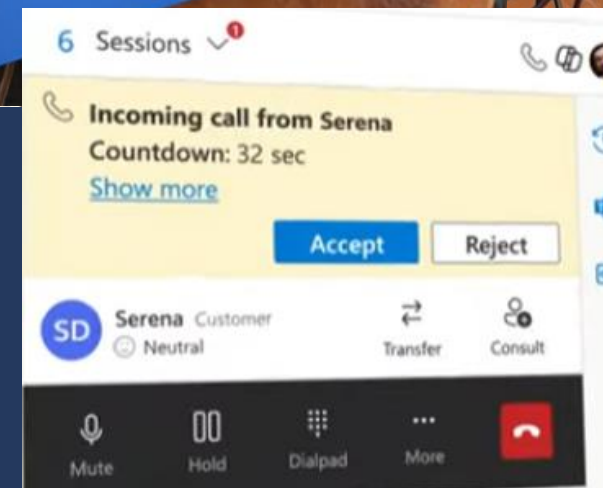
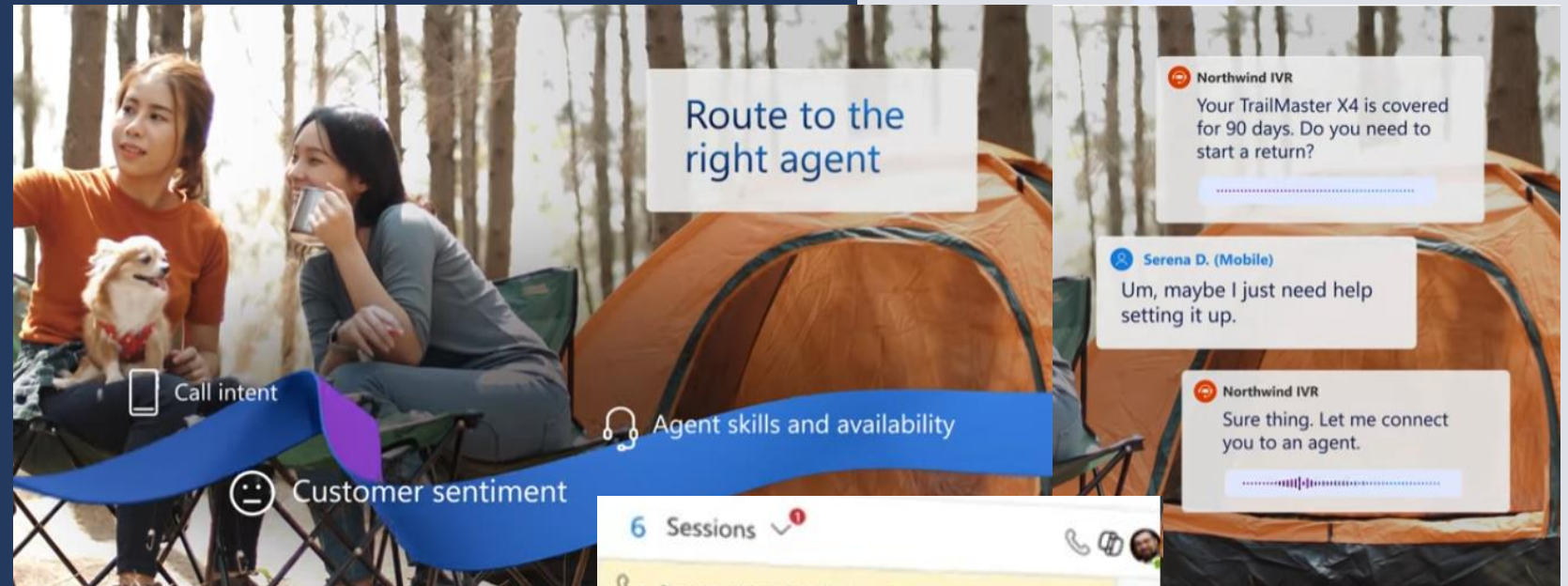
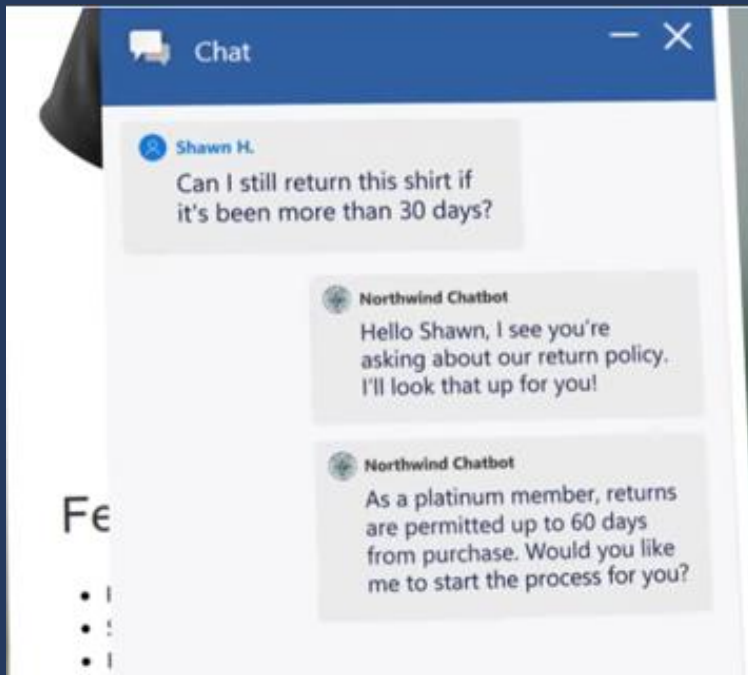
Dynamics 365 Contact Center CCAAS: Contact Center as a Service

A Copilot-first Cloud Contact Center to transform service experiences



Dynamics 365 Contact Centre

Next-generation self-service from Nuance and Microsoft Copilot Studio's designer



Dynamics 365 Contact Centre CCAAS: Contact Center as a Service

A Copilot-first Cloud Contact Center to transform service experiences

The screenshot displays the Dynamics 365 Contact Center interface. On the left, a 'My work items' list shows several active cases, including one for 'Serena' with a 'Product Inquiry' queue. The central 'Communication Panel' shows a chat conversation with 'Serena' where an agent has responded: 'We can help with that! Let me connect you to an agent on the product support team.' To the right, the 'Customer details' pane shows information for 'Serena Davis', including her account ID, phone number, email, and address. Below this, a 'Timeline' section shows a list of events. On the far right, the 'Copilot' sidebar is visible, featuring a 'Hi Preston, what do you need?' greeting and a 'Describe it and get an answer generated by AI' prompt. A 'Timeline highlights' section is also present, listing key events related to the customer's case.

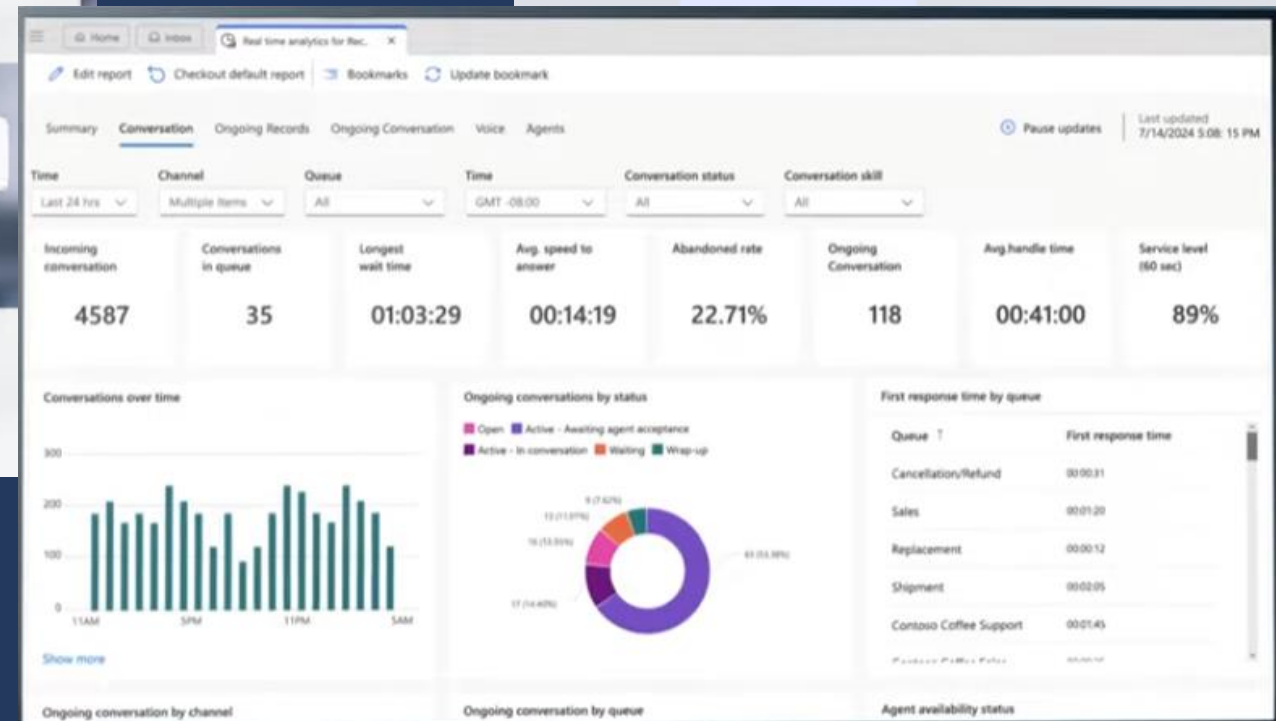
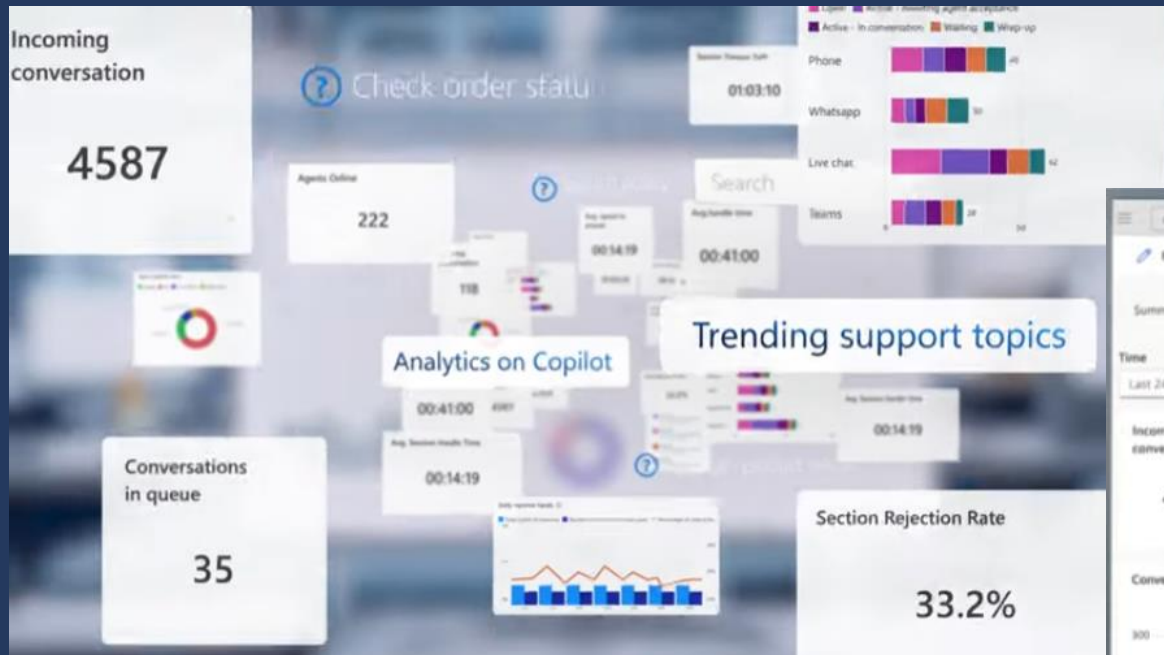
Timeline highlights

- Serena purchased the TrailMaster X4 July 18th using a rebate of 5840 loyalty points and paid for expedited shipping.
- She contacted Northwind support 2 minutes ago and her case was escalated.
- Serena needs assistance in assembling the TrailMaster X4. There have been recent complaints that assembly manuals have not been printed in the localized language.

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

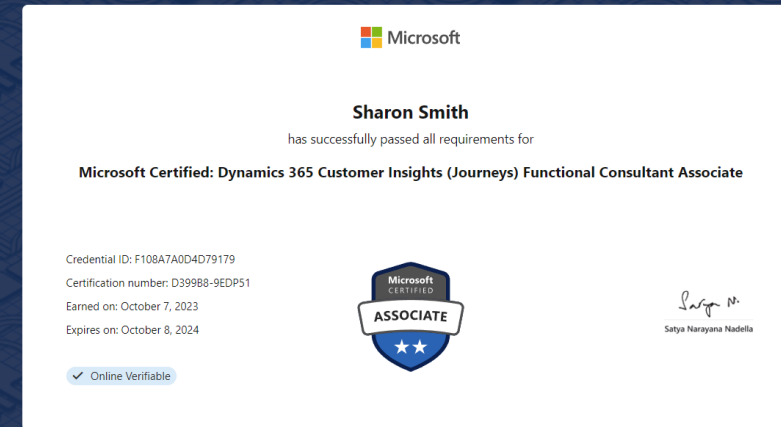
Dynamics 365 Contact Centre CCAAS: Contact Center as a Service

A Copilot-first Cloud Contact Center to transform service experiences



Evolving Microsoft's Certifications for Dynamics 365

Retirement of the three Dynamics 365 Sales and Customer Insights certifications and exams



The new Microsoft Certified: Dynamics 365 Customer Experience Analyst Associate

Merging Sales & Customer Insights certs - then what?

Evolving Microsoft Credentials for Dynamics 365

By  [Gretchen LaBelle](#)

Published May 16 2024 09:00 AM

 13K Views

[Evolving Microsoft Credentials for Dynamics 365 - Microsoft Community Hub](#)

Coming soon: New Microsoft Credentials for Dynamics 365

The new **Microsoft Certified: Dynamics 365 Customer Experience Analyst Associate** certification

Merging Sales and Customer Insights certificates - then what?

2023 Release Wave 2

Investment areas



Unify sales and marketing

Tear down data silos and gain a ubiquitous understanding of your customers through a unified view of data across the organization and improve your business outcomes across marketing, sales, and service.

2024 Release Wave 1

Copilot and AI innovation

Boost your productivity by harnessing the power of generative AI. As your daily assistant, Copilot in Customer Insights automates manual tasks and helps you be more creative, ultimately leading to better business outcomes.

Moments that matter

Understand your customers' expectations and identify the most effective communication channels and touchpoints to trigger interactions that will successfully engage customers in the moments that matter.



Transforming Seller Effectiveness with Dynamics 365 Sales Copilot

Transformation of D365 Sales Hub Home Page

Fully immersive Copilot Home Page

The screenshot displays the Dynamics 365 Sales Hub home page, featuring a fully immersive Copilot interface. The page is divided into several sections:

- My work list:** A sidebar on the left showing a list of tasks and activities, including "Follow-up call" and "Mark complete".
- Copilot:** A central panel with a "Your day" section showing tasks like "Discuss latest proposal", "Prepare marketing materials", "Review pricing information", and "Review installation details". It also includes a "Get latest news for accounts" section and a "What's newly assigned to me" section.
- Lead score:** A section showing a lead score of 72, with a "Decision maker is identified" status and a "Purchase timeframe is unknown" warning.
- Who knows whom:** A section showing a list of contacts, including "Alan Steiner", "Jeremy Johnson", and "David Mulroy".
- Leads table:** A table at the bottom showing leads that showed interest in non-alcoholic beverages and visited the website in the last 30 days.

Name	Topic	Account	Lead Score	Creation date
Henry Brill	50 Crates of Refreshing B...	Adatum Corporation	98%	1/17/2024
Eric Ishida	2000 Racks Non-alcoholi...	Tailwind Traders	98%	1/17/2024
Danielle Booker	Mindful Sip Sampler Set		95%	1/16/2024
August Bergman	100 Crates of Temperate...	Alpine Ski House	94%	1/15/2024
Mikhail Kotov	165 Crates of Crisp and C...		94%	1/12/2024
Laurence Gilbertson	Guilt-Free Guzzler's Gift B...	Alpine Ski House	88%	1/09/2024
Sarah Perez	Series 9 Kiosk	Adatum Corporation	86%	12/31/2023

Ask a sales question or type / to mention a record

AI-generated content may be incorrect—please review. Learn more

Transforming Seller Effectiveness with Dynamics 365 Sales Copilot

Copilot assistant homepage

The screenshot displays the Dynamics 365 Sales Copilot assistant homepage. The interface includes a left-hand navigation pane with sections for 'My Work' (Home, Recent, Pinned, Copilot, Sales accelerator, Activities, Dashboards), 'Customers' (Accounts, Contacts), 'Sales' (Leads, Opportunities, Competitors), 'Collateral' (Quotes, Orders, Invoices, Products, Sales Literature), and 'Marketing'. The main content area is titled 'Copilot' and features a 'Preview' label. It contains three tabs: 'Get info', 'Ask questions', and 'Stay ahead'. The 'Get info' tab is active, showing buttons for 'Get latest news for accounts', 'Show my pipeline', 'What's newly assigned to me', 'What's new with my sales records', 'Prepare for sales appointments', and 'Show emails that need follow up'. A 'Show my pipeline' button is also located below the tabs. Below the tabs, a section titled 'Here's the pipeline of your open opportunities ordered based on est. close date.' displays a 'Deal tracker' chart. The chart shows a sales funnel with bubbles representing opportunities, color-coded by stage: 1-Qualify (blue), 2-Develop (red), 3-Propose (blue), and 4-Close (purple). The x-axis represents the estimated close date, ranging from 05/01/24 to 01/01/25. The y-axis represents probability, ranging from 0 to 100. Below the chart, two specific opportunities are listed: '7 Café Corto Espresso Machines for Graphic Design Institute' with an estimated revenue of €110,000.00, and 'Low Waste Technology - Organic and Shade-Grown Coffee Beans' with an estimated revenue of €3,990.00. At the bottom, there is a text input field for asking questions about the data, a character count (0/500), and a 'See terms' link.

Dynamics 365 | Sales Hub

Search

New look

Copilot

Get info

Ask questions

Stay ahead

Get latest news for accounts

What's newly assigned to me

Prepare for sales appointments

Show my pipeline

What's new with my sales records

Show emails that need follow up

Use the % menu for more suggestions.

Show my pipeline

Here's the pipeline of your open opportunities ordered based on est. close date.

Deal tracker

Sales funnel

Today, 06/15/24

Probability

Est close date

1-Qualify 2-Develop 3-Propose 4-Close

7 Café Corto Espresso Machines for Graphic Design Institute

Graphic Design Institute • Est. revenue €110,000.00

Low Waste Technology - Organic and Shade-Grown Coffee Beans

Alpine Ski House • Est. revenue €3,990.00

Ask a question about the data in the app. Use / to reference data

0/500

See terms

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

Transferring from the immersive Copilot experience to Copilot chat.

Immersive experience working in sync with the Copilot Chat Side Pane

The screenshot displays the Dynamics 365 Sales Hub interface. On the left is a navigation pane with sections: Home, Recent, Pinned, My Work, Customers, Sales, Collateral, and Marketing. The 'My Work' section is active, showing a list of sales opportunities. The main area shows the 'Copilot' preview interface with a list of opportunities. A red box highlights the 'Copilot Chat Side Pane' on the right, which contains a chat window titled 'Summarize opportunity "7 Café Corto Espresso Machines for Graphic Design Institute"'. The chat window displays a summary of the opportunity and a list of key details.

Opportunities List:

- 7 Café Corto Espresso Machines for Graphic Design Institute
Graphic Design Institute • Est. revenue €110,000.00
- Low Waste Technology - Organic and Shade-Grown Coffee Beans
Alpine Ski House • Est. revenue €3,990.00
- 8 Café A-200 Automatic Espresso Machines for Fourth Coffee
Fourth Coffee • Est. revenue €0.00
- 10 Airpot XL Coffee Makers for Alpine Ski House
Alpine Ski House • Est. revenue €4,990.00
- 18 Airpot Coffee Makers for Northwind Traders
Northwind Traders • Est. revenue €30,582.00

Copilot Chat Side Pane:

Summarize opportunity "7 Café Corto Espresso Machines for Graphic Design Institute"

Here's the opportunity summary for 7 Café Corto Espresso Machines for Graphic Design Institute.

- The **Est. revenue** for the opportunity is €110,000.00, which helps in revenue forecasting.
- The **Customer Need** is that the customer wants to outfit their offices with automatic espresso machines.
- The **Proposed Solution** for the opportunity is Café Corto Espresso Machines meeting the customer's requirements.
- The expected **Est. close date** of the opportunity is 6/3/2024 for accurate revenue forecasts.
- The **Annual Revenue** for the account linked to this opportunity is \$120,000,000.00 under the Account entity.
- The **Primary Contact**, Aurora Badillo, from the Account entity serves as quick access to contact details.
- Aurora Badillo holds the job title of a Sales Manager under the Contact entity.

Ask a question about the data in the app. Use / to reference data

0/500

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

With the full Opportunity record in view and the Copilot-generated Summary in the Side Pane.

Navigating the app without losing context

The screenshot displays the Dynamics 365 Sales Hub interface. The main view shows an opportunity record for "7 Café Corto Espresso Machines for Graphic Design Institute". The opportunity is in the "Qualify (12 D)" stage. The summary pane on the right, highlighted with a red border, contains a Copilot-generated summary of the opportunity. The summary includes key details such as the estimated revenue, customer need, proposed solution, expected close date, annual revenue, primary contact, and product involved. The summary also includes a "Get started" section with a "Capture and manage all records in your timeline" button. The side pane on the left shows the navigation menu with options like Home, Recent, Pinned, My Work, Copilot, Sales accelerator, Activities, Dashboards, Customers, Sales, Opportunities, Competitors, Collateral, and Marketing.

7 Café Corto Espresso Machines for Graphic Design Institute - Saved

Opportunity · Sales Insights · Sales Process Active for 12 days

Graphic Design Institute Account 6/3/2024 Est. close date €110,000.00 Est. revenue Sharon Smith Owner

Summary Relationship analytics Quotes Products Related

Key details

Topic 7 Café Corto Espresso Machines...

Contact Aurora Badillo

Purchase timeframe This Quarter

Currency Euro

Budget amount €110,000.00

Purchase process Committee

Description Buying new machines for their current offices.

More info

Current situation No espresso machines in their facilities.

Up next

Manage your activities

See upcoming activities by connecting the opportunity to a sequence or by creating an activity. [Learn more](#)

Connect sequence Create activity

Timeline

Search timeline

Enter a note...

Opportunity score

89 Grade A Improving

Estimated budget is \$110,000.00

Purchase timeframe is this quarter

Decision maker identified

Purchase process is committee

Details

This opportunity was scored on 6/3/2024 7:46 PM.

Assistant

Notifications

1 reminder

Opportunity's close date has passed

7 Café Corto Espresso Machines for Graphic Design Institute

Copilot

Chat Email (preview)

Summarize opportunity "7 Café Corto Espresso Machines for Graphic Design Institute"

Here's the opportunity summary for 7 Café Corto Espresso Machines for Graphic Design Institute.

- The **Est. revenue** for the opportunity is €110,000.00, which helps in revenue forecasting.
- The **Customer Need** is that the customer wants to outfit their offices with automatic espresso machines.
- The **Proposed Solution** for the opportunity is Café Corto Espresso Machines meeting the customer's requirements.
- The expected **Est. close date** of the opportunity is 6/3/2024 to aid in accurate revenue forecasts.
- The **Annual Revenue** for the account associated with this opportunity is \$120,000,000.00 under Account.
- The **Primary Contact** for this account is Aurora Badillo who holds the job title of Sales Manager under Contact.
- The product involved in this opportunity is named Café Corto under Opportunity Product.
- A notable strength identified includes Grinders overtaking market share due to their accuracy in grind size in B2B

Ask a question about the data in the app. Use / to reference data

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

Copilot in Dynamics 365 Sales Roadmap

With further enhanced features in the Roadmap

Copilot in D365 Sales Roadmap

Copilot Chat

Understanding customer

- Summaries – Lead, Opportunity, Account
- Get CI insights in Lead summary
- Stay on top of what's changed with your records
- Account News
- Use AI to prepare for meeting
- Contact summary – in roadmap

Accelerating Deals

- Summarize RFP document
- Q&A SharePoint documents from within Dynamics
- Get recommendation on content e.g., Product catalogue, Case Study etc.
- Similar Opportunities – in Roadmap
- Get recommended actions like – in Roadmap
 - Email/Meeting follow-up
 - Contact update
 - CRM updates
 - Stalled accounts
 - Upcoming opportunity close date

Chat - Natural language chat on Sales Data

- Natural language chat e.g., get insights of a record details, ask questions on related entity
- Chat with Copilot using Sales specific language like Sales pipeline, Deal value, Customers I have not contacted since last 2 weeks etc.
- Get calculated insights like
 - Conversion rate
 - Sales cycle & size
 - Win rate
 - Business growth

Embedded

Email Copilot in Dynamics Sales

- Draft Sales email using Copilot
 - OOB Prompts
 - Custom prompts
- Enhance your email using Copilot Email Assist

Opportunity summary as a widget

Get recommended actions in form and grids – in roadmap

Copilot in grids – In roadmap

- Search grids using natural language
- Get AI insights across your grids
- Visualize your data using AI generated charts
- Summarize records from grids

Immersive

Understanding customer

- All the skills available in Copilot chat
- Landing page with customizable insights
- What's newly assigned to me
- Pipeline view with graph

Accelerating Deal

- All the skills available in Copilot chat
- Email follow-up
- Get insights across your Dynamics records
- Get recommended actions – in roadmap

Chat - Get insights across Dynamics Sales

- All natural language chat capabilities similar to side bar but the context is across Dynamics 365 Sales
- Sales pipeline – with chart
- Listing of records based on direct field queries

Sales Organization – In roadmap

- Pipeline Intelligence

ANY QUESTIONS?



www.linkedin.com/in/heuristicdev



<https://heuristicdev.co.uk>



THANK YOU

Looking forward to connecting!



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QR Codes



Feedback Form

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Agenda

[https://www.d365ppug.com/uk/
schedule](https://www.d365ppug.com/uk/schedule)