

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

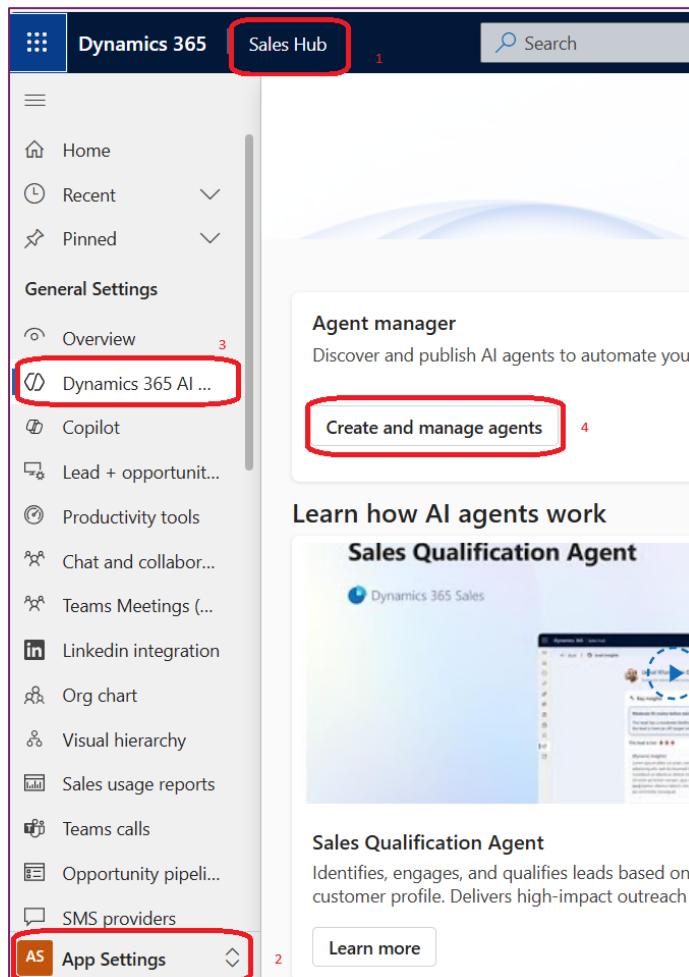
a. Prerequisites

- 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.

Dynamics 365 | Sales Hub

SANDBOX

Prerequisites

Make sure everything's in place for the AI agents to work as expected.

Microsoft Copilot Studio capacity Done

AI agents require tokens to run. You may buy credits or set up pay-as-you-go billing plan. [Learn more](#)

[Set up](#) [Refresh](#)

Move data across regions Done

Agents need data to move across regions for certain features to work properly. [Learn more](#)

[Accept terms](#) [Refresh](#)

AI prompts Done

AI prompts are natural language instructions guiding agent behavior through large language models. [Learn more](#)

[Set up](#) [Refresh](#)

[Create](#)

Choose Sales Qualifications Agent.

Create an AI agent [Preview](#)

Choose what best supports your org's business goals. Currently, you can create only 1 agent for each type. [Learn more](#)

Sales Qualification Agent

- Gathers lead insights
- Drafts or sends outreach emails to engage leads
- Detects buying interest from customer responses or behavior
- Qualifies and hands off leads that meet your defined criteria

Ideal for managing the entire early-stage process and seller handoff.

[Choose](#)

Opportunity Research Agent

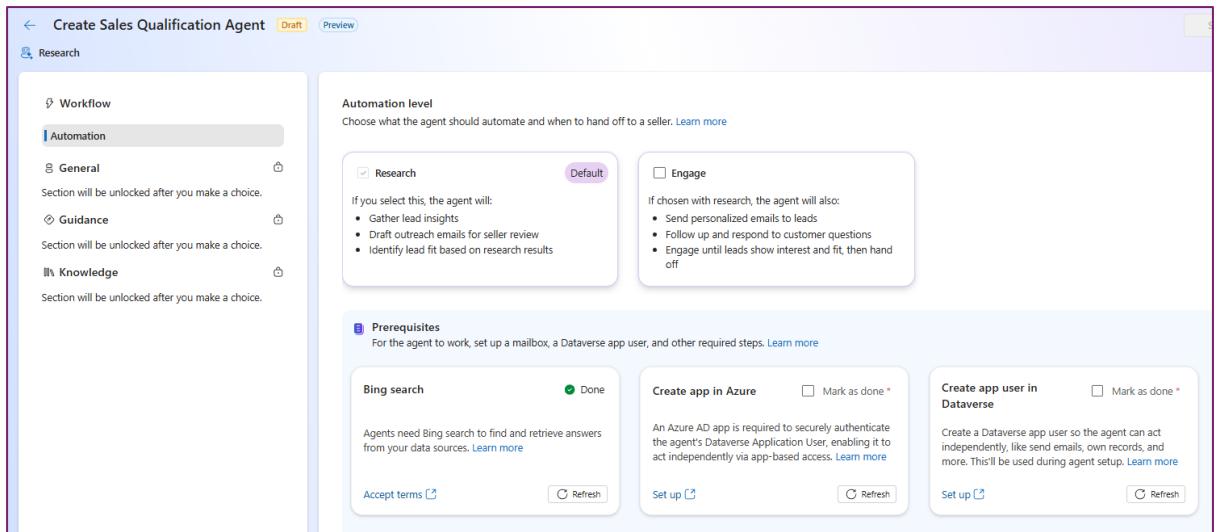
- Prioritizes high-value deals and flags risks early
- Assesses stakeholder engagement and competitor presence with talking points
- Surfaces insights from CRM, emails, web, and internal knowledge

Ideal for complex deals where the agent assists sellers, and for transactional deals the agent can manage autonomously.

[Choose](#)

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 AI SalesPerson role	Create an app in Azure Create an app user in Dataverse and assign AI SalesPerson 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:

The screenshot shows the 'Company info' configuration screen. On the left, there's a sidebar with categories: Workflow, General, Guidance, Knowledge, and Products. Under 'General', 'Company info' is selected. The main area is titled 'Company info' with the sub-instruction 'Your company details will be used to generate personalized outreach and engage with customers.' It contains two input fields: 'Company name *' with 'Contoso IT Services' and 'Company website *' with 'www.contoso.com'.

Product for Reference:

The screenshot shows the 'Products' configuration screen. The left sidebar has a single item under 'Products'. The main area is titled 'Value proposition of your products * ⓘ' and contains a callout box with the text 'Use AI to generate a value proposition based on your website, then add it here.' Below this, there's a larger text area with the content 'Offering Dynamics 365 ERP/CRM implementation upgrade and cloud migration. Delivering AI-powered productivity tools and integrated business applications that enhance collaboration, improve decision-making and unlock growth opportunities'.

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.

Selection criteria
Manage the criteria to help the agent focus on the right leads. [Learn more](#)

Name *
Cold leads

Description
This segment will be used to route leads to the autonomous SQA.

Segment conditions (max 10) (And)

Field	Operator	Value
Status	Equals	Open
Rating	Equals	Cold
Email	Contains data	

Consider leads created in the last

Preview leads
These leads are just examples, and actual results may vary. You're seeing a limited set, not the full list.

LeadName	CreatedOn	Owner
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- 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.

Email instructions
Manage how the agent personalizes and drafts emails. [Learn more](#)

Compliance
Choose a compliance profile to ensure your emails meet consent and privacy requirements. [Learn more](#)

Compliance profile (Check consent and adds an unsubscribe link to your commercial emails.)

Purpose (Commercial)

Topic (Choose a topic)

Email address validation

Choose the field to validate a lead's email and domain. The agent can run research and send emails only to leads with valid email addresses. [Learn more](#)

Email (emailaddress1)

- 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:

Workflow

- Automation
- General
- Agent profile
- Company info
- Products
- Guidance
- Selection criteria
- Email instructions
- Email address validation
- Handoff criteria**
- Assignment rules
- Knowledge
- Research
- Agent emails
- Simulation
- Outreach emails

Handoff criteria

Manage which leads are handed to sellers. The agent uses CRM data, web research, and conversations to assess fit and buying interest. High-interest leads that meet over half the criteria are handed off; others are disqualified. If budget, authority, need, or timeline criteria are set, the agent continues engaging until all are confirmed. Otherwise, leads are handed off once purchase interest is identified. To start the agent, at least one handoff criterion must be set. [Learn more](#)

What industries are you targeting?

Consulting, Manufacturing, Technology, Automotive, General Engineering, Aerospace

Where's this info stored?

[LeadIndustry](#) [AccountIndustry](#) [+ Add](#)

What's the typical employee size of companies you sell to?

For example: Enterprise-level orgs with a big workforce, typically ranging from 1,000 to over 100,000 employees.

Where's this info stored?

What roles make the buying decisions at these companies?

All managers, directors, purchasing roles and leaders

Where's this info stored?

Where are your customers located?

For example: We target customers located in major business hubs across North America, Europe, Asia, and other key regions globally, including cities like New York, London, Tokyo, and Sydney.

Where's this info stored?

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

Assignment rules

Choose who the AI agent hands over the leads to. Leads will be distributed using round robin. [Learn more](#)

AI agent should hand leads over to? *

Seller

Choose sellers

#M # Manjusha Deshmukh × MD Manjusha Deshmukh × RK Rajeev Kumar ×

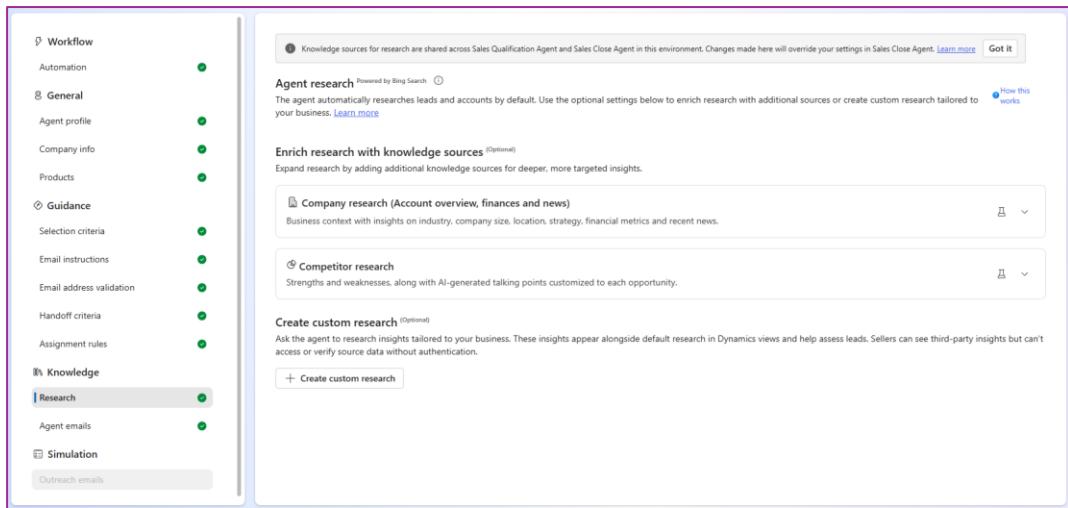
Add supervisor * ⓘ

Choose supervisor

AS Anand Singh ×

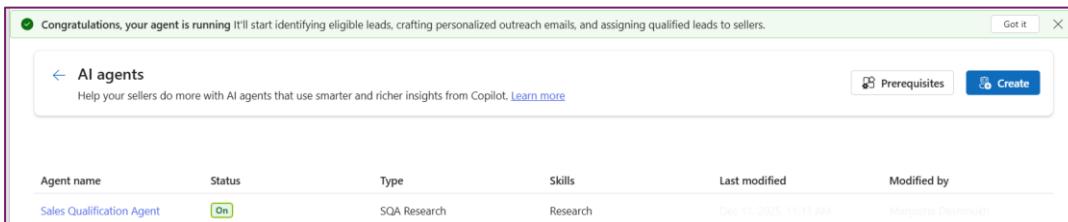
e. Configure Knowledge sources

- Configure knowledge sources for company & competitor insights and email personalization & responses. Please refer [Configure knowledge sources](#) for more details.



f. Start the agent

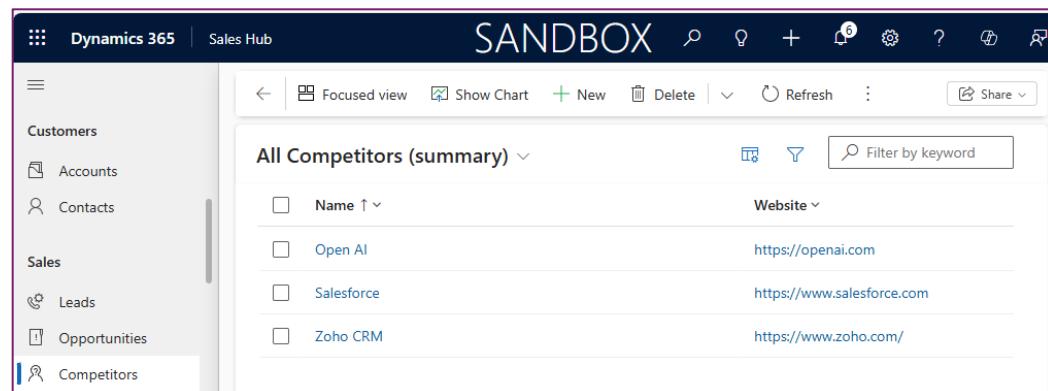
- Once the above insights and engage configuration is setup, save and start the agent. Please refer [start the agent](#) for more details. (*If agent get stuck during the activation process or revert to a draft state, please refer [Troubleshoot Activation Issues with Dynamics 365 Sales AI Agents - Dynamics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



3. Test Research Mode

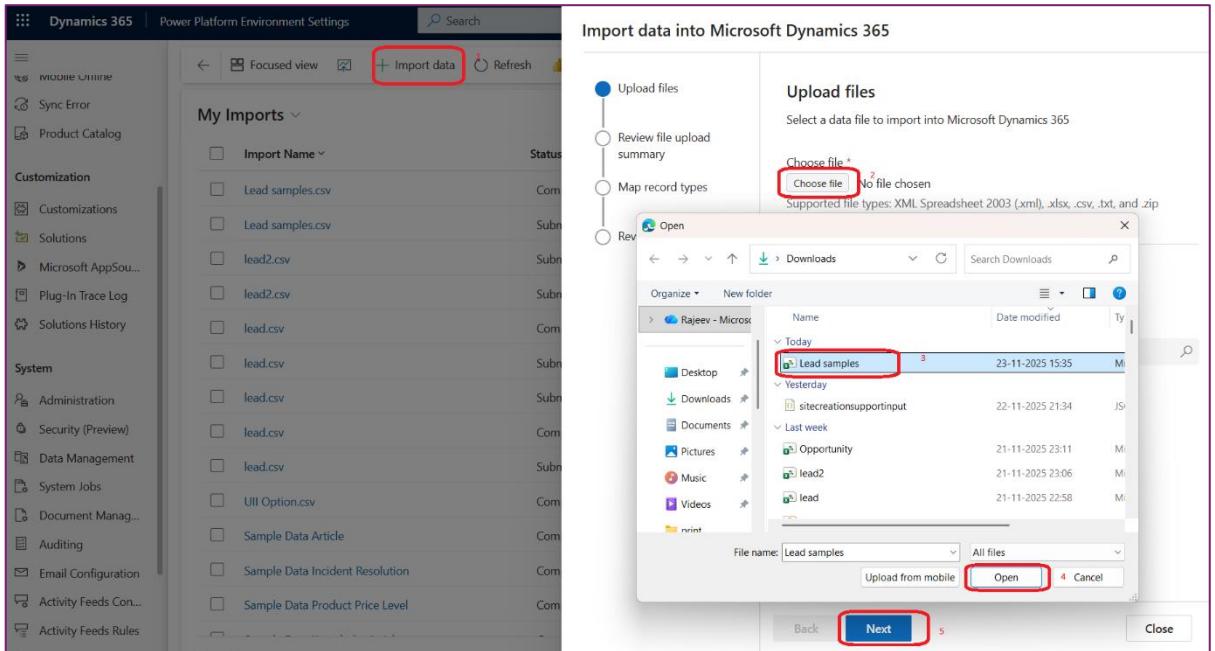
For our scenario we are assuming the Contoso inc is a software company who has Cloud, CRM/ERP & AI products. They take Cloud transformation, CRM/ERP implementation projects. Below is a general walkthrough with same data.

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

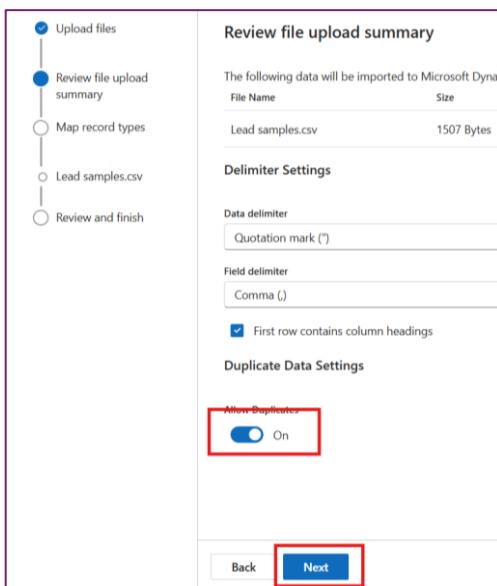


- Import sample leads.

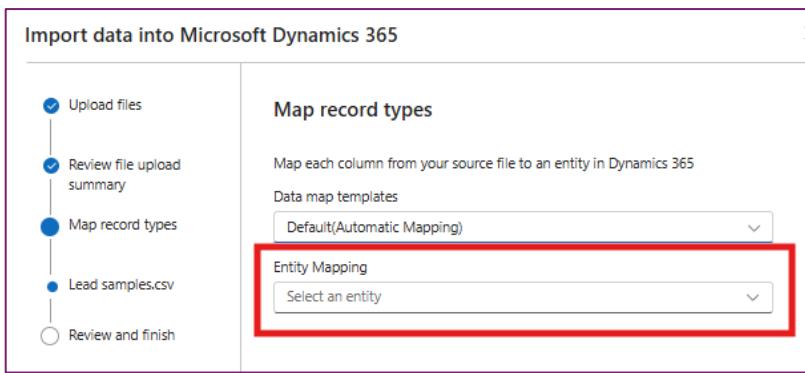
- Download a local copy of [Lead sample file](#).
- Update the email field with valid email. Same email can be used for all records.
- This email will be used by Sales Qualification Agent to communicate about leads & opportunities.
- Let's import first 3 leads from data file to test agent's research 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



- Ensure proper field mapping

This screenshot continues the 'Map record types' step. It shows detailed mappings for various fields:

- Optional Fields:**
 - Company name: Company Name
 - Country/Region: Country/Region
 - Email: Email
 - Est Value: Not Mapped
 - First Name: First Name
 - Industry: Industry (Option set)
- Source option values vs Dynamics 365 option values:**
 - Aerospace: Aerospace
 - Consulting: Consulting
 - Transport: Transport
 - (empty): Ignore
- Rating:**
 - Cold: Cold
 - (empty): Ignore
- Source:**
 - Lead Source (Option set):
 - Web: Web
 - (empty): Ignore
- Website:** Website

- 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 | [Modern Machining Technology: A Practical Guide - Google Books](#) 2 | [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

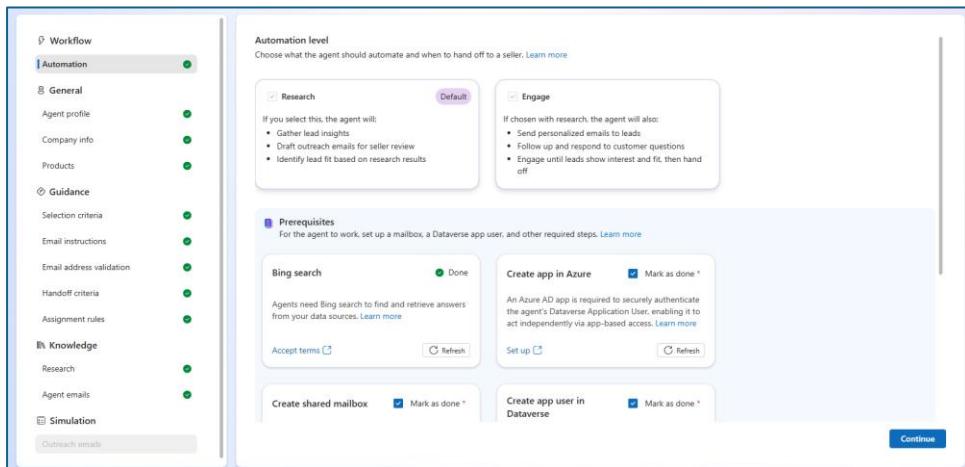
TechNova Solutions displays solid financial health with consistent revenue growth and expanding market presence, indicating strong buying capacity and financial stability for enterprise-grade IT investments. The company reported \$1.25 billion in revenue with net income at \$210 million, positive operating 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](#)

Agent emails

Guide the agent to write emails that feel more helpful and relevant to your customers and decide how the agent handles email responses. [Learn more](#)

Knowledge sources for email personalization *

Add social proof like testimonials and case studies to make emails more credible. You can do this in Microsoft Copilot Studio. [Learn more](#)

[Add](#)

Knowledge sources for email responses *

Add knowledge sources like product specs, sales playbooks, or competitor insights. These help the agent send better follow-ups and ask the right questions. [Learn more](#)

[Add](#)

- 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.
 - Go to the Simulation section and then select Outreach emails.
 - 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.

The screenshot shows the Microsoft Outreach interface. On the left, there's a sidebar with a tree view of settings: Automation, General, Guidance, Knowledge, Simulation, and Outreach emails (which is selected). The main area is titled 'Review outreach emails' with a sub-section 'How this works'. It explains the process: start testing to segment leads and begin researching them, then after research, the agent will draft outreach emails for review. Once reviewed, drafts are used to engage leads autonomously. There's also a small icon of clouds with a checkmark. At the bottom right are 'Start testing' and 'Review' buttons.

- After the research is complete, the drafts are available for review, select **Review**.

The screenshot shows a drafted outreach email. The subject is 'Groww digital transformation opportunities'. The body of the email reads:

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.

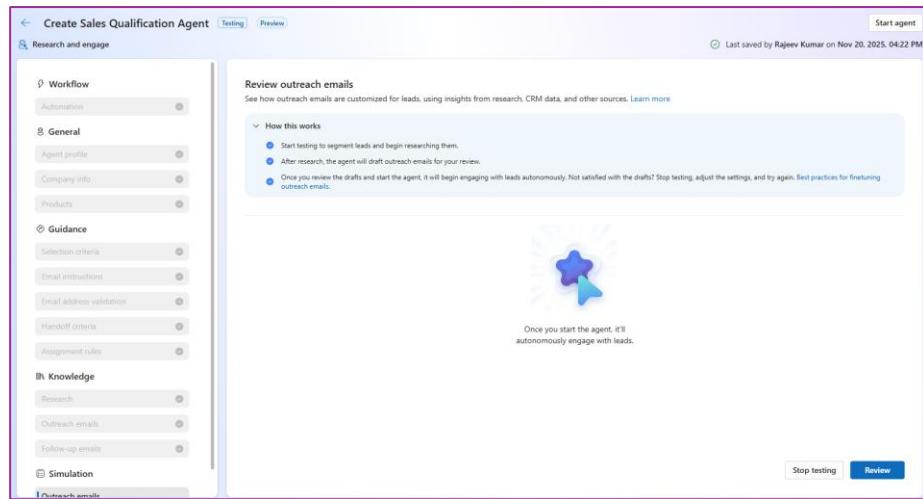
Contoso IT Services specializes in Dynamics 365 CRM implementation, upgrade, and cloud migration, which aligns well with Groww's strategic priorities of enhancing platform stability and diversifying revenue streams. Our solutions can support Groww's transition to a holistic wealth management ecosystem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

- 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:

◆ **Summary** Preview

Sales Qualification Agent is processing this lead
The agent is currently researching this lead and will soon initiate contact. Based on how they respond, the agent will suggest what to do next

Once the agent has sent an initial mail, the research summary will look like below.

◆ **Summary** Preview

Sales Qualification Agent is processing this lead
The agent is actively engaging with the lead. Based on how they respond, the agent will suggest what to do next

The lead contact will receive an email, based on their response agent will take next action (either assignment, more insights or disqualification).

◆ **Summary** Preview

Respond to customer query on pricing details for CRM solutions

- This lead has a high purchasing intent. Zepto is led by an Owner, but operates in Quick Commerce and does not machine exotic materials. Rajeev Kumar requested more pricing details for Dynamics 365 CRM implementation, upgrade, and cloud migration, but we have not yet provided this information. Please respond to the email.
- 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.
- 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.
- 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.

See full research Copy

Full research should be like below

← Back | Lead Research Preview

Powered by Bing Search | AI-generated content may be incorrect.

Rajesh Gupta from Zepto

Digital adoption challenges in ecommerce 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
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 Has Strong Financial Capacity
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](#)

Industry Mismatch with Target Profile
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 | 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.

[← Back](#) | [Lead Research](#) [Preview](#)

Powered by Bing Search | AI-generated content may be incorre

Rakesh Iyer from NeoBank Asia [🔗](#)

Azure OpenAI integration with D365, real-time customer insights for fintech | This lead is cold 🔴 ⚪ ⚪

Head of Digital - rajeev.kumar@microsoft.com [🔒 Work](#)

Generated 06:30 pm ⓘ

How was this research generated?

[Suggested action](#)

Lead Auto-disqualified due to low buying intent

This lead has low purchasing intent, as Rajeev Kumar at Neobank Asia explicitly stated they have found a service provider and will reach out in the future if any opportunity arises. The company is in the FinTech industry, and Rajeev Kumar is Head of Digital, but there is no evidence of machining exotic materials.

1 | [✉ Re: Real time insights for fintech growth CRM:0560001](#)

[Reassign](#)

Key insights

What has happened to this lead

We sent three emails to Rajeev Kumar at Neobank Asia between November 20 and November 23, 2025, discussing digital transformation and CRM solutions. On November 23, 2025, the lead replied stating they have found a service provider and will reach out in the future if any opportunity arises. No further engagement or follow-up has occurred since then.

Why this lead is cold

Lead Explicitly Declined Current Solutions

The lead responded on November 23, 2025, stating they have already selected a service provider and will only reach out if future opportunities arise, indicating no current purchase intent and a high likelihood of deal loss. ⓘ

Industry Mismatch with Target Criteria

Neobank Asia operates in the FinTech sector, which does not match the required industries for qualification, reducing the likelihood of a successful sale.

Recent Email Response but No Ongoing Engagement

The most recent interaction was a direct reply from the lead on November 23, 2025, but there have been no further responses or engagement since then. ⓘ

1 | [✉ Re: Real time insights for fintech growth CRM:0560001](#)

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.](#)