

Key Prerequisites: D365 Sales Agents Setup

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Required License

- Dynamics 365 Sales Premium or Enterprise License
- Copilot Studio license. Learn more in [Copilot Studio licensing](#)
- Microsoft Exchange Online License

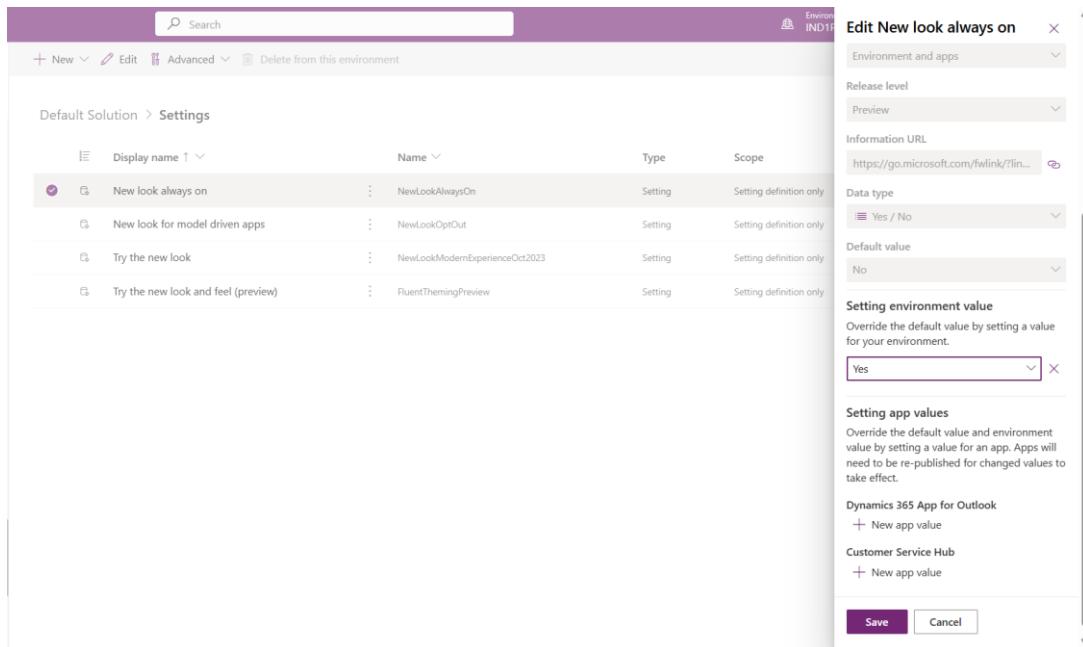
Required Security Roles

- System Administrator
- Alsalesperson
- Sales Research Agent Reader

Prerequisites

Ensure that the following prerequisites are met:

1. Turn on AI capabilities in Power Platform Admin Center:
 - [AI prompts](#). This setting allows the agent to use custom or predefined prompts.
 - [AI insight cards](#). This setting allows sellers to be notified about the insights on the opportunity record. Learn more about turning on this feature in [Manage feature settings](#).
 - [AI Agents](#). This setting enables the configuration and use of AI agents in Dynamics 365 Sales.
2. You have a Copilot Studio license. Learn more in [Copilot Studio licensing](#).
3. You have available MCS message capacity assigned to an environment for agent use. Learn more in [Manage Copilot Studio messages and capacity](#).
4. You turned on the modern UI for the Sales Hub app. Learn more in [Enabling the modern look for my app and removing the toggle](#).



5. You enabled in-app notifications to notify sellers and supervisors about lead handovers for **Sales Hub** app. Learn more in [Enable in-app notifications for your organization](#).

6. You turned on Copilot in Dynamics 365 Sales to allow your sellers to get a 360-degree view of the lead and their company. Learn more in [Turn on and set up Copilot in Dynamics 365 Sales](#).
7. Ensure that your organization's data policies allow the use of the following connectors required by the Opportunity Research Agent:

Connector	Why is it required?
Knowledge source with public websites and data	The agent needs it to access public data for enrichment.
Microsoft Copilot Studio	Copilot Studio is the core platform for building and deploying the agent.
Microsoft Dataverse	A data platform that securely stores data from various Microsoft products, allowing agents to access and utilize it.
Knowledge source with SharePoint or OneDrive	Required only if the agent is configured to use internal documents on SharePoint or OneDrive for enrichment.
Knowledge source with documents	Required only if the agent is configured to use internal documents for enrichment.
Direct Line channels in Copilot Studio	Required for the agent to connect to Microsoft Copilot Studio.

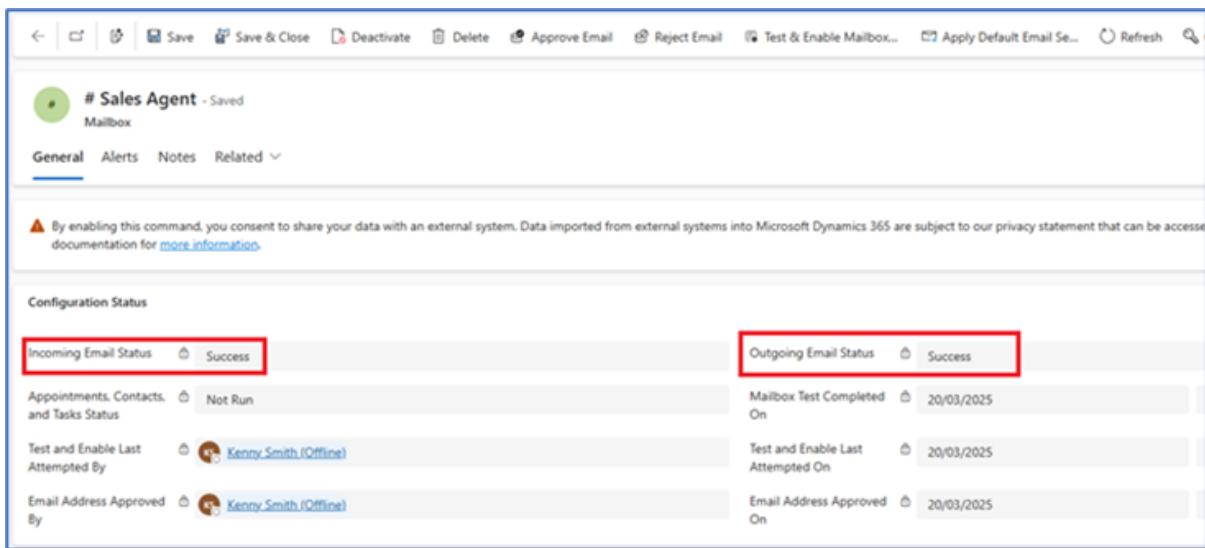
8. Configure server-side synchronization:

After you identify the sellers who work on leads and the segment of opportunities that the agent will research on, you must configure server-side synchronization for their mailboxes. This step is required to allow the agent to access emails and meetings related to the leads and opportunities from the seller's mailboxes.

To configure server-side synchronization:

- a. [Create an email server profile for Exchange Online](#).
- b. [Configure default email processing and synchronization](#).
- c. [Configure mailboxes](#) of sellers who own the leads and opportunities and [approve their mailboxes](#).

When the configuration is successful, the **Incoming Email Status** and **Outgoing Email Status** for the mailbox are set to **Success**.



9. Configure the following prerequisites before you set up the agent. Please navigate to the links to complete these steps.
 - a. **Create App in Azure**
 - i. Ensure that you have the Application Developer role in Microsoft Entra.
 - ii. To create the app in the Azure portal, go to [Azure Portal](#) and follow the instructions mentioned in [Create an app in Azure](#) starting from Step 4. (*Skip step 1-3*)
 - b. **Create an app user in Dataverse and assign AISalesPerson role**
 - i. Ensure that you have the System Administrator role for your Dynamics 365 organization
 - ii. Go to [Create an app user in Dataverse and assign AISalesPerson role](#) and follow the instruction starting from step 4. (*Skip step 1-3*)
 - c. **Create a shared mailbox**
 - i. Ensure that you have one of the following roles in Microsoft Office 365 admin portal:
 - Office 365 Global Administrator,
 - Exchange Administrator,
 - Exchange Recipient Administrator
 - ii. Go to <https://admin.exchange.microsoft.com> and follow the instructions mentioned in [Create a shared mailbox](#) starting from step 4. (*Skip step 1-3*)
 - d. **Configure server-side synchronization**
 - i. Ensure that you have the following roles:
 - **System Administrator** for your Dynamics 365 organization.
 - **Office 365 Global Administrator or Exchange Administrator** in Microsoft Office 365 admin portal.
 - ii. In your Dynamics 365 organization, go to **Advanced Settings > System > Email Configuration > Mailboxes** and follow the instructions mentioned in [Configure server-side synchronization](#) starting from step 3. (*Skip step 1-2*)
10. Verify prerequisites
 - a. In the Sales Hub app, go to **Change area** in the lower-left corner of the page and select **App Settings**.
 - b. Go to **General Settings > Dynamics 365 AI hub**. If you have trouble finding or accessing the AI hub, it might be due to permission restrictions. Learn more in [Access Dynamics 365 AI Hub](#).
 - c. Select **Create and manage agents** under **Agent manager**.

- d. On the **AI agents** page, select **Prerequisites** and ensure that all prerequisites are met.

[← Prerequisites](#)

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

Microsoft Copilot Studio capacity AI agents require tokens to run. You may buy credits or set up pay-as-you-go billing plan. Learn more	<input checked="" type="checkbox"/> Done Set up Refresh
Bing Search Agents need Bing search to find and retrieve answers from your data sources. Learn more	<input checked="" type="checkbox"/> Done Accept terms Refresh
Move data across regions Agents need data to move across regions for certain features to work properly. Learn more	<input checked="" type="checkbox"/> Done Accept terms Refresh

- e. If any of them isn't marked as **Done**, select the appropriate call-to-action to complete the prerequisite:

- i. **Microsoft Copilot Studio capacity:** Select **Set up** to open the Power Platform admin centre and set up capacity. Learn more in [Manage Copilot Studio messages and capacity](#).
- ii. **Bing search:** Select **Accept terms** to open the Power Platform admin centre and allow Bing search under **Generative AI features > Bing search**.
- iii. **Move data across regions:** Select **Accept terms** to open the Power Platform admin centre and allow data movement under **Generative AI features > Move data across regions**.

Demo Data for Sales Research Agent

After completing the environment preparation step, we recommend that you have the following entities populated with data for Sales Research Agent to generate meaningful insights. You can download the instruction and data from [Sample Data | GitHub](#) and refer the instruction file for data import.

Reference

- [Configure the Sales Close Agent - Research \(preview\) | Microsoft Learn](#)
- [Set up and configure Sales Research Agent \(preview\) | Microsoft Learn](#)
- [Set up and configure the Sales Qualification Agent | Microsoft Learn](#)