





Microsoft

**GLOBAL
DEVELOPER
BOOTCAMP
2025**

Sharon Smith

MVP

**AI & Autonomous Agents
The New UI for D365 CRM**



Global Dynamics 365 Bootcamp 2025

AI and Autonomous Agents: the new UI
Transmogrifying Microsoft Dynamics 365



POWER
COMMUNITY



Today's Agenda

Who am I?

- ♦ -

The D365 UI/UX
Shifting
Landscapes and
their Timeline



Spotlight:
Immersive Copilot
Homepage in D365
Sales (preview)

- ♦ -

Spotlight:
Project Sophia in
M365 Copilot for
Sales (preview)



Spotlight:
Pre-Built
Autonomous
Agents for D365

Sales
Qualification
Agent

- ♦ -

Where next?

Speaker Bio: Sharon Smith



- Dynamics 365 Solution Architect
- Dual Microsoft BizApps MVP for Customer Experience and Customer Service
- 8+ Years Experience with Dynamics 365 CRM & ERP Apps
- Working both Global and National projects
- Lead Architect for ANS Group's Microsoft FastTrack Portfolio Partner program
- Microsoft Women In Power(Platform) Mentor and Power Up Program Champ



“There’s no such thing as Normal”

#ANS Squirrel Club Power



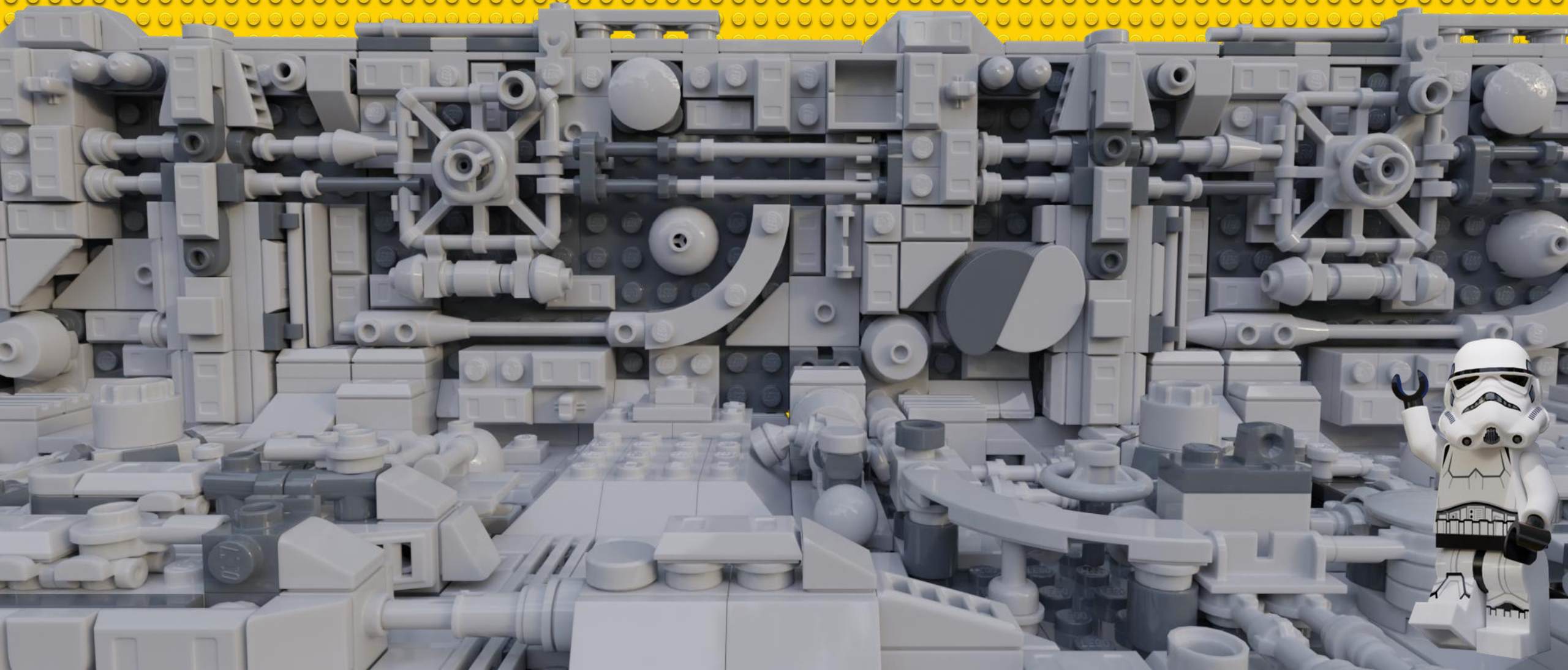
LinkedIn:
www.linkedin.com/in/heuristicdev



Website:
[www. HeuristicDev.co.uk](http://www.HeuristicDev.co.uk)



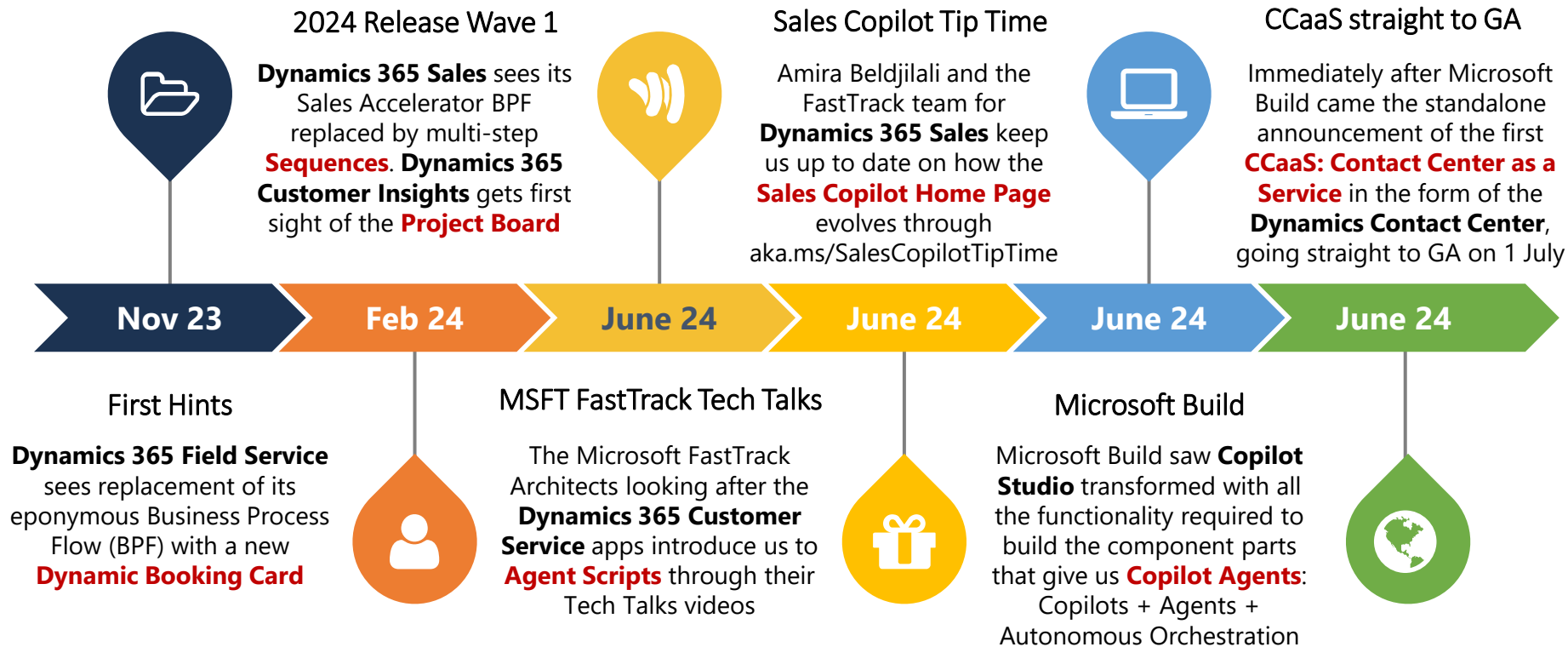
What were the Shifting Landscapes?



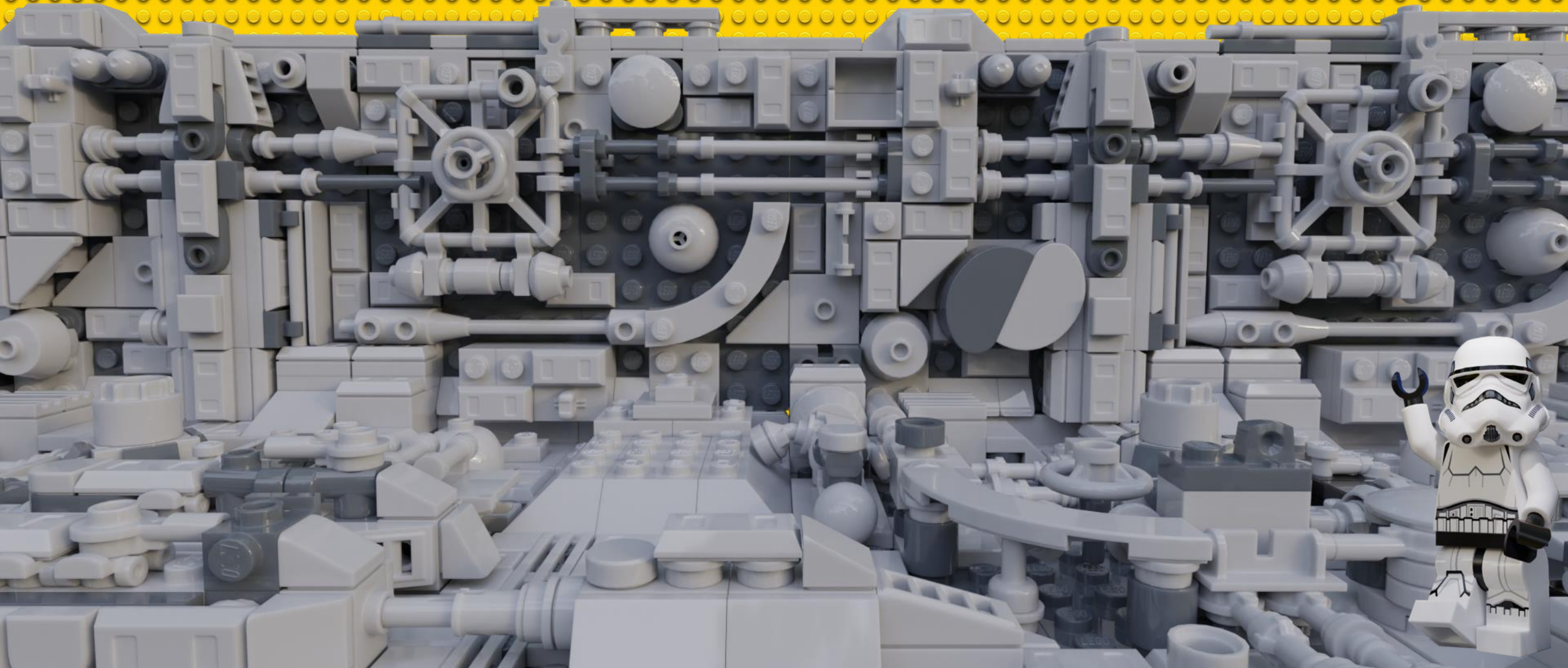
Timeline of the Shifting Landscapes



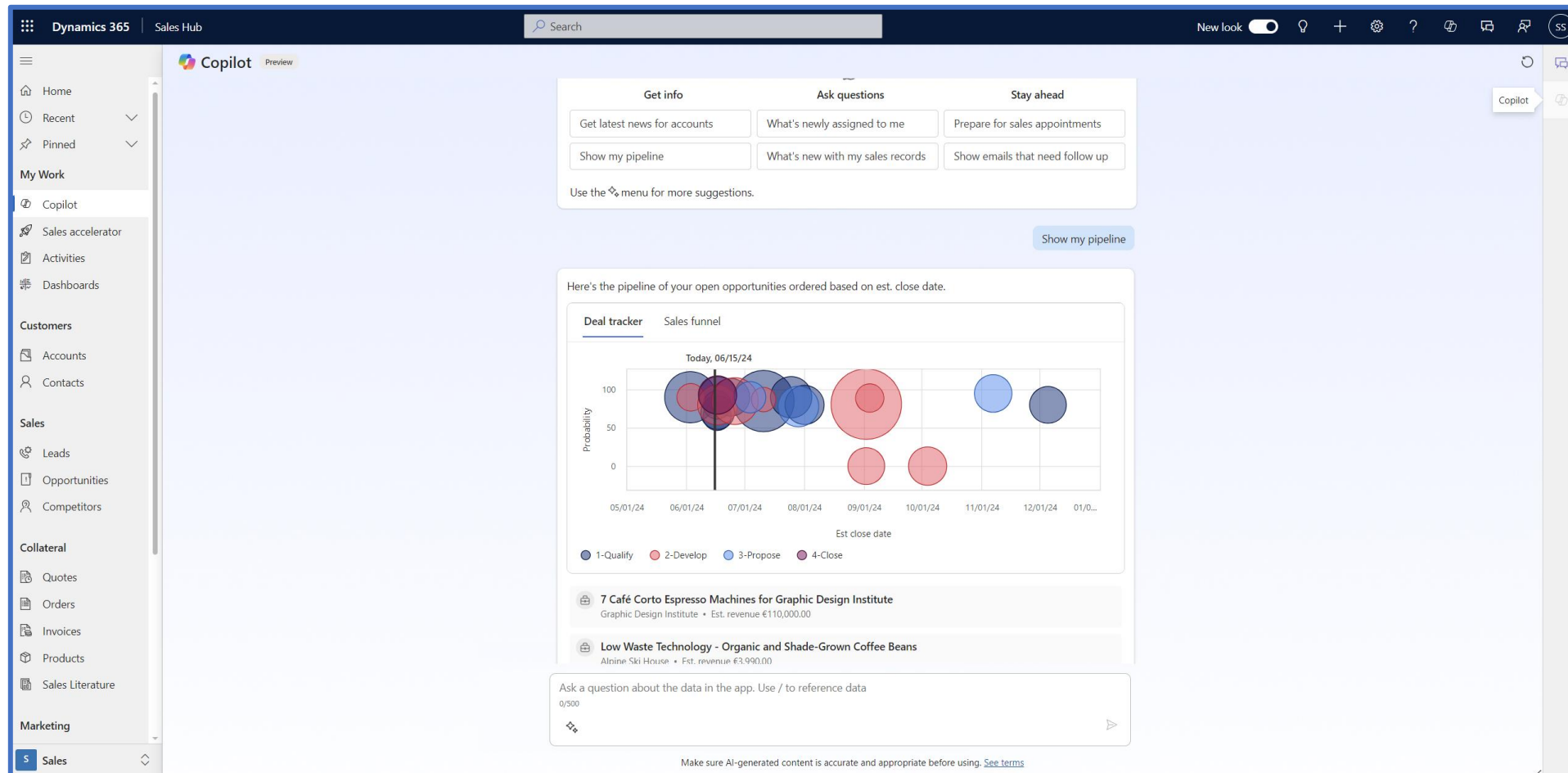
◆ From First Hints, through the 2024 Release Waves, and standalone announcements from Microsoft ◆



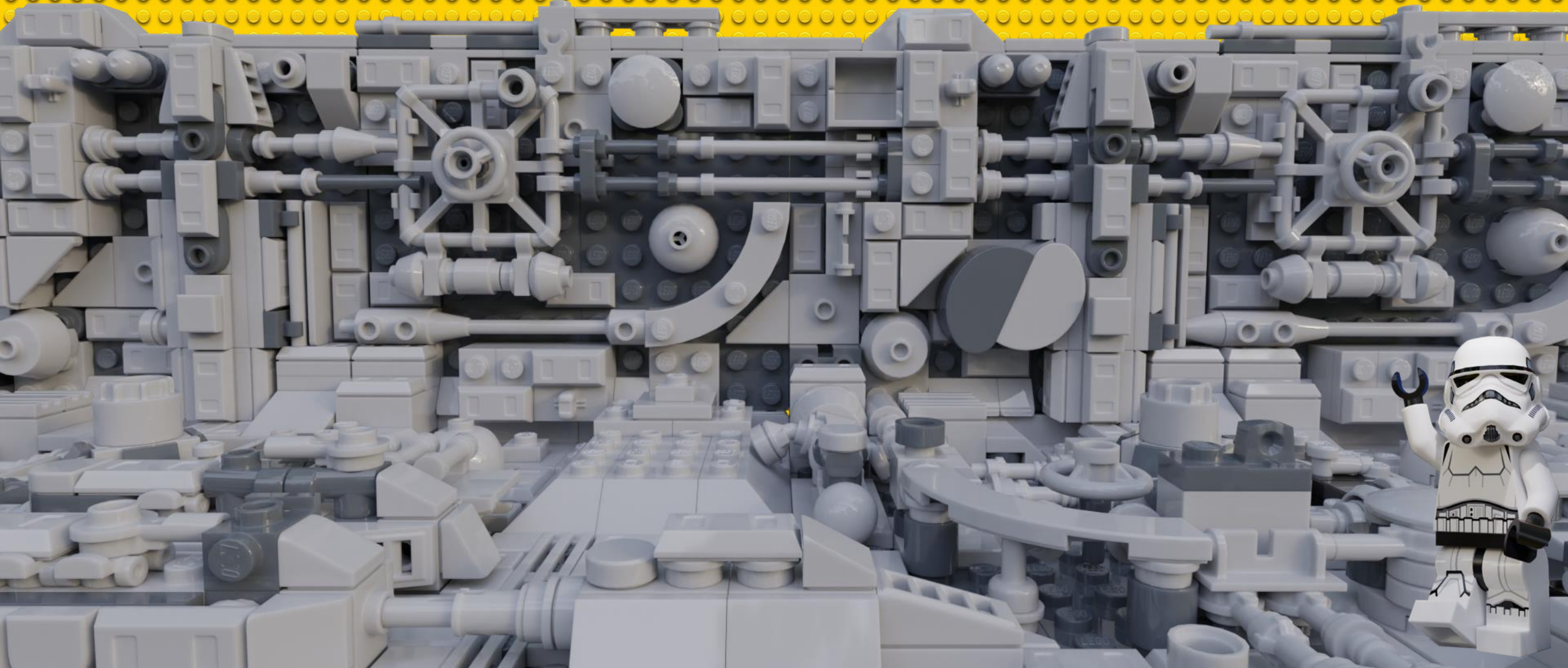
Spotlight: the UI for AI in D365 Sales



Immersive Copilot Homepage



Spotlight: Optimising Insights



Project Sophia in M365 Copilot for Sales (Preview)



Microsoft Copilot for Sales (preview): Project Sophia



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Customer service
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Sales and marketing
Meet revenue targets
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Start a data exploration journey highlighting key insights and trends

[Preview with sample data](#) [On](#) [+](#)

Overview

Summary

The data presents insights on sales performances, industry challenges, and contract renewal dates for various entities. Key trends include varying revenue achievements across sales reps, a diverse set of challenges across industries, and specific contract renewal distributions among accounts.

Sales Rep Performance based on Territory

- Top Performer: Lena Powels (Washington)

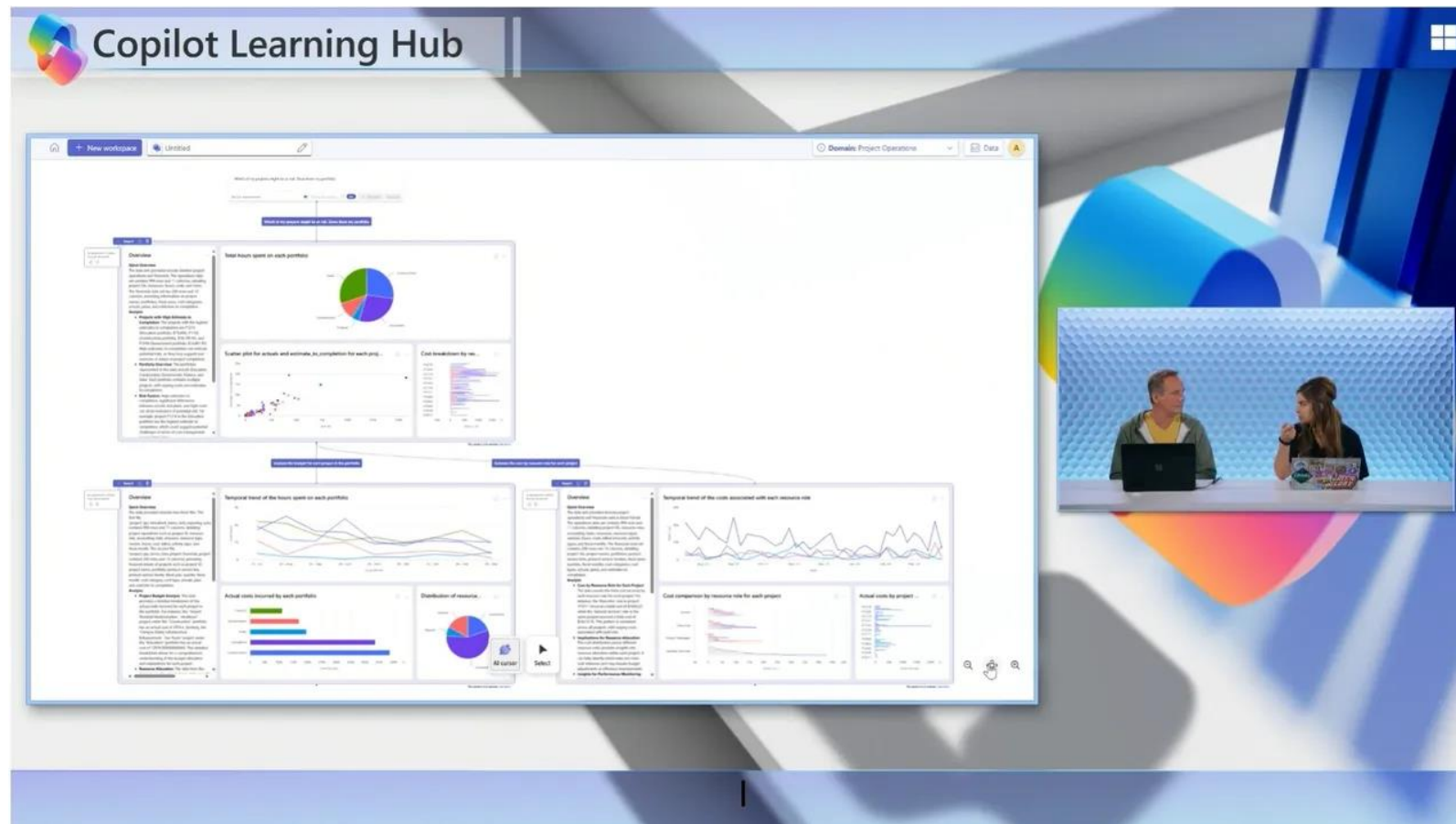
Sales Rep Performance based on Territory

Lisa Johnson (Florida)	
Peter Pen (Montana)	
Tom Tims (Alaska)	
Ben Olson (Idaho)	
Luna Moon (Oregon)	
June Bennis (Kansas)	
Jacob John (New York)	
Lena Powels (Washington)	

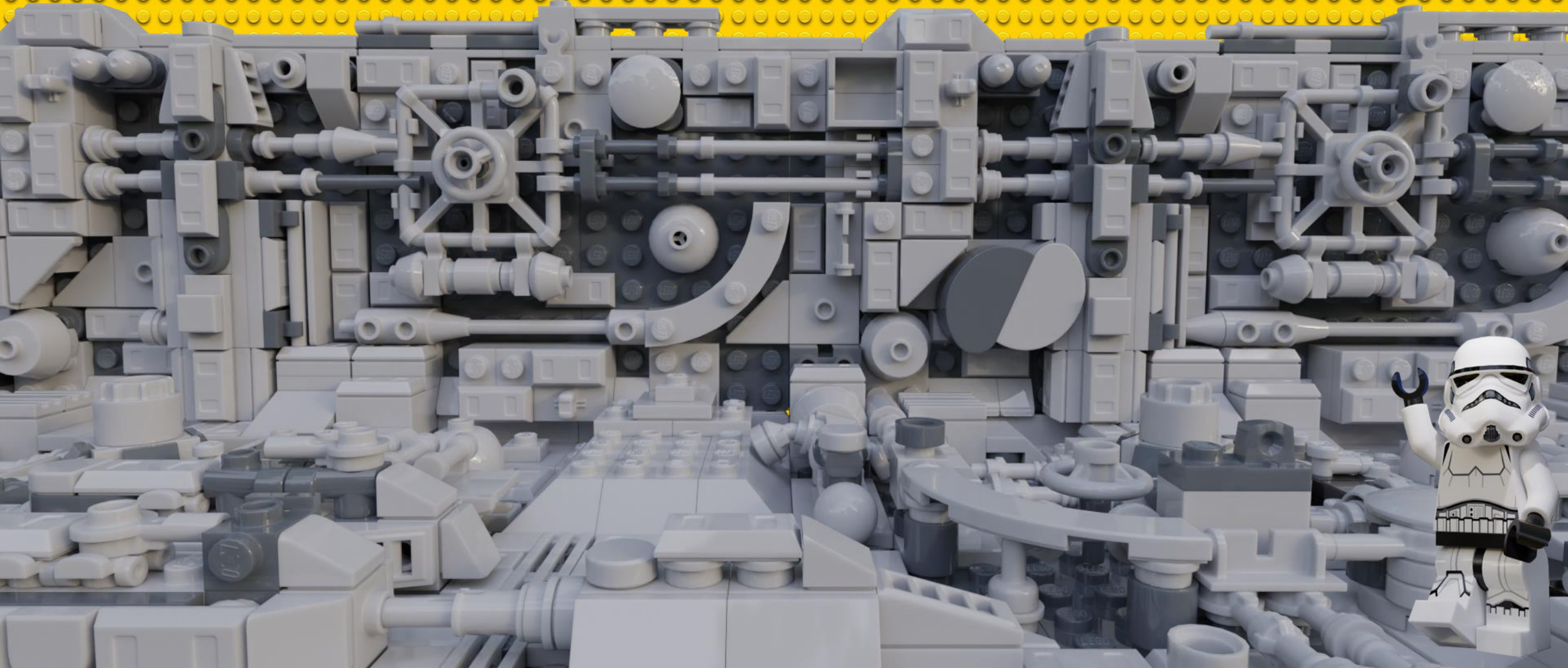
Copilot Learning Hub with Dona & Per



- Introducing Project Sophia: AI-Driven Decision-Making for Leadership | Microsoft Learn



Pre-Build Autonomous Agents for D365



Transform work with Autonomous Agents



Transform work with autonomous agents across your business processes - Microsoft Dynamics 365 Blog



Name	Type	Description	Created On
Microsoft	Customer Service	Helping customers with their issues	10/20/2024 10:00 AM
Finance	Finance	Managing your company's finances	10/20/2024 10:00 AM
Supply Chain	Supply Chain	Managing your company's supply chain	10/20/2024 10:00 AM
Sales	Sales	Managing your company's sales	10/20/2024 10:00 AM

Transform work with autonomous agents across your business processes

By [Bryan Goode](#), Corporate Vice President, Business Applications and Platform

October 21, 2024

[Facebook](#) [X](#) [LinkedIn](#)

Tags

AI

Business Applications Launch Event

Product

Dynamics 365 Customer Service

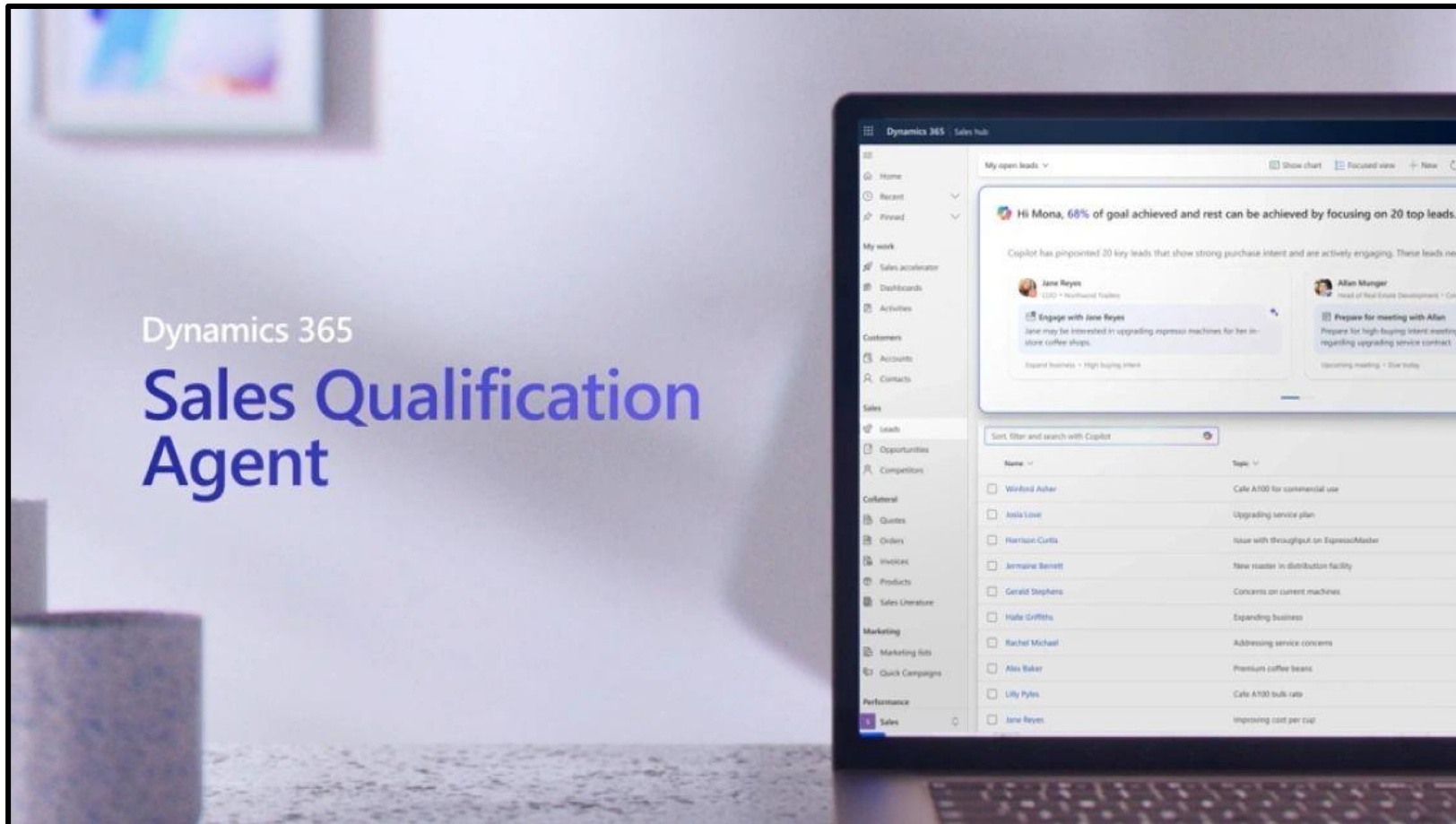
We're expanding our ambition to bring AI-first business process to organizations. First, we're announcing that the ability to **create autonomous agents with Microsoft Copilot Studio** will be available in public preview in November 2024. Learn more on the [Copilot Studio blog](#).

Second, we're introducing **10 new autonomous agents in Microsoft Dynamics 365** to build capacity for sales, service, finance, and supply chain teams. These agents are designed to help you accelerate your time to value and are configured to scale operational efficiency and elevate customer experiences across roles and functions.

Transform work with Autonomous Agents



Introducing the Sales Qualification Agent for Dynamics 365 Sales



Transform work with Autonomous Agents



Sales Qualification Agent click through Demo



Dynamics 365 | Sales hub

My open leads

Hi Mona, 68% of goal achieved and rest can be achieved by focusing on 20 top leads.

Copilot has pinpointed 20 key leads that show strong purchase intent and are actively engaging. These leads need your focus.

Jane Reyes
COO • Northwind Traders
Engage with Jane Reyes
Jane may be interested in upgrading espresso machines for her in-store coffee shops.
Expand business • High buying intent

Allan Munger
Head of Real Estate Development • Contoso Coffee
Prepare for meeting with Allan
Prepare for high-buying intent meeting Copilot scheduled for 2 PM regarding upgrading service contract.

Other key activities

- Cafe A100 for Woodland Bank
Woodland Bank • \$200,000 • 8 days to close
Review draft and reply to Chris Naldo
- Partnership opportunity for Fabrikam
Fabrikam • \$5,000,000 • 12 days to close
Prepare me for Fabrikam's key stakeholder meeting

Target \$45 million 68% of target achieved

Sort, filter and search with Copilot

Name		Created on
<input type="checkbox"/> Winford Asher		4/02/2024 12:00 PM
<input type="checkbox"/> Josia Love	Upgrading service plan	3/30/2024 7:45 AM
<input type="checkbox"/> Harrison Curtis	Issue with throughput on EspressoMaster	3/28/2024 3:30 PM
<input type="checkbox"/> Jermaine Berrett	New roaster in distribution facility	3/25/2024 11:05 AM
<input type="checkbox"/> Gerald Stephens	Concerns on current machines	3/23/2024 4:50 PM
<input type="checkbox"/> Halle Griffiths	Expanding business	3/21/2024 10:20 AM
<input type="checkbox"/> Rachel Michael	Addressing service concerns	3/19/2024 1:15 PM
<input type="checkbox"/> Alex Baker	Premium coffee beans	3/17/2024 8:00 AM
<input type="checkbox"/> Lilly Pyles	Cafe A100 bulk rate	3/13/2024 2:45 PM
<input type="checkbox"/> Jane Reyes	Improving cost per cup	3/10/2024 9:30 AM

Welcome to Sales Qualification Agent Demo

The Sales Qualification Agent is designed to automate manual aspects of the sales process such as researching leads and reaching out to customers so you can maximize your time building customer relationships and closing deals.

[LET'S TAKE A LOOK](#)

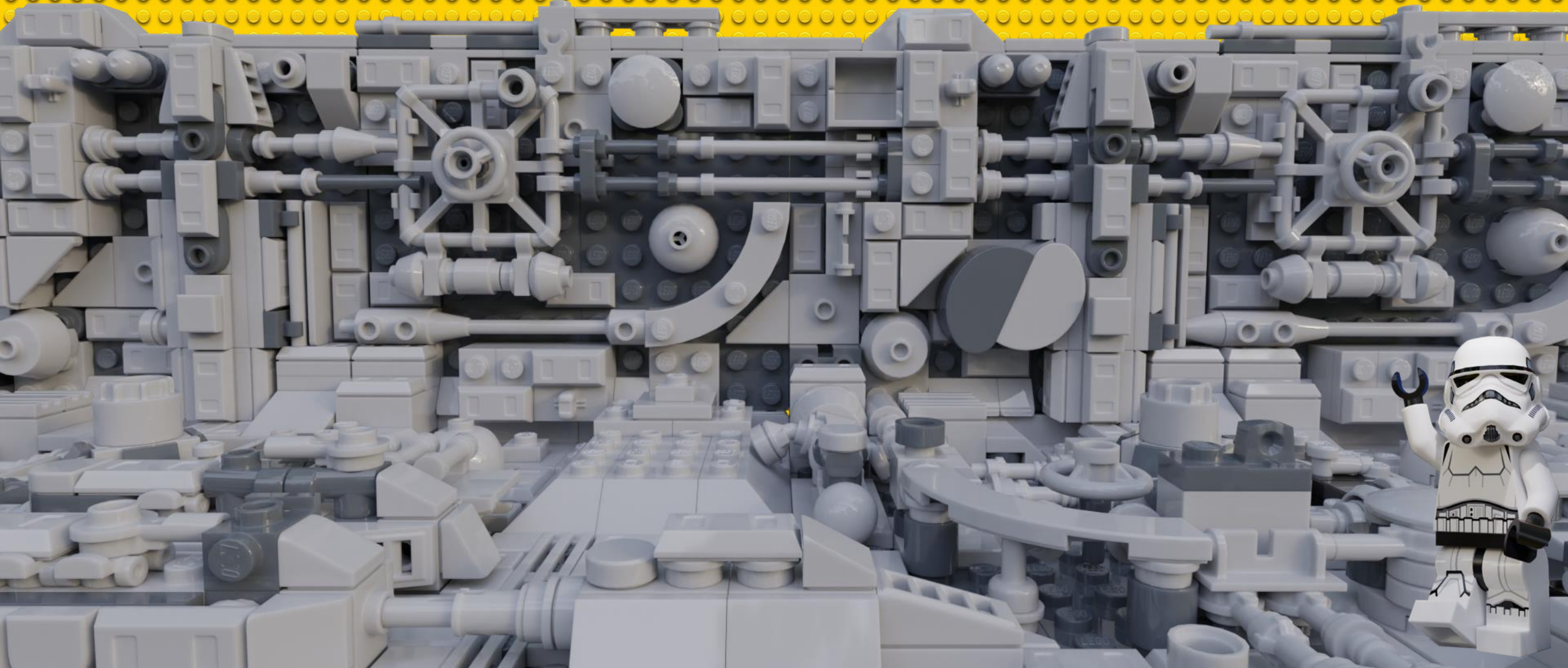
M365 Copilot for Sales: Opportunity Intelligence Agent: Public Preview Jan 2025



Microsoft Dynamics 365 - Release Plans

A screenshot of the Microsoft Dynamics 365 Sales interface. The top navigation bar shows 'New Teams' and a search bar. The left sidebar contains icons for Activity, Chat, Home, Settings, Back to Home, Recent Interactions, Up Next, Next meeting, Meeting, Sales, and a plus icon. The main content area displays details for the '50 Cafe A-100 Automatic' account. It includes a summary bar with estimated revenue (\$8,000,000), estimated close date (10/1/2024), open days (67), billed forecast recommendation (Committed), account name (Tailspin Toys), and owner (Darcy Phillips). Below this are two warning banners: 'No email response in 14 days' and 'Single threaded for 30 days'. The 'Overview' section is divided into 'Recent Interactions' and 'Objections'. 'Recent Interactions' lists a meeting with John Davis (CFO) and Emily Rogers (SVP of Sales) from AlphaTech. 'Objections' lists three points: 'CafeA thinks \$5000 is too much considering they need to fill 30 kitchens', 'Contoso has been mentioned as a better alternative for Tailspin Toys timelines', and 'Competitors have models with a similar amount of features for lower prices'. The 'Up Next' section lists three tasks: 'John Davis to loop in the Procurement Director for final contract review and approval before the signing deadline', 'Emily Rogers has proposed three possible dates for a meeting with Jake Thompson on September 28, 2024, to finalize CRM integration details and discuss implementation timelines', and 'Sarah Blake is coordinating with AlphaTech's legal team to ensure all compliance requirements are met and to confirm the contract is ready for execution by October 1, 2024'. The 'Next meeting' section shows a meeting titled 'Schneider Electric - Cleveland Clinic new campus' at 11:30 AM on 10/1/2024, with a 'Join' button.

Exploring Agents in Copilot Studio



Explore Agents in Copilot Studio



The screenshot displays the Copilot Studio web application. The top navigation bar includes 'Home', 'Create', 'Agents', and 'Library'. The main content area is divided into two sections: 'Create' and 'Explore agents'.

Create

New agent
Create an agent that leverages end-to-end generative AI for task completion, knowledge sharing, analytics, and more.

Explore agents
This AI-powered feature is currently in preview. [See terms](#)

Agent Name	Description	Status
Safe Travels	Provides answers to common travel questions and related health and safety guidelines.	Available
Website Q&A	Instantly answer user questions using the content of your web site or other knowledge.	Available
Team Navigator	Assists employees in finding colleagues and their hierarchy within the organization using Microsoft Teams.	Available
IT Helpdesk	Empowers employees to resolve issues and effortlessly create/view support tickets.	Available
Store Operations	Improve the efficiency of retail frontline workers by enabling easy access to store procedures and policies	Available
Financial Insights	Help financial services professionals get quick and concise info from their org's financial documents and other available resources.	Available
Case Management	Provide round-the-clock automated support to customers by understanding their issues and creating cases.	Available
Inclusivity	Helps employees to have a safe place to ask questions and to learn how to activate inclusivity in a modern and diverse workforce.	Available
Sustainability Insights	Enables users to easily get insights and data about a company's sustainability goals and progress	Available
Weather	Your go-to assistant for getting weather forecast.	Available
Voice	An agent with voice capabilities.	Available
Benefits	Benefits Agent provides personalized information on various benefits offered by the employer that are tailored to employee's unique circumstances.	Available
Citizen Services	Enable Public Sector organizations to build an agent with their publicly available websites to assist citizens navigate services and information.	Available
Self-Help	Boost customer service with AI for faster, consistent, and efficient resolutions.	Available
Approval Manager	Streamline your approval process across multiple systems with summarized requests in a consolidated view.	Coming soon
CV Match	Employees use the power of AI to analyze CV and get recommended CVs.	Coming soon

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