

# Dynamics 365 2021 Release Wave 1 Notes

## Sales

### Feature summary

### Release date

### How to enable

#### Collaboration with Microsoft Teams

Engage in a Microsoft Teams chat from within Dynamics 365: [link](#)

Business value: Users can view Microsoft Teams chats already relating to the Dynamics 365 record, within a Dynamics 365 application. Other chats, including most recent, can be seen while in the app and engaged within the context of the Dynamics 365 record.

May 2021

Admins need to enable for users

#### Digital selling

New seller KPIs and manager dashboards to encourage productivity: [link](#)

Business value: New OOB KPIs able to be surfaced within Dynamics 365 dashboard. KPIs include:

- Number of active leads in the org versus previous periods
- The conversion ratio between leads and opportunity
- Leads by sources types
- Leads per sellers
- Number of qualified leads
- Number of calls
- Number of meetings
- Estimated value

June 2021

Admins need to enable for users

Enhanced personal settings for users: [link](#)

Business value: Users can now create personal email templates for future emails as well as personalized signature control. This allows your users to feel more comfortable sending emails from the system and leverage the intelligence from Email Engagement, if enabled.

April 2021

Automatic for users

Automation and adaptive sequences: [link](#)

Business value: This feature can automatically send out emails to the customer if it senses an email activity is the next task due in the sequence. This will allow for a seamless transition from getting leads/opportunities in the system and sending them their first email and moving the process forward for your sales team.

April 2021

Admins need to enable for users

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Zero-click sequence assignment: <a href="#">link</a>		
Business value: Prior to this feature, sequence assignment was a manual task. This feature intelligently detects which sequence should be assigned after lead/opportunity creation and adapts.	April 2021	Admins need to enable for users

## Forecasting and pipeline analytics

Clone an existing forecast: <a href="#">link</a>		
Business value: Forecast admins can quickly replicate activated forecast configurations as drafts. This significantly reduces the pain of starting from the beginning whenever making updates to an existing forecast configuration or building forecasts for a coming period.	April 2021	Automatic for admins

## Mobile

Never miss a detail in your customer engagements: <a href="#">link</a>		
Business value: Any phone call made from the Dynamics 365 Mobile app will be transcribed and ready to review at the closure of the call. The transcription will be intelligently placed within the timeline of the correct record, automatically. Action items will also be captured and highlighted for the seller to review.	August 2021	Admins need to enable for users
Log and share information effortlessly: <a href="#">link</a>		
Business value: Encourages sellers to repeatedly visit, consume, respond and log more information. Notes and quick create show up in a new way on mobile, being accessible from anywhere within the app.	February 2021	Admins need to enable for users

## Pipeline manager workspace

New workspace experience that is engaging, intuitive and accessible from Sales hub and other custom apps: <a href="#">link</a>		
Business value: Dynamics 365 will be releasing a brand-new Deal Manager Workspace, which will allow users to quickly and efficiently view their opportunities, while seeing in-line data with the new record side panel equipped with full editing abilities.	June 2021	Admins need to enable for users

\* Additional Dynamics 365 Sales features can be seen in the Microsoft documentation [here](#).

## Marketing

Feature summary	Release date	How to enable
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### AI-powered

<p>AI-driven recommendations for images, videos, documents or fragments: <a href="#">link</a></p> <p>Business value: Get real-time AI-driven recommendations when building an email to guide the user to build their most effective and engaging content.</p>	April 2021	Will be automatic for admins
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### Analytics

<p>Improve journey effectiveness with a new set of built-in analytics dashboards and cross-journey insights: <a href="#">link</a></p> <p>Business value:</p> <ul style="list-style-type: none"> <li>Evaluate the effectiveness of journeys against your objectives.</li> <li>Troubleshoot journeys by identifying areas of friction.</li> <li>Discover what is working so that you can amplify or recreate the same approach elsewhere.</li> <li>Understand the effectiveness of various channels of communication.</li> </ul>	April 2021	Will be automatic for admins
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### Channels

<p>Create and send SMS messages to any mobile phone: <a href="#">link</a></p> <p>Business value:</p> <ul style="list-style-type: none"> <li>The SMS message channel includes transactional and marketing SMS and MMS messaging via toll-free numbers and short codes.</li> <li>Option to purchase or use existing phone numbers across select regions in North America, United Kingdom and Ireland.</li> <li>Craft an end-to-end experience with personalized messages inside the SMS editor and orchestrate timely delivery to mobile users.</li> </ul>	April 2021	Will be automatic for admins
<p>Search, version, manage and tag your digital assets with a new centralized asset library: <a href="#">link</a></p> <p>Business value:</p> <ul style="list-style-type: none"> <li>Single asset library across Dynamics 365.</li> <li>Search, create, update and delete images, videos</li> </ul>	April 2021	Will be automatic for admins

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<p>and binaries.</p> <ul style="list-style-type: none"> <li>• Version, revert.</li> <li>• Channel content is aware of asset updates or deletions to prevent broken asset references.</li> <li>• Bulk import and management of images, videos and binaries.</li> <li>• Intelligent image and video tagging using AI for effective search.</li> </ul>		
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## Moments-based

<p>Real-time, event-based customer journey orchestration: <a href="#">link</a></p> <p>Business value:</p> <ul style="list-style-type: none"> <li>• Intuitive customer journey designer optimized for event-based journeys.</li> <li>• Journeys are triggered in real time so you can respond to customers immediately.</li> <li>• Automatically add or remove customers from a journey based on their actions.</li> <li>• Personalize the experience for every customer based on their actions during the journey.</li> <li>• Create dynamic schedules for sending messages based on type of customer actions.</li> <li>• Create journey branches that remind customers to perform an action and merge back to the main journey once the customer performs the action.</li> </ul>	April 2021	Will be automatic for admins
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## Personalization

<p>Author personalized content across email and SMS, and push notifications through a new point-and-click interface: <a href="#">link</a></p> <p>Business value: Microsoft has made it easier to add personalization to your emails and leverage the content you have captured on Dynamics 365. You can now seamlessly personalize content based on field values available to you on the Lead and Contact tables.</p>	April 2021	Will be automatic for admins
<p>Use customer journeys to target leads in addition to contacts: <a href="#">link</a></p> <p>Business value:</p> <ul style="list-style-type: none"> <li>• Target customers through Lead entities without creating a parent Contact.</li> <li>• Personalize messages by inserting dynamic content for Lead entities.</li> </ul>	August 2021	Will be automatic for admins

*\*Additional Dynamics 365 Marketing features can be seen in the Microsoft documentation [here](#).*

Customer service		
Feature summary	Release date	How to enable
<b>Agent productivity</b>		
<p>Collaborate with organizational contacts within Dynamics 365 using Microsoft Teams: <a href="#">link</a></p> <p>Business value: Agents can easily collaborate with anyone within the organization — such as agents from other departments, supervisors, customer service peers or support experts — to resolve customer issues without leaving the conversation. Chats will be linked directly to Customer Service records, enabling a contextual experience.</p>	May 2021	Admins need to enable for users
<p>Multiple languages support for AI-suggested knowledge articles and similar cases: <a href="#">link</a></p> <p>Business value: Surfacing the best knowledge articles and similar cases with AI in the right languages helps agents find the right solutions quickly. This solution has been expanded to support French, German, Spanish, Dutch, Italian and Japanese.</p>	April 2021	Admins need to enable for users
<b>Case management</b>		
<p>Configuration to allow updates to cases in resolved and canceled status: <a href="#">link</a></p> <p>Business value: Administrators and customizers can change the system behavior to allow user accounts with proper privilege to update case records (incident entity) that are in a resolved or canceled state.</p>	April 2021	Admins need to enable for users
<p>Improved embedded analytics for customer service managers: <a href="#">link</a></p> <p>Business value: Allows service managers to identify problem areas and opportunities to improve from historical data, along with rich slice-and-dice capabilities powered by Power BI.</p>	April 2021	Admins need to enable for users
<b>Email</b>		
<p>Improved user experience through email configurability: <a href="#">link</a></p> <p>Business value:</p>	April 2021	Automatically for admins

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<ul style="list-style-type: none"> <li>• Customize the list of available fonts.</li> <li>• Set a default font.</li> <li>• Add your own font.</li> <li>• Adjust the toolbar location and buttons.</li> <li>• Automatically increase the editor height to fit the content.</li> <li>• Access the HTML.</li> </ul>		
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## Knowledge management

<p>Knowledge search analytics: <a href="#">link</a></p> <p>Business value: New search analytics will be made available to customer service managers, including:</p> <ul style="list-style-type: none"> <li>• Search term volume</li> <li>• Search term average click position</li> <li>• Search term engagement rate</li> <li>• Top search terms by volume and other KPIs</li> <li>• Searches that return no results</li> <li>• Searches with low engagement rate</li> </ul>	April 2021	Admins need to enable for users
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## Omnichannel voice

<p>Call transcription and real-time sentiment analysis: <a href="#">link</a></p> <p>Business value: Call transcription converts a phone conversation into written words, reducing the amount of notes an agent needs to take and helping with accessibility. Furthermore, sentiment analysis examines the conversation and identifies the general sentiment or mood of the customer.</p>	August 2021	Admins need to enable for users
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## Timeline

<p>Configuration enhancements for timeline in the new form designer: <a href="#">link</a></p> <p>Business value: Enables the timeline to show a customer’s history across cases, accounts or contacts. This experience gives administrators the ability to configure the information displayed in each timeline to help agents have the best understanding of the customer’s history so they can deliver more personalized service.</p>	April 2021	Automatic for admins
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*\* Additional Dynamics 365 Customer Service features can be seen in Microsoft documentation [here](#).*