

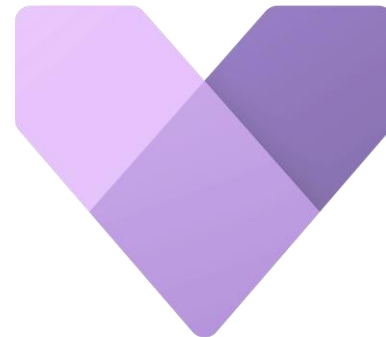
Boost your Customer Engagement

| WAVE 2 2022 RELEASE FOR DYNAMICS 365 CE

The Wave 2 2022 release for Dynamics 365 opens up new innovative and elementary functions for users to digitize their company in a future-proof and sustainable way. Here we will show you how you can benefit from the new features!



Dynamics 365



Microsoft Dynamics 365 Marketing

MARKETING | 2022 WAVE 2 RELEASE PLAN

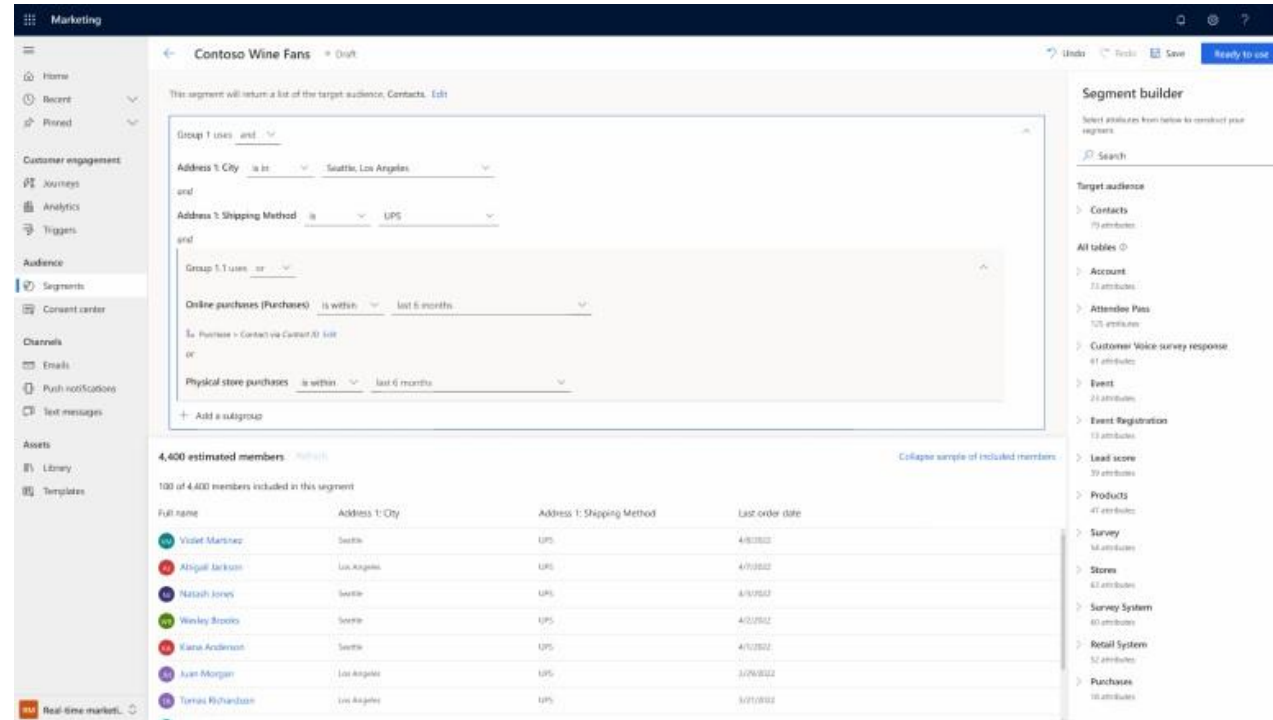


Enhanced Collaborative Apps with a deeper sales integration thanks to realtime marketing

- Marketing forms for leads with dynamic fields
- Create a customized communication channel
- Better visualize marketing and sales team goals with new dashboards
- Tripled monthly capacity of marketing interactions
- Personalization using AI-powered content



MARKETING | TARGET THE RIGHT AUDIENCE USING THE NEW SEGMENT BUILDER



Features

- Easy drag-and-drop logic builder
- Preview and estimate the number of segment members

MORE INFORMATION

Enabled For
Admins, makers,
marketers, or analysts

Public Preview
June 2022

General Availability
February 2023

Read More:
<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/marketing/dynamics365-marketing/target-right-audience-using-new-segment-builder>

Business Value

- Improve your productivity by intuitively creating segments for contacts and leads in the new segment builder

MARKETING | MARKETING FORMS FOR LEADS WITH DYNAMIC FIELDS

A screenshot of the Dynamics 365 Marketing interface. The top navigation bar shows 'Dynamics 365 Marketing' and a 'Marketing Form 2' draft. The main area is titled 'Lead Generation Form' and contains a welcome message: 'Hello, we're excited to host you. Do fill up this form and help us get to know you better.' Below the message are two form fields: 'What is your name?' with a description 'Add a description' and a text input field labeled 'Enter your full name'; and 'What is your company name?' with a description 'Add a description' and a text input field labeled 'Enter your company name'. On the right, an 'Elements' panel lists various form field types: Short text, Multi choice, Long text, Yes / No, Statement, Dropdown, Number, Title, Paragraph, Divider, Media, and Date.

Features

- Create forms that display dynamic form fields
- You can show or hide fields

MORE INFORMATION

Enabled For
Admins, makers,
marketers, or analysts

Public Preview
December 2022

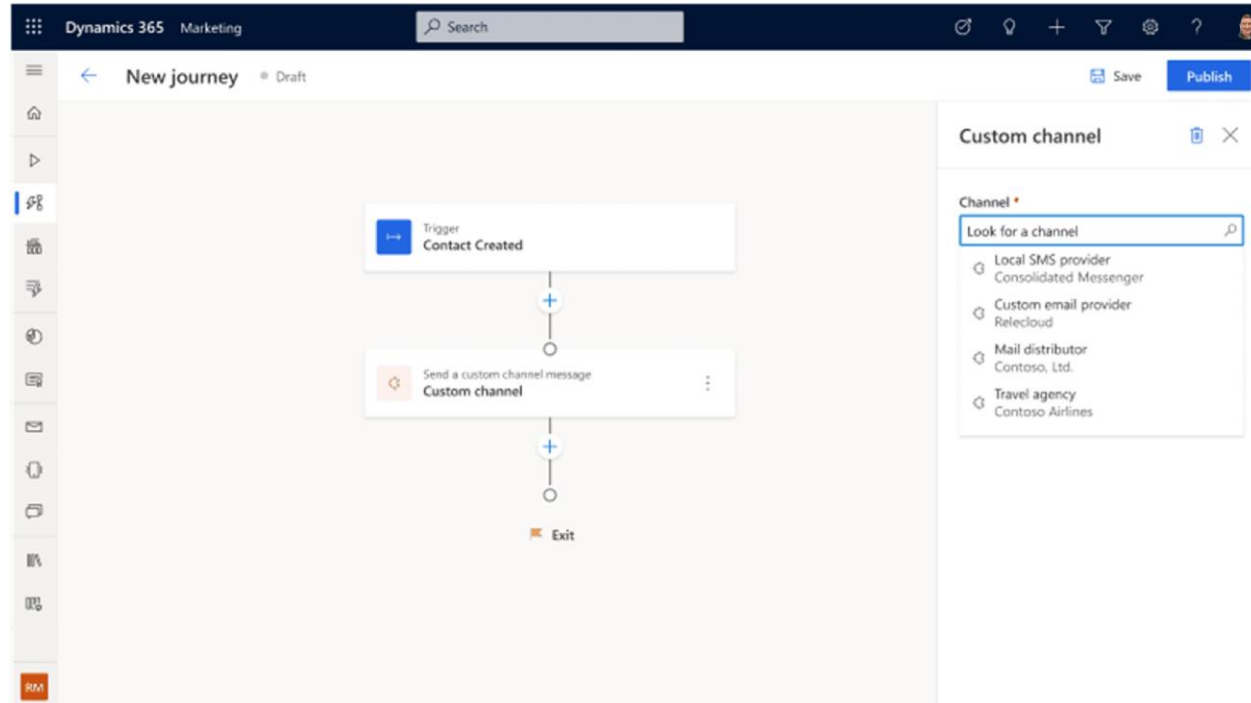
General Availability
February 2023

Read More:
<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/marketing/dynamics365-marketing/create-lead-capture-forms-that-convert-visitors-customers>

Business Value

- Increasing the conversion rate of your marketing campaigns

MARKETING | CREATE A CUSTOMIZED COMMUNICATION CHANNEL



Features

- Create a custom channel
- Use them in templates

Business Value

- Choosing the right communication channel

MORE INFORMATION

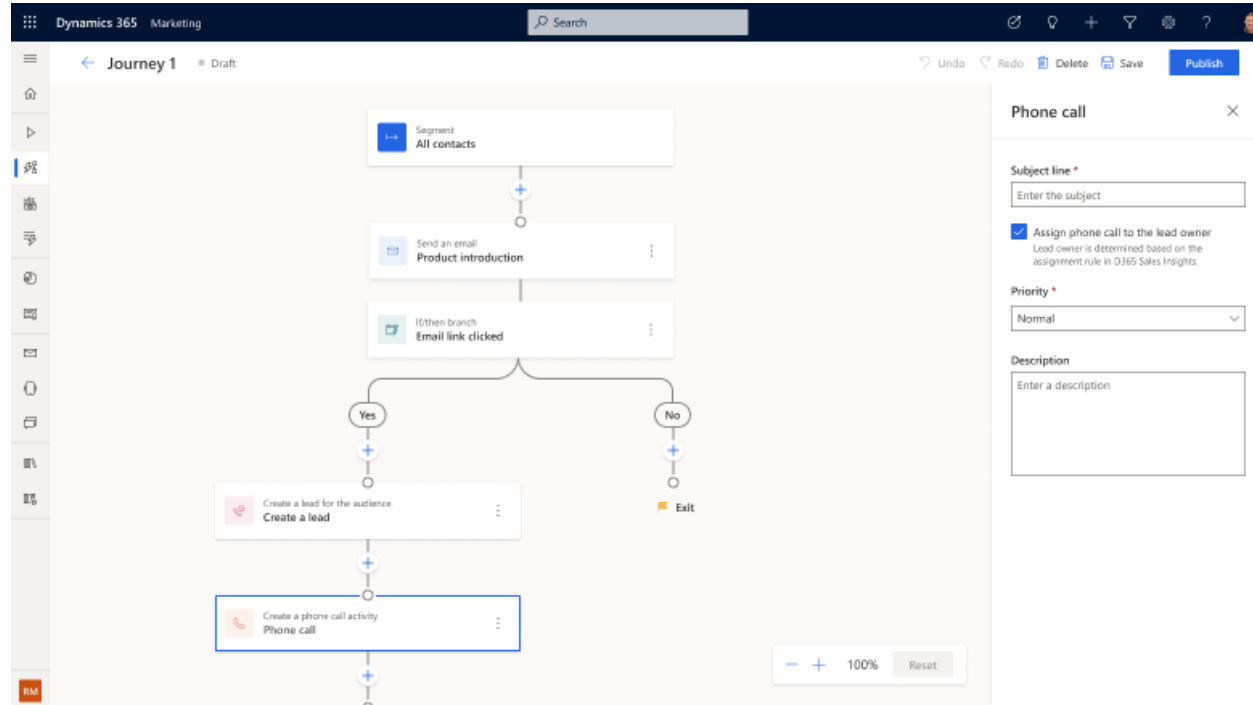
Enabled For
Admins, makers,
marketers, or analysts

Public Preview
October 2022

General Availability
December 2022

Read More:
<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/marketing/dynamics365-marketing/extend-outreach-custom-channels>

MARKETING | CLOSE LEADS QUICKLY BY AUTOMATING THE HANDOFF TO SALES



Features

- Receive customized attention at the right time
- Engage with leads at the right time and stage

Business Value

- Respond quickly to incoming leads by routing them directly to sales representatives

MORE INFORMATION

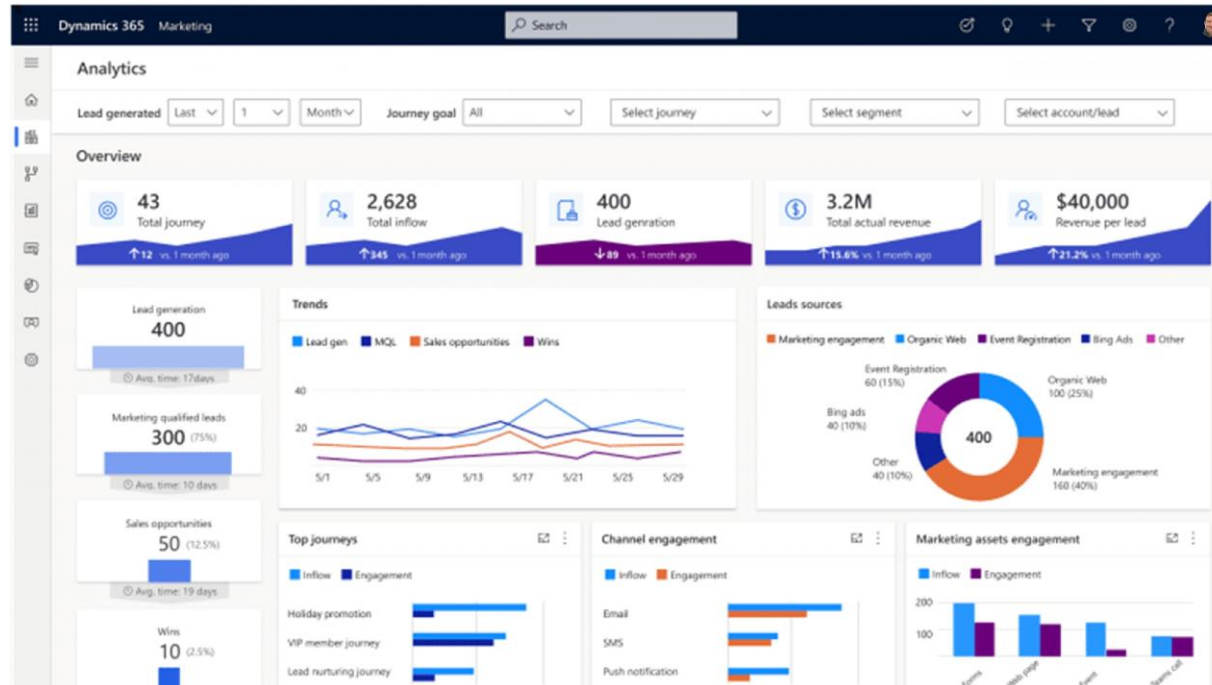
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Public Preview
February 2023

General Availability
To be announced

Read More:
<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/marketing/dynamics365-marketing/close-leads-fast-automating-handoffs-sales>

MARKETING | IMPROVED ANALYSIS DASHBOARD OF YOUR MARKETING ACTIVITIES



Features

- Out-of-the-box analytics dashboard
- Analyze the performance of your marketing content

MORE INFORMATION

Enabled For
Admins, makers,
marketers, or analysts

Public Preview
October 2022

General Availability
December 2022

Read More:
<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/marketing/dynamics365-marketing/planned-features>

Business Value

- Better visualize marketing and sales team goals

MARKETING | NEW CAPACITY

Features

- Interact more intensively with your contacts
- Send up to 300 million interactions
- Reach up to 100 million marketing contacts or leads

Business Value

- Tripled monthly capacity of marketing interactions

MORE INFORMATION

Enabled For

Admins, makers,
marketers, or analysts

Public Preview

February 2023

General Availability

tbd

Read More:

<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/marketing/dynamics365-marketing/grow-business-3x-maximum-monthly-interactions>

MARKETING | PERSONALIZATION WITH AI

Features

- Find the best content for each customer
- AI model learns from the optimization criteria
- Improve the ROI

Business Value

- Personalization using AI-powered content

MORE INFORMATION

Enabled For

Admins, makers,
marketers, or analysts

Public Preview

August 2022

General Availability

October 2022

Read More:

<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/marketing/dynamics365-marketing/drive-engagement-at-scale-highly-tailored-audience-specific-content>

Microsoft Dynamics 365 Sales

SALES | 2022 WAVE 2 RELEASE PLAN

Dynamics 365 Sales focuses on Teams and Outlook collaboration enhancements as well as realizing new sales accelerators

- Working with several people in parallel to achieve sales success
- Improved process efficiency using sequencing knowledge in sales accelerator
- New Sales Dashboard that summarizes progress, changes and insights
- The Conversation Intelligence feature uses AI-driven insights to get relevant information for example during a call with the customer

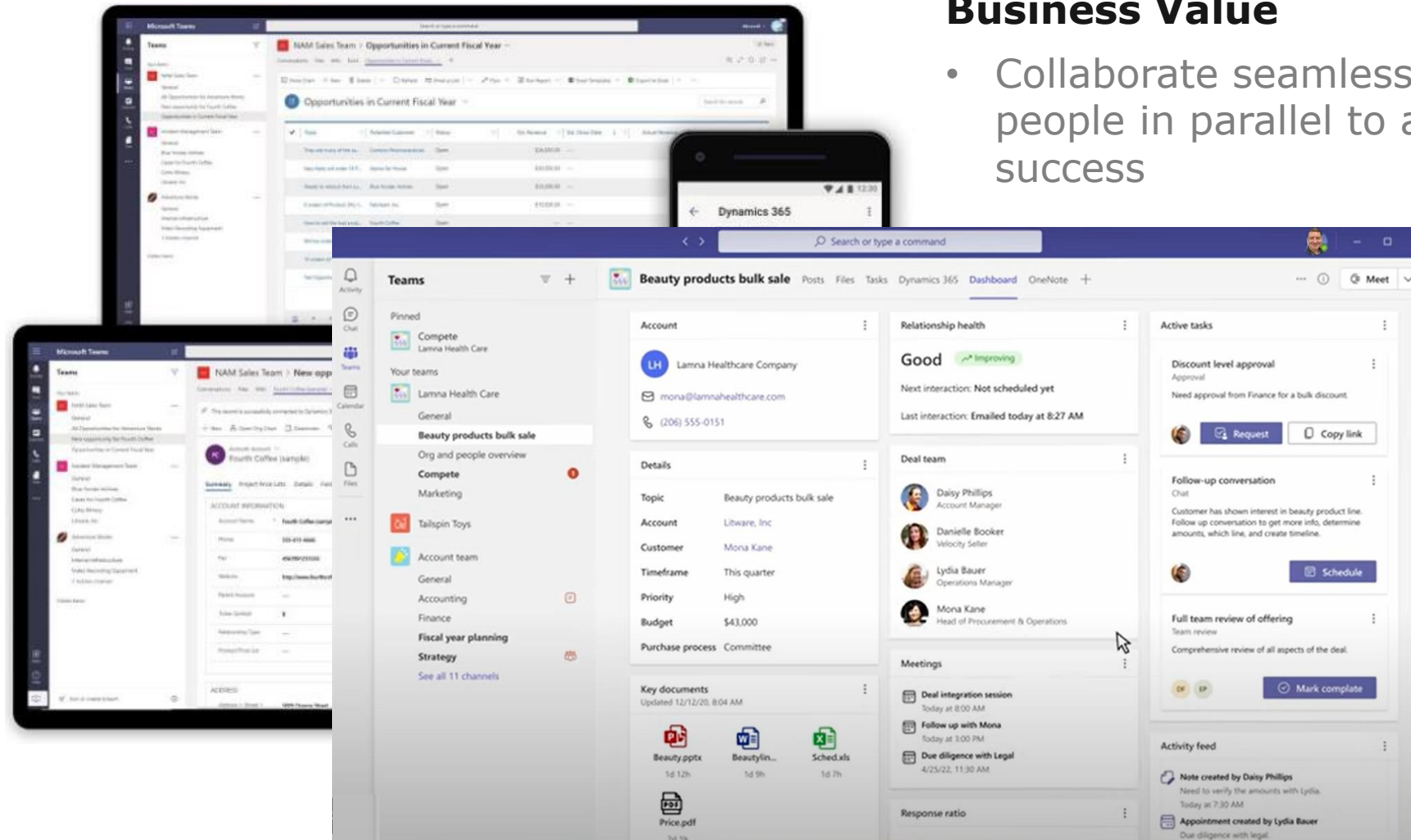


SALES | TEAMS AND OUTLOOK COLLABORATION ENHANCEMENTS



Business Value

- Collaborate seamlessly with several people in parallel to achieve sales success



MORE INFORMATION

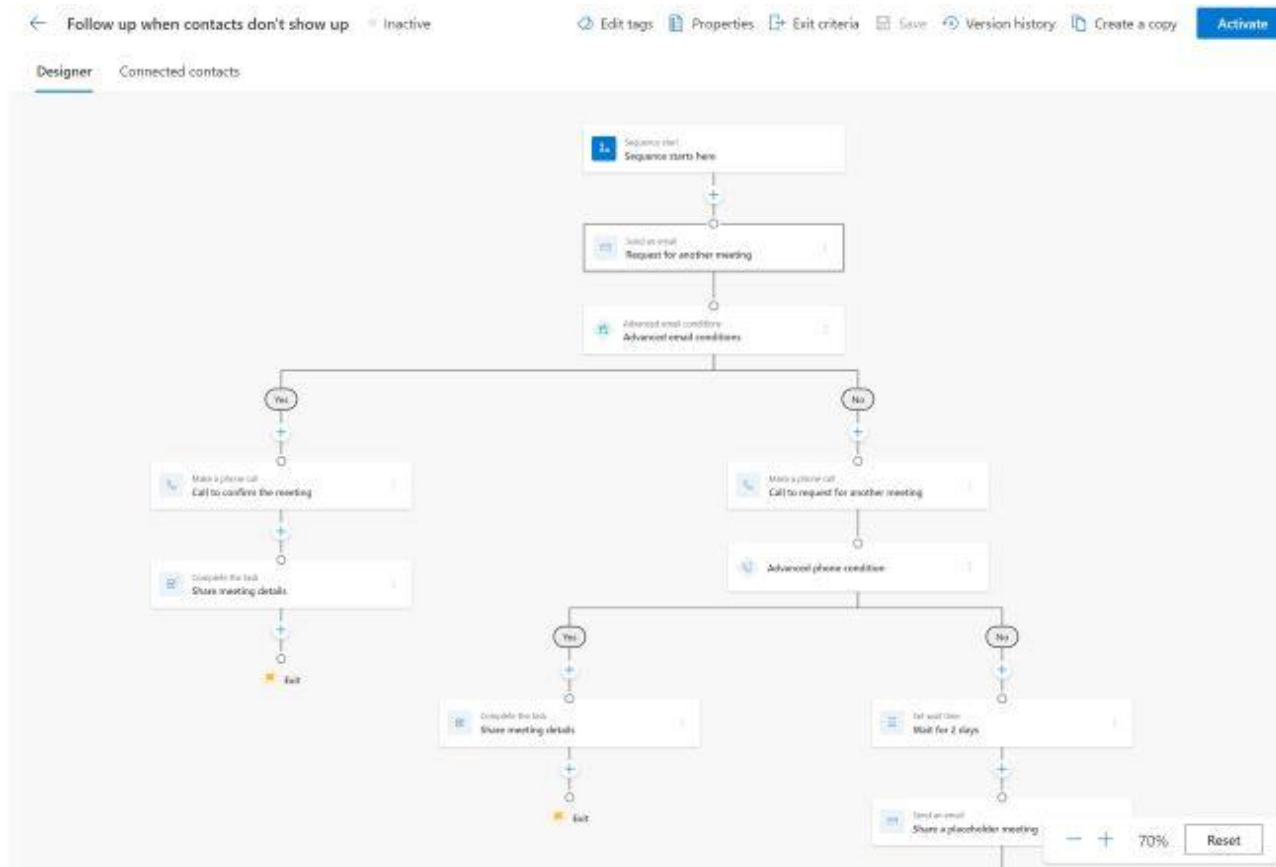
Enabled For
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Public Preview
August 2022

General Availability
October 2022

Read More:
<https://team.microsoft.com/en-us/dynamics365-release-plan/2022wave2/sales/dynamics365-sales/teams-outlook-collaboration>

SALES | IMPROVED PROCESS EFFICIENCY IN SALES ACCELERATOR



Features

- Get detailed analytics to quickly identify the most efficient channels for customer interactions
- Gain detailed insights to develop solutions that improve your sales results and sequence performance
- Benefit from the enhanced user experience and Sequence Designer features when configuring sequences
- SMS integration in sequences

Business Value

- Enable salespeople to engage with leads, prospects, and customers

MORE INFORMATION

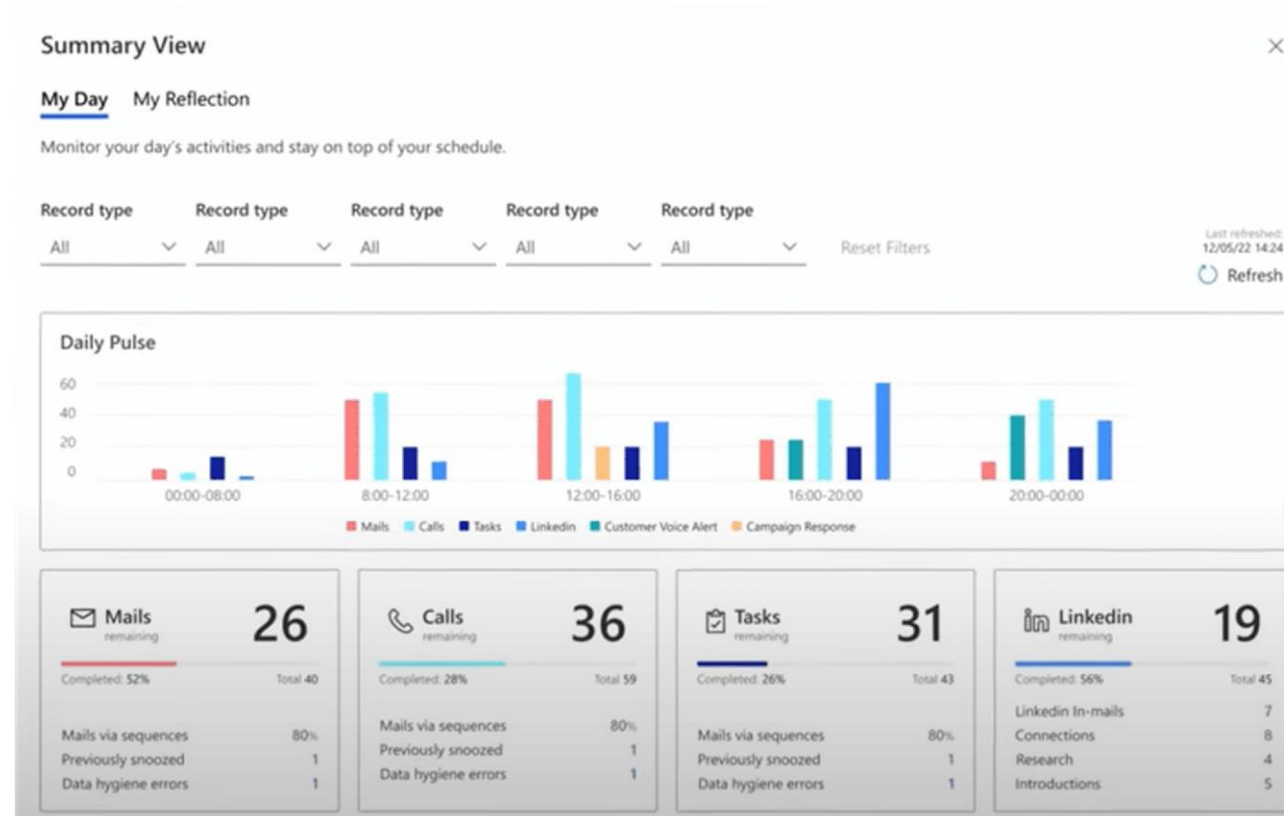
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Public Preview
February 2023

General Availability
To be announced

Read More:
<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/sales/dynamics365-sales/improve-process-efficiency-using-sequence-insights>

SALES | NEW SALES DASHBOARDS



Features

- Better summary overview of your progress of your activities across contacts, companies, leads and sales
- Key insights about networking via LinkedIn and conversations you've participated in

MORE INFORMATION

Enabled For
Admins, makers, or analysts

Public Preview

General Availability
March 2023

Read More:
<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/sales/dynamics365-sales/track-progress-using-seller-dashboard>

Business Value

- New Dashboards for better overview

SALES | CONVERSATION INTELLIGENCE WITH ARTIFICIAL INTELLIGENCE



Features

- The Conversation Intelligence feature uses analytics and data science
- The salesperson for example, can receive AI-driven information during a sales call
- It provides you with suggestions about product- and service details, competitors, pricing, and more

Business Value

- AI-driven informations

MORE INFORMATION

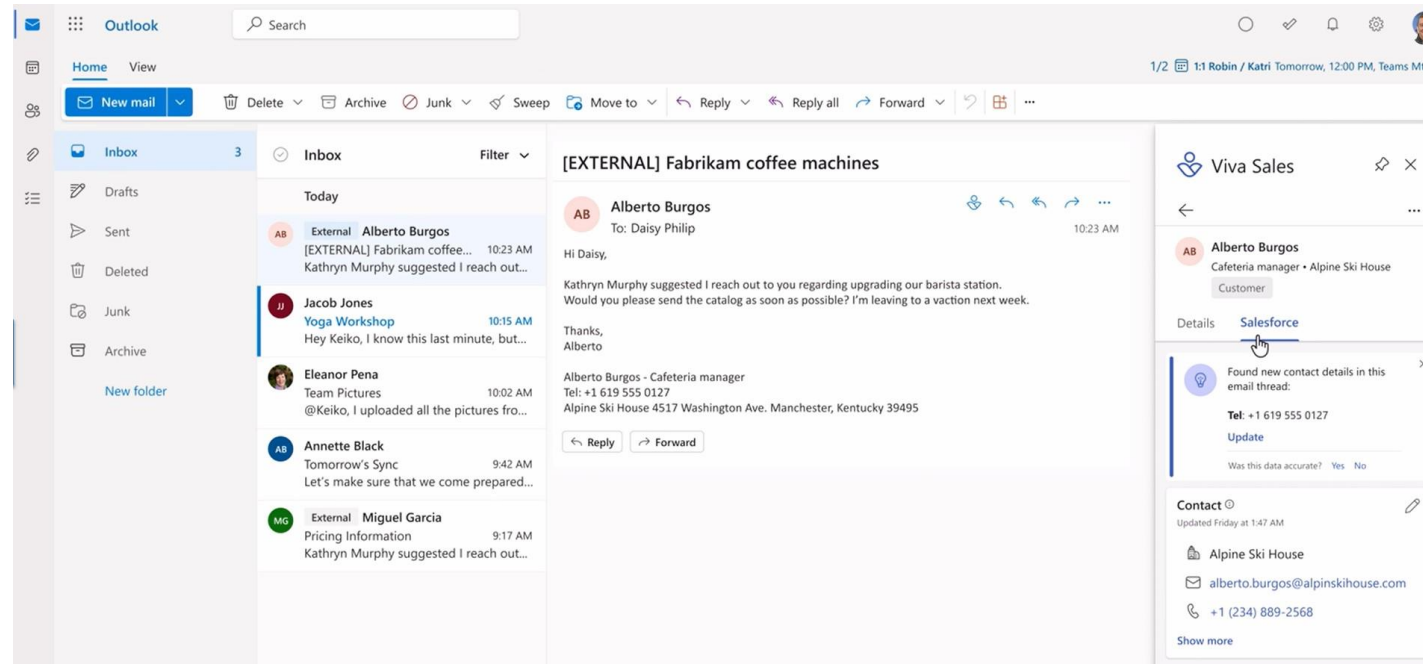
Enabled For
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Public Preview
January 2023

General Availability
March 2023

Read More:
<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/sales/dynamics365-sales/use-ai-powered-insights-guide-customer-conversations>

SALES | NEW VIVA SALES



Features

- Viva Sales is a seller experience app that automatically captures Office 365 and Microsoft Teams data into any CRM tool
- Eliminating manual data entry to help you focus on selling
- Sync data

MORE INFORMATION

Enabled For
Admins, makers, or analysts

Public Preview
August 2022

General Availability
October 2022

Read More:
<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/sales/dynamics365-sales/viva-sales>

Business Value

- Integration with Microsoft Teams and Outlook

Microsoft Dynamics 365 Customer Service

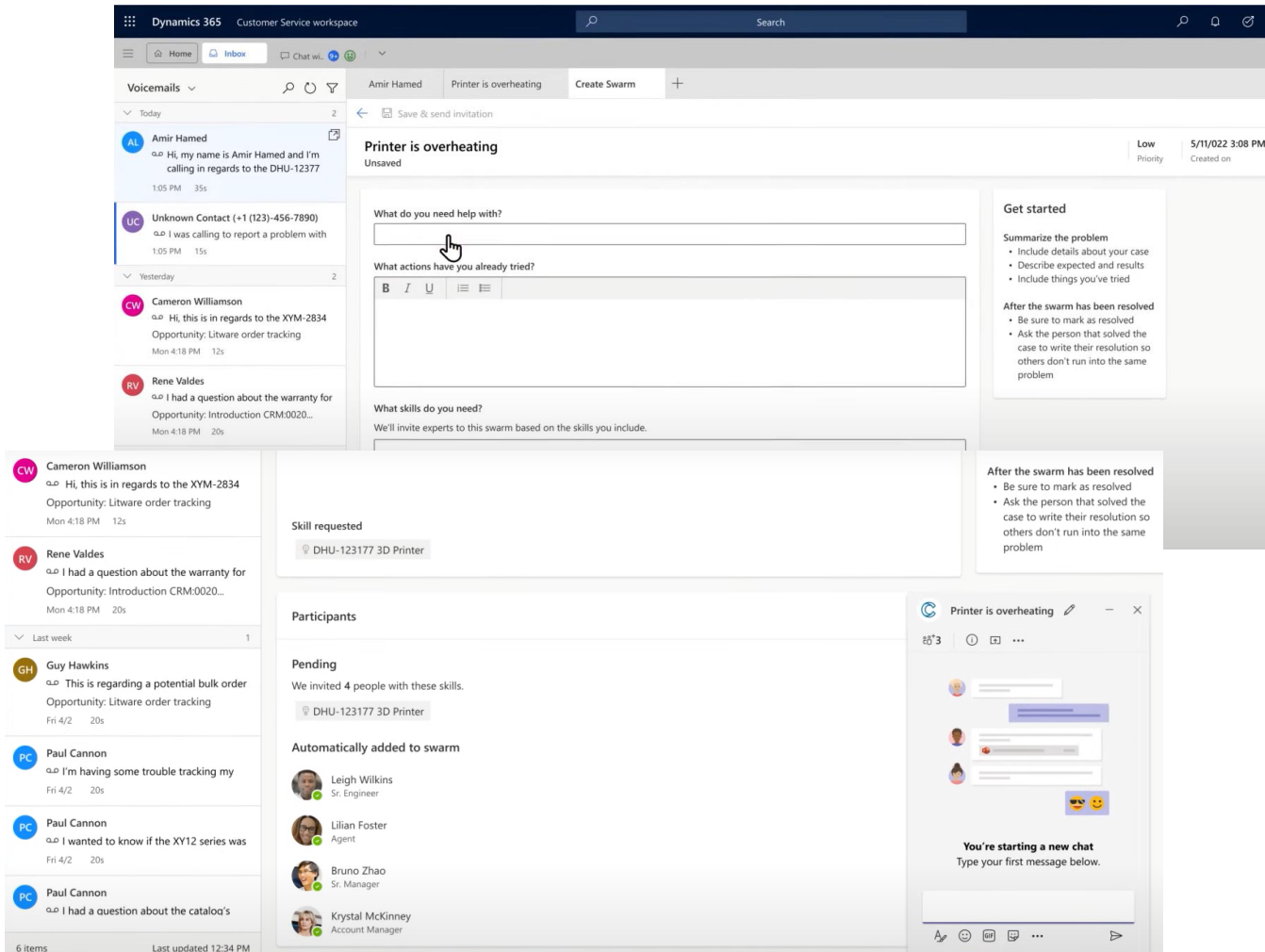
CUSTOMER SERVICE | **2022 WAVE 2 RELEASE PLAN**

Dynamics 365 Customer Service is focused on delivering capabilities to help increase contact center efficiencies

- Improved Microsoft Teams collaboration capabilities
- Enhanced omnichannel voice capabilities
- Modernized agent experience
- Add knowledge search providers from multiple sources
- Improved extensibility of the out-of-the-box reports and ability for supervisors
- Enhanced unified routing



CUSTOMER SERVICE | TEAMS INTEGRATION USING SWARMS FOR COMPLEX REQUESTS



Features

- Easily find colleagues from different departments to solve a problem
- The embedded Teams chat enables quick communication
- Predefined rules to suggest contacts for editing a record

Business Value

- Agents and experts can swarm cases in the applications they are accustomed to using.

MORE INFORMATION

Enabled For
Admins, makers, or analysts

Public Preview
October 2022

General Availability
October 2022

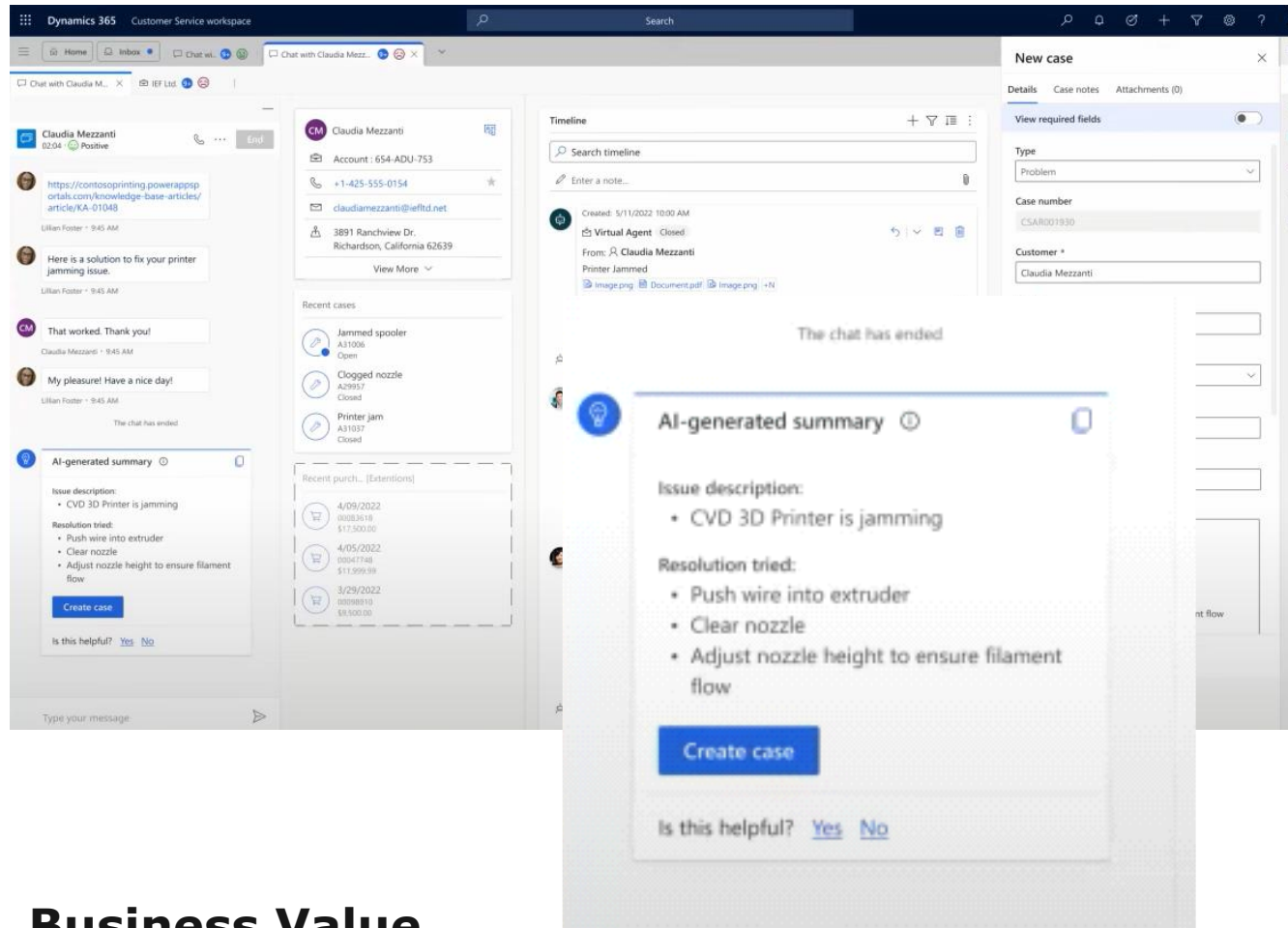
Read More:
<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/service/dynamics365-customer-service/use-customer-support-swarming-complex-cases>

CUSTOMER SERVICE | AUTOMATIC CALL SUMMARIZATION FOR TEAM-BASED COLLABORATION



Features

- Ability to edit the summary
- Automatic summarization
- Problem solutions overview



Business Value

- Automatic summary of team conversations

MORE INFORMATION

Enabled For
Admins, makers, or
analysts

Public Preview
October 2022

General Availability
October 2022

Read More:
<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/service/dynamics365-customer-service/auto-summarize-conversations-support-teams-based-collaboration>

CUSTOMER SERVICE | WORKSPACES

Features

- Improved handling
- Improved accessibility
- Aligned in-app notifications

Business Value

- Modernized agent experience with important layout changes

MORE INFORMATION

Enabled For
Admins, makers, or
analysts

Public Preview
August 2022

General Availability
October 2022

Read More:
<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/service/dynamics365-customer-service/enhanced-layout-customer-service-workspace>

CUSTOMER SERVICE | **AI-BASED SUGGESTIONS**

Features

- Up to 5 record fields can be selected
- Additionally, record fields of related entities are selectable from query and knowledge articles.
- Rules for individual filtering of suggestions can be defined

Business Value

- Knowledge articles with AI-based suggestions

MORE INFORMATION

Enabled For
Admins, makers, or analysts

Public Preview
-

General Availability
October 2022

Read More:
<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/service/dynamics365-customer-service/enhanced-settings-ai-suggestions-knowledge-articles-similar-cases>

Microsoft Dynamics 365 Field Service

FIELD SERVICE | 2022 WAVE 2 RELEASE PLAN

Dynamics 365 Field Service allows companies to transform their service operations by connecting people, places, and things to deliver customer-centric experiences.

- Mobile usability
- Resource scheduling



FIELD SERVICE | **MOBILE USABILITY**

Features

- Reduce time spending
- Switch tabs in a form
- Updated mobile command bar

Business Value

- Reduce the time spent performing repetitive tasks

MORE INFORMATION

Enabled For
Admins, makers, or analysts

Public Preview
-

General Availability
October 2022

Read More:
<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/service/dynamics365-field-service/field-service-dynamics-365-mobile-app-usability-enhancements>

FIELD SERVICE | RESOURCE SCHEDULING

Features

- Lock constraints
- Clustering logic for nearby work orders

Business Value

- More performance and usability improvements

MORE INFORMATION

Enabled For
Admins, makers, or analysts

Public Preview
August 2022

General Availability
October 2022

Read More:
<https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/service/dynamics365-field-service/new-schedule-board-becomes-default-all-deployments>

Thank you for your attention.