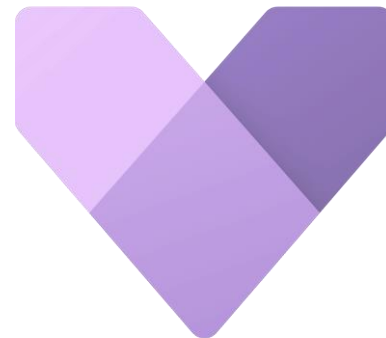


Boost your Customer Engagement

Jan F. Andersen, Solution Architect
Denmark

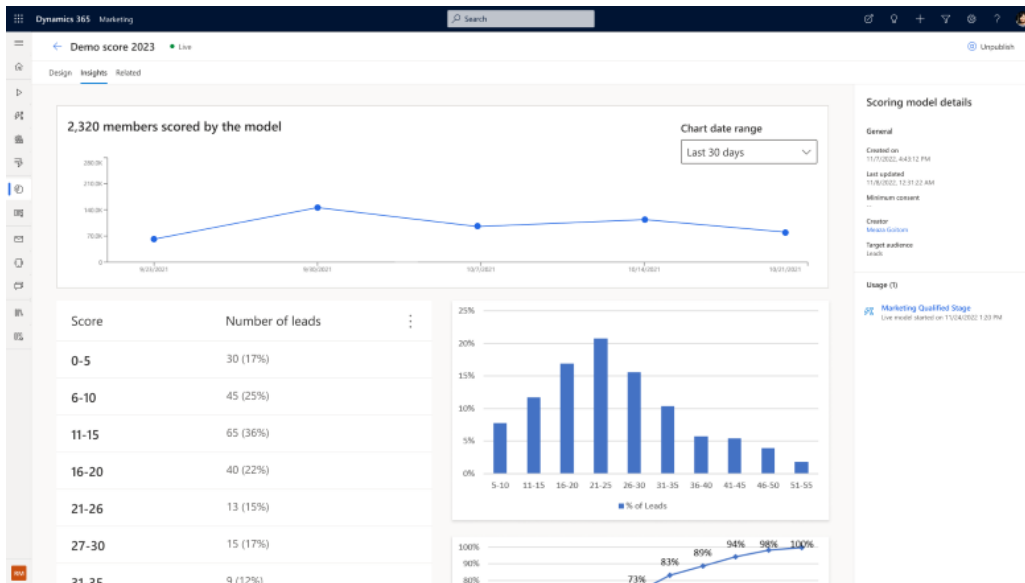
| WAVE 1 2023 RELEASE FOR DYNAMICS 365 CE

The Wave 1 2023 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!



Microsoft Dynamics 365 Marketing

MARKETING | PRIORITIZE THE BEST LEADS AND EMPOWER SELLERS WITH THE NEW LEAD SCORING BUILDER



Features

- Use the easy-to-use lead score builder to start quickly and update or optimize the model continuously.
- Create lead scoring models with not only behavioral but also demographic or firmographic conditions.
- Evaluate your scoring model outputs and performance using a new set of enhanced insights.
- Define lead qualification criteria and post-qualification actions.

Business value

- Maximize return on investment from marketing - Best prospects at the right moment when they're ready to engage.
- With real-time marketing - powerful lead scoring builder to define your scoring criteria and model more efficiently.
- Prioritize the most engaged leads from companies that match your ideal customer profile - profile-based scoring.
- Define qualification criteria and post-qualification actions to grow your pipeline
- Ensuring that each qualified lead receives attention from your sales teams.

MORE INFORMATION

Enabled For
Admins, makers,
marketers, or analysts,
automatically
Public Preview
May 2023

General Availability

Read More: [Prioritize the best leads and empower sellers with the new lead scoring builder | Microsoft Learn](#)

MARKETING | OPTIMIZE YOUR LEAD MANAGEMENT PROCESS BY ENGAGING YOUR SELLERS RIGHT AWAY



Features

- Respond quickly to incoming leads by routing them directly to sales agents.
- Add sales activities such as phone calls and tasks to your nurture journeys.
- Trigger a sales sequence in Dynamics 365 Sales to surface contextual recommendations for the seller picking up the lead.

Business value

Activate a sales sequence or create sales activities, inviting the sales team to engage with leads at the right time and stage of their journey.

As you nurture leads and opportunities with real-time journeys, the leads' signals might indicate an urgency to engage with your sales teams. With Dynamics 365 Marketing, you can now create sales activities such as tasks and phone calls directly from journeys, so that leads get individualized attention at the right time when they're most likely to engage. You can also activate a sales sequence to accelerate the deal, ensuring that sellers receive automated recommendations based on the sales playbook associated with the campaign.

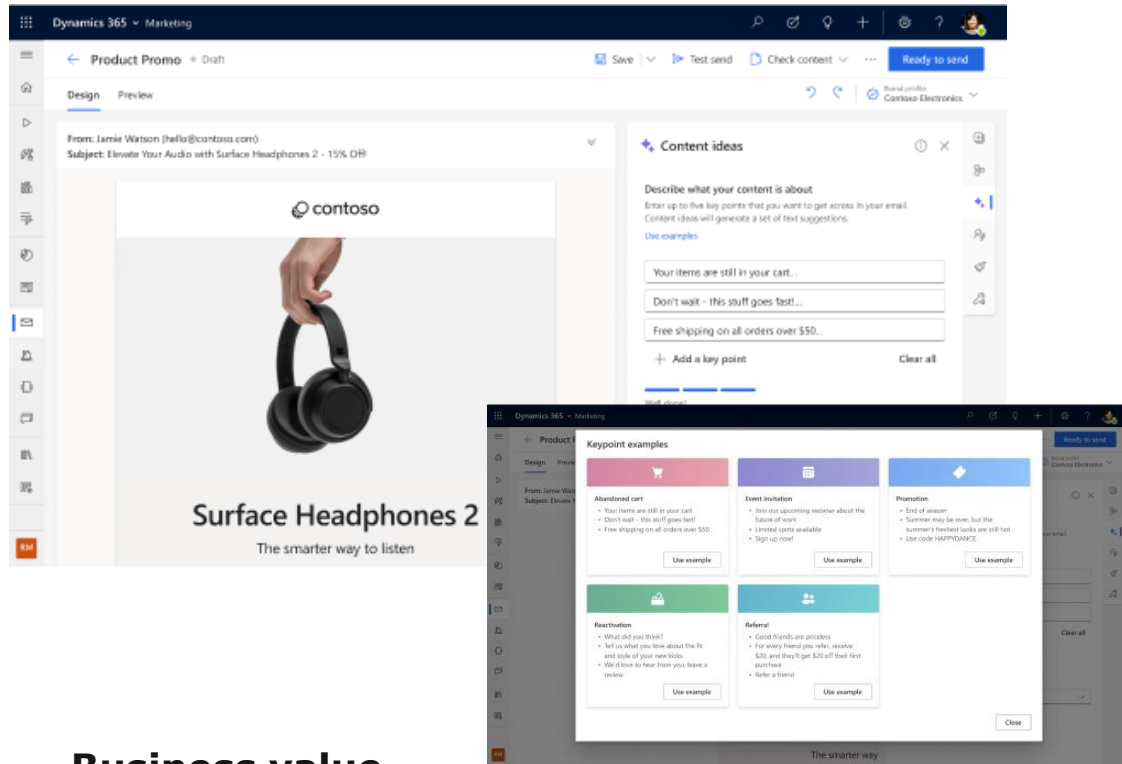
MORE INFORMATION

Enabled For
Admins, makers,
marketers, or analysts,
automatically
Public Preview
April 2023

General Availability
May 2023

Read More: [Optimize your lead management process by engaging your sellers right away | Microsoft Learn](#)

MARKETING | EASILY CREATE ENGAGING CONTENT USING AI-POWERED CONTENT IDEAS



Business value

How great would it be if your email editor could suggest relevant and engaging content? AI-powered content ideas do just that. Content ideas help you find inspiration and can be used as a starting point when composing emails for your audience. It's like asking a group of colleagues to brainstorm with you. Content ideas make creating emails simpler, more efficient, and fun. It's a completely new and innovative functionality leveraging intelligent technology.

Use our sample key points by email type to get inspired and start generating content. Select from different tones of voice such as engaged, adventurous, casual, luxurious, or formal. Use the tone that best fits your brand and your audience.

Features

- Enjoy improved quality of generated content thanks to AI and a refreshed look and feel.
- Select from different tones of voice to generate content ideas such as engaged, adventurous, casual, luxurious, or formal.
- Use examples of key points for typical email types such as an abandoned cart, a referral, or an event invitation to easily kick off the creation process.
- Generate engaging text snippets out of a few short key points.
- Easily access and get inspired by generative AI when adding or editing text.

MORE INFORMATION

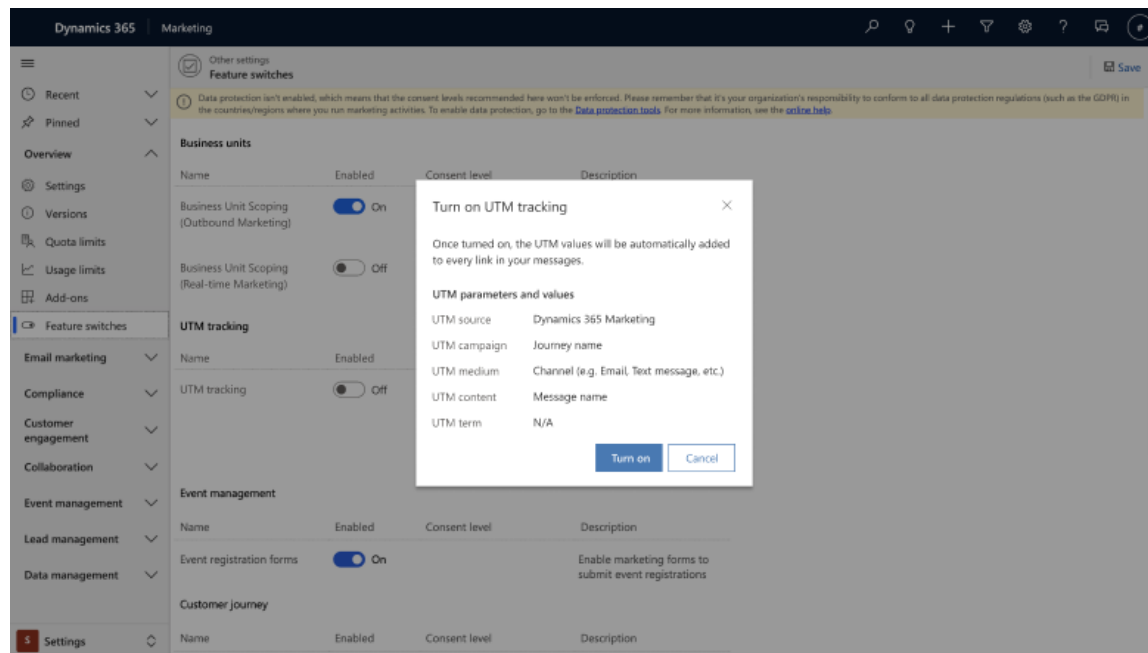
Enabled For
Admins, makers,
marketers, or analysts,
automatically

Public Preview
April 2023

General Availability

Read More: [Easily create engaging content using AI-powered content ideas | Microsoft Learn](#)

MARKETING | MEASURE MARKETING ACTIVITY, WEB TRAFFIC, AND CONVERSION GOALS USING AUTOMATIC UTM TAGGING



Features

- Every link in all your outbound messages is automatically appended with default UTM parameters.
- You can optionally override the default UTM campaign parameters and insert your own custom parameters.

Business value

Urchin Tracking Module (UTM) codes help you track sources of traffic for your websites and landing pages, enabling you to attribute conversions to the right source. Marketing messages can be a significant contributor to this traffic, but it is hard to track them without UTM parameters. They're often left out entirely from the links in messages due to the time-consuming process of manually adding the tags to each link.

Dynamic 365 Marketing now automatically tags all your messages with UTM parameters, following a consistent taxonomy. This gives you full visibility into your marketing contribution to web traffic and, in turn, empowers you to optimize traffic and conversions.

MORE INFORMATION

Enabled For

Admins, makers, marketers, or analysts, automatically

Public Preview

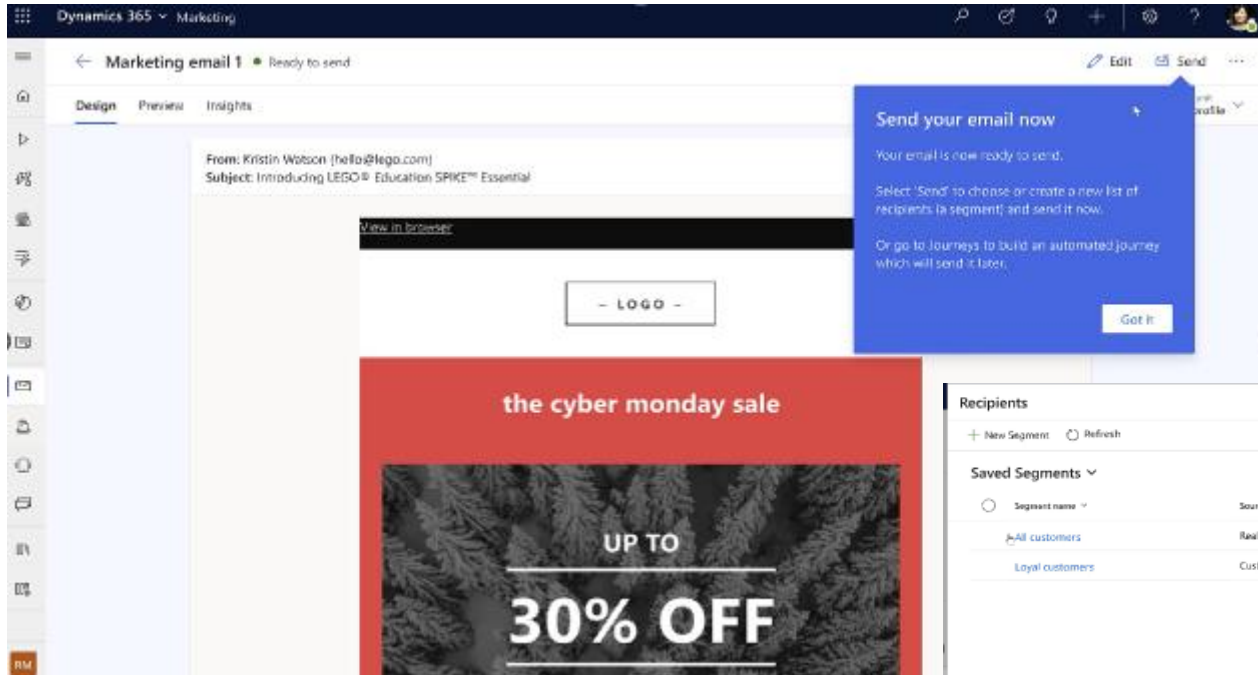
Feb 2023

General Availability

April 2023

Read More: [Measure marketing activity, web traffic, and conversion goals using automatic UTM tagging | Microsoft Learn](#)

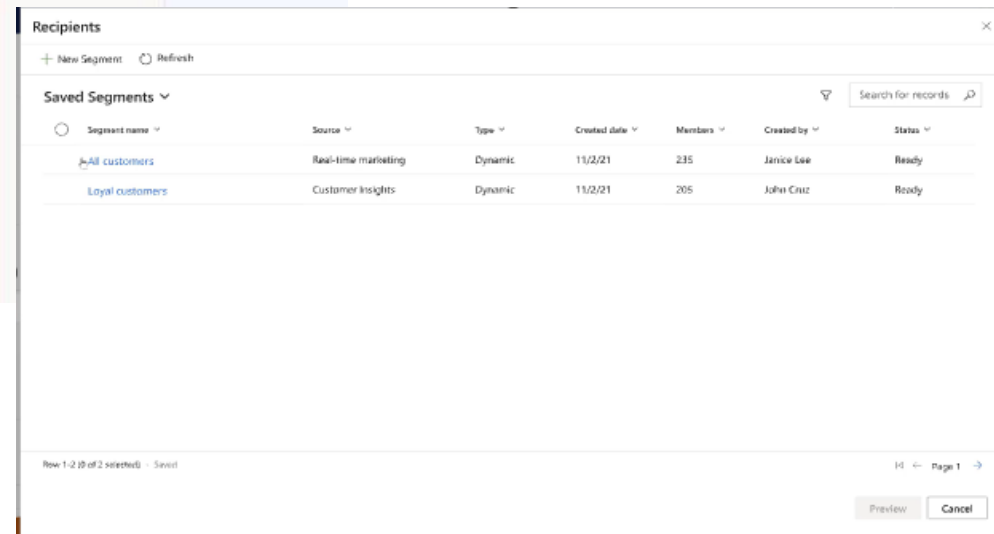
MARKETING | SEND EMAILS QUICKLY WITHOUT BUILDING A JOURNEY



Features

This workflow is optimized for any role or skill level, allowing senders to use Dynamics 365 Marketing to send emails that take advantage of email templates, personalization, email analytics, and connected CRM.

- Choose from email templates to craft your email quickly.
- Pick from an existing segment, preview the segment, and then send.



Business value

Send emails, such as newsletters, without creating a journey. This workflow allows you to select from a new template library, make changes easily with simplifications to the email editor, and send emails to the segment members you need to reach within minutes.

MORE INFORMATION

Enabled For
Users by admins,
makers, or analysts
Public Preview
Mar 2023

General Availability
April 2023

Read More: [Send emails quickly without building a journey | Microsoft Learn](#)

Microsoft Dynamics 365 Sales

SALES | GET BASIC RELATIONSHIP INSIGHTS



Features

- See who in your organization is in contact with the current record.
- View basic relationship KPIs generated with the Dynamics 365 data like:
- Customer interactions: Compares the total number of activities (except tasks) sent by us versus sent by them.
- Relationship activities: Day-wise breakdown of each of the number of activities sent/received (shown over the last 60 days).
- Email sent/received ratio: Compares the ratio of emails sent by us versus received by us.
- Most contacted: Customer most contacted regarding the current record.
- Most contacted by: Sellers who most contacted customers regarding the current record.
- Email engagement: Shows statistics about the number of links clicked, attachments opened, and the total open count (email engagement needs to be enabled for this to work).

Business value

- Currently, the Dynamics 365 administrator has to enable the relationship intelligence feature for sellers to view the relationship KPIs and Who knows whom information.
- With this enhancement, sellers will be able to view the basic relationship KPIs and Who knows whom information out of the box based on the Dynamics 365 data without having to wait for the admin to enable the feature.

MORE INFORMATION

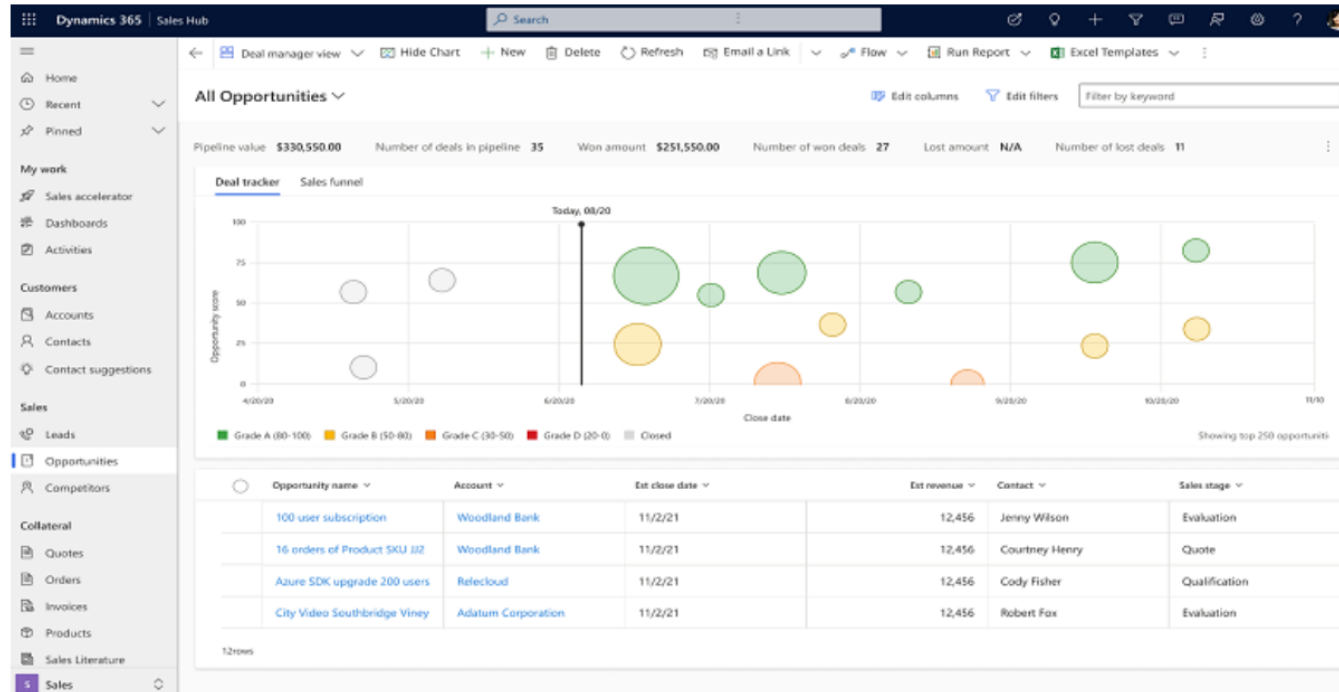
Enabled For
Sales users

Public Preview
January 2023

General Availability
April 2023

Read More:
[Get basic relationship insights out-of-the-box | Microsoft Learn](#)

SALES | MANAGE OPPORTUNITIES MORE EFFECTIVELY



Business value

The new opportunity view in Dynamics 365 Sales enables you to get a bird's-eye view of your pipeline and manage your opportunities more easily and intuitively than ever before. The new opportunity experience has been designed with sellers in mind, saving time for selling by removing many redundant steps and improving sales efficiency. It eliminates many processes that sellers would normally need to do and streamlines everything into a single workspace. Sellers can uncover the deals that need their attention and act right away. Additionally, they can tailor their experience and personalize the view.

Feature details

As a seller, you can:

- Organize opportunities in a way that works for you.
- Personalize your views.
- Update information quickly using an editable grid and side-panel.
- Add notes and tasks, and much more.
- See aggregations for pipeline value, number of deals in the pipeline, and other metrics.

As an administrator, you can:

- Customize the record side panel forms with custom attributes.
- Add support for business rules.
- Configure the charts.

MORE INFORMATION

Enabled For
Admins, sales & managers users

Public Preview
February 2023

General Availability
April 2023

Read More:
[Manage opportunities more effectively using the new pipeline view | Microsoft Learn](#)

SALES | USE FORECAST - MULTIPLE BUSINESS UNITS & USE TO DRILL-DOWN TO FOLLOW UP



User	Quota	Forecast	Won	Committed	Best case	Pipeline	Prediction	Lost	Omitted	Gap to ...
John Peltier (group)	\$3,490,640.00	\$10,350,515.00 (\$1,350,515.00)	\$5,323,880.00 153 %	\$12,367,019.00 354 %	\$760,227.00	\$406,882.00	\$2,079,240.00	\$2,421,106.00	\$1,004,979.00	(\$1,833,240.00) -53 %
John Peltier	\$419,529.00	\$1,172,647.00 279 %	\$293,849.00 94 %	\$776,796.00 185 %	\$12,897.00	\$27,128.00	\$210,322.00	\$82,291.00	\$19,832.00	\$26,080.00 6 %
Kenny Smith (i)	\$201,000.00	\$100,000.00 Adjust	\$2,152,938.00 1071 %	\$5,287,444.00 2631 %	\$310,700.00	\$212,747.00	\$808,942.00	\$996,607.00	\$453,387.00	(\$1,951,938.00) -971 %
Kenny S	\$301,000.00	\$700,000.00 Adjust	\$488,256.00 162 %	\$855,024.00 284 %	\$58,476.00	\$71,894.00	\$90,743.00	\$233,966.00	\$3,257.00	(\$187,256.00) -62 %
AIG	---	\$9,712.00	\$0.00	\$9,712.00	\$0.00	\$0.00	---	\$0.00	\$0.00	---
American Exp...	---	\$0.00	\$0.00	\$0.00	\$0.00	\$2,086.00	---	\$0.00	\$0.00	---
Anthem	---	\$13,830.00	\$0.00	\$13,830.00	\$0.00	\$0.00	---	\$0.00	\$0.00	---

Business value

Companies with multiple business units (BU) define different forecasts for each BUs to track, monitor, and provide targeted help.

Organizations need a way to easily track forecasts at BU-level to understand how each business unit is performing and develop data-driven strategies.

Feature details

As an administrator or forecast manager, you'll be able to:

- Configure forecasts based on a business unit, which allows your sales team to monitor and track the progress of each business unit separately.
- Restrict the forecast only to the sales team in that business unit.
- As a seller, you'll be able to:
- See the forecast for your business unit and make informed decisions to meet or exceed your quotas.
- Get a macro and micro view by monitoring your BU forecast and then drill down to your forecast to see how you're contributing to the BU forecast.

MORE INFORMATION

Enabled For

Admins, sales & managers users

Public Preview

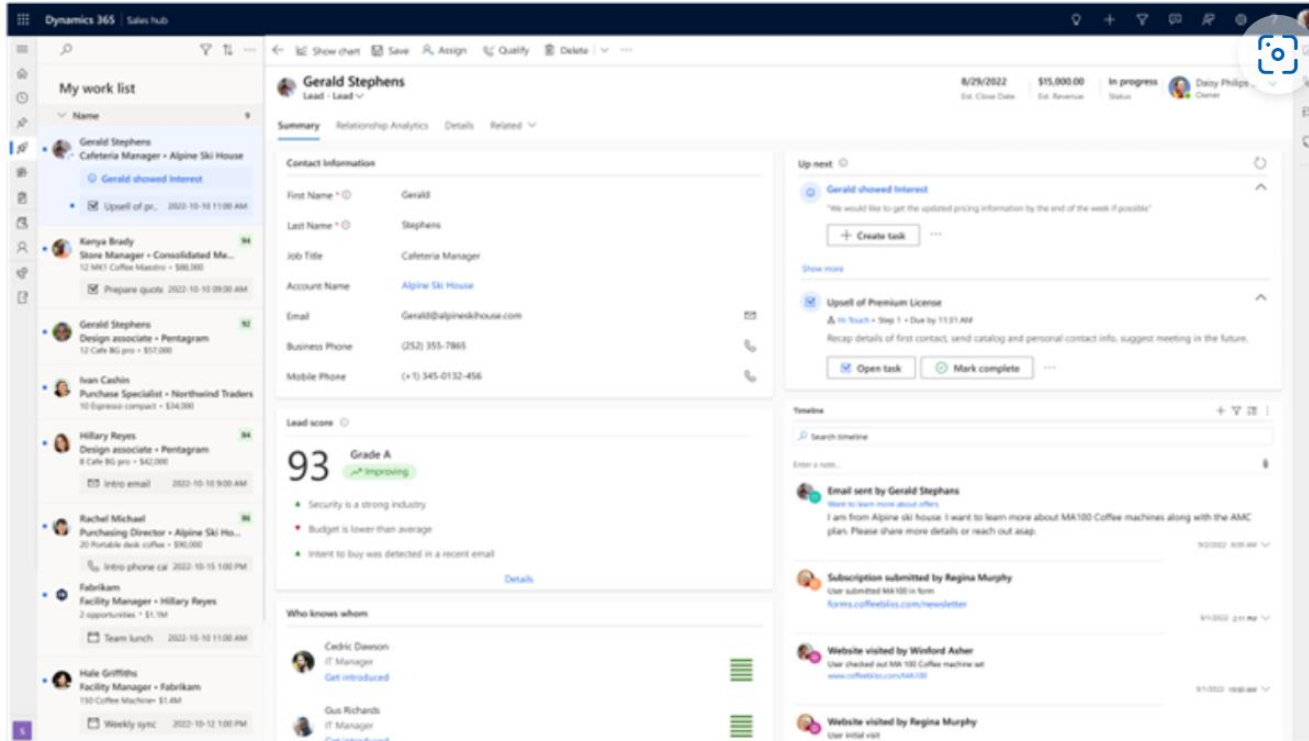
General Availability

April 2023

Read More:

[Configure forecasts for multiple business units | Microsoft Learn](#)

SALES | IMPROVE LEAD QUALIFICATION WITH INTENT DETECTION



Feature details

As a seller, you'll be able to:

- Engage with the lead for the possible next steps based on the intent detected by the AI model, thus expediting the lead qualification process.
- Be proactive in your customer engagement and improve the sales process.

Business value

Sales teams receive millions of potential leads each year. Each lead requires a seller's time to analyze, engage and determine the potential customer's needs. Sellers' capacity and efficiency must be maximized while working on these leads. This new AI-based feature would detect customer intent from emails and ensure that good quality leads are acted upon by the sellers at the right time, thus saving precious time for the sellers. It helps sellers proactively engage with their customers.

This feature helps fast-track the lead qualification process, increasing sales effectiveness and creating operational efficiencies in the lead management process.

MORE INFORMATION

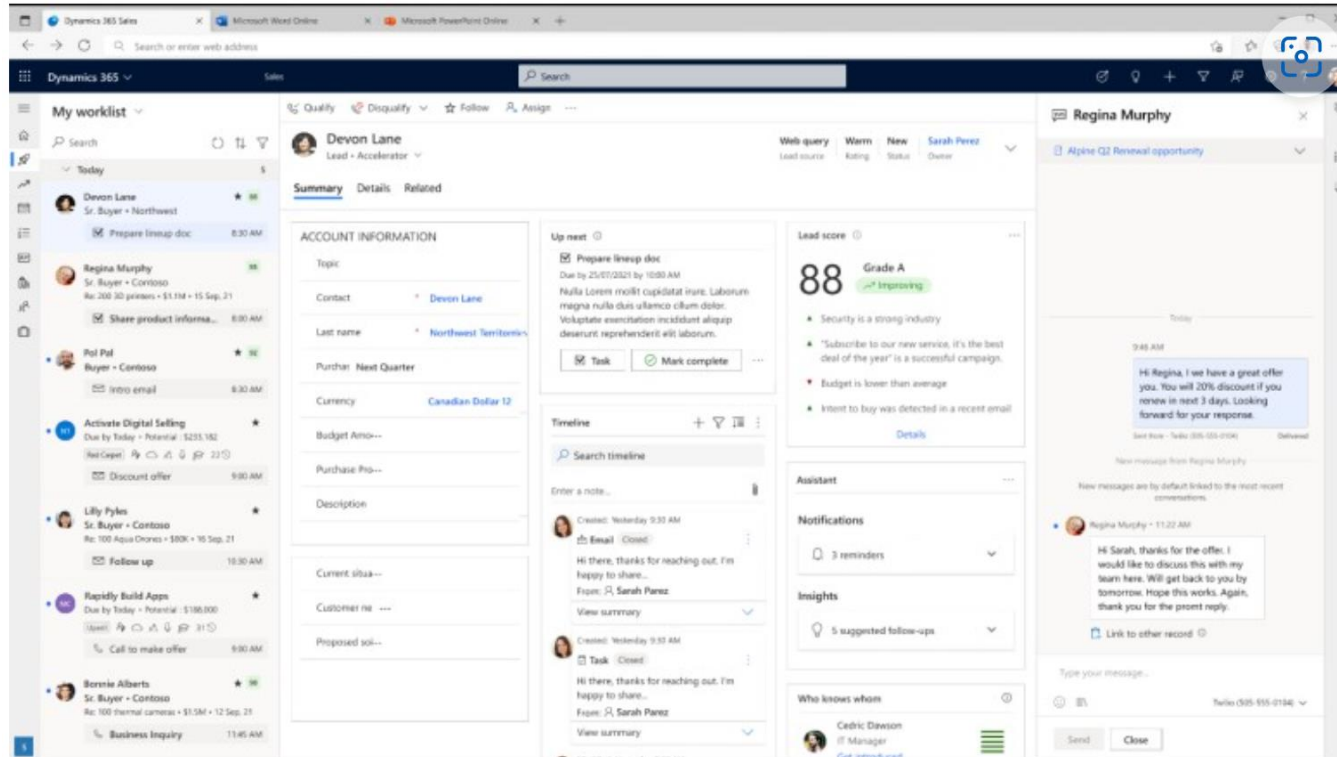
Enabled For
Admins, sales users

Public Preview

General Availability
September 2023

Read More:
[Improve lead qualification with intent detection | Microsoft Learn](#)

SALES | ENGAGE WITH YOUR CUSTOMERS USING SMS CONVERSATION



Feature details

The key capabilities that your sellers will be able to use as part of this feature include:

- Admins will be able to assign specific numbers to any user/team for SMS.
- Receive customer responses for SMS sent and revert to build an ongoing conversation.
- Send and receive SMS from all relevant Dynamics 365 Sales entity forms.
- Get real-time notifications for incoming SMS.

Business value

Effective customer engagement is an important means of building and maintaining customer relations to close deals in the current business-to-business industry. It is crucial to meet your customers where they prefer. As the world is changing towards a digital way of living, more and more customers prefer to be contacted via SMS. Even sellers find SMS a convenient and effective channel to send reminders, provide quick updates, or respond to customer queries. This feature will enable your sellers to engage with key customers and decision-makers via SMS during the ongoing sales process and build and maintain a lasting relationship.

MORE INFORMATION

Enabled For
Admins, sales users

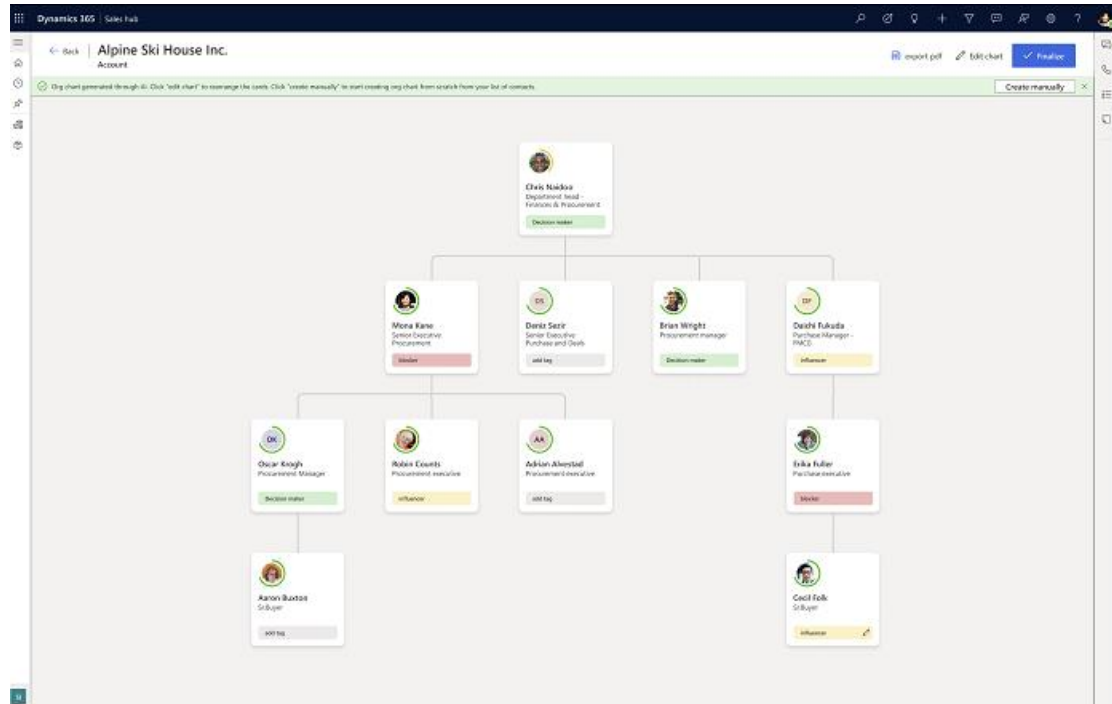
Public Preview

April 2023

General Availability
May 2023

Read More:
[Improve lead qualification with intent detection | Microsoft Learn](#)

SALES | VISUALIZE KEY STAKEHOLDERS AND TAKE ACTION WITH THE SMART ORGANIZATION CHART



Feature details

This new feature would have the following capabilities:

- Sellers/account managers can quickly create their customer org chart to understand the various stakeholders for an account.
- Maintain a relationship map to identify, engage and grow your network of customer contacts.
- Activity view of the contacts/stakeholders will enable you to understand your customer better.

Business value

Formulate the right engagement plan to reach out to the right stakeholders. Account team members often need help identifying the right stakeholders within a customer organization for their deals. Sellers typically engage only with a fraction of the buying committee, which could lead to missed upsell/ cross-sell opportunities. There is a need to capture the buyers' roles easily but also get a snapshot of the contact's activity levels with your organization to see if this is a stakeholder who needs more attention. With the new org management feature, you can build and visualize your customer organization for maintaining a healthy business relationship.

MORE INFORMATION

Enabled For
Admins, sales, or analysts

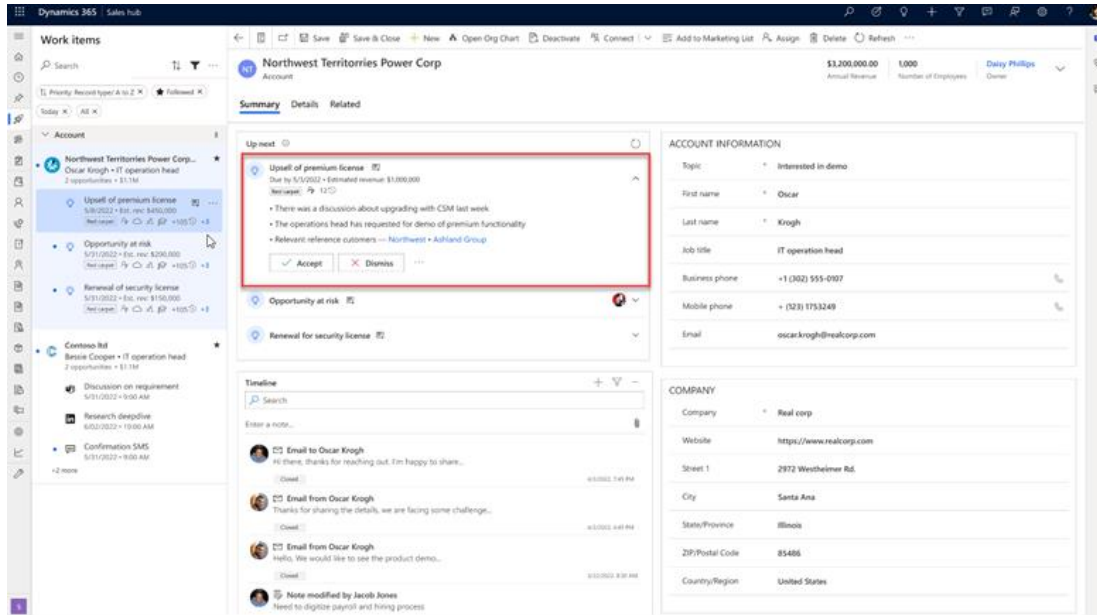
Public Preview

June 2023

General Availability

Read More: [Visualize key stakeholders and take action with the smart organization chart](#) | [Microsoft Learn](#)

SALES | IDENTIFY CROSS-SELL AND UPSELL OPPORTUNITIES WITH TIMELY PRODUCT RECOMMENDATIONS



Feature details

An artificial intelligence feature that considers historically successful deals and proposes products with upsell and cross-sell opportunities for creating new opportunities and increasing their deal size.

- As an administrator, you'll be able to enable and set up product recommendations.
- As a seller, you'll be able to view product recommendations while adding products to an opportunity.

Business value

It takes more time, money, and effort to sell to a new customer than to sell to an existing one. Hence, sellers should equally focus on cross-selling to current customers as much as selling to new customers. The likelihood of the cross-selling and upselling strategy being successful is directly tied to the relevance of the product recommendations. AI-based product recommendations can leverage historical data to suggest the right product to sellers while they're working on an opportunity.

Account executives and sellers deal with multiple customers for selling different products. Proposing the right products to the right customer at the right time is critical for the success of a deal. Sellers need an extra bit of help to upsell and cross-sell products to increase their deal size and suggest the right product to customers. They want to leverage the transactional data that is available within the application to propose the right products to their customers.

MORE INFORMATION

Enabled For
Admins, sales, or
analysts, users

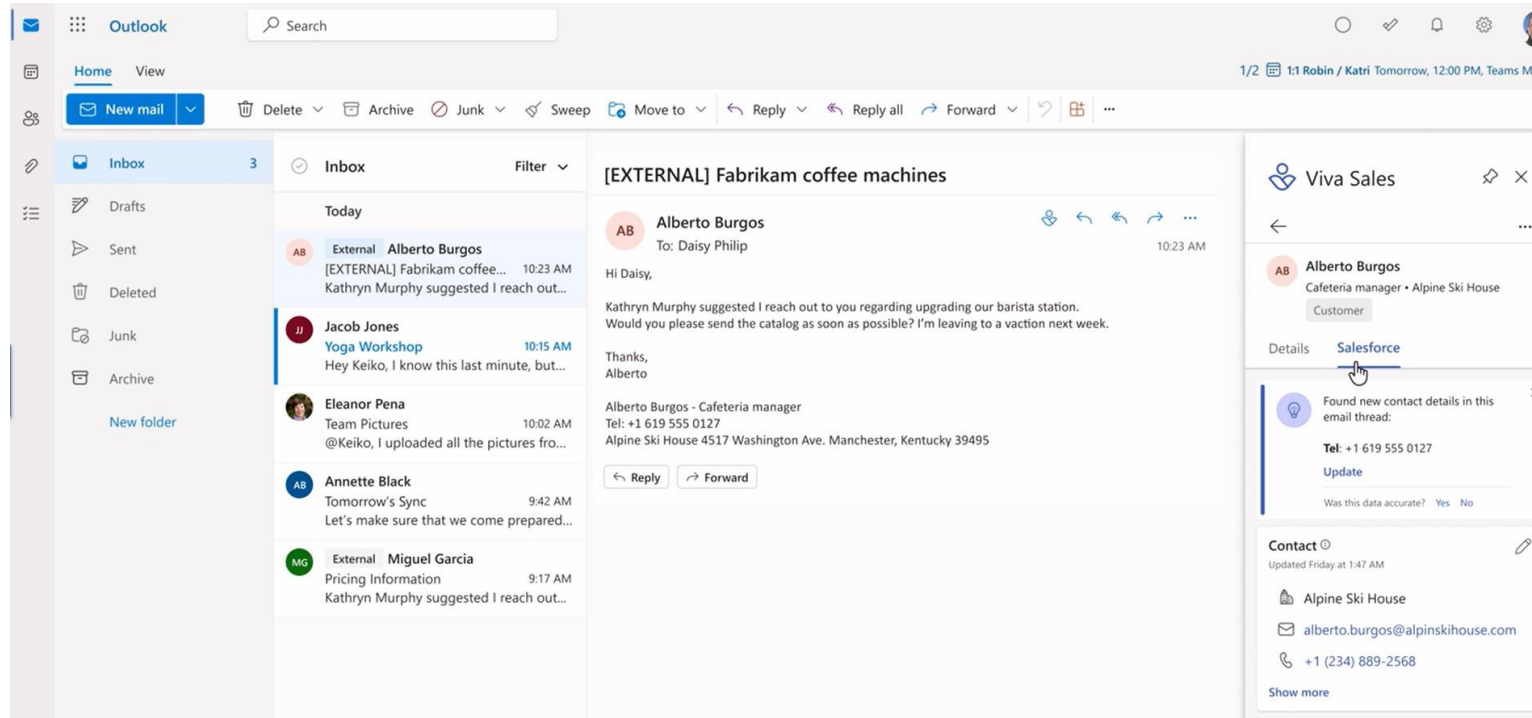
Public Preview

August 2023

General Availability

Read More: [Identify cross-sell and upsell opportunities with timely product recommendations | Microsoft Learn](#)

SALES | COPILOT & VIVA SALES



Features

- Viva Sales & Copilot makes CRM even stronger and easy to use linking to all your leads and customer data
- Eliminating manual data search a lot and help you focus on
- Selling & service

Business Value

Integration with Microsoft Teams and Outlook

Bring together the right users, contextual insights, and productivity apps to boost seller collaboration in Teams. Viva Sales makes internal and external collaboration center stage. Sellers can use sales templates to create a collaboration space.

AI-powered assistance across business functions—from sales, service, and marketing to supply chain. With Dynamics 365 Copilot, we're introducing the world's first AI copilot natively built-in to both CRM and ERP applications. Easy access to leads & customer information and dialogs.

MORE INFORMATION

Enabled For
Admins, sales, or analysts

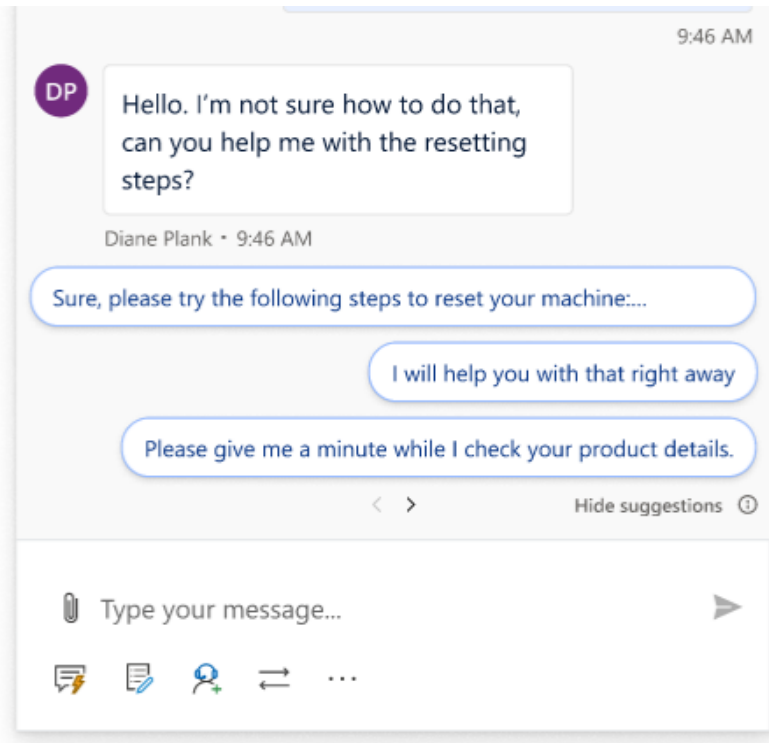
Public Preview
January 2023

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>

Microsoft Dynamics 365 Customer Service

CUSTOMER SERVICE | ACCELERATE TIME TO RESOLUTION WITH AI-SUGGESTED REPLIES



Features

Suggested replies in Customer Service will be powered by the state-of-the-art natural language processing technology used in Nuance Agent Coach. The highlights of the feature include:

- Intuitive, real-time suggested replies for agents directly in the digital messaging experience.
- Automated named-entity recognition and population that provides personalized responses for each user.
- Simplified data configuration experience to curate the reply set.
- Robust reply management experience for admins that provides visibility into the discovered responses and the ability to edit or consolidate responses.
- On-demand model retraining to ensure the model is always up to date and accurate.
- Unique models for each organization trained on historical support conversation data.

Business Value

Support advocates today face challenges in finding the right response to send to customers. They often resort to solutions such as sticky notes or documents to maintain manually templated responses or draft the replies manually. Suggested replies will address this challenge by providing agents with multiline prompts and response suggestions in the chat control based on the context of an ongoing conversation. The model learns from the organization's chat history and adapts over time so that response suggestions are always relevant and of high quality. This will drive significant improvements in key contact center metrics including handle time, throughput, and agent satisfaction.

MORE INFORMATION

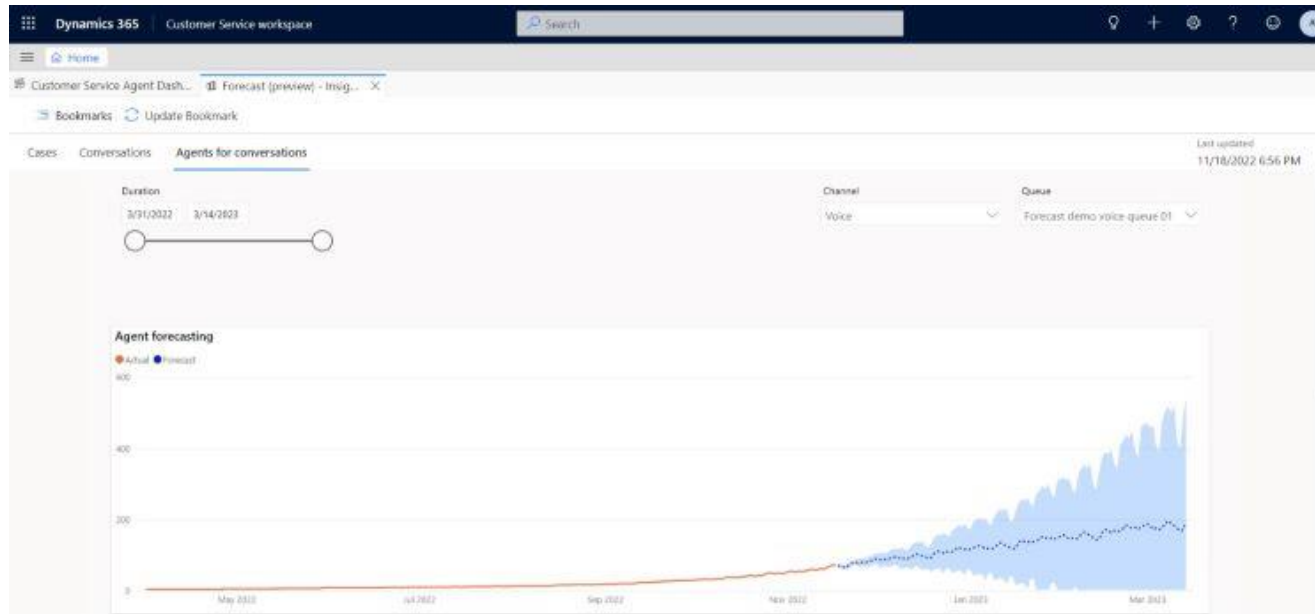
Enabled For
Admins, customers
service, or analysts

Public Preview
April 2023

General Availability

Read More: [Accelerate time to resolution with AI-suggested replies | Microsoft Learn](#)

CUSTOMER SERVICE | FORECAST AGENT DEMAND TO HANDLE CUSTOMER CONVERSATIONS



Features

- Forecast conversation volumes daily.
- Automatically detect seasonality from historical traffic to help customer service managers accurately forecast conversation volumes during special, seasonal events.
- Forecast agent demand to handle forecasted conversation volumes daily to account for business goals such as service-level agreements (SLAs) and average handle time.
- Visualize volume and agent forecasts on a daily, weekly, and monthly basis, for up to six months.
- Slice volume and agent forecasts by any combination of channels and queues.

Business Value

Customer service managers need trusted agent forecasts to plan future headcounts and schedule the right level of staffing to provide first-class customer service over voice and digital channels. Overestimation of the number of agents results in higher labor costs while underestimation leads to longer wait times and decreased customer satisfaction, damaging your brand loyalty.

MORE INFORMATION

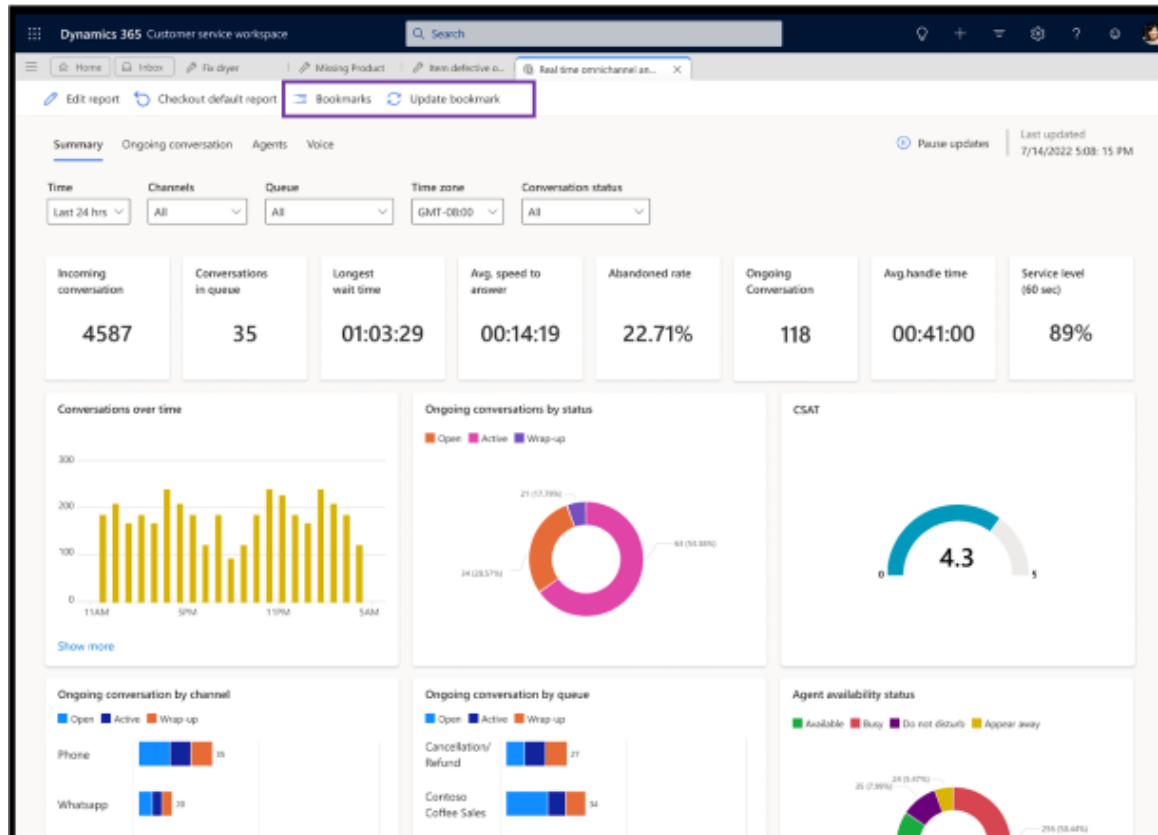
Enabled For
Admins, customer service, or analysts

Public Preview
April 2023

General Availability

Read More: [Forecast agent demand to handle customer conversations | Microsoft Learn](#)

CUSTOMER SERVICE | PERSONALIZE OUT-OF-THE-BOX REAL-TIME ANALYTICS REPORTS



Feature details

Key capabilities of the feature include the following:

- Save filters as bookmarks for out-of-the-box reports.
- Select from a previously saved filter list (bookmarks) to view metrics based on the filters.
- Set one of the bookmarks as default.
- Delete one or multiple bookmarks.

Business value

As a contact center supervisor, you might need to analyze the operational metrics across dimensions like queues and agent reporting to understand and improve the team's performance and the customer support experience. To address this need, you can use the out-of-the-box real-time reports with your selected filters by saving them as bookmarks. This helps personalize your reports and saves the time and effort required to reapply the filters every time you open the dashboards.

MORE INFORMATION

Enabled For
Admins, customer service, managers, or analysts

Public Preview

General Availability
April 2023

Read More: [Personalize out-of-the-box real-time analytics reports](#) | [Microsoft Learn](#)

CUSTOMER SERVICE | MONITOR SUPPORT OPERATIONS IN NEAR REAL TIME

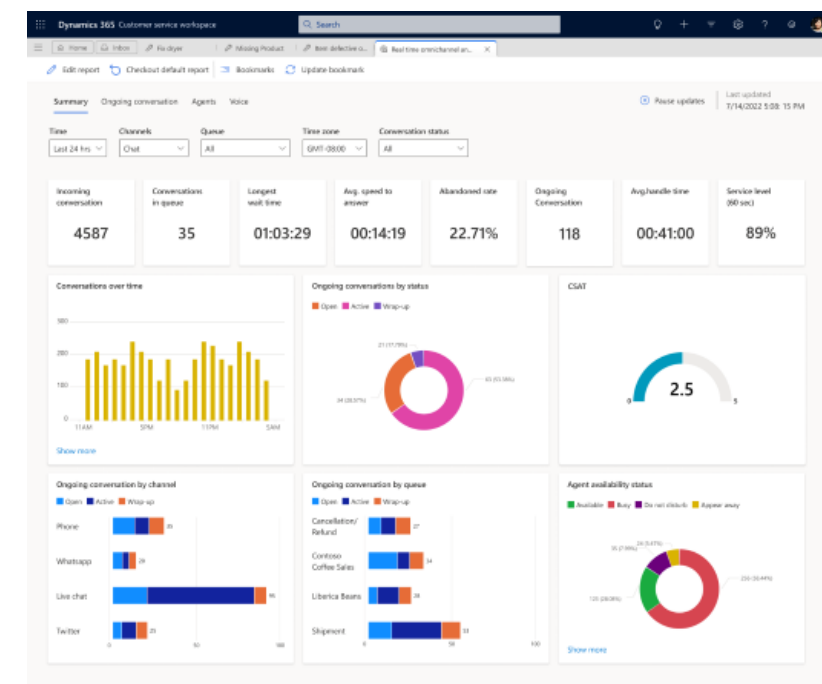
Business value

Contact center managers need to be able to react to events such as increases in the volume of incoming customer interactions, longer call lengths, and agent absences by optimizing agent allocation in real time to provide top-notch support and boost customer satisfaction. Having visibility into the overall support performance through near real-time reporting empowers managers to monitor key operational metrics, make course corrections at the right time, and keep service levels high.

Features

Key capabilities for supervisors and managers of contact centers include:

- **Summary report:** Helps understand the volume of customer interactions and service levels, along with the available capacity in near real time.
- **Agent report:** Provides information about the agent capacity and status for the last 24 hours with the ability to drill down to see details, like capacity and adherence, at each agent level.
- **Voice report:** Provides voice-specific metrics for the last 24 hours.
- **Conversation list:** Provides the list of currently ongoing conversations (in the last 24 hours).
- **Visual customization:** Helps customize the visual display of the out-of-the-box Power BI reports and publish to your organization.
- **Personalization:** Lets report users save and manage multiple bookmarks with the ability to set a default bookmark.
- **Auto refresh/Pause refresh:** Lets users pause and resume data refresh of reports.



MORE INFORMATION

Enabled For
Admins, support & service, managers or analysts

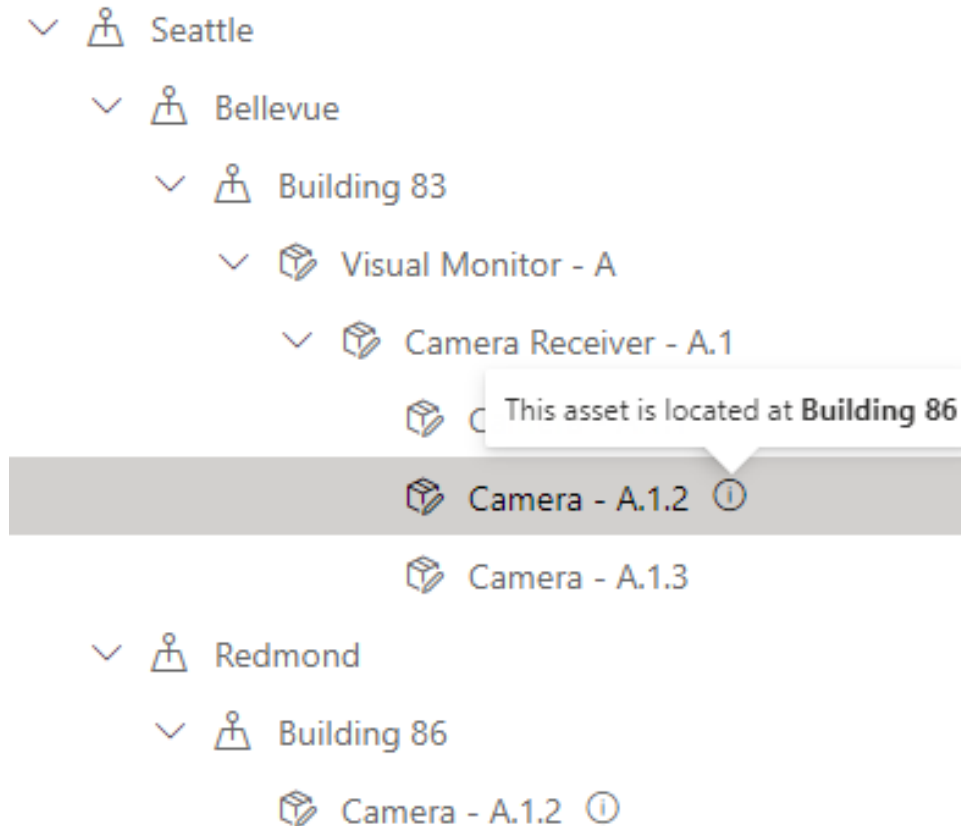
Public Preview
Oct 2022

General Availability
September 2023

Read More: [Monitor support operations in near real time | Microsoft Learn](#)

Microsoft Dynamics 365 Field Service

FIELD SERVICE | MODEL LOCATION AND ASSET HIERARCHIES FOR LARGE FACILITIES



Features

Both assets and locations can be complex and have hierarchical models. Building and understanding the hierarchy of an asset or location, such as a large office building or campus site, is critical to provide world-class service.

Business value

This feature enhances the location and asset hierarchy experience that allows dispatchers and service managers to pinpoint the location of an asset within a physical space so a technician can deliver faster and more efficient service.

MORE INFORMATION

Enabled For

Admins, makers, marketers, or analysts

Public Preview

Feb 2023

General Availability

April 2023

Read More: [Model location and asset hierarchies for large facilities](#) | [Microsoft Learn](#)

FIELD SERVICE | MANAGE WORK ORDER COSTS USING THE NOT-TO-EXCEED FUNCTION



00501 - Saved
Work Order

Work Order Business Pro...
Active for 4 days

Work Order (4 D)

Schedule Work Order

Summary

Settings

Products

Services

Service Tasks

Articles

Location

Record Log

Related

General

Priority

Work location

Onsite

Service territory

WA

Currency

US Dollar

Price not-to-exceed

\$1000

Cost not-to-exceed

\$700

+\$100 from default.

Estimate is 95% of not-to-exceed

PREFERENCES

Time From Promised

Time To Promised

Time Window Start

Time Window End

Fulfillment Preference

Features

You can now set up not-to-exceed values for cost and price on work orders. Not-to-exceed values can automatically apply to the work order based on the customer, the incident type, and the location of the work. Alternatively, you can enter the not-to-exceed amounts directly on the work order.

Business value

Setting financial expectations with customers and vendors is critical for managing a company's bottom line and maintaining successful relationships. This not-to-exceed capability helps service providers stay within the preapproved price from their customers and ensure frontline workers, including vendors and subcontractors, stay within the preapproved cost for work orders.

MORE INFORMATION

Enabled For

Users by admins, makers, or analysts

Public Preview

March 2023

General Availability

April 2023

Read More: [Manage work order costs using the not-to-exceed function | Microsoft Learn](#)

FIELD SERVICE | TRACK COST PER WORK ORDER TO ESTABLISH PREDICTABLE COST TRENDS



Total Price	
Estimated Subtotal Price	\$134.00
Estimated Total Price	\$134.00
Subtotal Price	\$75.00
Sales Tax	\$0.00
Total Price	\$75.00

Total Cost	
Estimated Total Cost	\$75.50
Total Cost	\$65.00

Features

Estimate the total cost and price of work orders—including all parts, services, and taxes—before work begins to ensure you meet the expectations and commitments to your customers. Additionally, compare estimated and actual work order costs to establish predictable cost trends and optimize service delivery. Estimated total price, estimated total cost, total cost, and taxes are calculated on work order summaries. The cost totals are the sum of all work order product and service costs.

MORE INFORMATION

Enabled For
Users

Public Preview
Mar 2023

General Availability
April 2023

Read More:
[Track cost per work order to establish predictable cost trends](#)
[| Microsoft Learn](#)

Business value

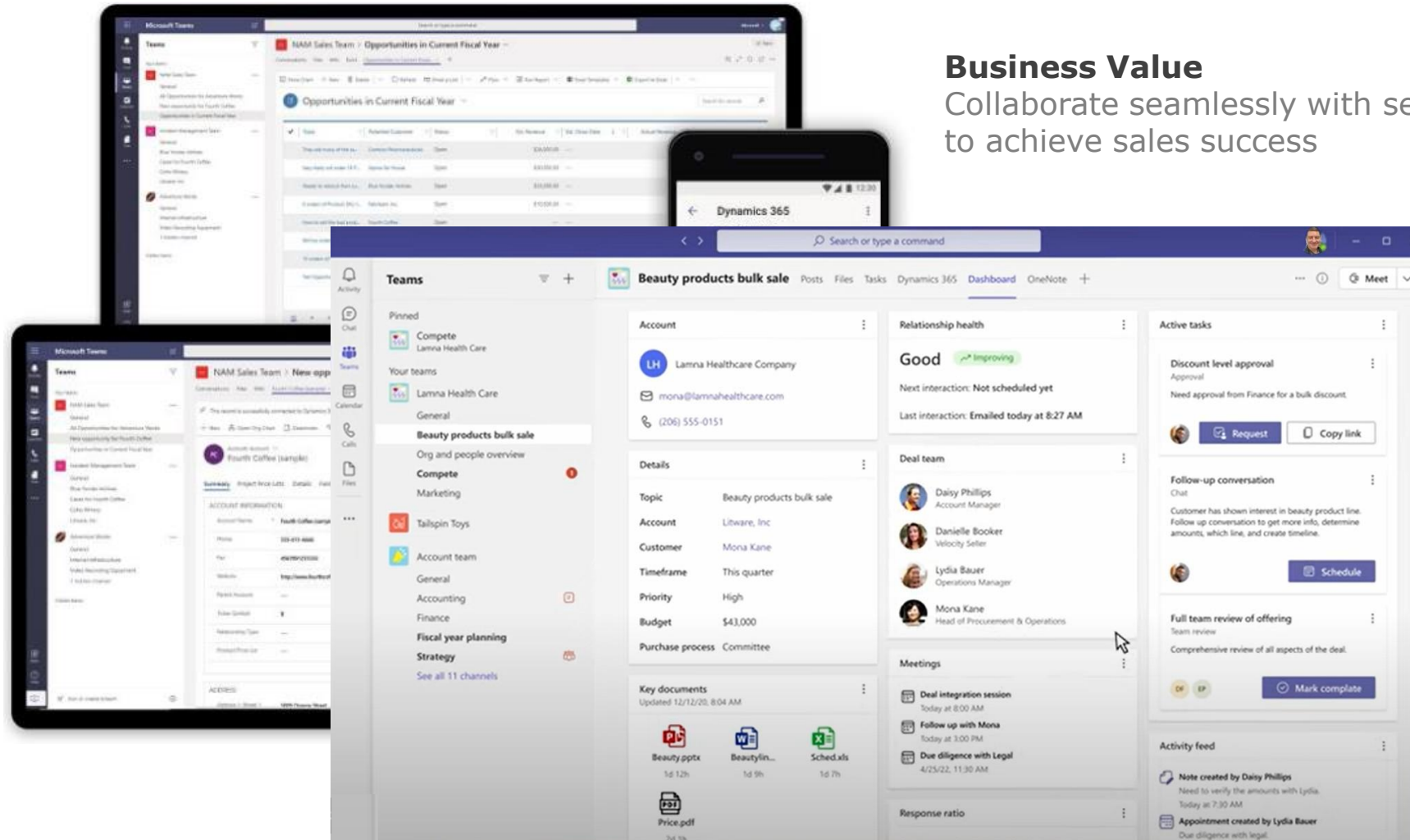
Ensure work meets customer cost and price expectations by estimating the total cost and price of work orders.

SALES | TEAMS AND OUTLOOK COLLABORATION ENHANCEMENTS



Business Value

Collaborate seamlessly with several people in parallel to achieve sales success



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/teams-outlook-collaboration>

Questions?