

# Welcome to **What's new in Microsoft 2024 Release Wave 2**

Tuesday, 24<sup>th</sup> September 2024

We will kick off shortly



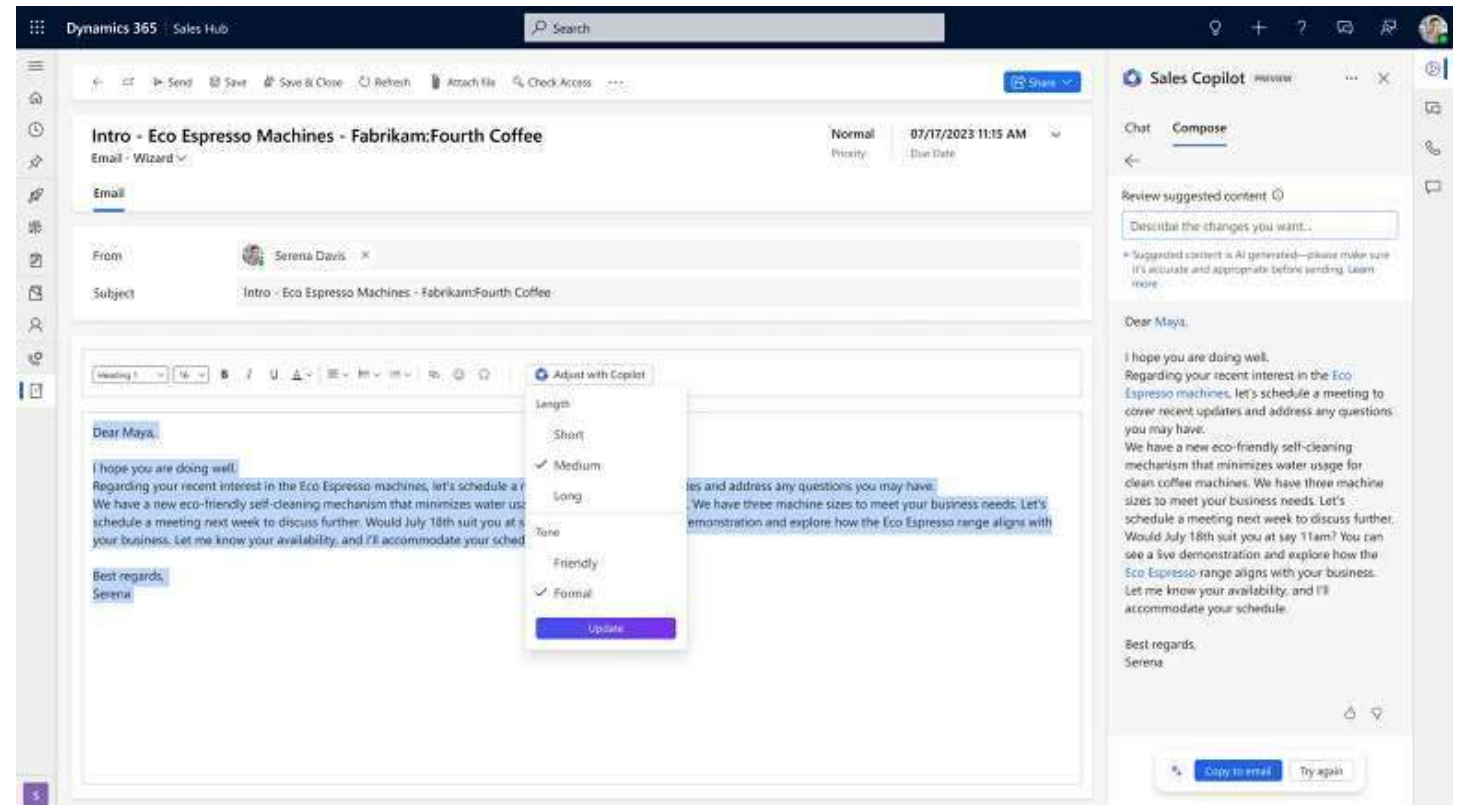
# What's new in Dynamics 365 CE



# Sales

# Sales - Copilot and AI innovation

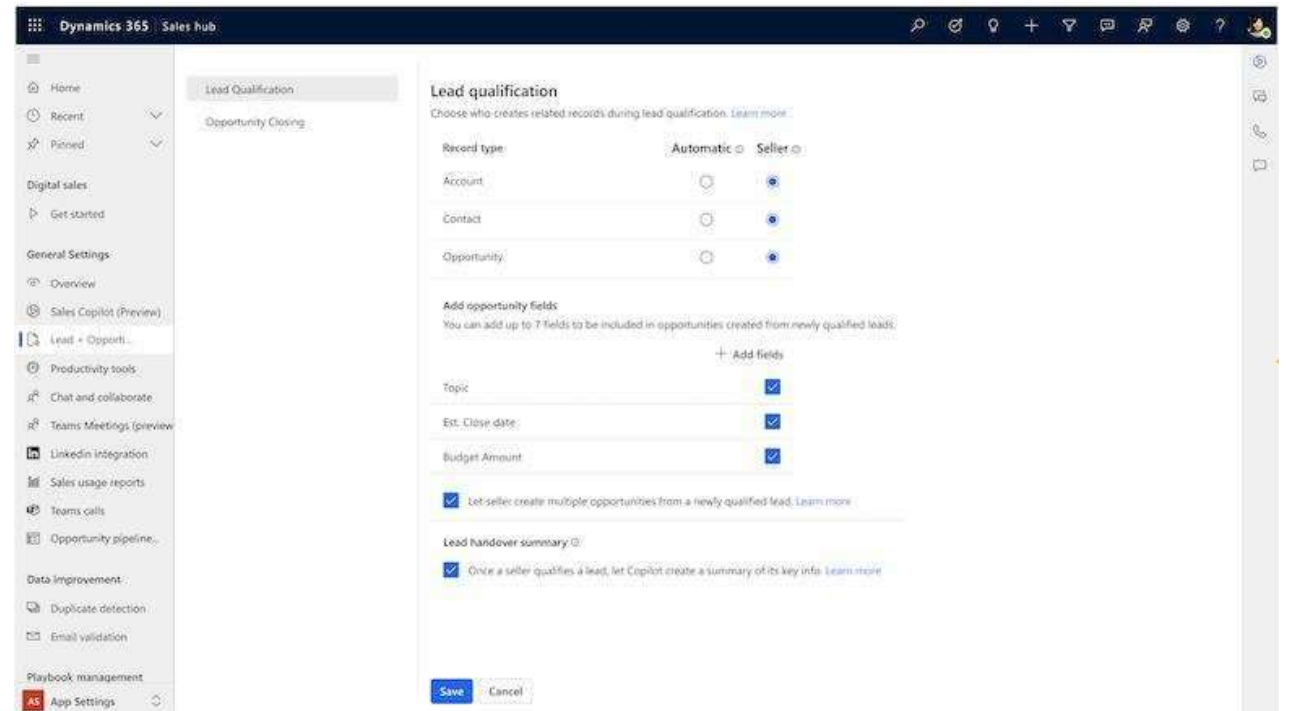
Item	N / U	Deadline	Benefits / Observations
Summarize lengthy emails using Copilot in Dynamics 365 Sales	Updated	Apr/2024	With this feature, as a sales professional, you will be able to: <ul style="list-style-type: none"><li>- Review detailed summaries for emails exceeding 1,000 characters.</li><li>- Efficiently share feedback by copying and pasting the generated summary.</li></ul>
Elevate your sales pitch using Copilot email assistance	Updated	Apr/2024	Copilot lets you spend less time composing email. With this feature, you can: <ul style="list-style-type: none"><li>- Select a predefined category or enter your own text and Copilot will suggest content with specific prompts and actions.</li><li>- Adjust the tone and length of the email.</li><li>- Customize the suggested content before you send it.</li></ul>



The screenshot displays the Dynamics 365 Sales Hub interface. The main window shows an email composition screen for 'Intro - Eco Espresso Machines - Fabrikam:Fourth Coffee'. The email body contains a draft message starting with 'Dear Maya, I hope you are doing well. Regarding your recent interest in the Eco Espresso machines, let's schedule a meeting to cover recent updates and address any questions you may have. We have a new eco-friendly self-cleaning mechanism that minimizes water usage for clean coffee machines. We have three machine sizes to meet your business needs. Let's schedule a meeting next week to discuss further. Would July 18th suit you at say 11am? You can see a live demonstration and explore how the Eco Espresso range aligns with your business. Let me know your availability, and I'll accommodate your schedule. Best regards, Serena'. A 'Adjust with Copilot' menu is open, showing options for Length (Short, Medium, Long) and Tone (Friendly, Formal). The right-hand pane shows the 'Sales Copilot' interface with a 'Review suggested content' section and a 'Compose' section. A red arrow points to the right-hand pane.

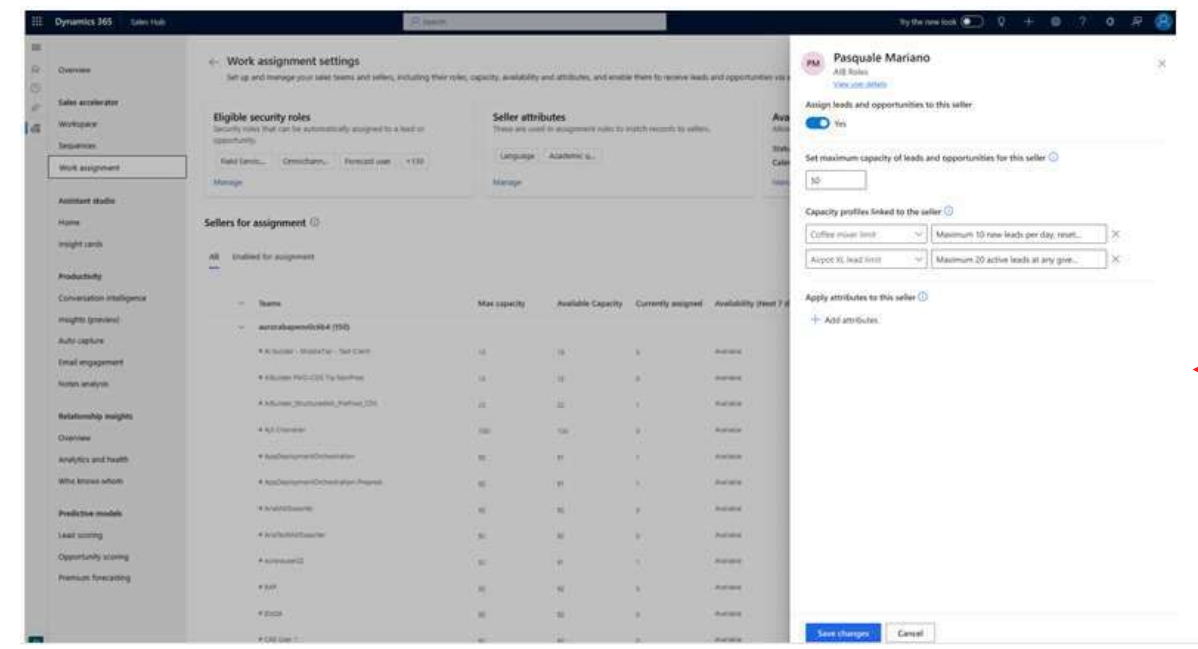
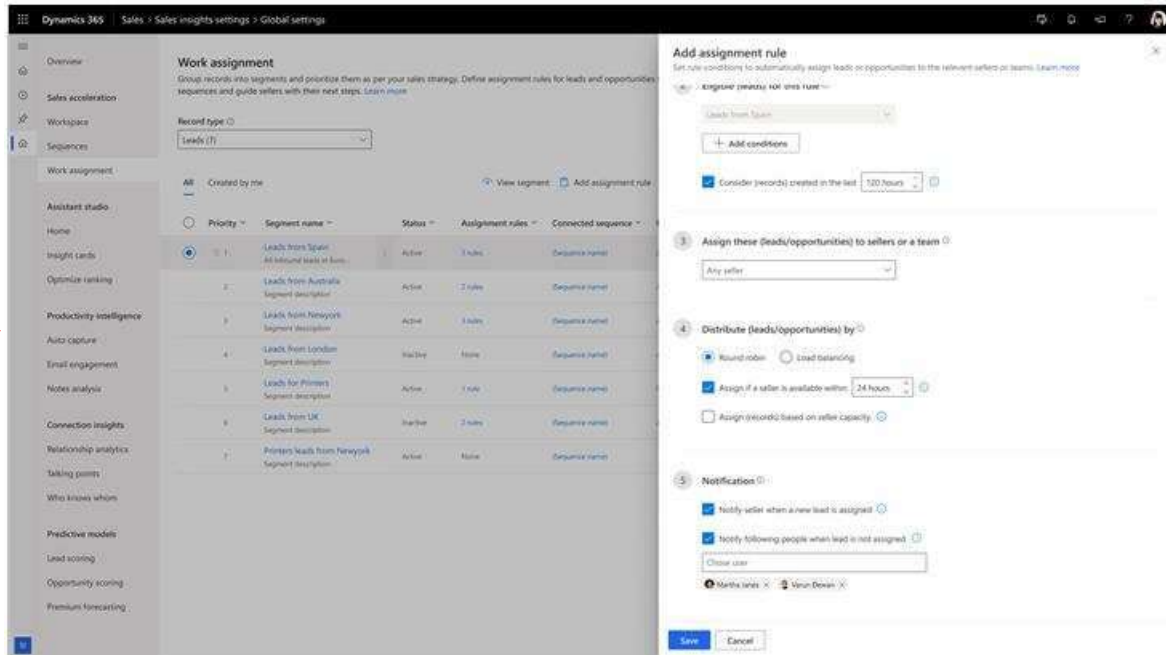
# Sales - Seller experiences

Item	N / U	Deadline	Benefits / Observations
Analyze opportunities with grouping and aggregating	Updated	Oct/2024	This upgraded pipeline view allows you to further streamline your sales strategies. You can now group opportunities dynamically based on critical factors such as account name, seller name, or closing date/month. This functionality enhances your ability to segment and target specific areas of your pipeline, ensuring a more personalized and effective approach to each opportunity.
Customize lead qualification for a seamless experience	Updated	Oct/2024	Streamlined lead qualification in Dynamics 365 Sales empowers you to fine-tune the qualification process, aligning it precisely with your organization's unique needs and sales criteria. This agile configuration eliminates back-and-forth interactions and saves valuable time, promoting swift, informed lead evaluation.



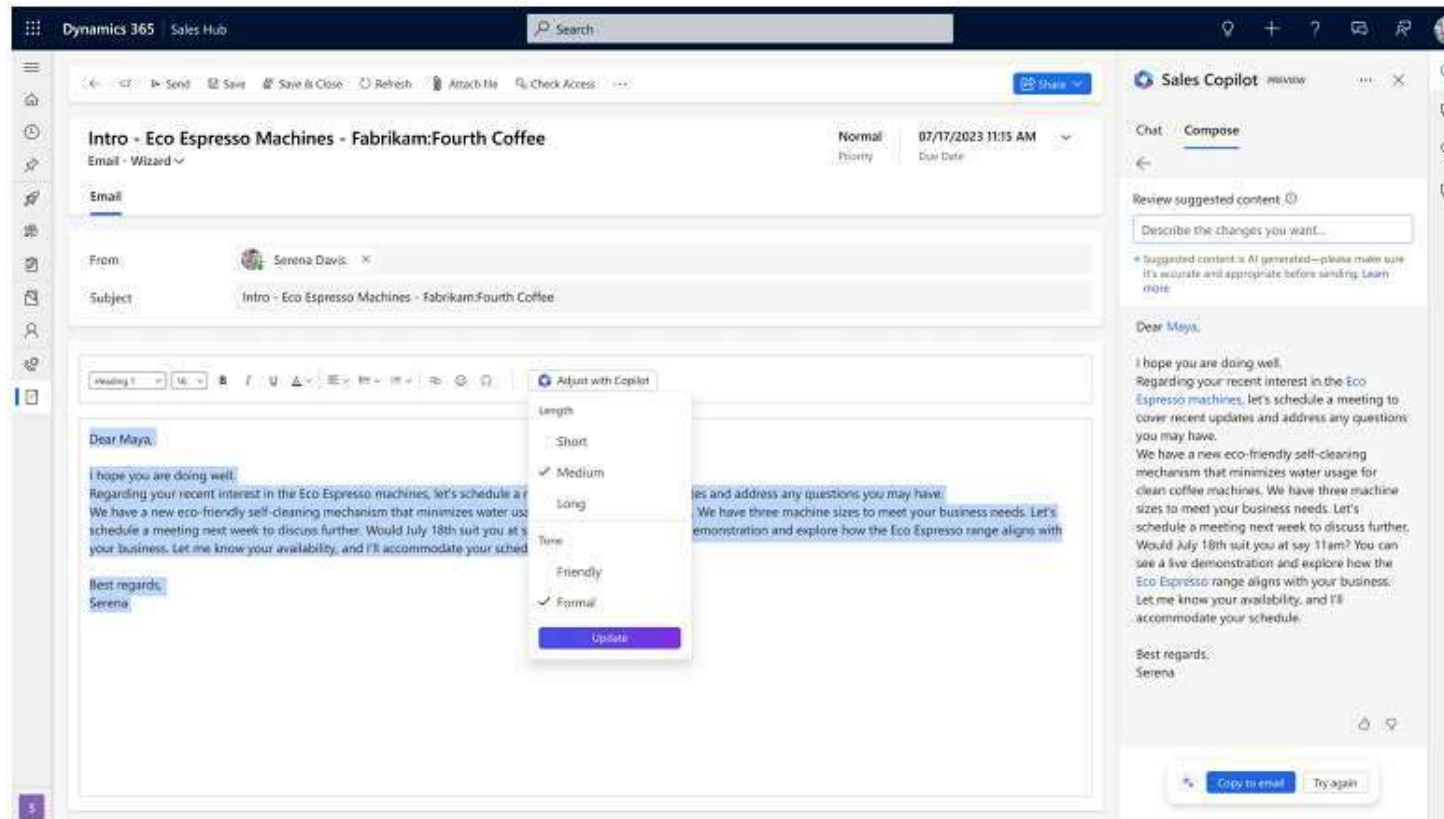
# Sales – Sales engagement and execution

Item	N / U	Deadline	Benefits / Observations
Assign leads, opportunities to sellers based on individual capacity		Sep/2024	As a sales manager, you can ensure that your sellers are always working on the top-priority leads by enforcing their capacity limits as per business needs. With this feature, you can: Implement sales strategy effectively by automatically assigning the most important leads to your sellers. Maximize seller productivity by limiting the number of low-priority leads that can be owned by a seller.
Notify sellers and sales managers after assignment rule execution		Aug/2024	As a sales manager or admin, you can configure notification settings as: A global setting to enable seller notification on successful assignment. A rule-level configuration to send notifications and regular notifications to specific users about assignment failures. A rule-level configuration to notify sellers on successful assignment.



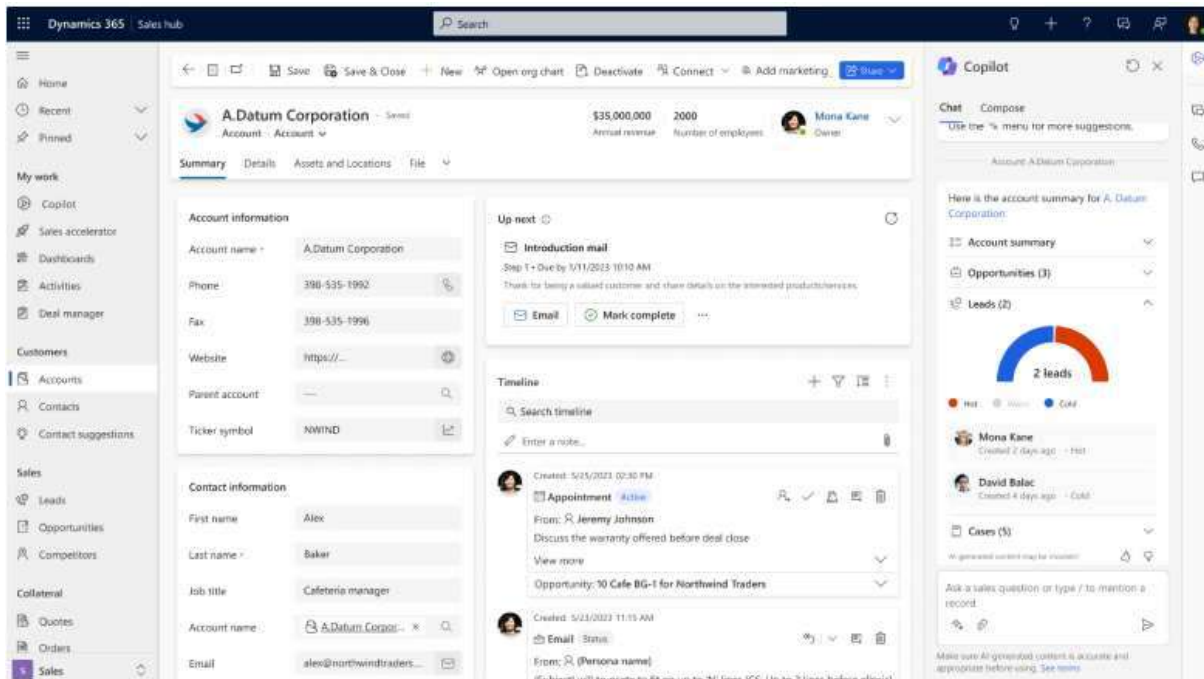
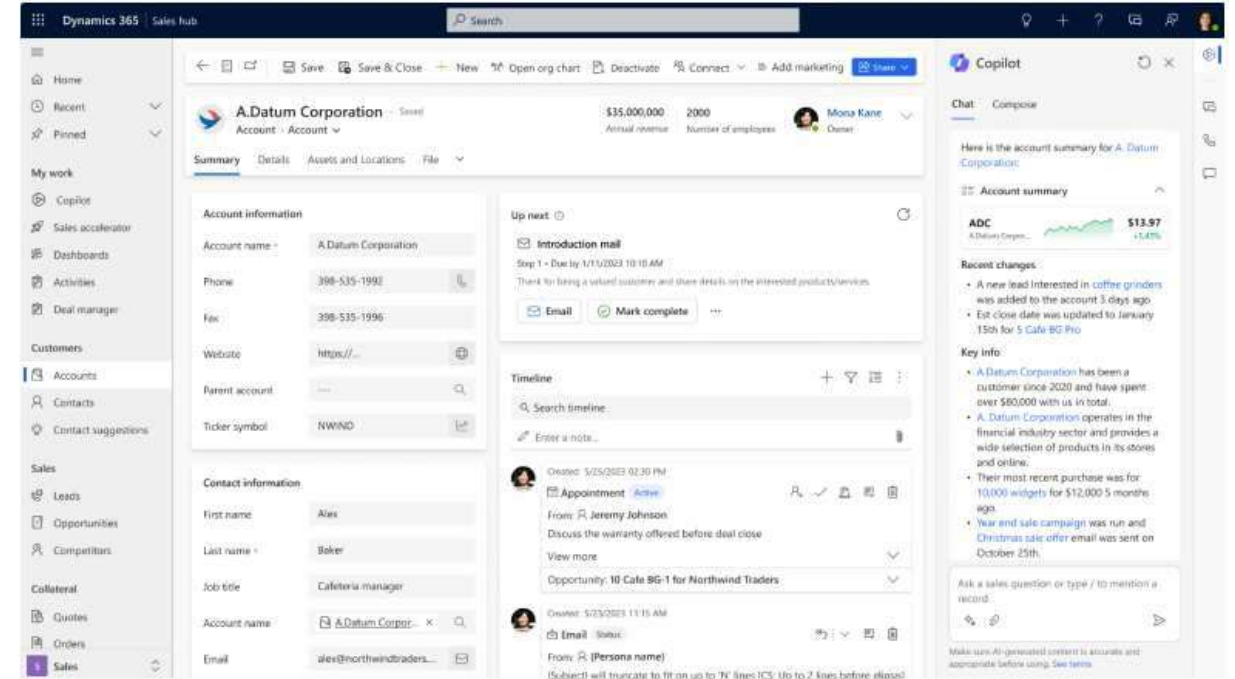
# Sales – Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Elevate your sales pitch using Copilot email assistance		Oct/2024	Email assistance can provide tremendous value to you by addressing these challenges. As a language model trained on a vast collection of text, Copilot can generate personalized, high-quality emails that are tailored to meet the specific needs of each customer. By using natural language processing (NLP) algorithms, Copilot can help you craft clear, concise, and compelling emails that resonate with your audience. This can lead to improved customer engagement, increased sales, and enhanced brand reputation. You can adjust the tone and length of the message to better resonate with customers, fostering stronger connections. You can also customize the suggested content before you send it.



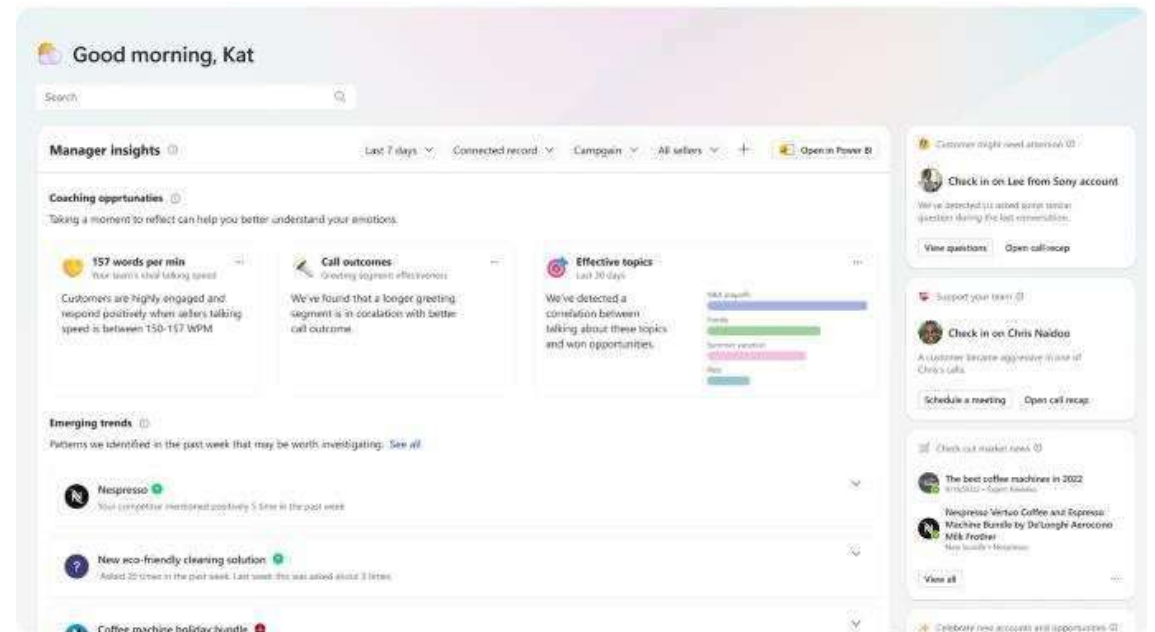
# Sales – Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Get 360-degree view with account AI-generated summary	Updated	Oct/24	With the Account summary feature, you can now access a consolidated summary of vital customer data, including buying behavior, associated opportunities, leads, marketing campaigns, and the latest news about an account through the power of AI. This enables you to quickly research an account.

# Sales – Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Streamline sales process with sales document summary	Updated	Nov/2024	As a sales professional, you sift through lengthy documents to understand the customer’s needs and preferences across multiple systems. This time-consuming task leads to decreased productivity and potentially missed opportunities. With the ability to automatically summarize important details from lengthy documents including proposals, reports, and agreements, you can save time and focus on building relationships with customers and closing deals. The sales document summarization feature can improve the quality of customer interactions by ensuring that you have a comprehensive understanding of customer needs as per the BANT (Budget, Authority, Need, and Timeline) framework. This feature will be released into the following Microsoft Azure geographic area: United States.
Leverage manager dashboards to coach sellers	Updated	Oct/2024	By analyzing aggregated customer interactions and seller behaviors, sales leaders can determine the effectiveness of their sales strategies, respond to market changes, and coach their sales staff more efficiently.



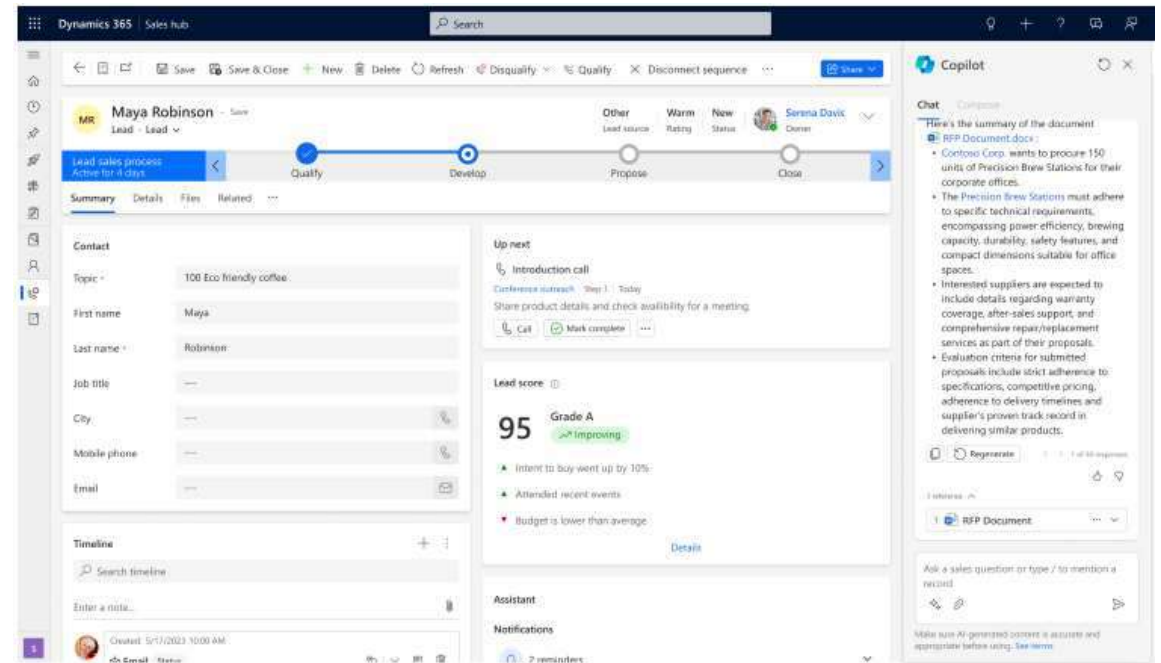
# Sales – Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Summarize lengthy emails using Copilot in Dynamics 365 Sales		Oct/2024	As a sales professional, you can use Copilot in Dynamics 365 Sales which offers a unique business value by being equally invaluable for sending and receiving email communication. When summarizing lengthy email threads, it saves valuable time and energy by condensing complex discussions into concise and easily understandable summaries. This streamlines the communication process, allowing teams to quickly grasp the key points and make informed decisions. By facilitating efficient comprehension, Copilot in Dynamics 365 Sales enhances productivity and enables effective collaboration within the organization.
Work efficiently using AI-powered action suggestions	Updated	Oct/2024	As a seller, you invest significant time and effort to stay informed about all your conversations and monitor developments within active sales processes. You visit multiple applications or contact team members to stay on top of all the active discussions and try to find optimal approaches for engaging with business decision-makers to take the assigned sales process forward. The actionable insights generated by Copilot in Dynamics 365 Sales help you plan and execute your daily tasks, thereby increasing the likelihood of attaining short and long-term goals.



# Sales – Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Get enriched lead summary with information from Customer Insights		Aug/24	<p>With this enhancement, Copilot in Dynamics 365 Sales can:</p> <ul style="list-style-type: none"> <li>Leverage profile information from Dynamics 365 Customer Insights to enhance lead data.</li> <li>Discover missing information such as phone numbers, email addresses, interests, demographics, and brand associations, enabling more personalized and effective engagement.</li> </ul>
Get crucial information summarized from proposals	Updated	Aug/24	<p>As a sales professional, you sift through lengthy proposals to understand the customer's needs and preferences across multiple systems. This is a time-consuming task and leads to decreased productivity and potentially missed opportunities. With the ability to automatically summarize important details from lengthy proposals, you can save time and focus on building relationships with customers and closing deals. The RFP summarization feature can improve the quality of customer interactions by ensuring that you have a comprehensive understanding of customer needs as per the BANT (Budget, Authority, Need, and Timeline) framework.</p>



# Sales – Copilot and AI innovation



Item	N / U	Deadline	Benefits / Observations
Use Copilot in Dynamic 365 Sales in your preferred language	New	Sep/24	<p>With this enhancement, you can effortlessly access and use Copilot's powerful capabilities in multiple languages, facilitating better communication, understanding, and rapport with customers. This leads to improved customer satisfaction, stronger relationships, and greater ease of use for sellers, ultimately driving sales growth.</p> <p>With this feature, you can use Copilot in Dynamics 365 Sales in the following languages: Chinese (simplified), Czech, Danish, Dutch, Finnish, French, German, Greek, Italian, Japanese, Korean, Norwegian, Polish, Portuguese (Brazil), Russian, Spanish, Swedish, Thai, Turkish.</p>
Work efficiently using AI-powered action suggestions	Updated	Oct/24	<p>As a seller, you invest significant time and effort to stay informed about all your conversations and monitor developments within active sales processes. You visit multiple applications or contact team members to stay on top of all the active discussions and try to find optimal approaches for engaging with business decision-makers to take the assigned sales process forward. The actionable insights generated by Copilot in Dynamics 365 Sales help you plan and execute your daily tasks, thereby increasing the likelihood of attaining short and long-term goals.</p>



# Copilot for Sales

Ex Sales Copilot

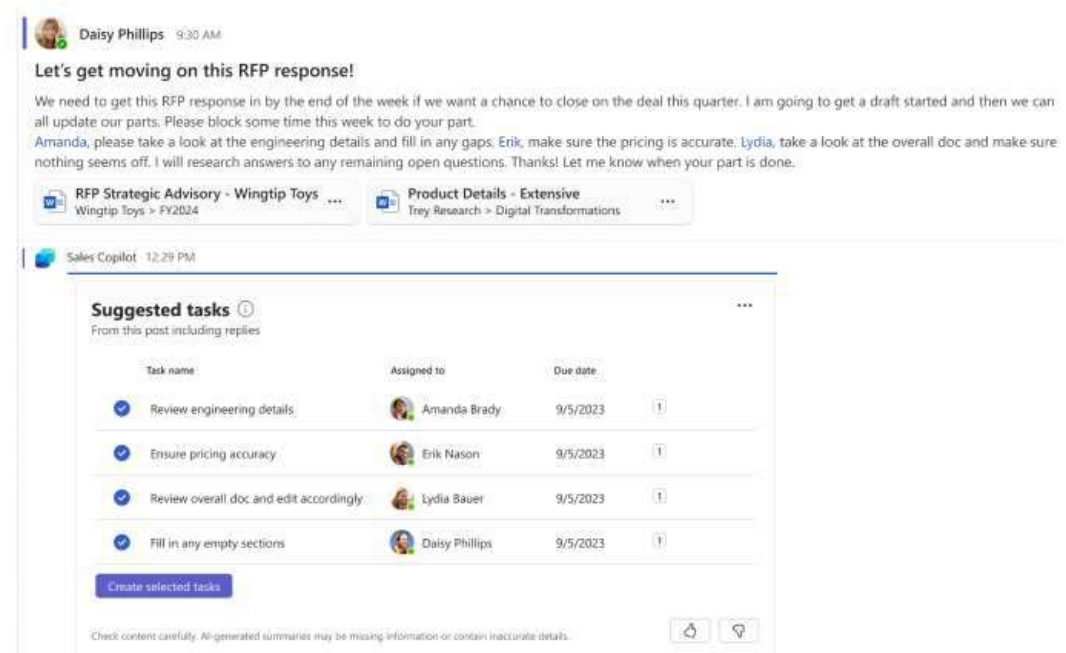
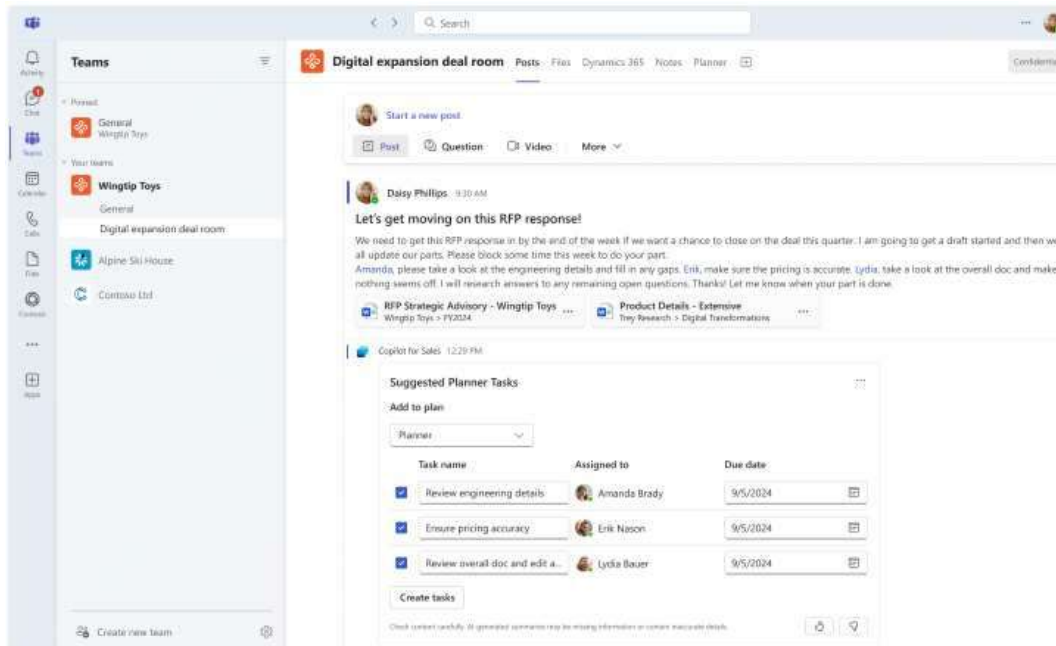
# Copilot for Sales – Microsoft Teams experiences



Item	N / U	Deadline	Benefits / Observations
Share important sales information seamlessly from Outlook to Teams	Updated	Jul/2024	<p>As a seller, you engage with your colleagues in group chats and channels depending on the type of conversation—opting for channels for formal discussions and group chats for more casual interactions.</p> <p>Regardless of the mode of communication, your ultimate goal remains constant. You seek to bring the right people and information into one place to jump-start collaboration.</p> <p>With this experience, we enable you to effortlessly share sales-specific CRM information, email summaries, and opportunity summaries within group chats. This ensures that all team members have access to the necessary information to collaborate effectively.</p>
View sales information with Copilot in Microsoft Teams during meetings		Jun/2024	<p>Copilot for Sales, inside Copilot for Microsoft 365, provides real-time assistance for sellers during Teams meetings. It helps them leverage the suggested content to smoothly incorporate it in their sales pitch without unnecessary distractions.</p> <p>In addition, as a meeting kicks off and throughout the meeting, sellers can get a summary of the deal tied to this meeting, including follow-ups, contacts, and more, so they can get up to speed on previous interactions related to that opportunity.</p>

# Copilot for Sales – Microsoft Teams experiences

Item	N / U	Deadline	Benefits / Observations
Collaborate with sales teams using AI-powered planner tasks	Updated	Jul/2024	<p>To mitigate the pain points you and your sales teams face, we propose an intelligent and automated task-creation solution in Teams channels where the Copilot for Sales app is installed. This solution aims to streamline task management, improve collaboration, and enhance productivity for you and your team.</p> <p><b>Feature Details</b></p> <ul style="list-style-type: none"> <li>- Automated prompting: The Copilot for Sales bot in Teams channels automatically scans conversations for relevant discussions and action items. When it identifies potential tasks, it prompts you and other sales team members with a notification, seeking your agreement to create the tasks.</li> <li>- Task creation and assignment: Once you agree, the solution automatically creates Teams tasks (planner tasks) based on the identified action items. A preview of the tasks is shown to you, the user creating the task. The tasks are then assigned to relevant users, ensuring accountability.</li> <li>- Planner app integration in Teams: Sales team members get a centralized view of all the tasks by pinning the planner app to the Teams channel. These tasks can also be accessed from the planner app.</li> </ul> <p><b>This solution works for both Dynamics 365 and Salesforce CRM users.</b></p>



# Copilot for Sales – Cross application experiences



Item	N / U	Deadline	Benefits / Observations
Access Copilot for Sales usage data via Viva Insights Analyst Workbench	Updated	Sep/2024	You need to access Copilot metrics to earn trust, justify investments, and drive adoption of Copilot for Sales. Using Viva Insights, you'll have access to key Copilot for Sales usage metrics via the Viva Insights Analyst Workbench, where you can use a set of provided Power BI templates or build your own custom reports.
Get Copilot for Sales extension in Teams Copilot chat		Sep/2024	<p>This capability lets you get authoritative answers for sales-related questions directly from your system of productivity in Microsoft 365 apps. With the Copilot for Sales extension in Teams Copilot chat, you get authoritative answers for natural language questions in a dedicated sales canvas that provides a greater sales-specific experience for you.</p> <p>Sales extensions appear as additional copilots in the Copilot app and can be triggered by clicking the extension entry or by @ mentioning the Copilot for Sales plugin in the main Copilot chat canvas.</p>
Prepare for a sales meeting with Copilot in Microsoft Word		Sep/2024	Getting ready for a customer interaction is key for sellers to be successful and reach their quota. With Copilot for Sales, sellers get to generate a detailed meeting preparation report in real time, directly from Copilot in Microsoft Word. Copilot generates a detailed report that brings key information and insights from the CRM, which can be easily shared with colleagues so that the entire sales team is up to date.

# Copilot for Sales – Application experiences



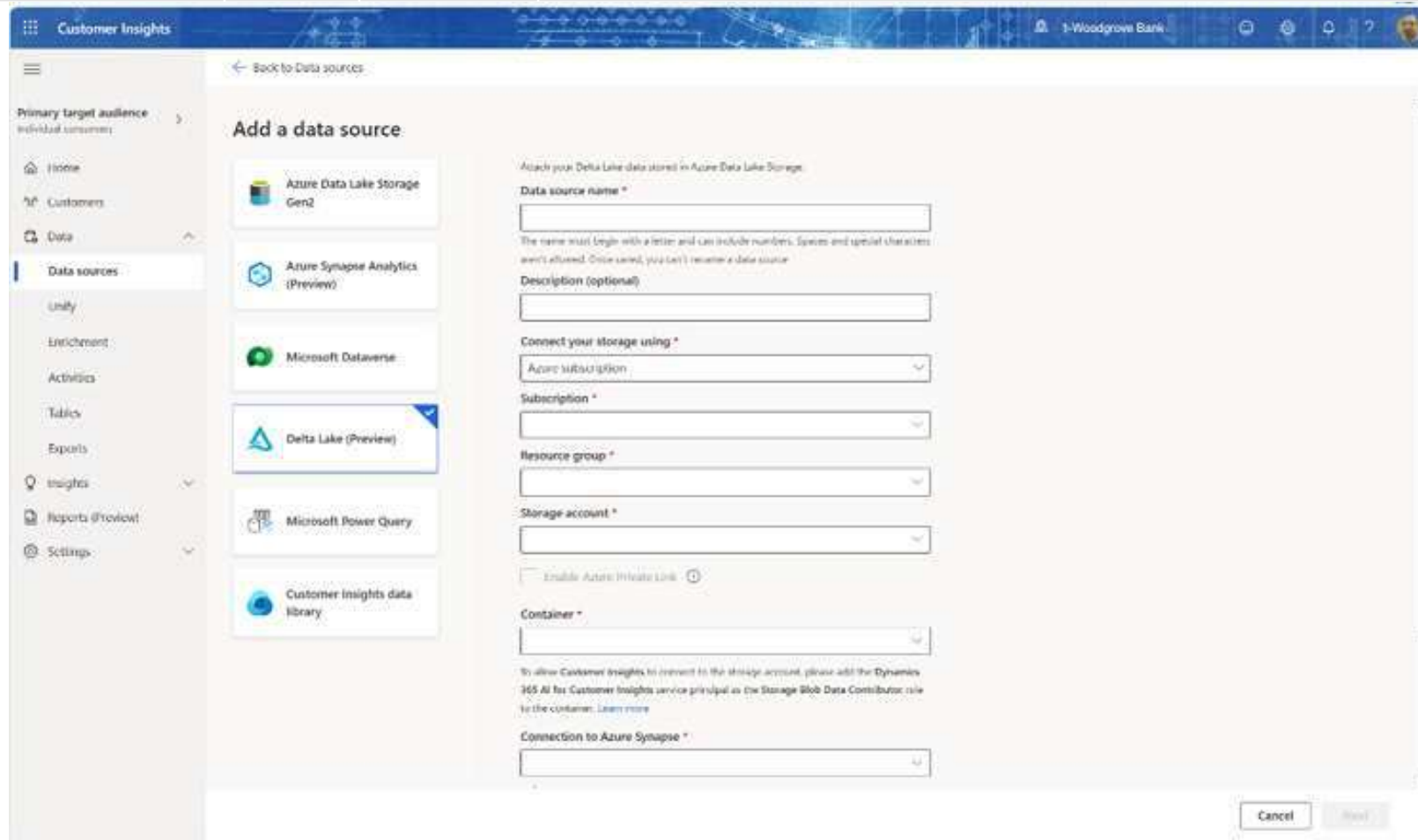
Item	N / U	Deadline	Benefits / Observations
Leverage manager dashboards to coach sellers	Updated	Oct/2024	By analyzing aggregated customer interactions and seller behaviors, sales leaders can determine the effectiveness of their sales strategies, respond to market changes, and coach their sales staff more efficiently.
Update CRM directly from the post-meeting insights page		Oct/2024	Smartly updating the system of record after a meeting, without switching context, saves sellers valuable time and helps sales organizations keep their business data fresh.



# Customer Insights

# Customer Insights - Real-time data processing

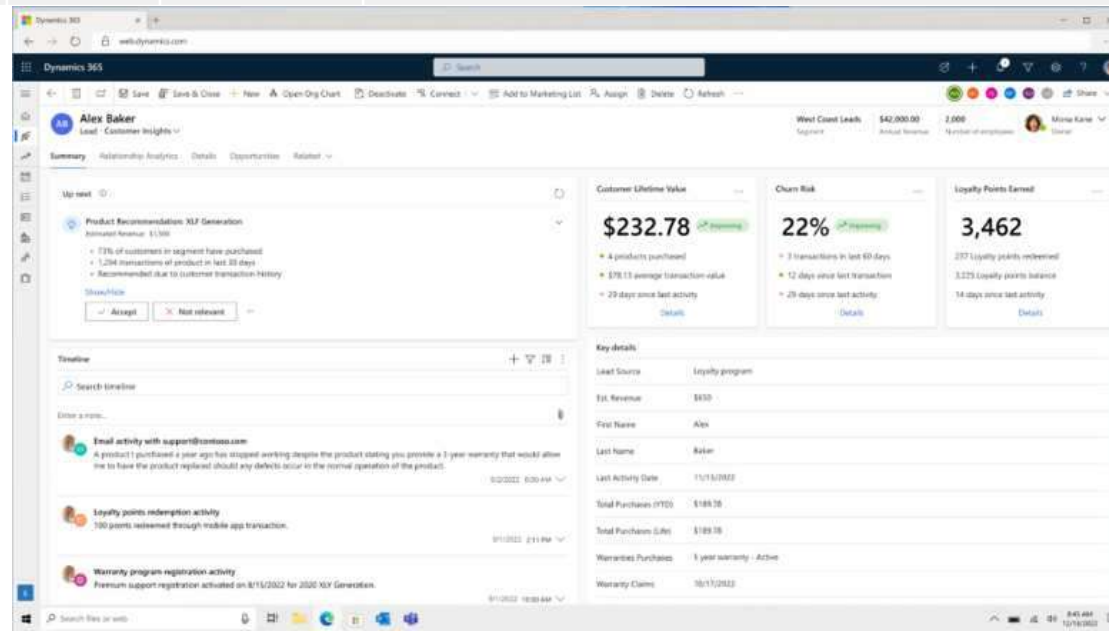
Item	N / U	Deadline	Benefits / Observations
Seamlessly onboard customer data from your Delta Lake with no data integration	Updated	Feb/2024	With this feature, you can: <ul style="list-style-type: none"><li>- Attach your data stored in Delta Lake format as a data source in Customer Insights.</li><li>- Save time, effort and cost by eliminating any transformation pipeline that converts your Delta Lake data into another format for ingestion to Customer Insights - Data. Delta formatted data can be read natively.</li><li>- Take advantage of Delta Lake incremental processing without any work. Data stored in Delta Lake format doesn't need to be formatted in separate full or upserts folders.</li></ul>



# Customer Insights - Unify sales and marketing



Item	N / U	Deadline	Benefits / Observations
Leverage customer insights in other business applications		Feb/2024	<p>Dynamics 365 Customer Insights makes it easy to create golden profiles and insights for your customers by unifying and enriching data from a variety of demographic, transactional, and behavioral data sources.</p> <ul style="list-style-type: none"> <li>- Every unified customer profile now has a direct relationship to its corresponding contact and lead records in Microsoft Dataverse and indirect relationships to other tables such as opportunity, accounts, and more.</li> <li>- Admins can augment customer records in model-driven apps, add insights from the corresponding customer profiles, and access the customer profile just like any other related table in Microsoft Dataverse.</li> <li>- Users can access customer profiles in Dynamics 365 applications. For example, marketers using Customer Insights - Journeys can create segments of contacts or leads based on their customer lifetime value metric and add customer profile fields as dynamic content in messages even when targeting contacts or leads.</li> </ul>
Share customer profiles and insights via Data Lake		Mar/2024	<p>Share the customer profiles and insights you create in Customer Insights - Data easily and reliably to Azure Blob Storage and Azure Data Lake Storage Gen2. The tables that you select for export are exported with all data fields, metadata, schemas, and mapping details. A common use case for the export of full tables to Azure Data Lake Gen2 are custom-built solutions, which organizations use to further process the data that originates from Customer Insights.</p>



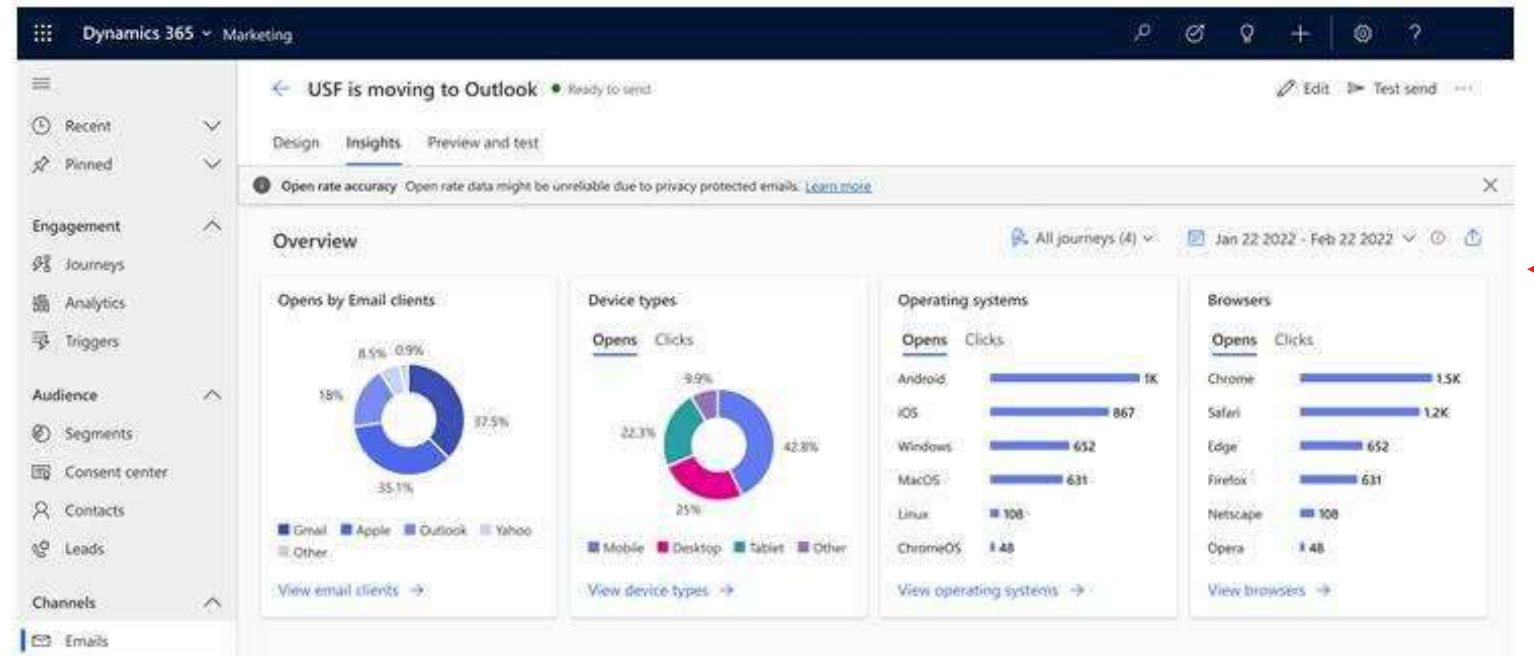


# Customer Insights - Journeys

# Customer Insights - Journeys - Moments that matter

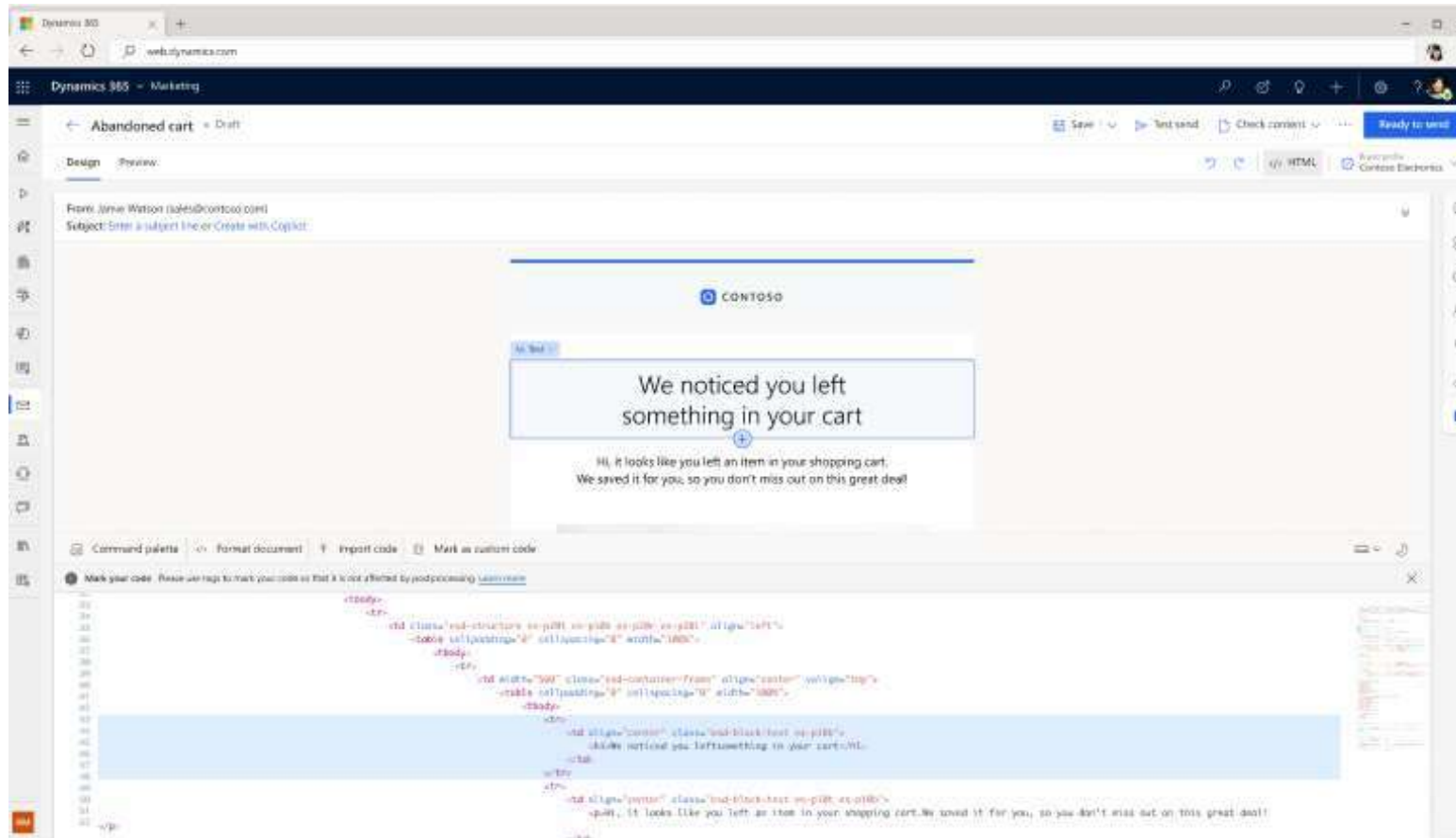


Item	N / U	Deadline	Benefits / Observations
Optimize email content based on customer behavior across devices	Updated	Aug/2024	In real-time journeys email insights, you can now delve into comprehensive device data, including operating systems, browsers, device types, and session details. Leverage the power of detailed engagement analysis across different platforms to fine-tune your marketing strategy. Tailor your email's design and content to align with the devices most used by your audience, ensuring seamless readability for your messages and, ultimately, leading to heightened customer interaction and loyalty.
Improve reliability of insights with advanced bot protection	Updated	Aug/2024	Ensuring the integrity of your data and the efficiency of your operations is paramount. Advanced bot protection in Customer Insights - Journeys empowers your business to thrive by safeguarding your business processes. Improve your business decisions with the confidence of knowing that the data you collect is accurate and represents real human interactions. With bot protection, you not only enhance the quality of your insights but also elevate the customer experience by minimizing disruptions caused by malicious bots.



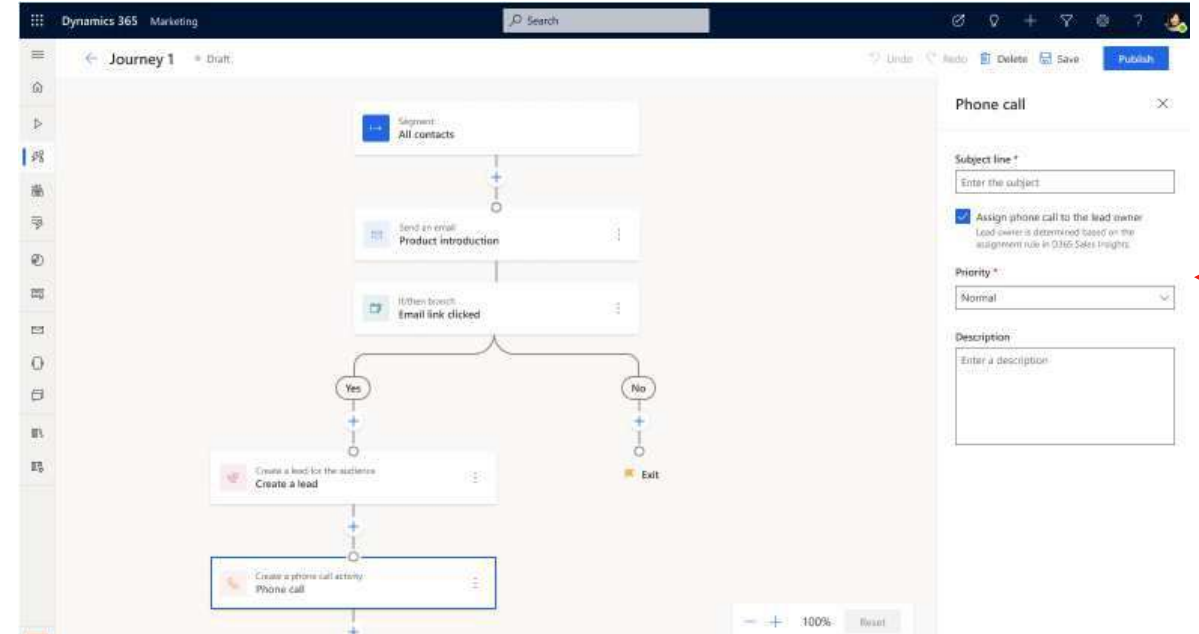
# Customer Insights - Journeys - Moments that matter

Item	N / U	Deadline	Benefits / Observations
Streamline email creation with real-time HTML edits	New	Jul/2024	Easily customize emails in Dynamics 365 Customer Insights - Journeys with the ability to toggle back and forth between the visual editor and HTML code. Get more control over how you display information by marking the code and seeing how it renders across devices and email clients.



# Customer Insights - Journeys - Moments that matter

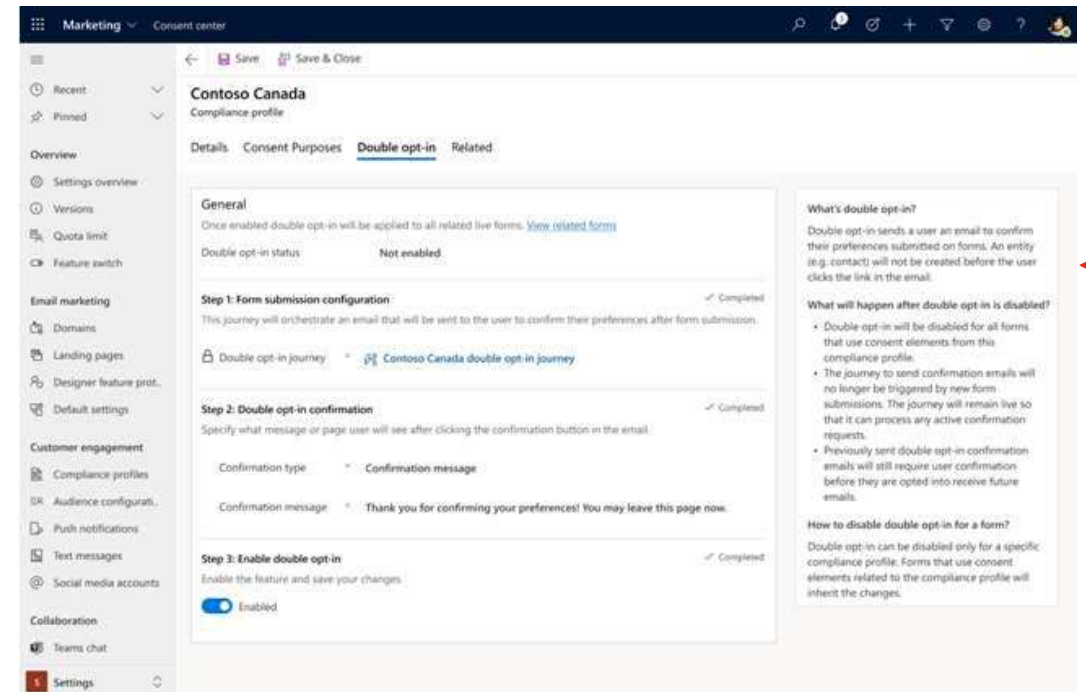
Item	N / U	Deadline	Benefits / Observations
Automate seamless handoffs between marketing and sales		Sep/2024	Real-time journeys are a key part of nurturing and qualifying leads and opportunities. When your customer has sent the right signals through your direct engagement, the next step is often for your sales team to act. You can now create sales activities such as tasks and phone calls directly from journeys so that leads get individualized attention when they're most likely to engage. You can also create lead or opportunity records based on a customer's interaction with your campaign, ensuring that the sales team has the right information to close leads generated from marketing activities.
Reach customers with greater throughput for trigger-based journeys		Sep/2024	With this release, you can reach customers faster by reacting to customers' behavior in moments that matter with up to 500,000 interactions per hour for trigger-based journeys. This allows you to connect with customers at pivotal moments, making your outreach more timely and relevant and amplifying the effectiveness of each interaction.



# Customer Insights - Journeys - Moments that matter

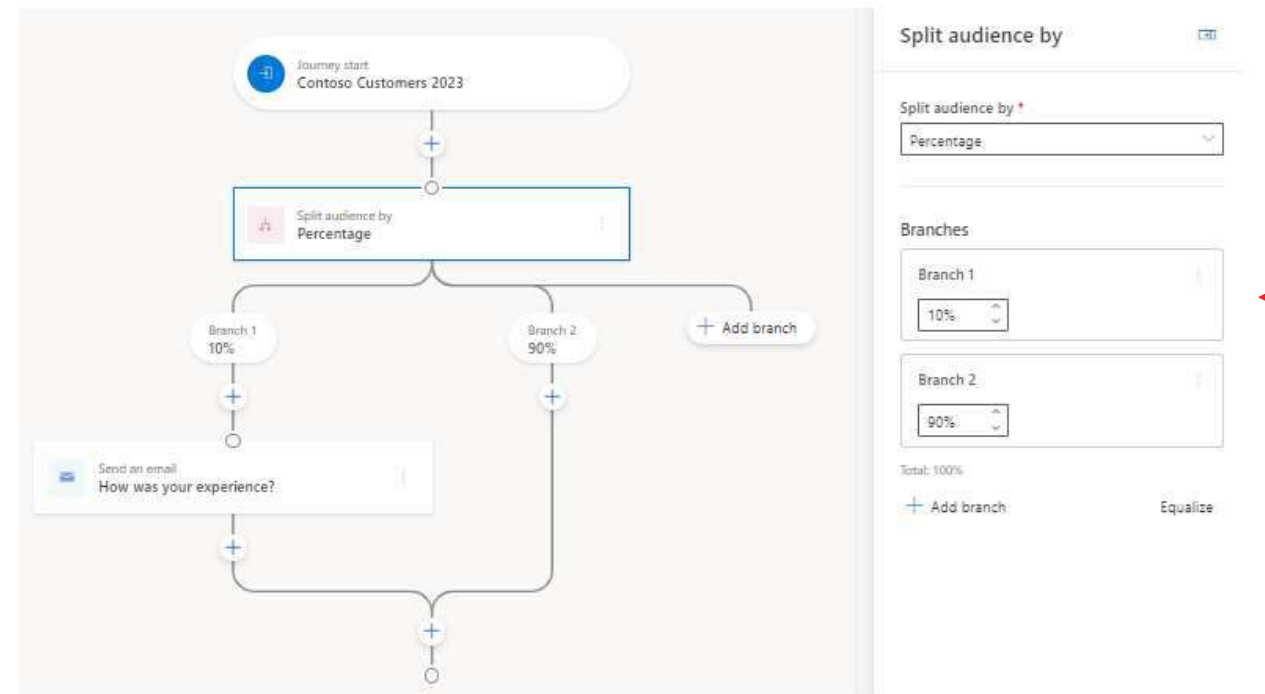


Item	N / U	Deadline	Benefits / Observations
Scale your business with confidence with 300M maximum monthly interactions		Sep/2024	Reach up to 100 million contacts or leads and send up to 300 million messages per month in real-time journeys. Added capacity empowers you to deliver personalized experiences at scale and delight customers in new ways. Additional interactions help you grow your business, whether you're increasing your customer base in new markets, reaching additional geographies, promoting new products, or expanding your prospective customer pipeline to reach higher sales targets.
Improve engagement and compliance with double opt-in	Updated	Oct/2024	Privacy and data protection laws in many regions require double opt-in functionality to help verify customer information. Double opt-in requires users to confirm subscription preferences through a follow-up email after the initial subscription. By confirming subscription preferences a second time, you comply with legal requirements and improve engagement by ensuring that users who've subscribed are intent on receiving future communications. When customers are certain they want to receive email communications, spam complaints and bounce rates are reduced, and your sender reputation is improved.



# Customer Insights - Journeys - Moments that matter

Item	N / U	Deadline	Benefits / Observations
Orchestrate journeys using any marketing interaction	Updated	Oct/2024	Instantly adapt your strategies based on your customers' real-time interactions, ensuring that every message you send hits the right note. By engaging customers based on their interactions, you can significantly ramp up your chances of conversion with greater personalization. For example, you can branch and orchestrate journeys based on customer interactions with emails such as "email link clicked" or "email blocked."
Split audience into groups to deliver unique customer experiences	Updated	Nov/2024	The new journey split tile allows you to split your audience into branches to provide a subset of your audience with unique experiences, whether that be a survey, a new type of experience to test, or a first-come promotional offer. You can split your audience by percentages (for cases where you need randomness) or by numbers (for cases where you want to deliver specific experiences to a set number of people).



# Customer Insights - Journeys - Moments that matter



Item	N / U	Deadline	Benefits / Observations
Control how fast customers can enter a journey	Updated	Dec/2024	<p>With journey rate limiting, you'll be able to space out message sending over time by setting how quickly you want customers to enter your journey. This feature helps prevent overwhelming downstream operations with a large influx of requests from customers who receive messages from your journey.</p> <p>For example, let's say you have a journey that sends messages to your entire customer base with a call to action to contact your call center. You may want to avoid creating a poor customer experience due to long wait times from an overwhelmed help desk if you send messages at the same time to everyone. Instead, you can now slow down how fast customers enter the journey, avoiding thousands of phone calls at the same time.</p>

## ▼ Rate limit

### Add a rate limit

Rate limits let you control how fast people enter this journey.

Enable rate limit

### Maximum rate

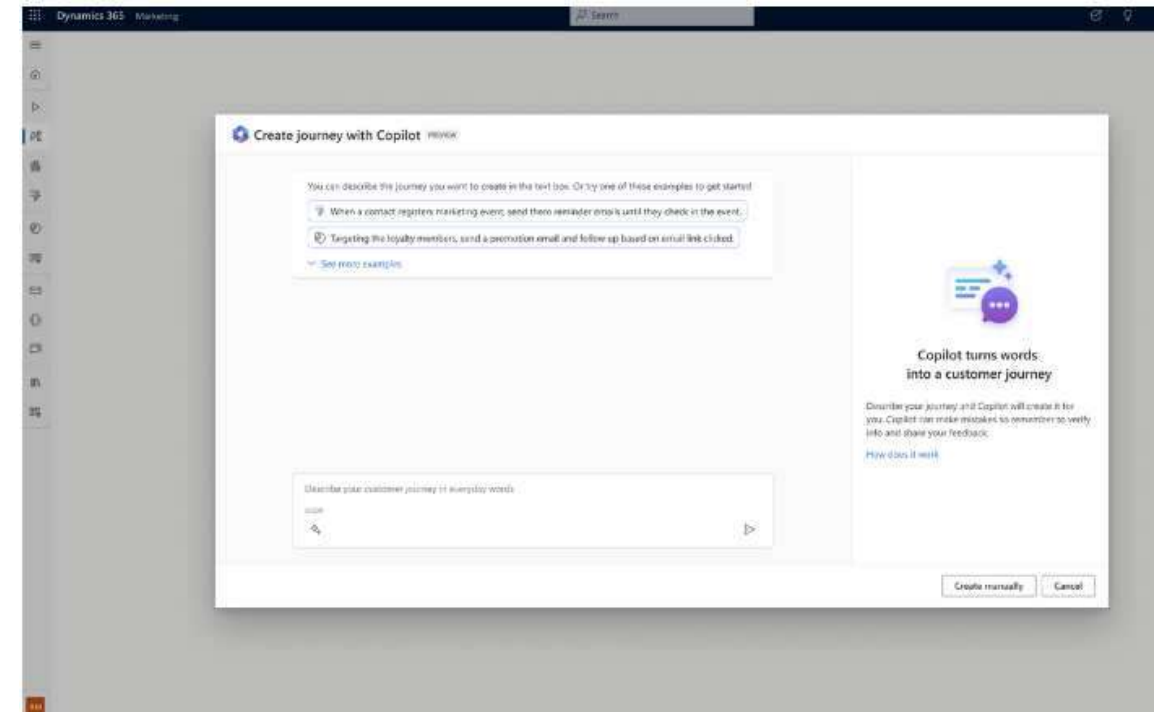
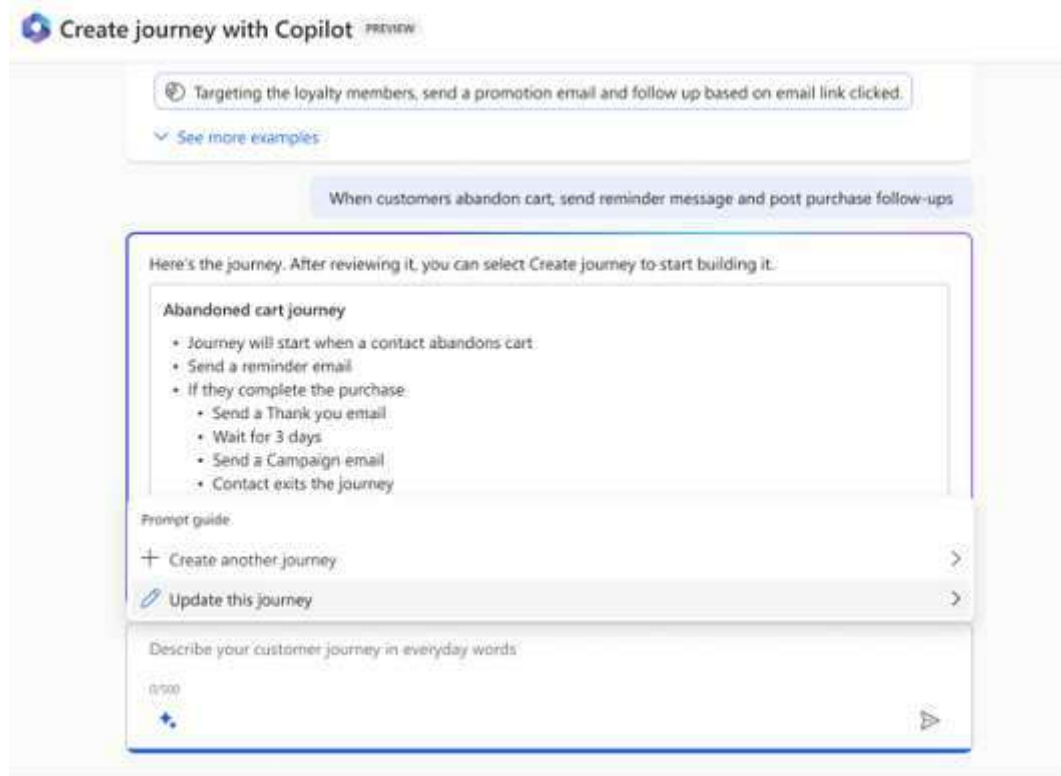
per day

People will enter this journey on these days:

Every day [Review and edit](#)

# Customer Insights - Journeys – Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Create journeys by using Copilot to describe them	Updated	Oct/2024	With Dynamics 365 Customer Insights - Journeys, anybody can create journeys in minutes, even if they've never done it before. Simply describe in everyday words what you want to create and rely on generative AI to build the journey for you. This empowers you to do more with less. Instead of spending time getting the mechanics of the journey right, you can now ensure that you're delivering the most personalized experience for your customers by collaborating with your entire team and quickly driving stakeholder alignment. Using the journey creator functionality together with content ideas for email creation, you can now get your customer experience ideas to market in no time.



# Customer Insights - Journeys - Unify sales and marketing



Item	N / U	Deadline	Benefits / Observations
Build custom reports using Microsoft Fabric integration	Updated	Jul/2024	Now in real-time journeys, you can effortlessly create custom Power BI reports tailored to your business needs by leveraging Microsoft Fabric capabilities. Harness seamless access to data to gain a complete understanding of your campaigns, lead management, market performance, and customer engagement, enabling you to identify new opportunities.



# Customer Insights - Data

# Customer Insights - Data - Unify sales and marketing



Item	N / U	Deadline	Benefits / Observations
Increase control when attaching to data in Dataverse	Updated	Aug/2024	Significant improvements to the Microsoft Dataverse connector make it your best option for ingesting any Dataverse data into Dynamics 365 Customer Insights - Data. You can now import the largest Dataverse tables with the highest levels of performance and reliability possible. Select only the tables you want to import, and filter rows to precisely control what data is ingested. Enable incremental processing of data and other great advantages of this updated connector.

### Tables

Source Output Relationships

Table Name	Data source name	Updated	Data sensitivity ↓	Status	Row filters
▼ User (54)					
careplan	careplan	an hour ago	None	✓ Successful	Filters: 1
careplan	delta101	an hour ago	None	✓ Successful	Filters: 2
CustomersWithPerf...	LakeDB	2 hours ago	None	✓ Successful	Add filters
StarCustomers	LakeDB	2 hours ago	None	✓ Successful	Add filters

# Customer Insights - Data – Moments that matter



Item	N / U	Deadline	Benefits / Observations
Accelerate time to insights with data in Delta Lake format		Oct/2024	With native support for Delta Lake storage format in Customer Insights, you can now accelerate processing times even with a higher volume of fast-changing data updates. Get customer profiles and associated insights updated more frequently and react to customer engagements based on the most current information available. This empowers you to create the most relevant and personalized experiences for your customers and the most up-to-date and timely insights for your business users.
Use automation to manage segments and measures		Oct/2024	<p>As your Dynamics 365 Customer Insights usage increases, so does the number of segments and measures. Large numbers of segments and measures can result in longer system refresh times, which delay time-sensitive insights.</p> <p>Customer Insights now automatically deactivates segments and measures based on their usage to ensure your active segments and measures refresh faster. As an admin you get to control the retention period that applies and can support your organization to scale confidently.</p>



# Customer Service

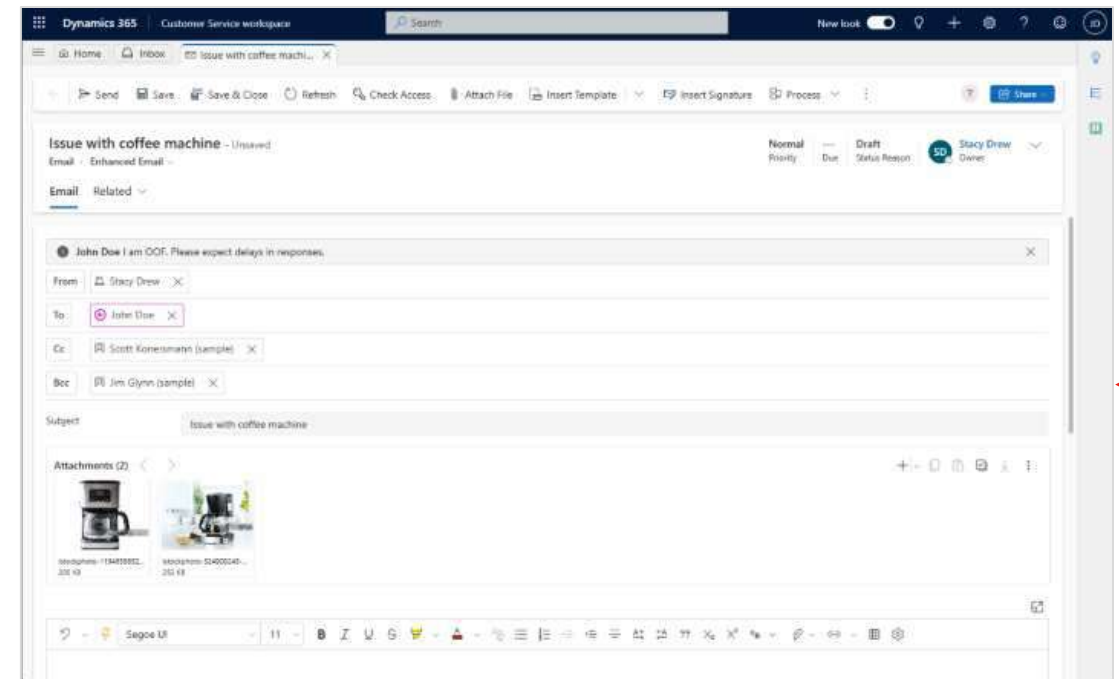
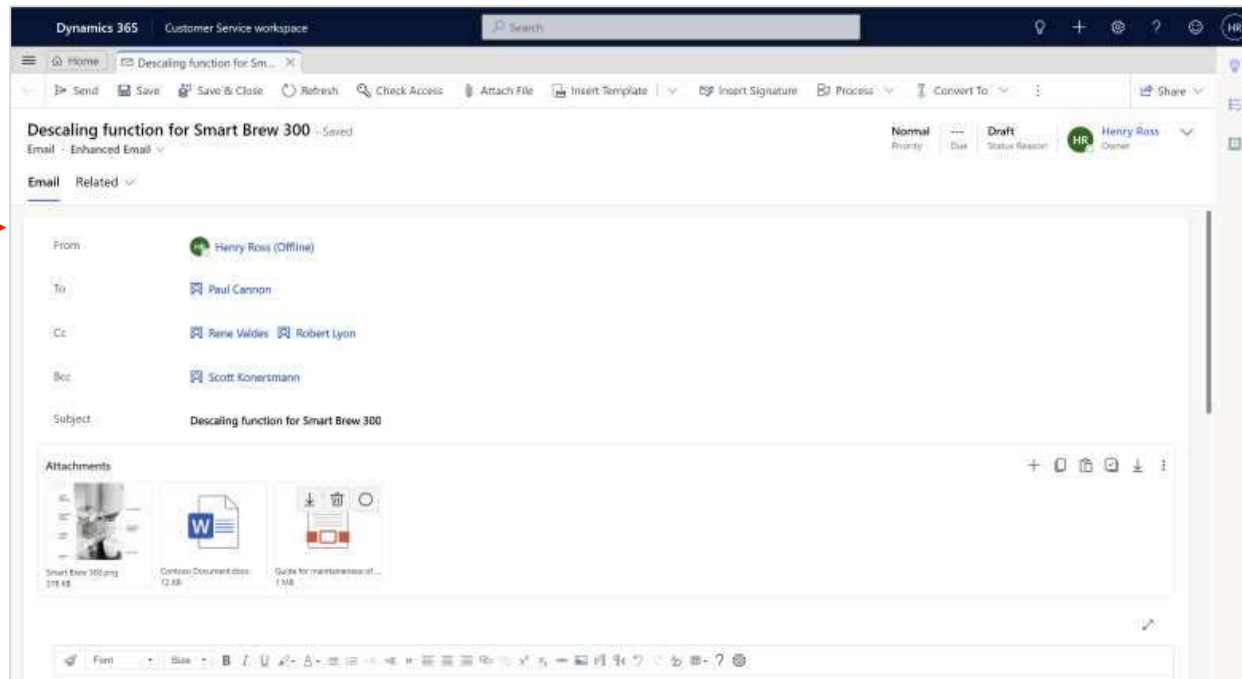
# Customer Service - Agent experiences



Item	N / U	Deadline	Benefits / Observations
Manage cases efficiently with enhanced case controls	New	Oct/2024	<p>Agents must upload attachments individually and then search for them in the case timeline in order to open them. Therefore, they require intuitive controls on the case form to easily locate and access the relevant information, allowing them to perform operations efficiently.</p> <p>Enhanced case form controls are added on the default case form, Case for multisession experience in the Customer Service workspace application. This allows agents to easily upload and view multiple attachments, take quick notes, and use color-coded icons for efficient field identification during case creation. These enhancements streamline daily case management tasks, reducing effort and boosting productivity.</p>
Prioritize cases with improved case grids	New	Oct/2024	<p>Case grids displaying agents' active cases with color differentiators for columns like priority and origin, and information like Next SLA, Last Interaction, Is Escalated, and Case age, help them prioritize cases that require the most attention. Agents can also navigate directly to the latest interaction on the case. This improves their overall productivity while working on cases.</p>

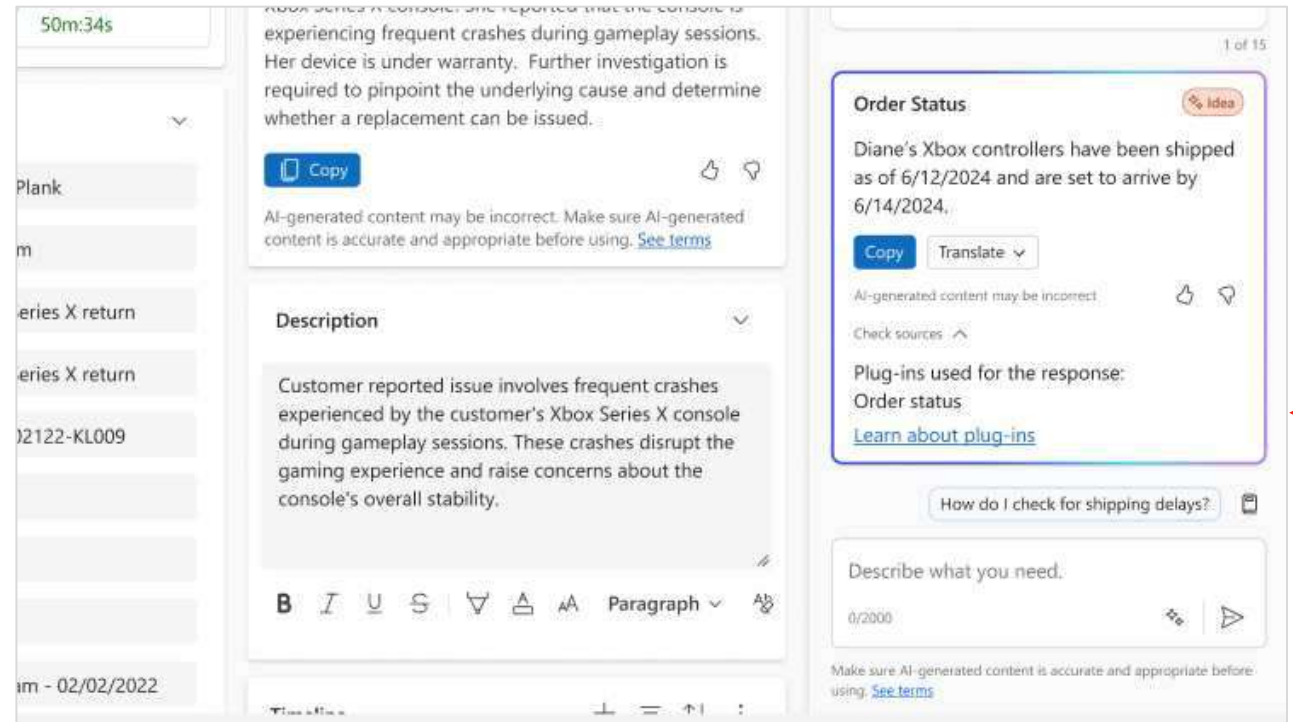
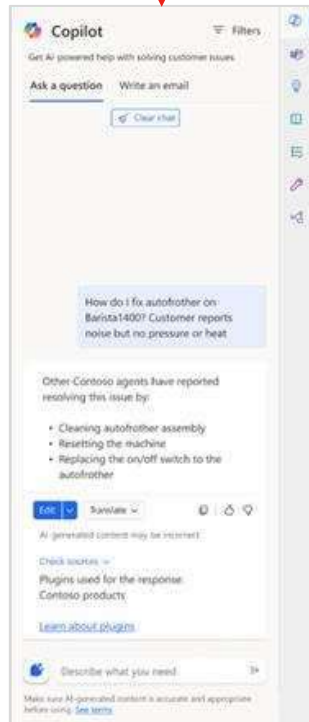
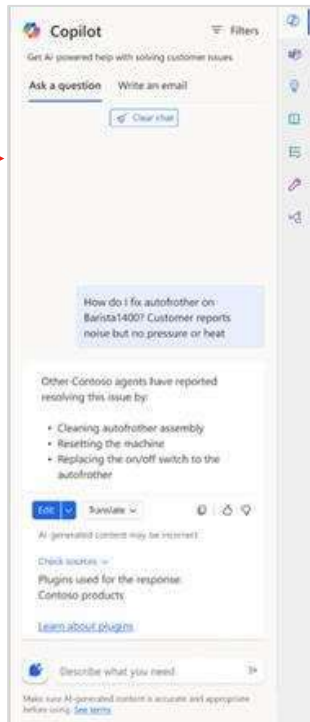
# Customer Service - Agent experiences

Item	N / U	Deadline	Benefits / Observations
Compose emails using improved attachment experience	Updated	Oct/2024	The enhanced attachment experience allows agents to drag and drop attachments in emails, saving time and increasing their productivity. A reminder is sent to agents if they forget to include an attachment that they've mentioned in the email subject or body.
Compose emails with enhanced recipients handling	Updated	Oct/2024	The enhanced recipient experience offers improved user experience in emails. Recipients can be configured to display email addresses along with their names, drag and drop recipients among TO, CC, and BCC fields, view recipients' presence status and out-of-office messages, and bulk resolve email addresses to Dynamics 365 records.



# Customer Service - Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Extend Copilot with plugins	Updated	Oct/2024	Your customer service representatives rely on data and information from a wide variety of systems. Now, you can connect Dataverse to Copilot through plugins and let your agents securely access data from these systems using Copilot.
Enable Copilot plugins to connect with external systems	Updated	Oct/2024	Your customer service representatives rely on data and information from a wide variety of systems. Now, you can connect external systems to Copilot through plugins and let your agents securely access data from these systems using Copilot.
Use proactive prompts and insights generated by Copilot	Updated	Oct/2024	Proactive prompting enables agents to discover and prompt Copilot effortlessly, without the need for manual typing. This will save agents time and improve the quality of their overall experience.



# Customer Service - Unified routing

Item	N / U	Deadline	Benefits / Observations
Update queue memberships for agents in real time		Oct/2024	When a contact center experiences a surge in conversations, admins and supervisors are suddenly faced with a staffing shortage. To handle these surges, they need to quickly add or redistribute the workforce between channels and lines of business represented by queues. With this enhancement, the queue membership updates made by admins will happen faster. This ensures that new agents can take work in their new queues as soon as they are added, and when you remove agents from queues, they won't receive work from the old queue while the membership changes. These benefits help maintain low customer wait times even during peak traffic periods and avoid unintended work assignments.
Use overflow for lengthy wait times for work items		Sep/2024	When contact centers face sudden spikes in customer queries in queues, agents might not be available to respond quickly. To improve customer satisfaction, overflow handling helps customers who wait for a long time by taking actions like automatically transferring work items to other queues.

### Overflow handling

Define and rank overflow conditions and actions to stop work items from entering a queue when it's overflowing and to manage queued items during an overflow. [Learn more](#)

> Before work items are queued  
1 condition-action pair set

^ When work items are queued (preview)  
1 condition-action pair set + Add condition-action pair

1	Condition:	Wait time in queue exceeds	5	Minutes
	Action:	Select an action		
		Transfer to a different queue		



# Copilot for Service

# Copilot for Service - Agent experiences in Microsoft Teams



Item	N / U	Deadline	Benefits / Observations
Provide meeting summary and follow-ups to create CRM tasks	Updated	Oct/2024	<p>As agents are talking to customers, they can now save time on documenting the discussion and action items. Copilot for Service will now provide meeting summaries and action items in integration with the Teams recap, providing all the service-specific follow-up items. Agents can also create CRM tasks right from the Teams recap section.</p> <p><b>Geographic areas:</b> <span style="color: red;">United States</span></p>



# Contact Center

# Contact Center - Administrator experiences



Item	N / U	Deadline	Benefits / Observations
Configure embedded experience for other CRM solutions		Oct/2024	This feature allows organizations with multiple lines of business needs to be able to configure the embedded experience so that their agents can connect with their customers without navigating away from their workspace.

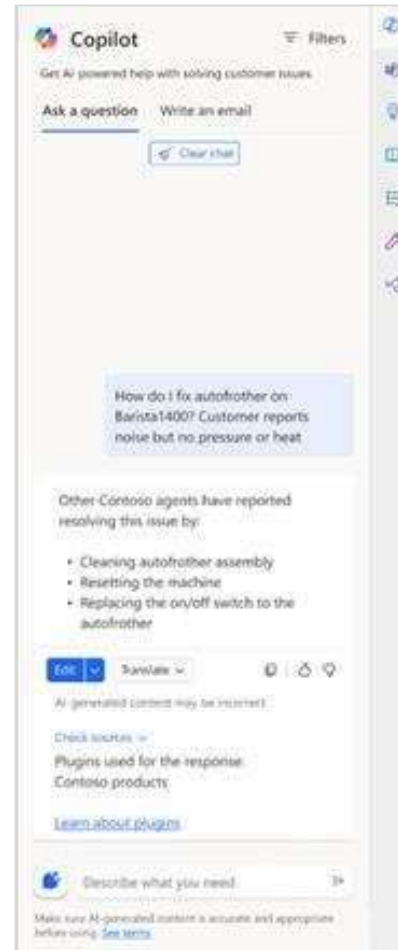
# Contact Center - Agent experiences



Item	N / U	Deadline	Benefits / Observations
Search for a customer in the outbound dialer	Updated	Oct/2024	Placing a call has become easier for agents with the option to search for a customer in the outbound dialer and open the customer record from the call history.

# Contact Center - Extensibility

Item	N / U	Deadline	Benefits / Observations
Extend Copilot with plugins		Oct/2024	Your customer service representatives rely on data and information from a wide variety of systems. Now, you can connect Microsoft Dataverse to Copilot through plugins and let your agents securely access data from these systems using Copilot.



# Contact Center - IVR capabilities



Item	N / U	Deadline	Benefits / Observations
Customers can opt out of recording when they talk to IVR		Nov/2024	This feature helps businesses make sure that they're legally compliant by avoiding the storage of sensitive and personal user information in call recordings based on customer choice. It is particularly useful in regions where obtaining consent from the caller before recording the call is a legal requirement.
Manage calls when bot handling fails	New	Nov/2024	You can ensure a seamless customer experience by maintaining call continuity during system failures. Administrators can customize responses and transfer strategies, minimizing disruption, and enhancing customer satisfaction.
Use multilingual IVR bots		Nov/2024	multilingual Copilot Studio bot can help reduce the total cost of ownership through easier maintenance and faster deployment. It can enhance CSAT by allowing seamless language switching, eliminating the need for multiple bots or language-specific phone numbers.
Configure IVR to switch languages based on dialed number		Nov/2024	You can use a single IVR bot for multiple languages. The bot distinguishes between languages based on the phone number the customer dials, eliminating the need for creating multiple bots.

# Contact Center - Omnichannel customer experiences



Item	N / U	Deadline	Benefits / Observations
Play prerecorded audio during bot processing delays	Updated	Oct/2024	You can play prerecorded audio messages to avoid customer call drop-offs when a bot is taking time to process customer requests.
Use SLA-based automated actions on conversations		Oct/2024	Businesses can set up automatic actions on messaging conversations based on time-based SLA to improve CSAT and booster agent productivity
Hide transcripts for voice calls	Updated	Oct/2024	By hiding transcripts for voice calls even when the transcription feature is turned on, you can reduce distractions and clutter for your agents.
Monitor work item lifecycle in Application Insights	Updated	Oct/2024	Customers require real-time monitoring of system health to investigate issues proactively and ensure operational continuity. By integrating Dynamics 365 Contact Center with Application Insights, organizations can access self-serve information to monitor operational telemetry, troubleshoot issues, and understand the root cause to guide their mitigation plan.
Transfer calls to Teams users through VOIP	New	Sep/2024	You can now take full advantage of the experts you may have on Teams, with or without phone numbers. You'll also pay less to have them on the call.

# Contact Center - Unified routing



Item	N / U	Deadline	Benefits / Observations
Use first-in, first-out order in custom prioritization		Dec/2024	<p>Messaging channels like persistent chat, Facebook, and WhatsApp provide the flexibility of a single conversation thread that can be asynchronously accessed by users and agents. Supervisors managing these channels can reduce the time to reply to a new interaction in these long-running conversations. With this enhancement to first-in, first-out prioritization, when customers resume interaction on an existing conversation, they will be prioritized based on the time the conversation was resumed instead of the time the conversation started. This ensures that customers who have resumed their conversations now have a shorter wait time irrespective of the age of the conversations.</p>
Update queue memberships for agents in real time		Oct/2024	<p>When a contact center experiences a surge in conversations, admins and supervisors are suddenly faced with a staffing shortage. To handle these surges, they need to quickly add or redistribute the workforce between channels and lines of business represented by queues. With this enhancement, the queue membership updates made by admins will happen faster. This ensures that new agents can take work in their new queues as soon as they are added, and when you remove agents from queues, they won't receive work from the old queue while the membership changes. These benefits help maintain low customer wait times even during peak traffic periods and avoid unintended work assignments.</p>
Prioritize existing conversations in asynchronous channels	New	Sep/2024	<p>Messaging channels like persistent chat, Facebook, and WhatsApp provide the flexibility of a single conversation thread that can be asynchronously accessed by users and agents. Supervisors managing these channels want to reduce the time to reply to a new interaction in these long-running conversations. With this enhancement to first-in-first-out prioritization, when customers resume interactions on an existing conversation, they will be prioritized based on the time the conversation was resumed instead of the time the conversation was initiated. Customers who resumed their conversations will now have a shorter wait.</p>

# Contact Center - Unified routing

Item	N / U	Deadline	Benefits / Observations
Use overflow for lengthy wait times for work items	New	Sep/2024	When contact centers face sudden spikes in customer queries in queues, agents might not be available to respond quickly. To improve customer satisfaction, overflow handling helps customers who wait for a long time by taking actions like automatically transferring work items to other queues.


### Overflow handling ✕

Define and rank overflow conditions and actions to stop work items from entering a queue when it's overflowing and to manage queued items during an overflow. [Learn more](#)

> **Before work items are queued**  
1 condition-action pair set

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^ **When work items are queued (preview)** + Add condition-action pair  
1 condition-action pair set

1	Condition:	Wait time in queue exceeds <input type="text" value="5"/> Minutes
	Action:	Select an action
		Transfer to a different queue 



# Field Service

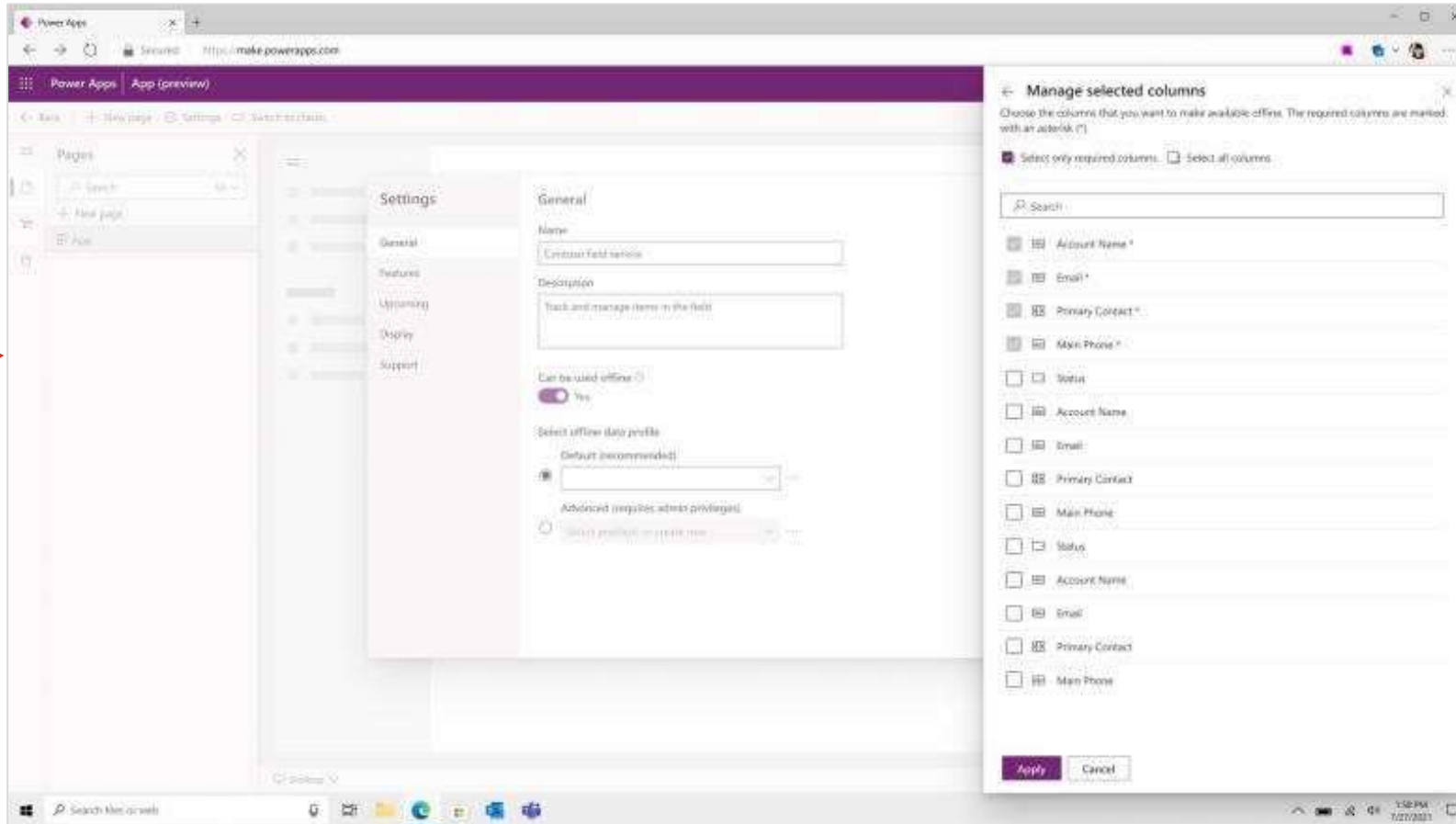
# Field Service - Boost technician productivity



Item	N / U	Deadline	Benefits / Observations
Use Remote Assist mixed reality annotations in Microsoft Teams	Updated	Oct/2024	First-time fix rates are a key business and operational metric for service organizations. When a service technician is stuck on a work order because they may not have the required knowledge or experience with that issue, they can quickly initiate a call with another technician or support specialist in the back office to guide them through the issue and its resolution.
View your mobile offline sync data with Application Insights	Updated	Oct/2024	Ensuring a seamless experience both with and without device connectivity is crucial for an effective frontline workforce. Field Service offers mobile offline capabilities to address this need. To create optimized offline profiles, you need insights into the offline performance and device data. Using Application Insights, you get the necessary data to answer essential questions about offline mobile usage, which helps with enhanced troubleshooting and user experience optimization.

# Field Service - Boost technician productivity

Item	N / U	Deadline	Benefits / Observations
Select table columns to include in mobile offline sync	Updated	Oct/2024	Makers can now select the columns of tables that are downloaded on mobile devices for offline use. The fewer columns you select, the faster the app downloads the data on the device for usage without connectivity.



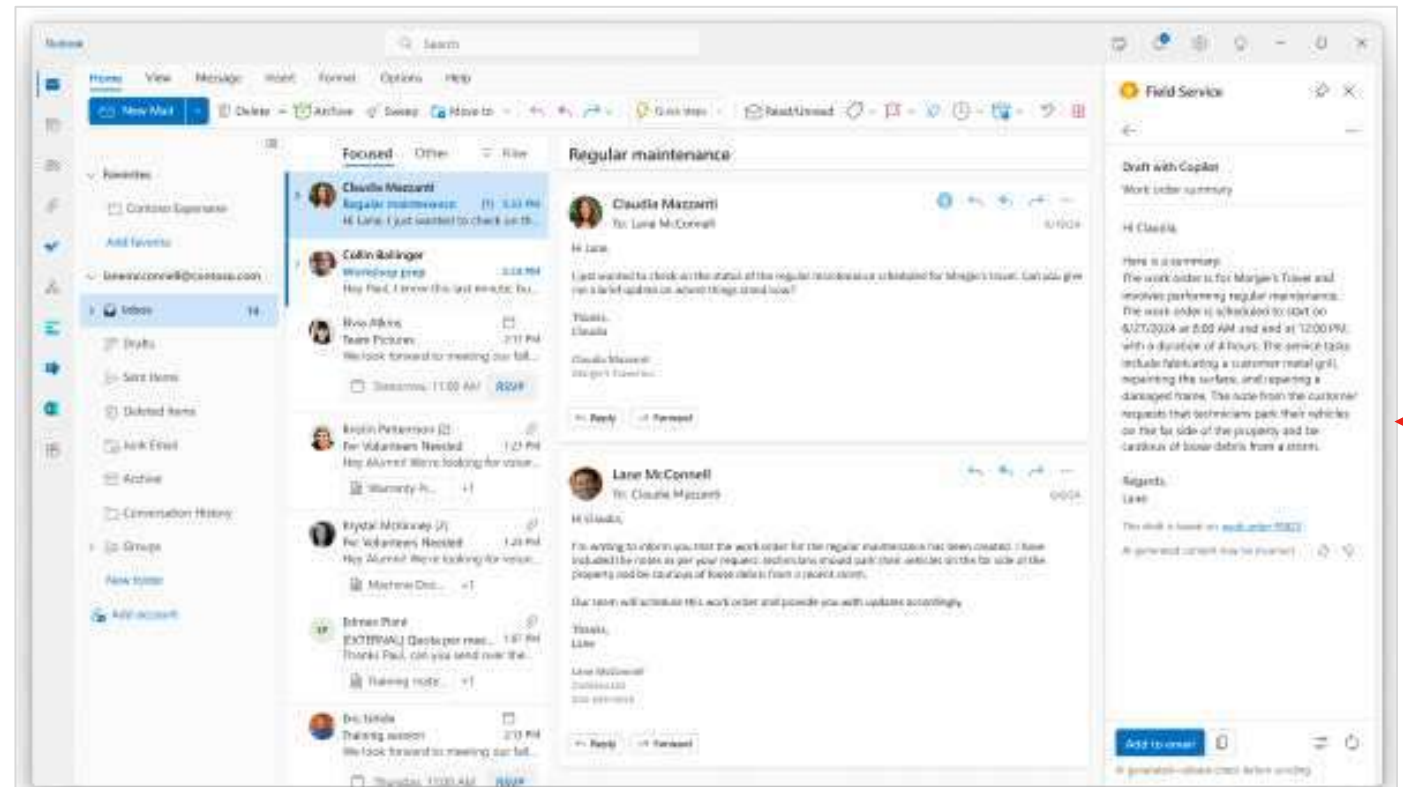
# Field Service - Copilot and AI innovation

Item	N / U	Deadline	Benefits / Observations
Enhance Copilot experiences in the web app		Oct/2024	Expedite work by using enhanced Copilot experiences. Every member of the back office and frontline workforce can tap into enhanced Copilot side pane experiences to quickly get the information they need to be more efficient on the job.
Summarize work orders with Copilot in Outlook		Nov/2024	With the Outlook add-in for Dynamics 365 Field Service, service managers and frontline workers don't have to leave Outlook and open the Field Service web app or mobile app to get summary of a work order. Stay in your flow of work and boost your productivity and efficiency with contextual information right in your preferred communication app.

Hi Kat,  
Welcome to Copilot for Field Service. Ready to explore? Select one of the suggestions below to get started...

- Act**  
Navigate to work orders
- Analyze**  
How many bookings were overdue in the past 30 days?
- Ask**  
How many work orders do I have scheduled today?

You can ask questions about work orders, accounts, resources, bookings and more!



The screenshot shows the Outlook interface with a 'Field Service' add-in pane on the right. The pane displays a 'Regular maintenance' work order summary. The summary includes a 'Hi Claudia' greeting, a detailed description of the work order (e.g., 'The work order is for Margie's Tinet and involves performing regular maintenance...'), and a 'Hi Lane' greeting. The interface also shows a 'Draft with Copilot' section and a 'Signets' section.

# Field Service - Optimize resource scheduling

Item	N / U	Deadline	Benefits / Observations
Improve usability and performance of the schedule board	Updated	Nov/2024	With improved usability and performance, technicians and dispatchers can manage schedules more efficiently, leading to increased productivity and employee satisfaction.
Transition all users to the new schedule board	Updated	Oct/2024	The new schedule board brings improved accessibility, usability, and performance while laying the foundation for new capabilities for multi-day scheduling and intelligent interactions.

**Days of the Week**  
Board view settings  
Time zone: (GMT) Coordinated Universal Time  
Working time: 12:00 AM - 12:00 AM (+3AM)  
Working days: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday  
*#1 Ideas Portal*

**Week numbers**  
11/0/2023 - 10/15/2023 - 9  
Wednesday - 3/1/2024 (Week 10)  
10 AM - 11 AM - 12 PM  
*#4 Ideas Portal*

**3 Dot Menu**  
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0m booked 0%  
*#Accessibility Win*

**Day Line on Daily+**  
May 2024  
*#Customer Voice #Accessibility Win*

**Reorder tabs**  
Anil's Tab | Brian's | Brun...  
Board settings  
Reorder tabs  
Delete  
Arianne Wozniak  
*#Customer Voice*

**Fluent Modernization**  
- Improved colors  
- Consistency with FS web/mobile  
*#Customer Voice #Accessibility Win*

**Schedule Board improvements (Usability and Modernization)**

# Thank you!



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