Dynamics 365 Sales Qualification Agent Labs

1. Introduction

Sales Qualification Agent in Dynamics 365 Sales automates lead research, helping sellers qualify leads faster and focus on high-potential prospects. It streamlines manual tasks by providing insights and recommendations, while keeping sellers in control of decisions. The agent supports efficiency without replacing human judgment.

This document gives detailed information about how to configure and test this agent.

2. Setting Up the Sales Qualification Agent
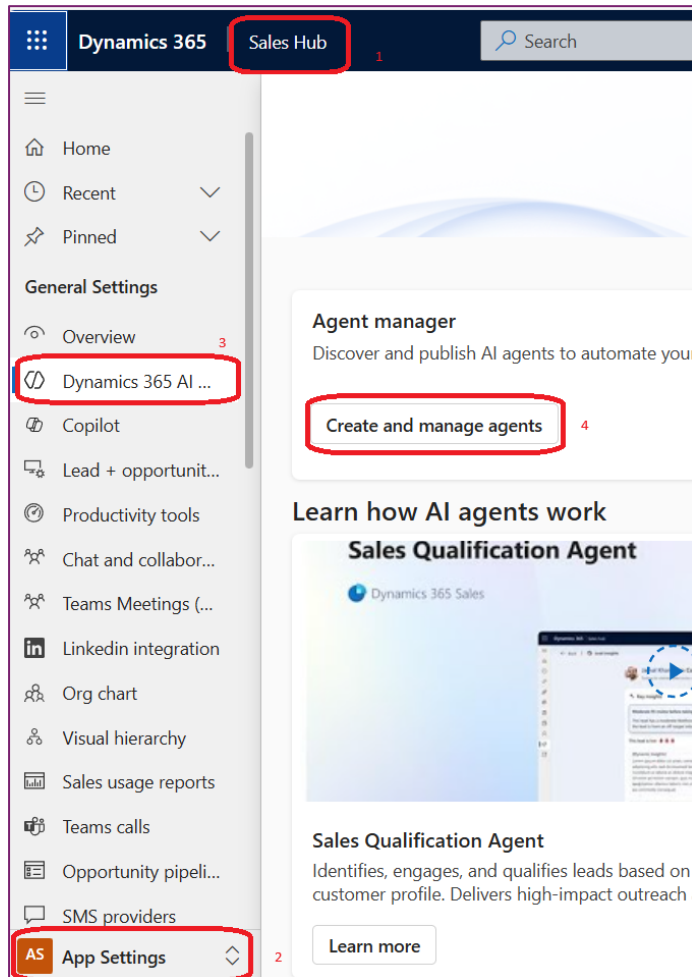
a. Prerequisites

- Microsoft Copilot Studio Credits available

- Move data across region & Bing Search enabled

- AI Prompts enabled

- Azure AD App created

- Dataverse app user configured

- Shared Mailbox available
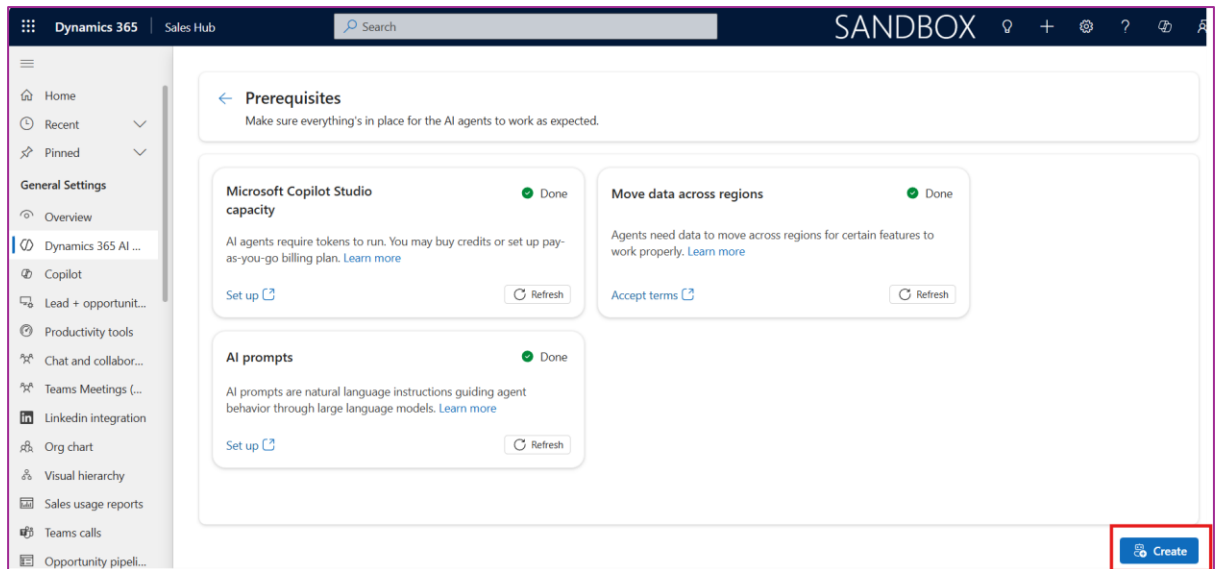
- Server-Side Sync configured

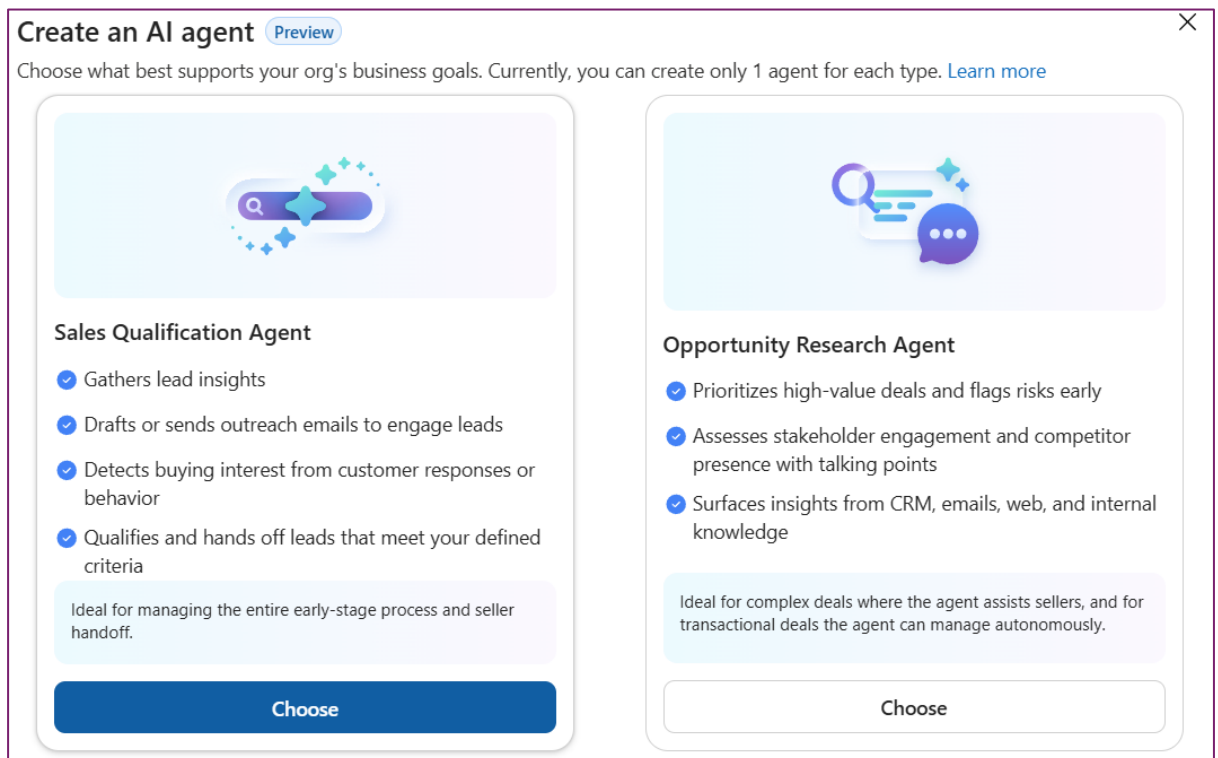Please use the step by step guide - [D365 Sales Agents - Key Prerequisites](#)

b. Create Agent

- Open the Sales Qualification Agent settings page – Go to Sales Hub -> App Settings-> Dynamics 365 AI Hub-> Create and Manage Agents

Make sure prerequisites are set. Click Create.

Choose Sales Qualifications Agent.

Settings page will open

- Select the automation level—Research

- Ensure the following prerequisites are met before continuing to set up the next steps in the agent. Please navigate to respective links for detailed steps.

	Research-only mode	Research and engage mode
Prerequisites	Create an app in Azure Create an app user in Dataverse and assign AISalesPerson role	Create an app in Azure Create an app user in Dataverse and assign AISalesPerson role Create a shared mailbox Configure server-side synchronization

c. Configure Agent Profile

For our scenario we are assuming the Contoso inc is a software company who has Cloud, CRM/ERP & AI products. They take Cloud transformation, CRM/ERP implementation projects. Below is a general walkthrough with same data.

- Continue to General section and configure Profile, Company info, and Products. Please refer Configure general information for detailed steps.

Agent Profile for reference:
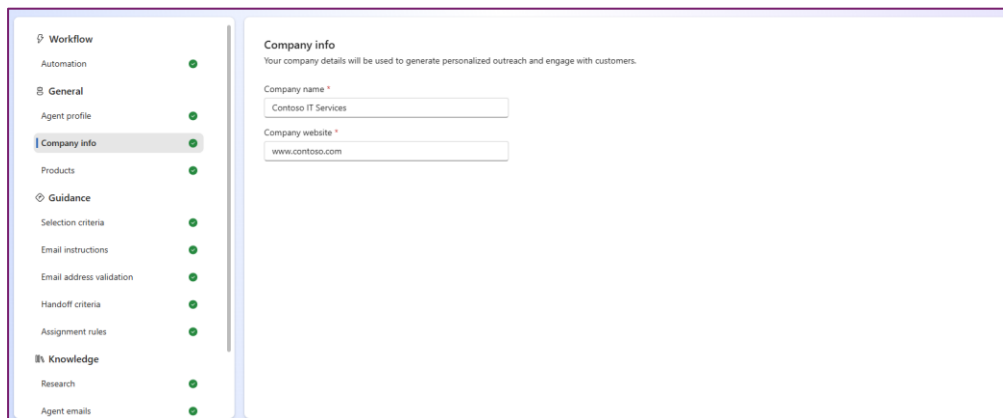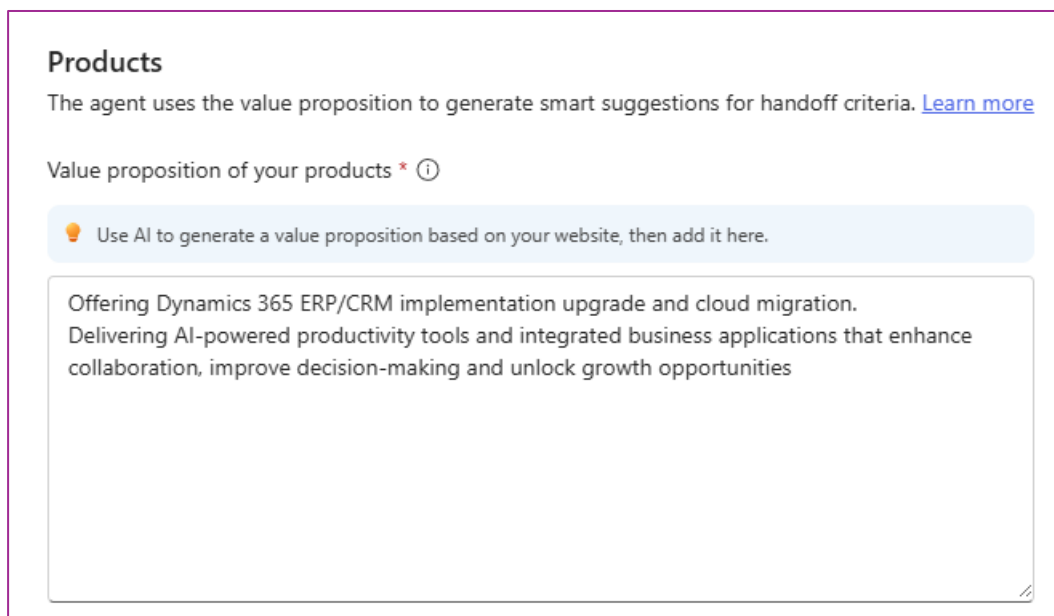
Company Information for reference:

Product for Reference:

d. Configure guidance for agent

- Configure selection criteria for the agent to process the leads. Use Preview section to confirm the filters. Please refer Configure selection criteria for detailed steps.

- Setup email instructions which will be used to draft email based on insights generated or in engage mode to auto engage with contacts. Please refer Configure email instructions and address validation for detailed steps.

- Setup handoff criteria to define and handover the lead to sales rep to engage or disqualify based on intent. Please refer Configure handoff criteria for detailed steps.

For reference:

- Setup assignment rules to identify and assign the qualified leads to sales reps. Please refer Configure assignment rules for more detailed steps.

e. Configure Knowledge sources

- Configure knowledge sources for company & competitor insights and email personalization & responses. Please refer Configure knowledge sources for more details.
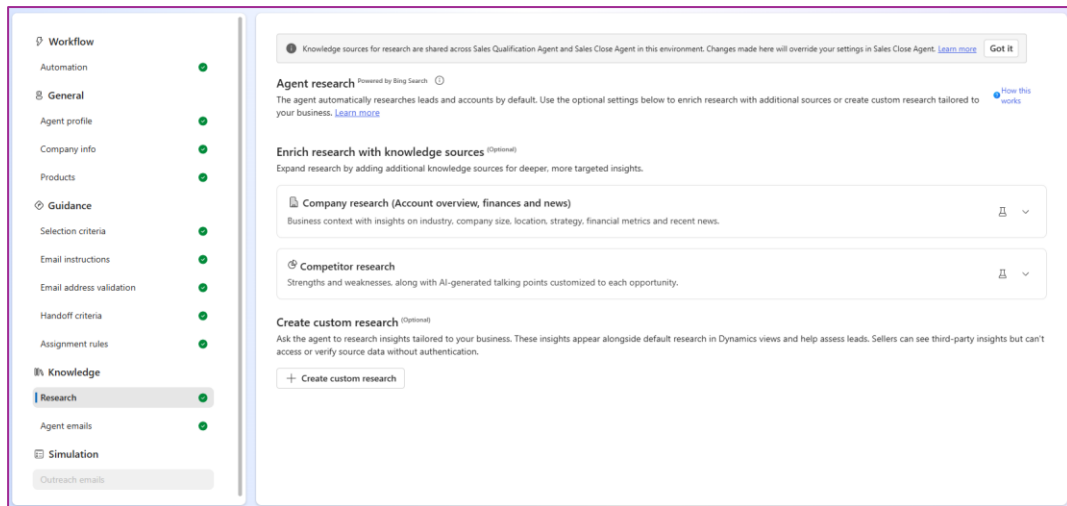
f. Start the agent

- Once the above insights and engage configuration is setup, save and start the agent. Please refer start the agent for more details. (*If agent get stuck during the activation process or revert to a draft state, please refer Troubleshoot Activation Issues with Dynamics 365 Sales AI Agents - Dynamics 365 Sales | Microsoft Learn)*
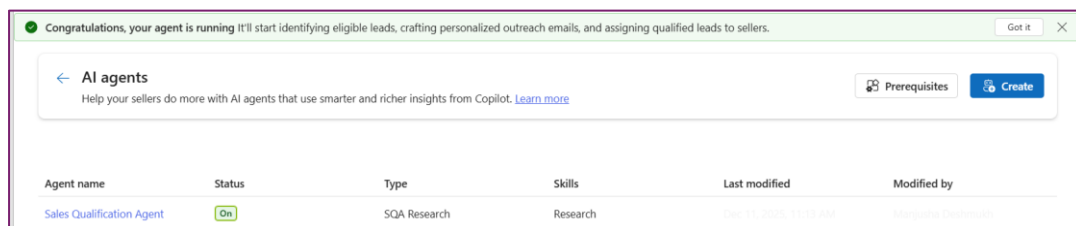
3. Test Research Mode

For our scenario we are assuming the Contoso inc is a software company who has Cloud, CRM/ERP & AI products. They take Cloud transformation, CRM/ERP implementation projects. Below is a general walkthrough with same data.

- Add sample competitors by navigating to Sales Hub -> Sales->Competitors section
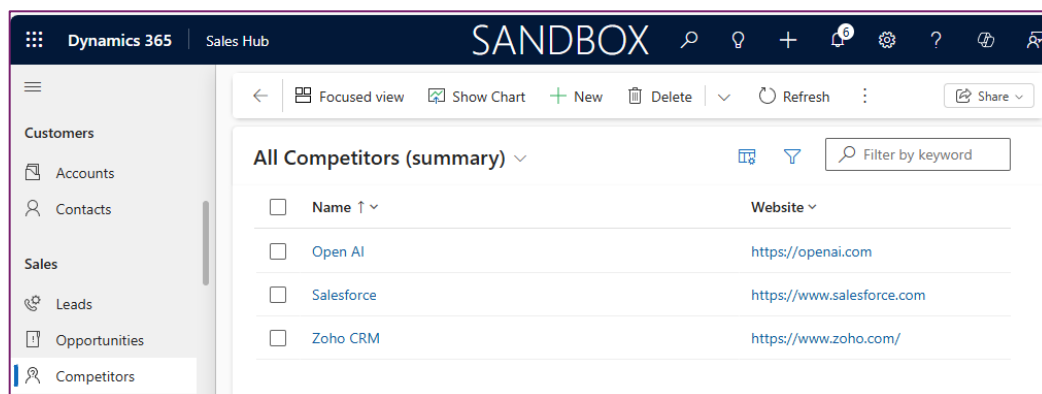
- Import sample leads.

- Download a local copy of Lead sample file.
- Update the email field with valid email. Same email can be used for all records. This email will be used by Sales Qualification Agent to communicate about leads & opportunities.
- Let's import first 3 leads from data file to test agent's research mode.
- Go to your environment -> Change app and open "Power Platform Environment Settings"
- From left navigation go to System->Data Management->Import->Import data
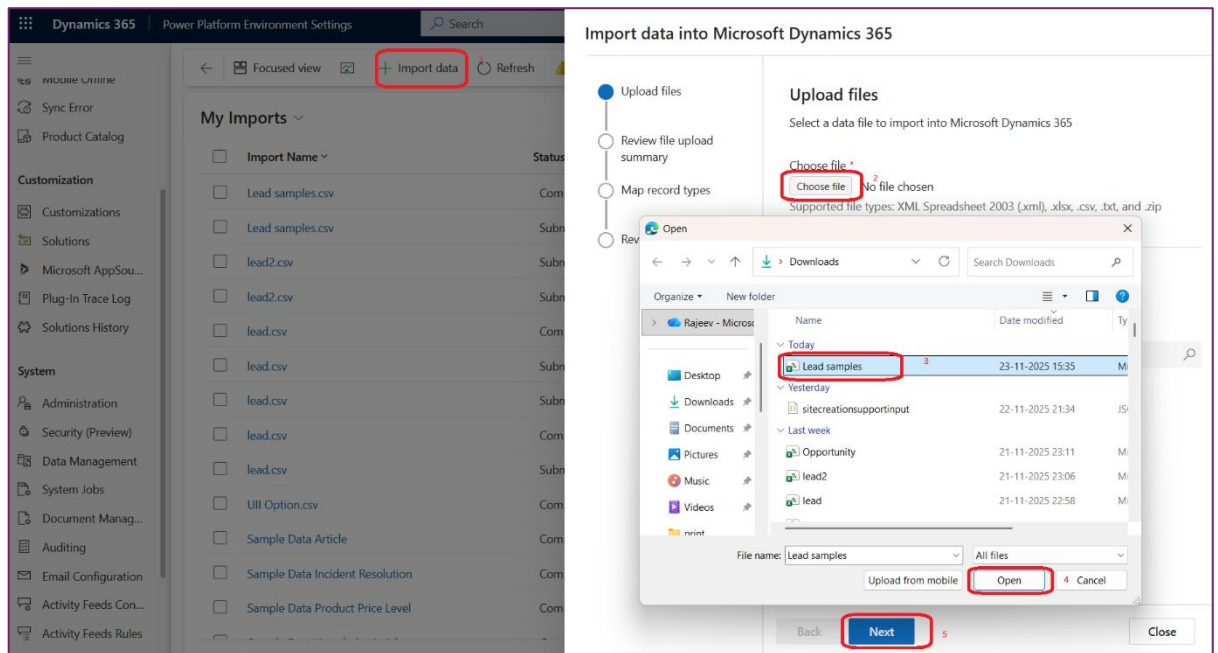
- set [Allow duplicate = On], click next
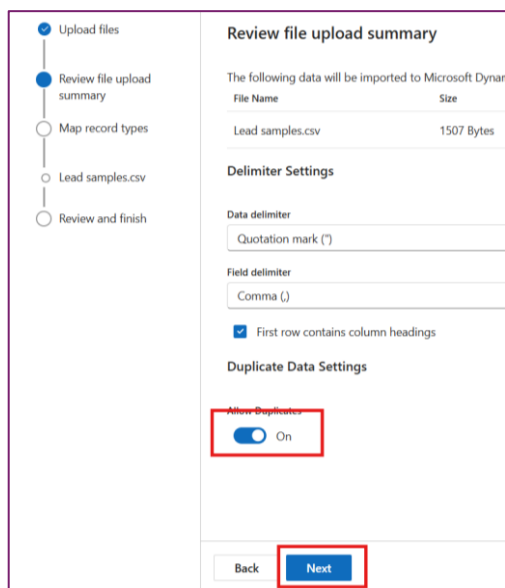
- Select Lead in Entity Mapping field

o Ensure proper field mapping

o Click next to submit the mapping. Import process will start. In few mins, the leads will be successfully created.

- Add relevant competitors to the imported lead. You can find the latest imported leads by navigating All leads and sorting on Created On field in descending order.
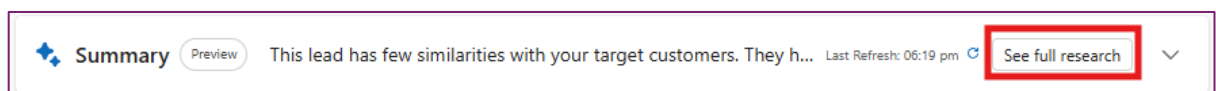
- Validate if the leads are picked by Sales Research Agent – Navigate to 'Leads being processed by AI Agent' view. If there is no backlog the leads should be picked immediately for processing.

- If the lead is eligible for qualification, this will be assigned to any of the sales persons configured in agent. If the lead is not eligible for qualification, this will be disqualified and marked as lost with insights. In any of these scenarios, you can validate the research outcome from the summary section by clicking the "See full research" button.

- The lead research should give insights into the lead, company, your competitors and recommendations for next step:

Key insights

Why this lead is warm

Consulting Industry and Advanced Materials Alignment

Technova Industries operates in the consulting sector and is likely machining metals, composites, ceramics, and polymers, which matches the target industries and material requirements. This strong alignment suggests the lead is a good fit for solutions focused on advanced manufacturing and process optimization. [1] [2] [3]

No Job Title Data Available

There is no relevant data available for the lead's job title, so it is unclear if the contact is a manager, director, or purchasing decision-maker. This gap may affect qualification and should be addressed in future outreach.

Company Background Supports Technology Investment

Technova Industries is focused on middleware solutions, data science acceleration, and cloud computing, with a small but specialized workforce. Their strategic priorities and financial health indicate readiness for enterprise-grade IT investments. [4] [5] [6]

| [1] G Modern Machining Technology: A Practical Guide - Google Books | [2] G Machining Composites Materials - Google Books | +4 |

Deeper insights

∧ Company Overview

Overview

- **Company background:** Technova Industries operates in the Scientific Research & Development Services sector, specializing in middleware solutions for data science acceleration and cloud computing. The company is headquartered in Green Bay, Wisconsin, and was founded in 2023. It maintains a small workforce of roughly 10-100 employees. Technova's core offering is DataStorm One, an advanced SaaS platform that automates the integration of legacy and modern systems, leveraging AI and predictive analytics to collect and analyze data from various sources, such as security cameras and sensors, for actionable insights. This B2B model supports organizations in optimizing infrastructure and management through seamless technology integration. This background is relevant to Contoso IT Services because Technova's focus on integrating business processes with advanced cloud and analytics platforms, particularly with a need to connect diverse technologies, directly relates to the Dynamics 365 CRM cloud migration and upgrade services Contoso provides. [1] [2]
- **Strategic priorities:** Technova is strategically focused on expanding its middleware product adoption, enabling seamless integration of business processes, improving operational efficiency, and facilitating data-driven decision-making through advanced analytics and automation. The company's recent recognition in international security conferences, active pursuit of innovation, and engagement with new investors (noted by recent VC rounds) highlight a drive for growth and digital transformation. These priorities strongly align with Contoso IT Services' value proposition for Dynamics 365 CRM upgrades and cloud migrations—especially for organizations seeking to modernize finance, resource management, and information systems to achieve operational excellence and scalable growth. [1] [3]

Finances

TechNova Solutions displays solid financial health with consistent revenue growth and expanding market presence, indicating strong buying capacity and financial stability for enterprise-grade IT investments. The company reported $1.25 billion in revenue with net income at $210 million, positive operating cash flow of $350 million, and EBITDA of $30 million, showing operational efficiency despite some pressures from increased costs and strategic R&D spend. The rising share of recurring revenue (65% of total) and segment expansion in cybersecurity, cloud, and analytics reinforce reliable future cash flow, while management is proactively addressing risks from competition and market uncertainty. These financials suggest that TechNova is well-positioned to invest in Contoso IT Services' Dynamics 365 CRM solutions, supporting both immediate and scalable technology deployments. [4] [5]

News

4. Enable Engage Mode

- Open the Sales Qualification Agent settings page – Go to Sales Hub -> App Settings-> Dynamics 365 AI Hub-> Create and Manage Agents

- To edit, in the AI agents page, select the Sales Qualification Agent name.

- Select the automation level—Engage
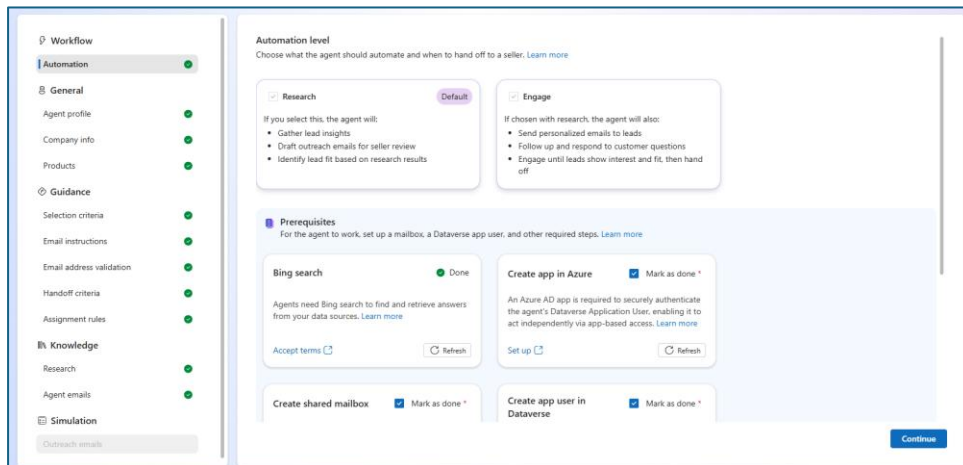
- In the Knowledge section, select Agent emails. Click Add to explore the option to personalise outreach email response using Knowledge Sources. Learn more in Configure knowledge sources for Sales Qualification Agent | Microsoft Learn
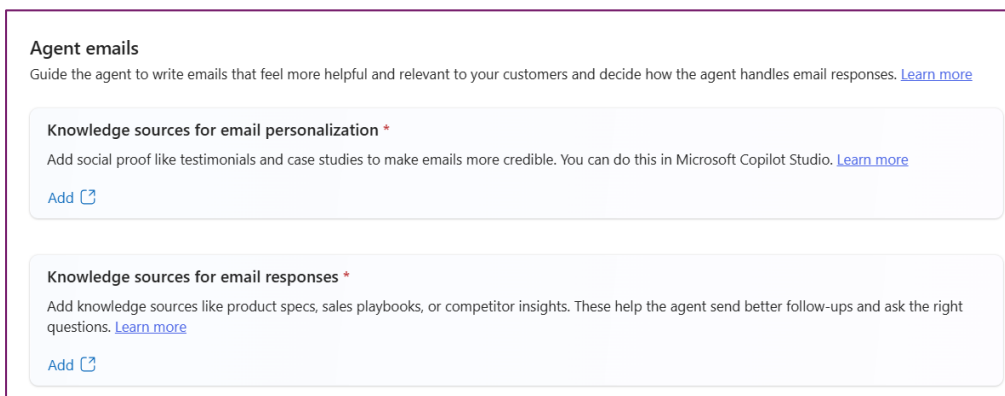
- Run simulations to review the quality of outreach emails and apply improvements. Please refer Run simulation to review the agent's outreach emails for more detailed steps.
  a. Go to the Simulation section and then select Outreach emails.

  b. In the **Review outreach emails** page, select **Start testing**. The agent performs the following actions:

    - Research the assigned leads.

- Draft outreach emails based on the research.
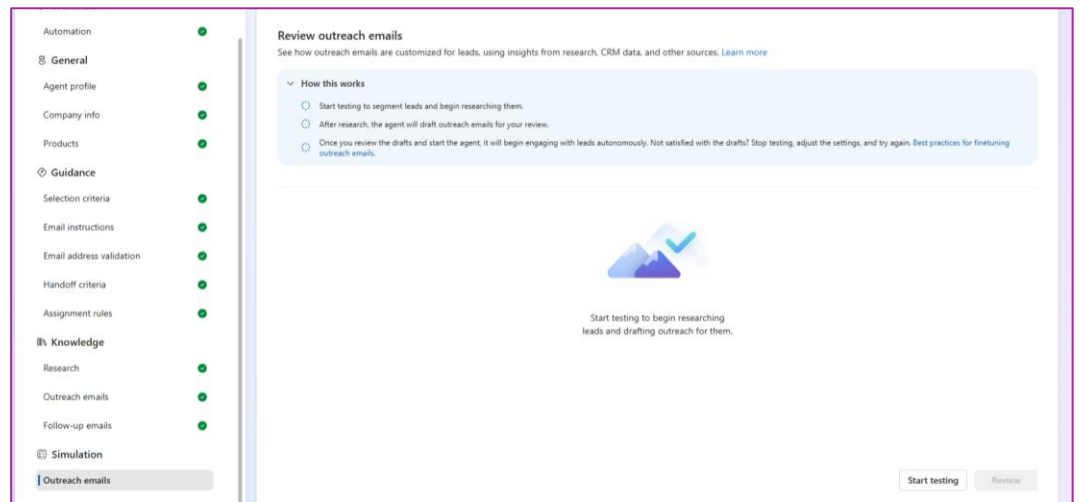
c. After the research is complete, the drafts are available for review, select **Review**.

Review outreach email

| Subject | Groww digital transformation opportunities |

Hi Arunk,

Groww's recent IPO and focus on cloud upgrades and digital infrastructure highlight a strong commitment to modernizing its platform and expanding its market presence.

Contoso IT Services specializes in Dynamics 365 CRM implementation, upgrade, and cloud migration, which aligns well with Groww's strategic priorities of enhancing platform stability and diversifying revenue streams. Our solutions can support Groww's transition to a holistic wealth management ecosystem by improving customer relationship management and operational efficiency.

Would you be available for a quick call in the next few days to discuss further?

Best regards,
AI sales representative

Email generated by AI

d. Review the drafts and provide feedback or make edits as necessary.
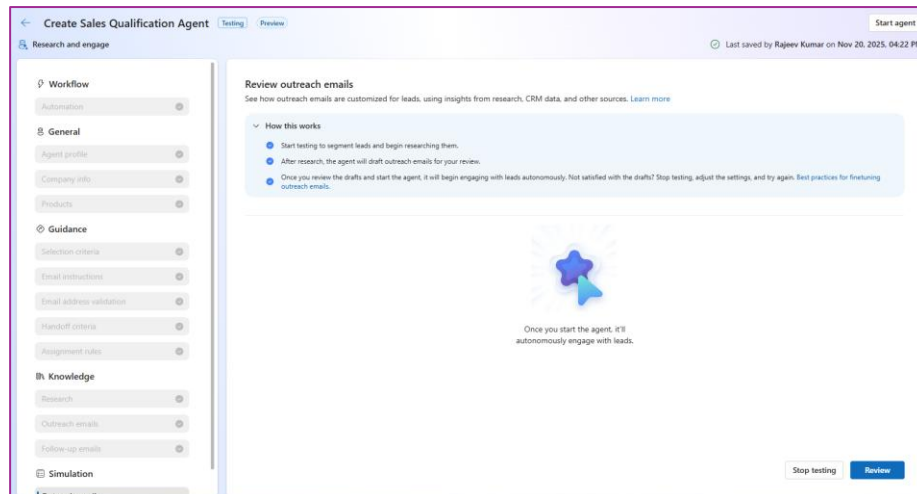
5. Test Engage Mode

If the agent is configured to Engage, the agent auto engages through email for required information. Based on response it will disqualify or assign the lead to sales reps. Please note that the engage mode always considers the research is enabled. Once you enable engage this can't be disabled.

Get a local copy of additional samples from lead-samples-engage . Import in the environment. Observe post an interval. The full research insights will display in below stages:
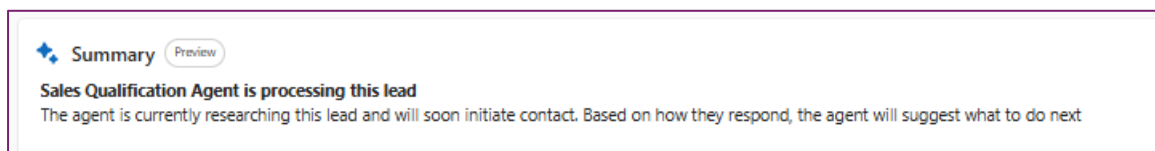
Once the agent has sent an initial mail, the research summary will look like below.
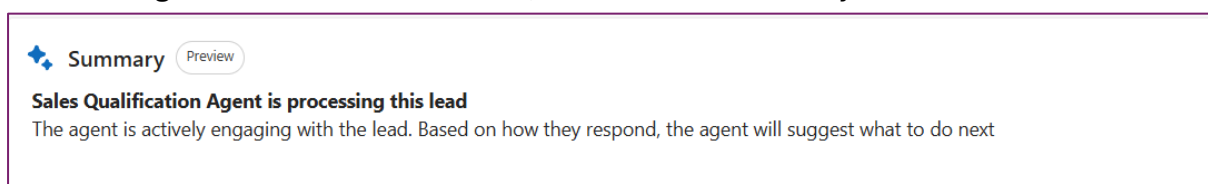
The lead contact will receive an email, based on their response agent will take next action (either assignment, more insights or disqualification).
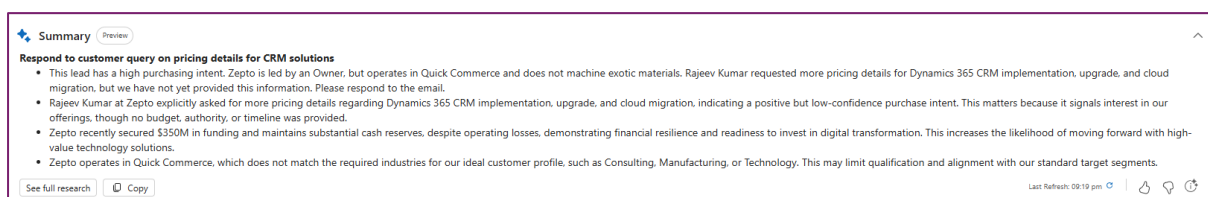
Full research should be like below

Rajesh Gupta from **Zepto** ⟲

RG   Digital adoption challenges in ecomerce retail businesses | This lead is warm 🔥 🔥 🔥

Owner - rajeev.kumar@microsoft.com (📧 Work)

Generated yesterday ⓘ   How was this research generated?

Key insights   ⌃

What has happened to this lead

We exchanged three emails with Rajeev Kumar at Zepto between November 21, 2025, discussing Zepto's digital adoption and cloud migration. On November 21, Rajeev requested more pricing details for Dynamics 365 CRM solutions, but we have not yet provided this information. No evidence of unsubscribing or failed follow-ups is present.

Why this lead is warm

Requested Pricing Details for CRM Solutions	Zepto Has Strong Financial Capacity	Industry Mismatch with Target Profile
Rajeev Kumar at Zepto explicitly asked for more pricing details regarding Dynamics 365 CRM implementation, upgrade, and cloud migration, indicating a positive but low-confidence purchase intent. This matters because it signals interest in our offerings, though no budget, authority, or timeline was provided. [1]	Zepto recently secured $350M in funding and maintains substantial cash reserves, despite operating losses, demonstrating financial resilience and readiness to invest in digital transformation. This increases the likelihood of moving forward with high-value technology solutions. [2] [3] [4]	Zepto operates in Quick Commerce, which does not match the required industries for our ideal customer profile, such as Consulting, Manufacturing, or Technology. This may limit qualification and alignment with our standard target segments.

| 1 | ✉ Re: Solving digital adoption in quick commerce CRM:0560016 | 2 | B Zepto FY24 Report: Rs 5,747 Cr Spent, Rs 4,454 Cr Revenue | +2 | 👍 👎

If the lead is disqualified based on communications, the research should give insight on why the decision has been made.

The lost lead will have option to be reassigned to individual sales rep in case of any insights gap.

6. References:

- [Sales Qualification Agent overview](#)
- [Setup and configure Sales Qualification Agent](#)
- [Test the Sales Qualification Agent](#).