Dynamics 365 Sales – October Release (Wave 2)

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# 1. Introduction & Overview

This document summarizes the new features and enhancements in the October Release (Wave 2) of Dynamics 365 Sales. It includes Copilot AI improvements, productivity tools, UI upgrades, and data governance highlights. The release spans from October 2025 to March 2026, with early access beginning in August 2025.

# 2. Key Dates & Rollout

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| Milestone | Date |
| Release Plan Published | July 2025 |
| Early Access Begins | August 2025 |
| General Availability | October 2025 |

# 3. Feature Summary

Key enhancements in this wave include:  
  
- Sales Qualification Agent (Copilot)  
- Email validation and categorization  
- Smart grid with natural language query  
- Full-screen embedded summaries  
- Enhanced UI and pipeline visualization

# 4. Configuration & Setup Guidance

Enable preview features in Power Platform Admin Center. Assign proper roles, validate sandbox behavior before pushing to production. Ensure security and licensing compliance for Copilot features.

# 5. Deprecations & Breaking Changes

Legacy hierarchy controls are deprecated. New hierarchy visualization requires adoption. Embedded summaries may replace custom summary fields—review customizations accordingly.

# 6. Analysis & Impact

## 6.1 Copilot & AI Enhancements

Sales Qualification Agent (SQA) introduces automation in lead research and qualification. Expected to streamline initial engagement steps, reduce manual data gathering, and improve decision-making time. Early sandbox testing is recommended to align this with current lead routing processes.

## 6.2 Smart Grid and Natural Language Features

Natural language sorting/filtering democratizes access to sales records for less technical users. Teams should document common phrases and search use cases for training and onboarding. User feedback collection during pilot rollout is critical.

## 6.3 Hierarchy & UI Enhancements

New visualizations simplify parent-child relationships. This enhances account management and opportunity alignment but may require updates to custom views or dashboard configurations. Compatibility testing is essential.

## 6.4 Email Experience Updates

Improved contextual linking of CRM records to emails improves tracking but may auto-associate incorrectly. Sales teams must monitor linkage accuracy. Improved UI enhances communication efficiency and reduces toggling.

## 6.5 Licensing & Governance Considerations

Copilot and agent capabilities may require additional licensing. IT and compliance teams should evaluate data access and handling within Copilot interactions. Licensing cost assessments should be completed during early access phase.