Known issues in Dynamics 365 Sales

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Copyright

Introduction

This document lists the known issues in Dynamics 365 Sales, along with workaround where possible.

Deal manager

This section lists the known issues in deal manager. For more information about deal manager, see the Deal manager workspace (Preview) topic in product documentation.

Filters

Related entities aren't supported

Though you can add a related entity to the filter condition by using the More filters option, the condition displays an error state.

Workaround: Create a deal manager view and add the filter condition with the related entity.

Charts

The segment list is limited to two fields

When you customize the bubble chart, you have the option to change the **Segment by** option, which indicates the color of the bubble. Currently, this option only supports **Opportunity Grade** and **Pipeline Phase** fields.

The funnel chart can't be customized

Though you can customize the bubble chart, the Sales funnel chart can't be customized. You can only enable or disable the chart or change its name.

Smart fields aren't supported in tooltips

In the chart tooltip, you can only select the basic fields; smart fields aren't yet supported.

Personalization

Client-side personalization can't be saved to the view

Any personalization that you do in the deal manager workspace directly can't be saved to a view. For example, if you modify the metrics, edit columns, or add filters in the workspace, they won't be saved to a view. However, the changes will be available until you sign out.

If you want to save the personalization changes, create a view.

Views can't be edited

Editing the view from the deal manager workspace isn't supported in this release.