

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

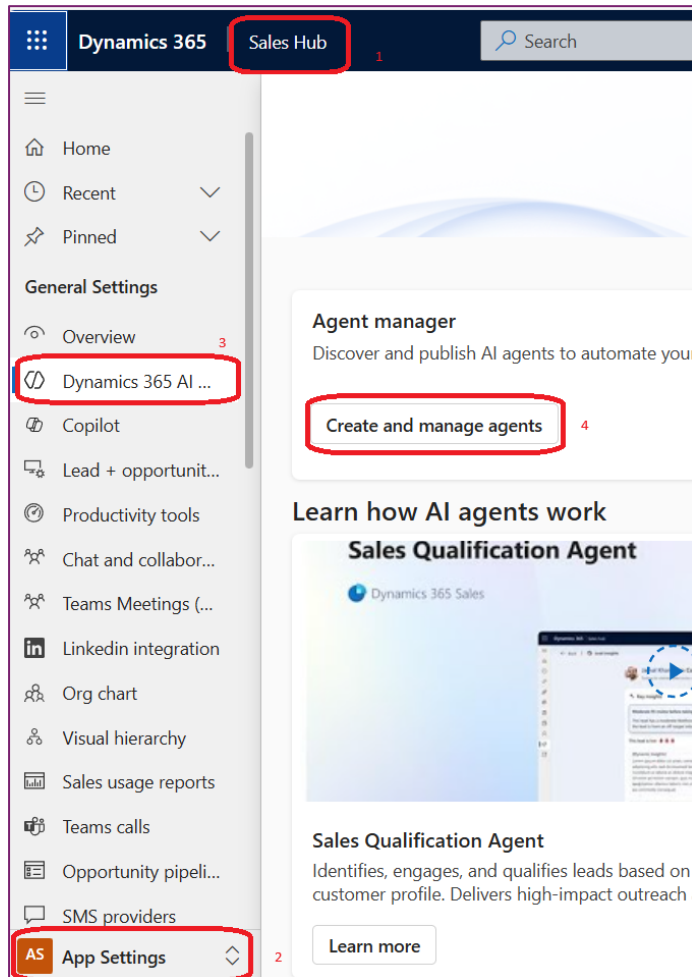
a. Prerequisites

- 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

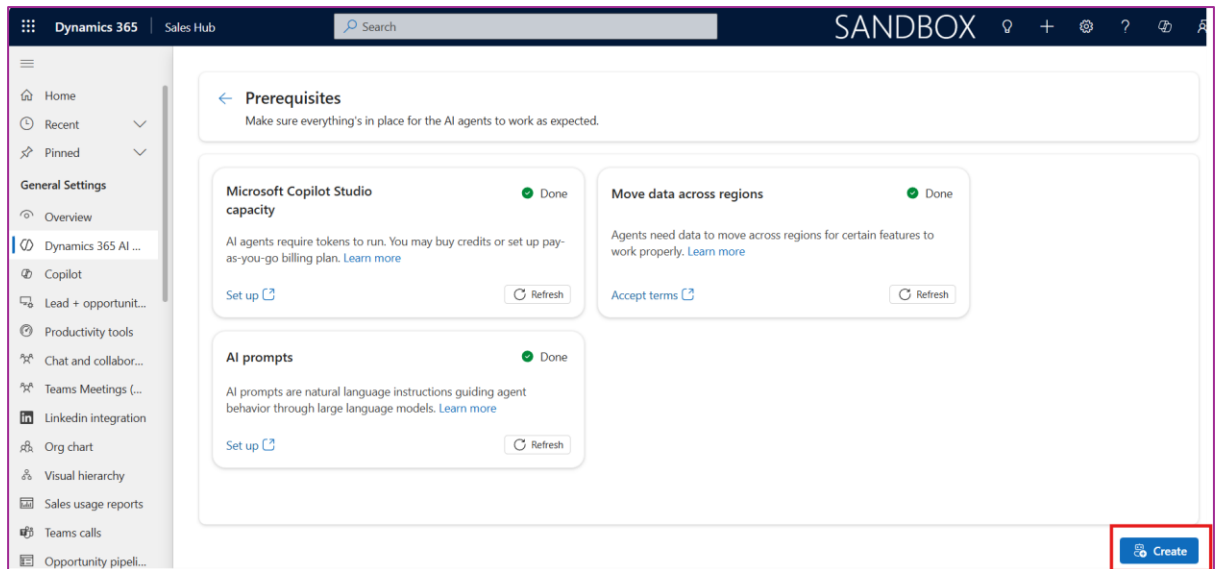
Please use the step by step guide - [D365 Sales Agents - Key Prerequisites](#)

b. Create Agent

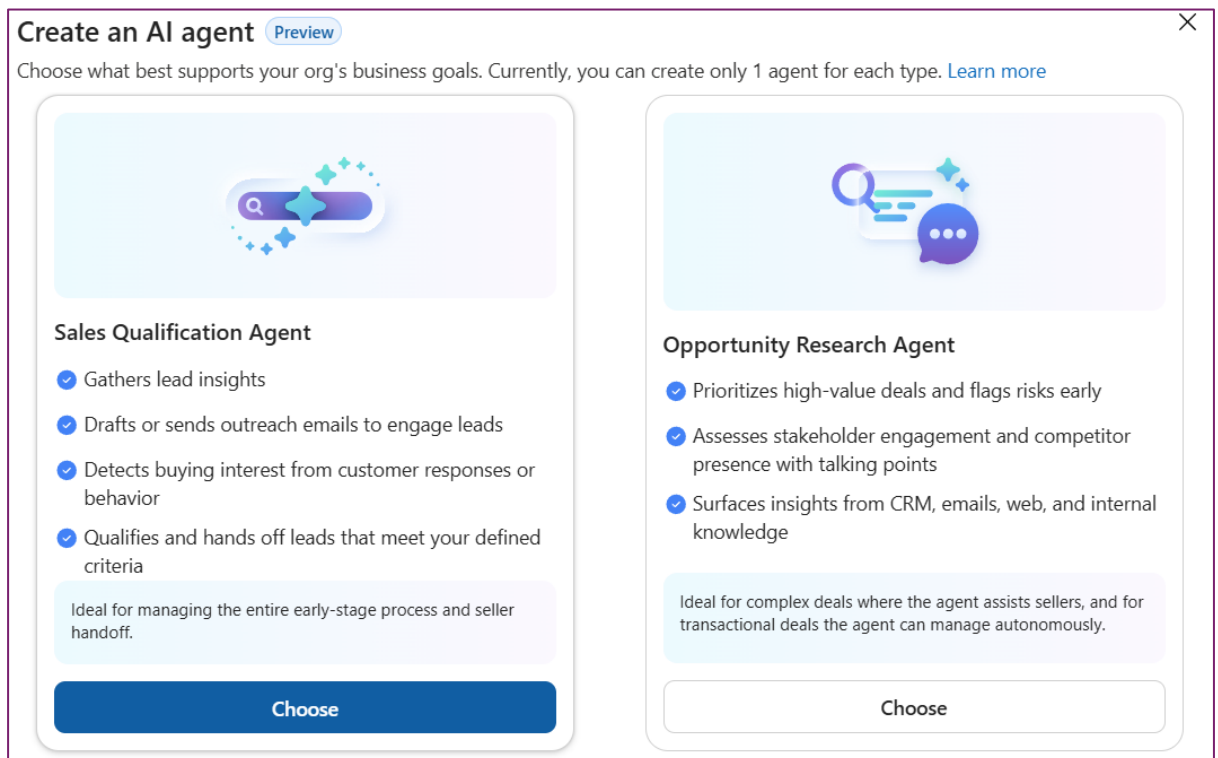
- [Open the Sales Qualification Agent settings page](#) – Go to Sales Hub -> App Settings-> Dynamics 365 AI Hub-> Create and Manage Agents



Make sure prerequisites are set. Click Create.



Choose Sales Qualifications Agent.



Settings page will open

- Select the automation level—Research

← Create Sales Qualification Agent Draft Preview

Research

Workflow

Automation

General

Guidance

Knowledge

Automation level

Choose what the agent should automate and when to hand off to a seller. [Learn more](#)

☒ Research Default

If you select this, the agent will:

- Gather lead insights
- Draft outreach emails for seller review
- Identify lead fit based on research results

☐ Engage

If chosen with research, the agent will also:

- Send personalized emails to leads
- Follow up and respond to customer questions
- Engage until leads show interest and fit, then hand off

Prerequisites

For the agent to work, set up a mailbox, a Dataverse app user, and other required steps. [Learn more](#)

Bing search Done

Agents need Bing search to find and retrieve answers from your data sources. [Learn more](#)

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

Create app in Azure Mark as done *

An Azure AD app is required to securely authenticate the agent's Dataverse Application User, enabling it to act independently via app-based access. [Learn more](#)

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

Create app user in Dataverse Mark as done *

Create a Dataverse app user so the agent can act independently, like send emails, own records, and more. This'll be used during agent setup. [Learn more](#)

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

- 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:

Workflow

Automation

General

Agent profile

Company info

Products

Guidance

Selection criteria

Email instructions

Email address validation

Handoff criteria

Assignment rules

Knowledge

Research

Agent emails

Agent profile

Manage the agent's details that'll be used to engage with your customers. [Learn more](#)

Agent name *

Sales Qualification Agent

What should this agent do?

Describe what this agent should do

Agent user *

Best regards,
AI sales representative

[Modify signature](#)

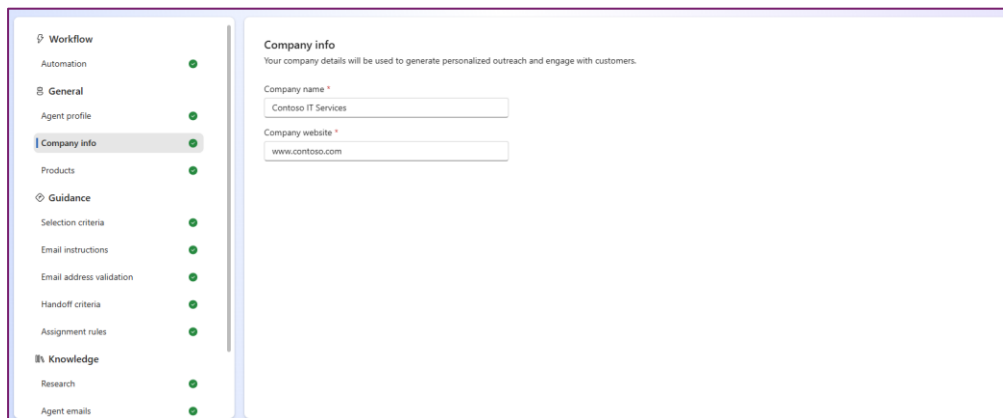
AI disclaimer

Email generated by AI

Other terms

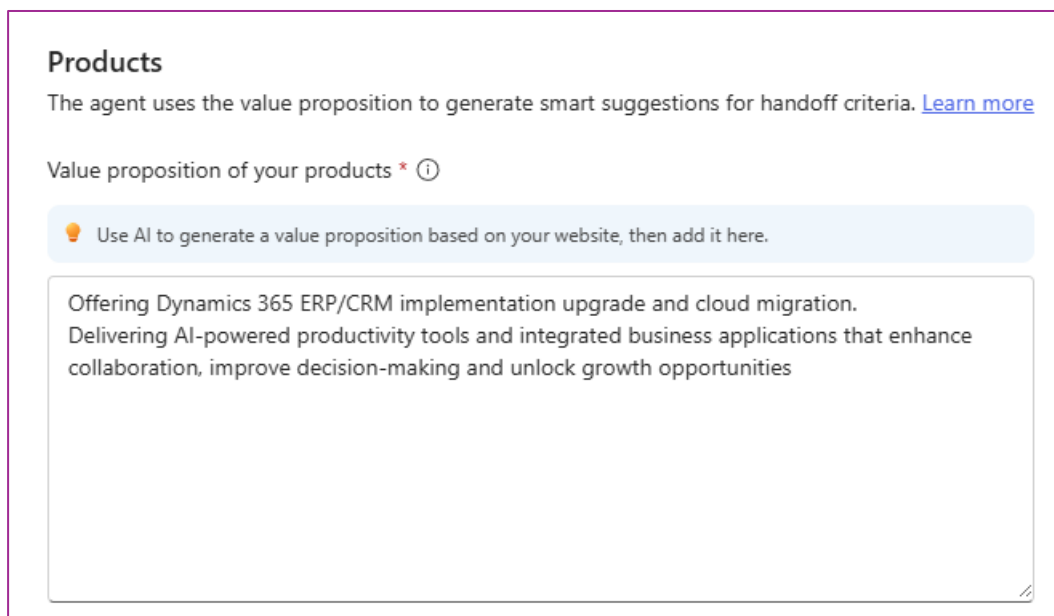
Enter other terms

Company Information for reference:



The screenshot shows a configuration interface with a sidebar on the left and a main content area on the right. The sidebar has a tree view with categories: Workflow, General, Guidance, and Knowledge. Under 'General', 'Company info' is selected and highlighted. The main content area is titled 'Company info' and contains a sub-header 'Your company details will be used to generate personalized outreach and engage with customers.' Below this, there are two input fields: 'Company name *' with the value 'Contoso IT Services' and 'Company website *' with the value 'www.contoso.com'.

Product for Reference:



The screenshot shows a configuration page titled 'Products'. Below the title is a paragraph: 'The agent uses the value proposition to generate smart suggestions for handoff criteria. [Learn more](#)'. Below this is a label 'Value proposition of your products *' followed by an information icon. A light blue callout box contains a lightbulb icon and the text: 'Use AI to generate a value proposition based on your website, then add it here.' Below the callout is a large text area containing the text: '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
<input type="checkbox"/>	Status	Equals	Open
<input type="checkbox"/>	Rating	Equals	Cold
<input type="checkbox"/>	Email	Contains data	

[+ Add](#)

☒ Consider leads created in the last 30 days [+](#)

[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 [+](#)
default

Purpose [+](#)
Commercial

By default, commercial emails are sent unless user opts out.

Topic [+](#)
Choose a topic

Create and manage Compliance Profiles, Purposes and Topics
[Manage compliance settings](#)

Personalize email based on key fields from Lead
Info from the key fields you choose will be used to personalize outreach emails. You can add up to three fields. [Learn more](#)

Field Name	Agent Instruction
Topic	The value in this field signifies the opportunity

[+ New field](#)

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) [v](#)

- 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:

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?

Lead Industry Account Industry + 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 Rajeiv Kumar

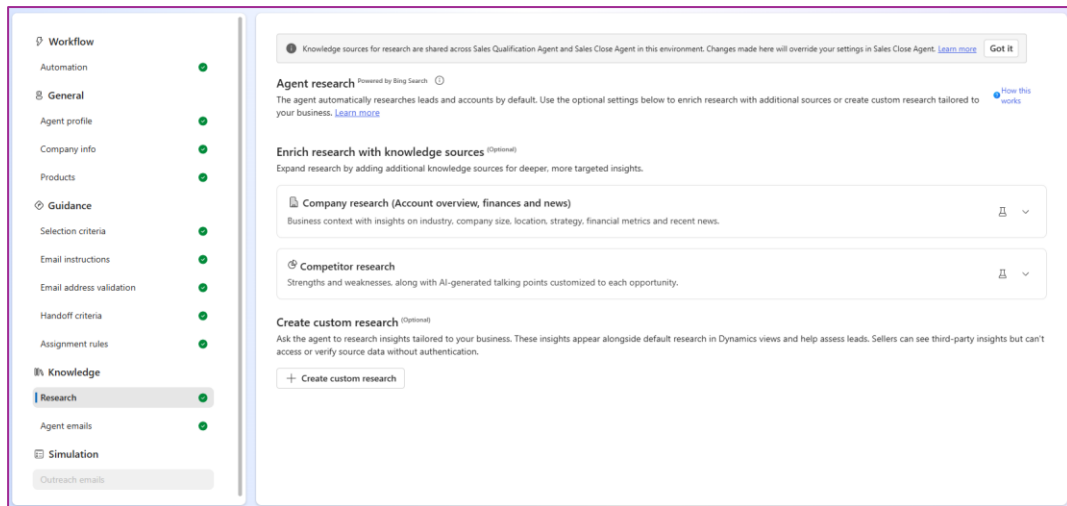
Add supervisor * ①

Choose supervisor

AS Anand Singh

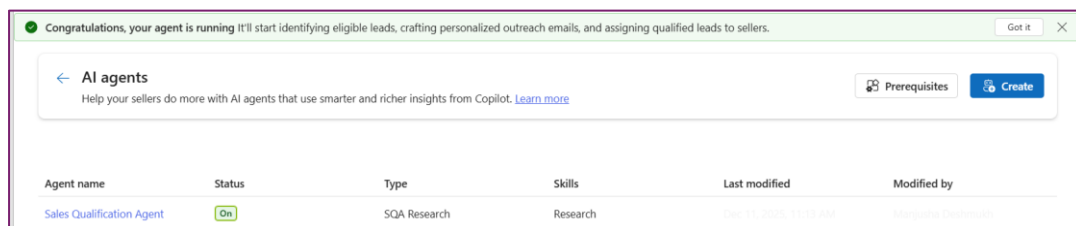
e. Configure Knowledge sources

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



f. Start the agent

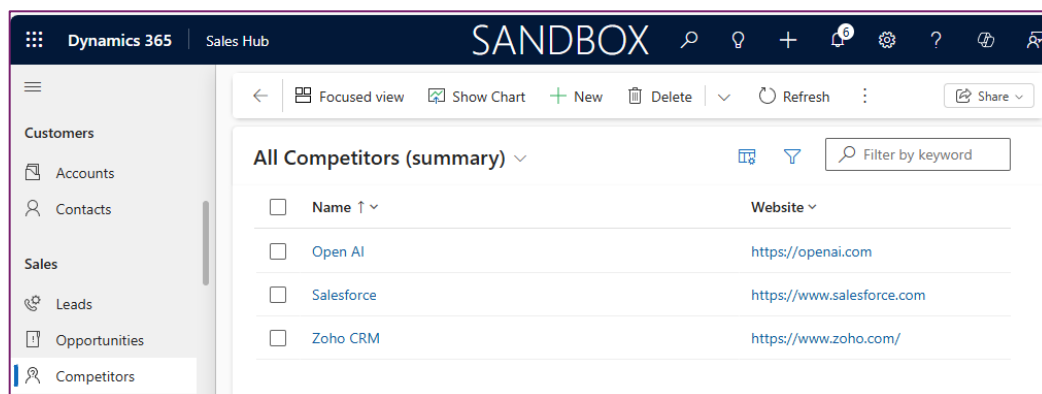
- Once the above insights and engage configuration is setup, save and start the agent. Please refer [start the agent](#) for more details. *(If agent get stuck during the activation process or revert to a draft state, please refer [Troubleshoot Activation Issues with Dynamics 365 Sales AI Agents - Dynamics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



3. Test Research Mode

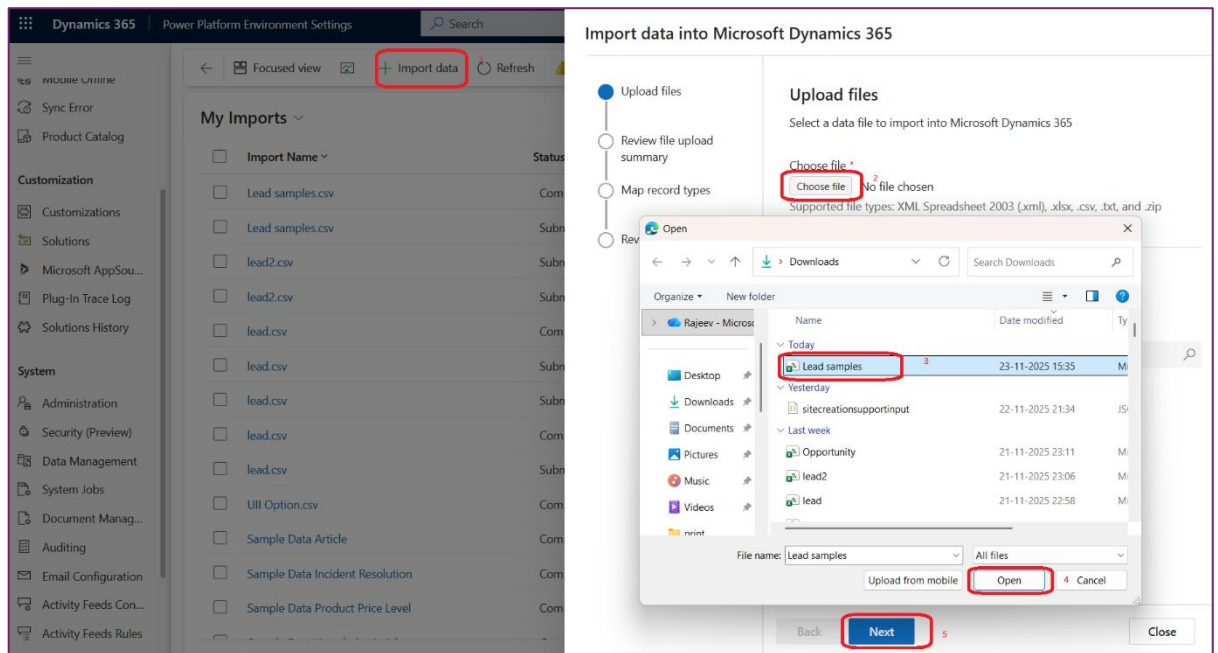
For our scenario we are assuming the Contoso inc is a software company who has Cloud, CRM/ERP & AI products. They take Cloud transformation, CRM/ERP implementation projects. Below is a general walkthrough with same data.

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

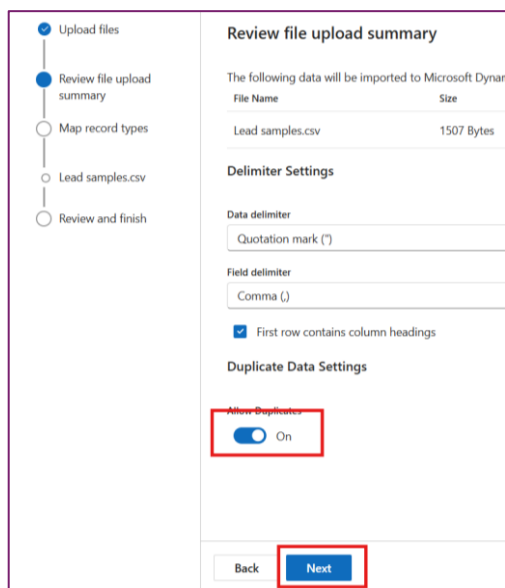


- Import sample leads.

- 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

Import data into Microsoft Dynamics 365

- Upload files
- Review file upload summary
- Map record types**
- Lead samples.csv
- Review and finish

Map record types

Map each column from your source file to an entity in Dynamics 365

Data map templates
Default(Automatic Mapping)

Entity Mapping
Select an entity

- Ensure proper field mapping

Map record types

Lead samples - Engage.csv

Review and finish

Last Name
Last Name

Topic
Topic

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	Dynamics 365 option values
Aerospace	Aerospace
Consulting	Consulting
Transport	Transport
(empty)	Ignore

Job Title
Job Title

No of Employee
No. of Employees

Phone
Mobile Phone

Rating
Rating (Option set)

Source option values	Dynamics 365 option values
Cold	Cold
(empty)	Ignore

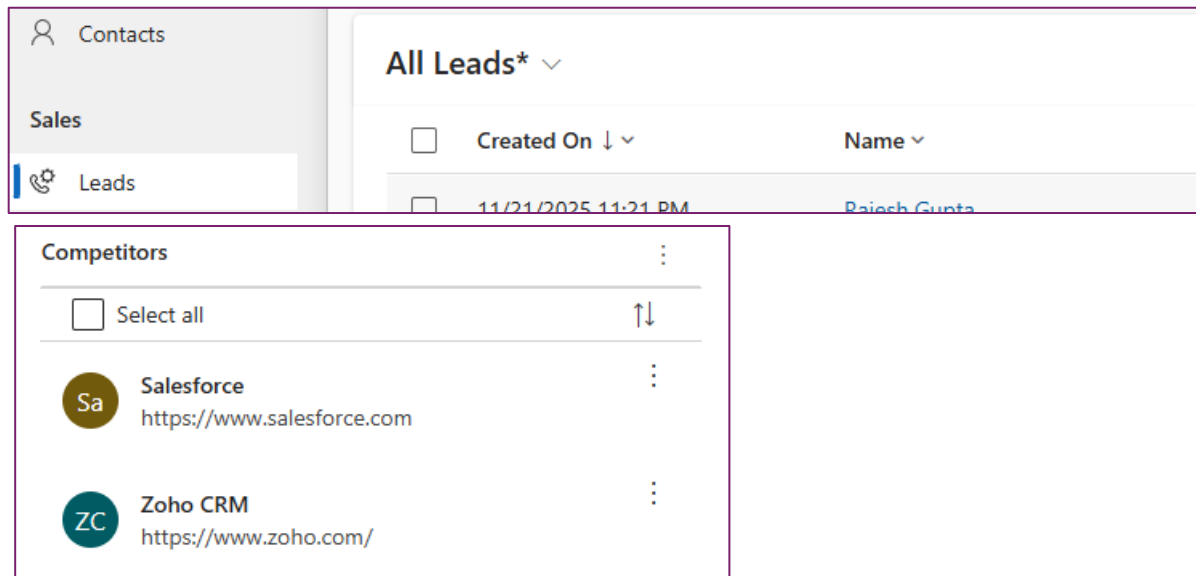
Source
Lead Source (Option set)

Source option values	Dynamics 365 option values
Web	Web
(empty)	Ignore

Website
Website

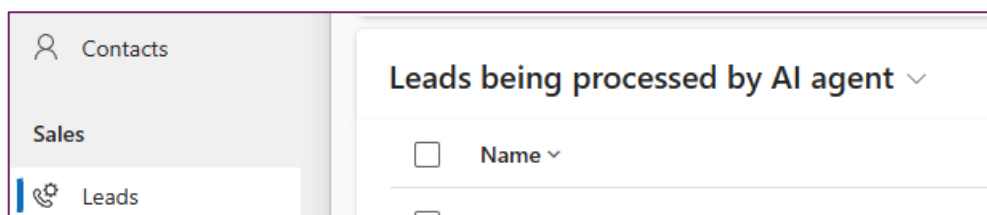
- Click next to submit the mapping. Import process will start. In few mins, the leads will be successfully created.

- 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.



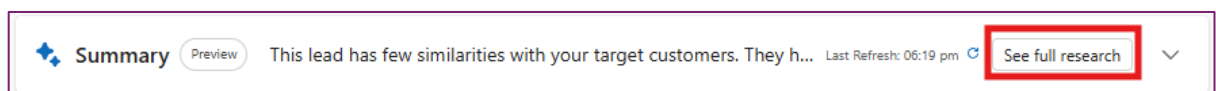
The screenshot shows the CRM interface. On the left, there is a sidebar with 'Contacts', 'Sales', and 'Leads' (highlighted with a gear icon). The main area is titled 'All Leads*' and shows a table with columns 'Created On' (sorted descending) and 'Name'. A row is visible with the date '11/21/2025 11:21 PM' and the name 'Rajesh Gupta'. Below this, a 'Competitors' section is shown, featuring a 'Select all' checkbox and a list of competitors: 'Salesforce' (with URL https://www.salesforce.com) and 'Zoho CRM' (with URL https://www.zoho.com/).

- 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.



The screenshot shows the CRM interface with the sidebar on the left. The main area is titled 'Leads being processed by AI agent' and shows a table with a 'Name' column. A row is visible with the name 'Rajesh Gupta'.

- 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 screenshot shows the CRM interface with the sidebar on the left. The main area is titled 'Summary' and shows a preview of a lead. The text reads: 'This lead has few similarities with your target customers. They h... Last Refresh: 06:19 pm'. A 'See full research' button is highlighted with a red box.

- 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

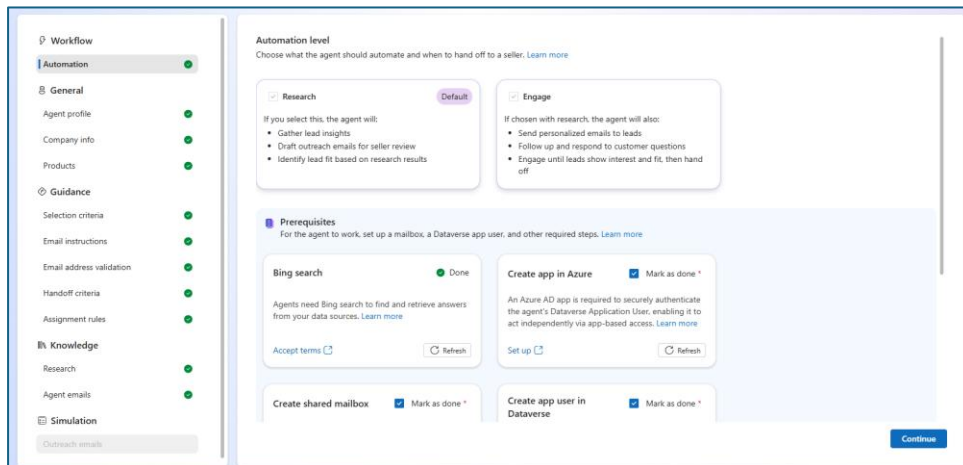
TechNova Solutions displays solid financial health with consistent revenue growth and expanding market presence, indicating strong buying capacity and financial stability for enterprise-grade IT investments. The company reported \$1.25 billion in revenue with net income at \$210 million, positive operating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

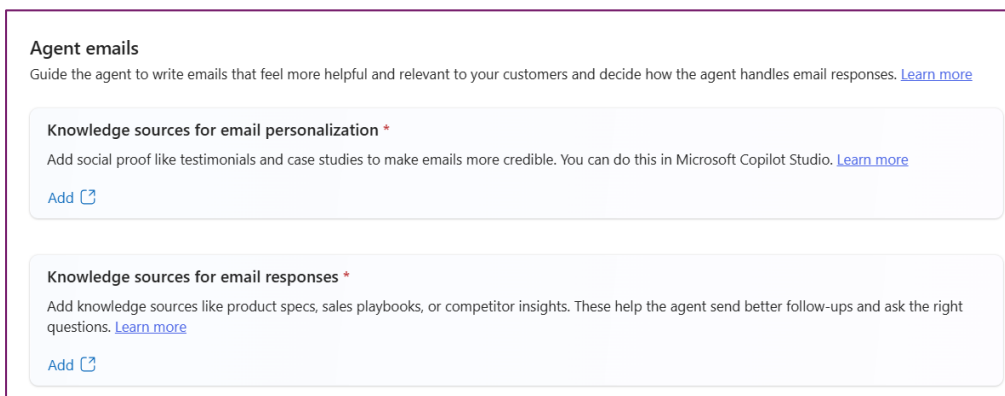
4. Enable Engage Mode

- [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

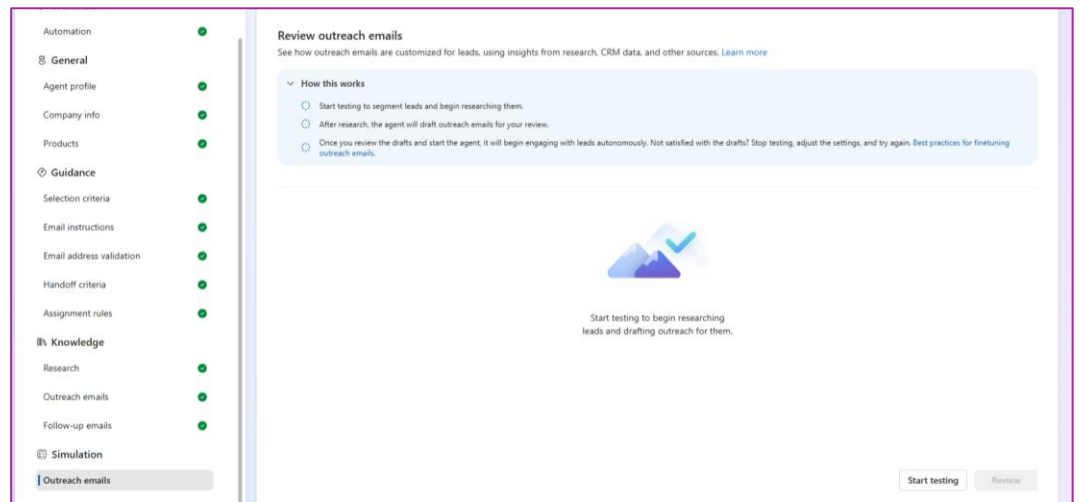


- In the Knowledge section, select Agent emails. Click Add to explore the option to personalise outreach email response using Knowledge Sources. [Learn more in Configure knowledge sources for Sales Qualification Agent | Microsoft Learn](#)

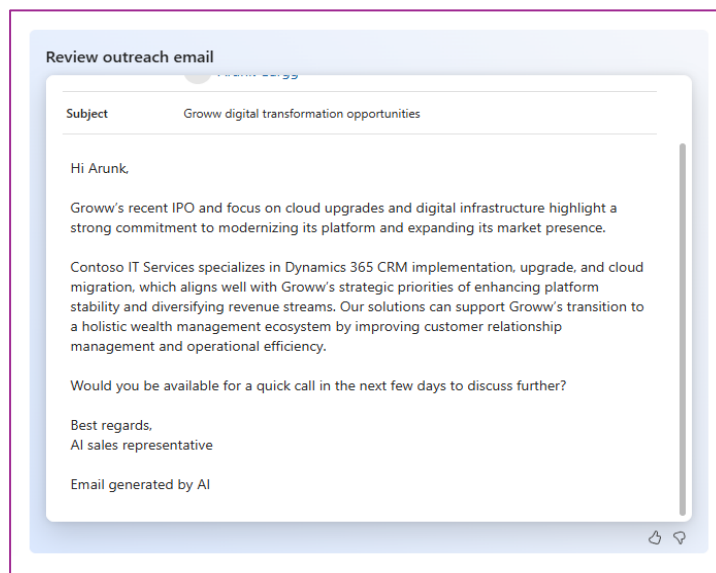


- Run simulations to review the quality of outreach emails and apply improvements. Please refer [Run simulation to review the agent's outreach emails](#) for more detailed steps.
 - Go to the Simulation section and then select Outreach emails.
 - In the **Review outreach emails** page, select **Start testing**. The agent performs the following actions:
 - Research the assigned leads.

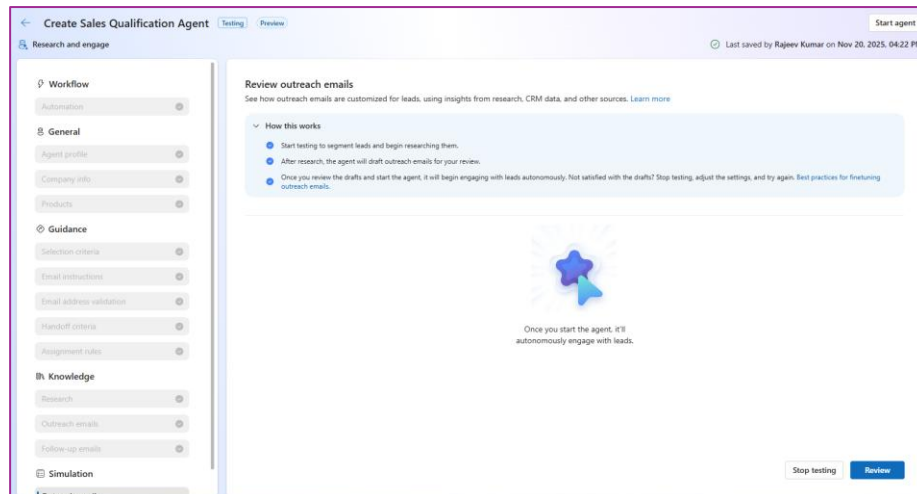
- Draft outreach emails based on the research.



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



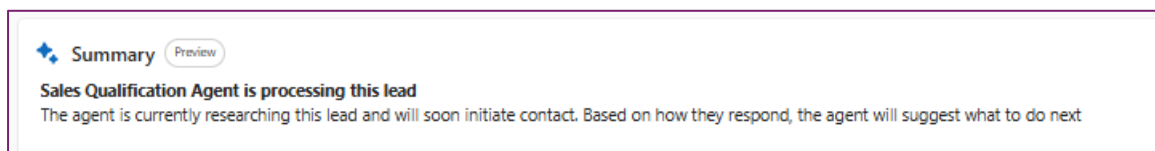
- d. Review the drafts and provide feedback or make edits as necessary.



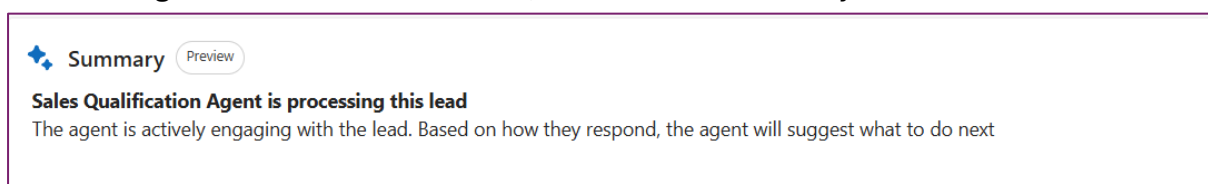
5. Test Engage Mode

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.

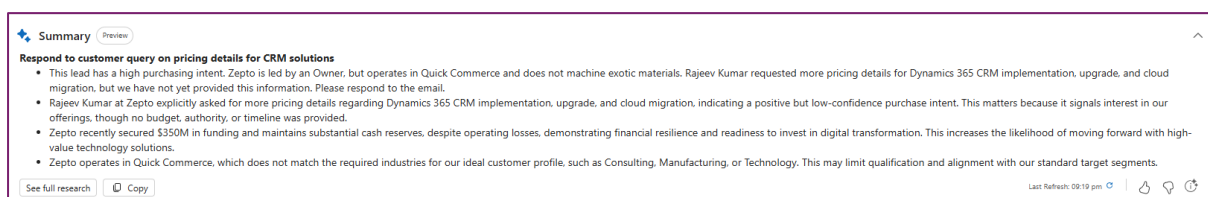
Get a local copy of additional samples from [lead-samples-engage](#) . Import in the environment. Observe post an interval. The full research insights will display in below stages:



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

Back
Lead Research
Preview

Powered by Bing Search
AI-generated content may be incorrect

RI

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

Reassign

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

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. 1

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

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.](#)