



Sales Research Agent

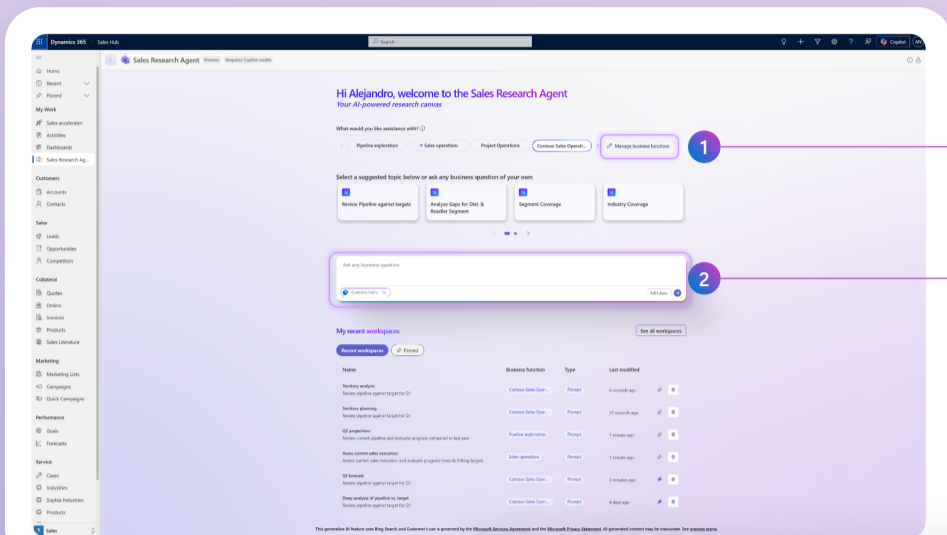
Help sales and operations leaders get answers to complex sales questions and turn raw data into decision-ready insights



Sales Research Agent in Dynamics 365 Sales is an agentic research experience that:

- Answers complex sales and business questions using natural language
- Connects to Dynamics 365 Sales data by default and can also use data from Fabric Lakehouse, Dataverse data, and uploaded Excel, CSV, and PDF files¹
- Generates research blueprints, which provide a structured view of findings, recommendations, visualizations, and visible reasoning

Turn a business question into actionable insights



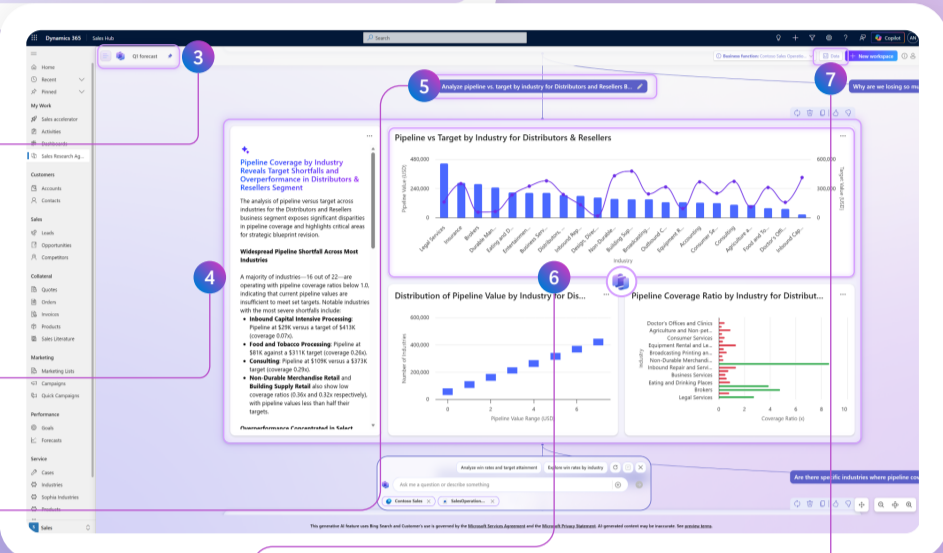
1. Business function
Guide the analysis with built-in business contexts,² such as pipeline exploration, or create your own business functions.

2. Business questions
Use natural language to ask questions like: *Where are we at risk of missing our targets? Which deals are most likely to slip this quarter? Who are the top contributors to closed revenue this quarter?*

3. Workspace
Displays your blueprints in an endless research workspace and lets you search or create a new one.

4. Research blueprint
An AI-generated view of findings, charts, and recommendations based on your question and data.

5. Journey lines
Shows the path of questions that led to the current research insights.



6. Interactive charts
Dive deeper into data visualizations to refine the analysis or ask follow-up questions.

7. Data
Shows which data is being used and lets you include additional sources when needed.

Shift to faster, more connected business research with Sales Research Agent

From	To	With
Static dashboards and manual spreadsheets	Interactive, structured, and decision-ready research blueprints	Natural language research over connected sales and business data
Piecing together CRM data, offline files, and business context by hand	Research insights grounded in your business context and consistent data definitions	Connected data sources and business functions tailored to your research needs
One-off analysis that is hard to explain or revisit	Dynamic, easy-to-update research journeys with sources, reasoning, and next steps	Features like show work, journey lines, and follow-up prompting
Waiting days or weeks for custom analysis	Sales questions answered in minutes, with the ability to analyze and go deeper	Multi-agent research planning, analysis, visualization, and summarization

Sales Research Agent allows sales leaders to explore data without waiting on analysts or static reports

- This can result in:**
- Informed decisions across topics such as pipeline, revenue, and territory performance
 - Streamlined access to sales data across systems
 - Confidence in the insights used to guide sales strategy

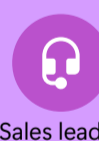
How to set up the Sales Research Agent



- Configure Copilot Studio capacity**
Ensure that you have enough Copilot Studio credits for the environment you are accessing the agent.
- Grant access to the Sales Research Agent**
To grant access to other users, assign the Sales Research Agent Reader security role to users in the Power Platform Admin Center, or create a group team in Power Platform Admin Center. Users must also have a proper Dynamics 365 Sales licenses to access the agent.
- Configure tenant settings**
At the environment level, administrators can configure feedback settings, such as whether users are allowed to submit feedback on their experience with the agent.

[View additional documentation on Microsoft Learn](#)

How to use the Sales Research Agent



- Go to My Work > Sales Research Agent in Sales Hub.
- Select a business function.
- Add your question and any supporting data.
- Select 'Generate' and review the research blueprint.
- Use the AI cursor (👉) to refine the analysis.
- Select 'Show work' (📄) or refresh the blueprint as needed.
- Ask a follow up question to update a block in the blueprint or generate a new blueprint.

Security, privacy, and transparency

Sales Research Agent operates within user permissions and only accesses approved data. It provides visibility into sources and reasoning through the 'show work' feature. Learn more about Responsible AI and language support on [Microsoft Learn](#).

Get research you can act on—fast.

Turn CRM data, business files, and natural-language prompts into research blueprints with charts, recommendations, and visible reasoning in Dynamics 365 Sales.

[Learn more about Sales Research Agent](#)



How to get started

Contact your Microsoft sales representative to set up Dynamics 365 or activate Sales Research Agent. Upgrade to Dynamics 365 Sales Premium to access additional features. Copilot Studio credits are included to help you get started faster.

1. Connections to Fabric Lakehouse and Microsoft SQL Server are available with a Dynamics 365 Sales Premium license.
2. Additional predefined business functions are available with a Dynamics 365 Sales Premium license.