

# Welcome to

## What's new in Microsoft 2026 Release Wave 1 Dynamics 365 Customer Engagement

Thursday, 7th May 2026

We will kick off shortly

# Before we get started...

- We are recording today's webinar and share it afterward.
- We will share the presentation, including relevant links.
- Feel free to ask your questions by writing in the chat.

# What are the Release Waves

The two main updates on the Microsoft Dynamics 365 platform are called "waves".

Usually they occur in April (Wave 1) and October (Wave 2) and it is recommended that customers and partners have prior knowledge of the news and possible impacts.



## March 18

Release plan/  
documentation.



## April 1

Possibility of applying the wave in  
environments to evaluate the functionalities  
or even to anticipate the update of the  
production environment.



## April 03

Starting with updates in  
all environments,  
including production.

### Important notes:

- The date of the wave update can be brought forward to better suit customers' schedules but cannot be postponed;
- In addition to the waves, Microsoft makes small weekly updates between 9pm on Fridays and 6am on Saturdays;
- The Microsoft telemetry area triggers warnings about code usage, functionality, depreciated license to the Dynamics 365 and/or Power Platform admin email.
- <https://learn.microsoft.com/pdf?url=https://learn.microsoft.com/en-us/dynamics365/release-plan/2025wave2/toc.json>
- <https://learn.microsoft.com/pdf?url=https://learn.microsoft.com/en-us/power-platform/release-plan/2025wave2/toc.json>



# What's new in Dynamics 365 CE



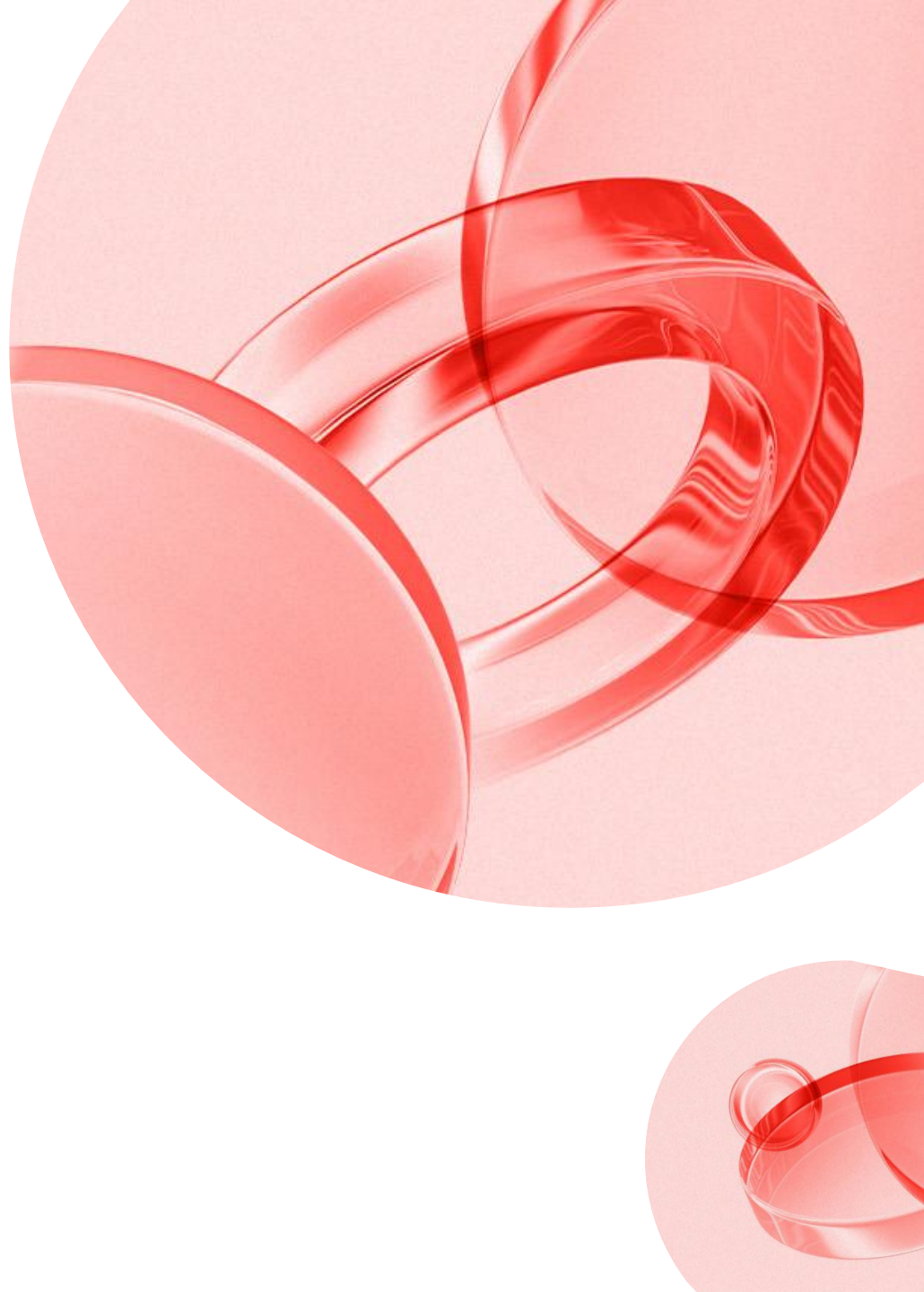
[Link to documentation](#)





# Sales

 [Link to documentation](#)



# Sales – Business research

Item	N/U	Deadline	Benefits / Observations
<b>Explore complex sales insights with Sales Research Agent</b>	New	March/2026	Sales Research Agent in Dynamics 365 Sales empowers you to explore complex business questions through natural language conversations with your data. It leverages a multimodal, multimodel, and multi-agent architecture to reason over intricate, customized schemas with deep sales domain expertise. The agent delivers novel, decision-ready insights through narrative explanations and rich visualizations tailored to the specific business context.

# Sales – Opportunity acceleration

Item	N/U	Deadline	Benefits / Observations
<b>Chat with your deal insights using ask-and-refine experience in Sales Close Agent</b>	Updated	June/2026	With an ask-and-refine experience built directly into the opportunity, you get right-sized, action-first insights based on the current opportunity context. You can quickly act on what matters now, then go deeper only when you choose. This reduces time spent hunting for answers, improves seller confidence at critical stages, and helps you scale AI usage efficiently across the organization.
<b>Stay on track at every deal stage with delta-first guidance in Sales Close Agent</b>	Updated	June/2026	As a seller, you juggle many active opportunities, but deal conditions can shift quickly as stakeholders change, buying signals drop, pricing or procurement hurdles appear, or budget and timeline assumptions shift. When you miss what changed, why it matters now, and what to do next for the current stage, deals lose momentum. Building on the existing deal briefing and continuous monitoring, Sales Close Agent - Research aligns guidance to the customer's business process flow (BPF) stage.
<b>Carry out suggested actions faster and more effectively</b>	Updated	May/2026	Next Best Action not only prioritizes the key actions for your team to focus on but also ensures that the execution of the suggested action is seamless, effective, and fast. It provides the necessary context and details that enable your team to execute the action with ease without having to invest time for researching and understanding the context for each action.

# Sales – Opportunity acceleration

Item	N/U	Deadline	Benefits / Observations
<b>Identify the most important actions in the flow of work</b>	Updated	May/2026	With Next Best Action, you can ensure that your team focuses on actions that matter most in achieving the target set for each individual member and the team as a whole. These actions will be identified across various experiences, ensuring your team never misses out on any action, wherever they are present.
<b>Improve opportunity context with AI-based data enrichment</b>	Updated	March/2026	When your opportunity data is incomplete or outdated, you may find it challenging to understand deal health and take the right actions. AI-powered data enrichment reduces this friction by analyzing your emails and highlighting gaps in opportunity information and suggesting updates. This feature helps you keep your opportunity data accurate and up to date, increases your confidence in pipeline data, and enables more effective deal reviews and forecasting.
<b>Uncover insights and risks to close more deals with Opportunity Research Agent</b>	Updated	March/2026	Sales Close Agent's Opportunity Research addresses this challenge by providing sellers with a holistic view of every opportunity. By tirelessly researching data from CRM, SharePoint, public web sources, and customer interactions, it delivers a complete picture of the opportunity. It equips sellers with the context they need to ramp up quickly, understand the competitive landscape to make a differentiated pitch, engage key stakeholders, respond to competitive threats, proactively mitigate risks, and ultimately drive more deals to closure.

## Prioritized list of actions on NBA carousel

**Suggested actions for your top deals**

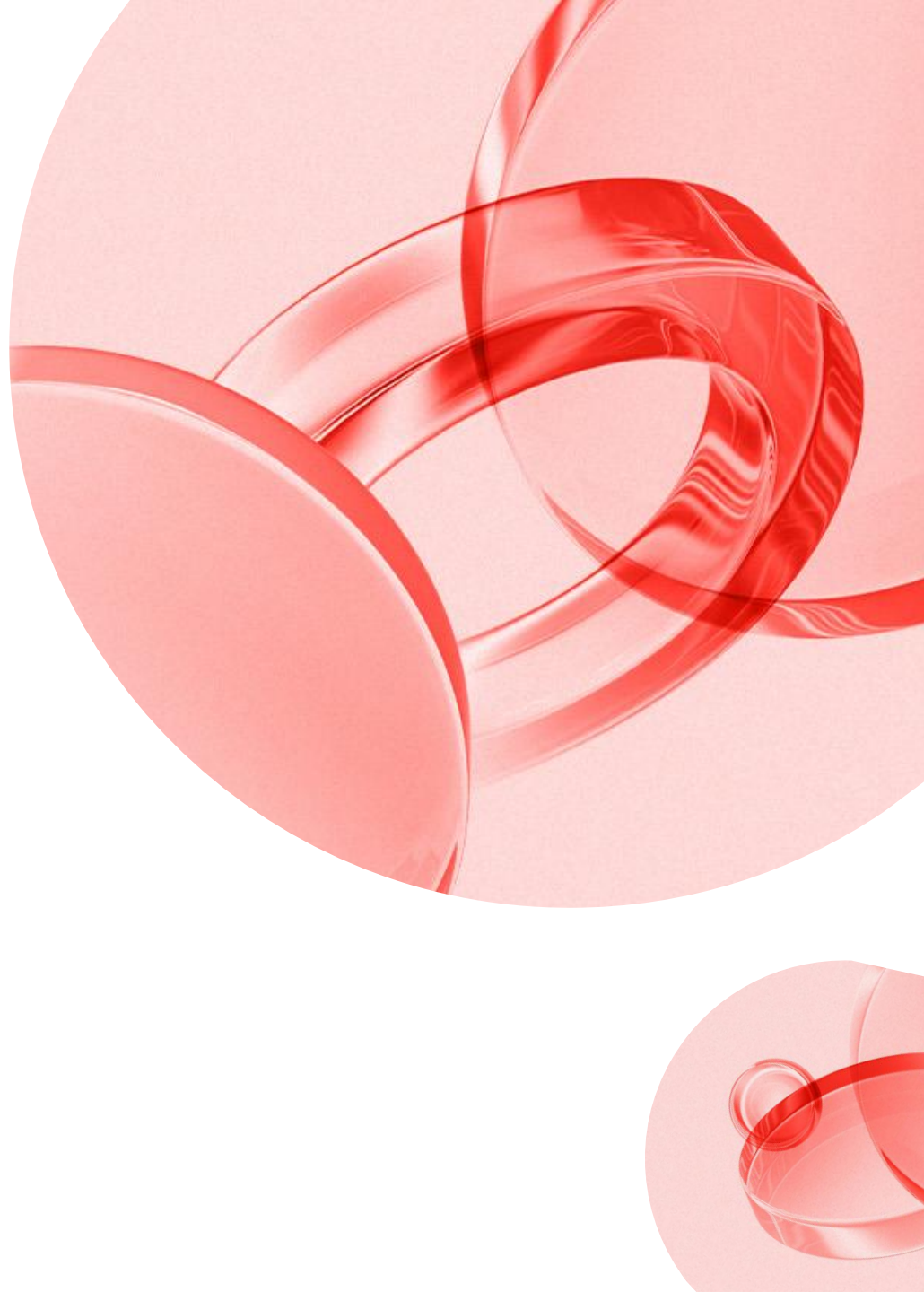
- Budget not confirmed -- verify approval ownership**  
**Insights:** High value opportunity worth \$30 Million.  
 Your Jan 20 email titled 'Budget and Vendor Compensation Discussion' indicates budget approval is still uncertain and under leadership review. Lack of budget clarity at this stage increases the risk of delay.  
 Insights on Costco Ltd - New office in Newark
- Competitor detected in Alpine Ski House deal - Review...**  
 Meeting invite from James Mitchell (IT Director at Alpine Ski House on Jan 22 mentions Dell as a potential vendor. Your upcoming demo faces direct competition. Review Dell's recent ProBook offerings and prepare comparison points. Plan your meeting strategy to highlight...  
 Insights on Alpine Ski House - ProBook req.
- Fourth Coffee ordering 30 laptops - Propose antivirus...**  
 CRM data shows Fourth Coffee's purchase order for 30 ProBook Elite units worth \$11,500. These units doesn't include antivirus protection. Organizations that use email endpoints security from any new email Michael Rodriguez (Procurement Manager) to propose SecureGuard.  
 Insights on Fourth Coffee - SecureGuard Enterprise pt.
- Competitor detected in Alpine Ski House deal - Review...**  
 Meeting invite from James Mitchell (IT Director at Alpine Ski House on Jan 22 mentions Dell as a potential vendor. Your upcoming demo faces direct competition. Review Dell's recent ProBook offerings and prepare comparison points. Plan your meeting strategy to highlight...  
 Insights on Alpine Ski House - ProBook req.

Show all



# Copilot for Sales

 [Link to documentation](#)



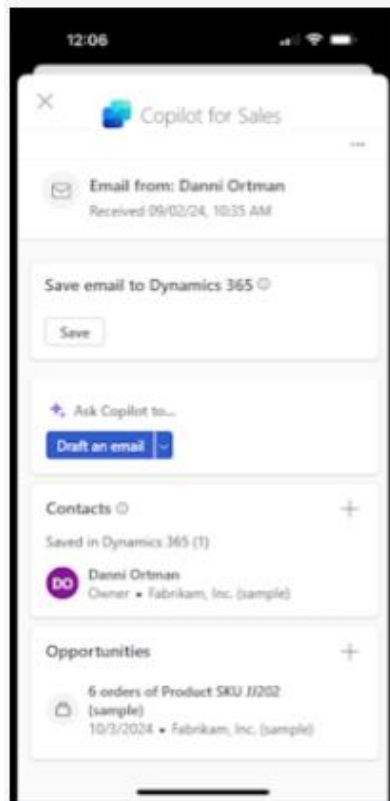
# Copilot for Sales – Access and analyze sales data with Sales Chat



Item	N/U	Deadline	Benefits / Observations
<b>Link meetings to CRM records automatically with AI</b>	Updated	June/2026	<p>This feature removes a manual step that slows you down by automatically linking meetings to the right CRM records. You get relevant deal insights while preparing for customer meetings, spend less time managing records, and spend more time selling with stronger context.</p> <p>When you schedule a meeting, AI evaluates meeting details and existing CRM relationships to identify the most relevant open opportunity. If no opportunity meets the confidence threshold, it falls back to an account-level match. The selected record is soft-linked and used to generate meeting prep insights, and you can accept, change, or remove the suggested match at any time.</p>

# Copilot for Sales - Microsoft Outlook experiences

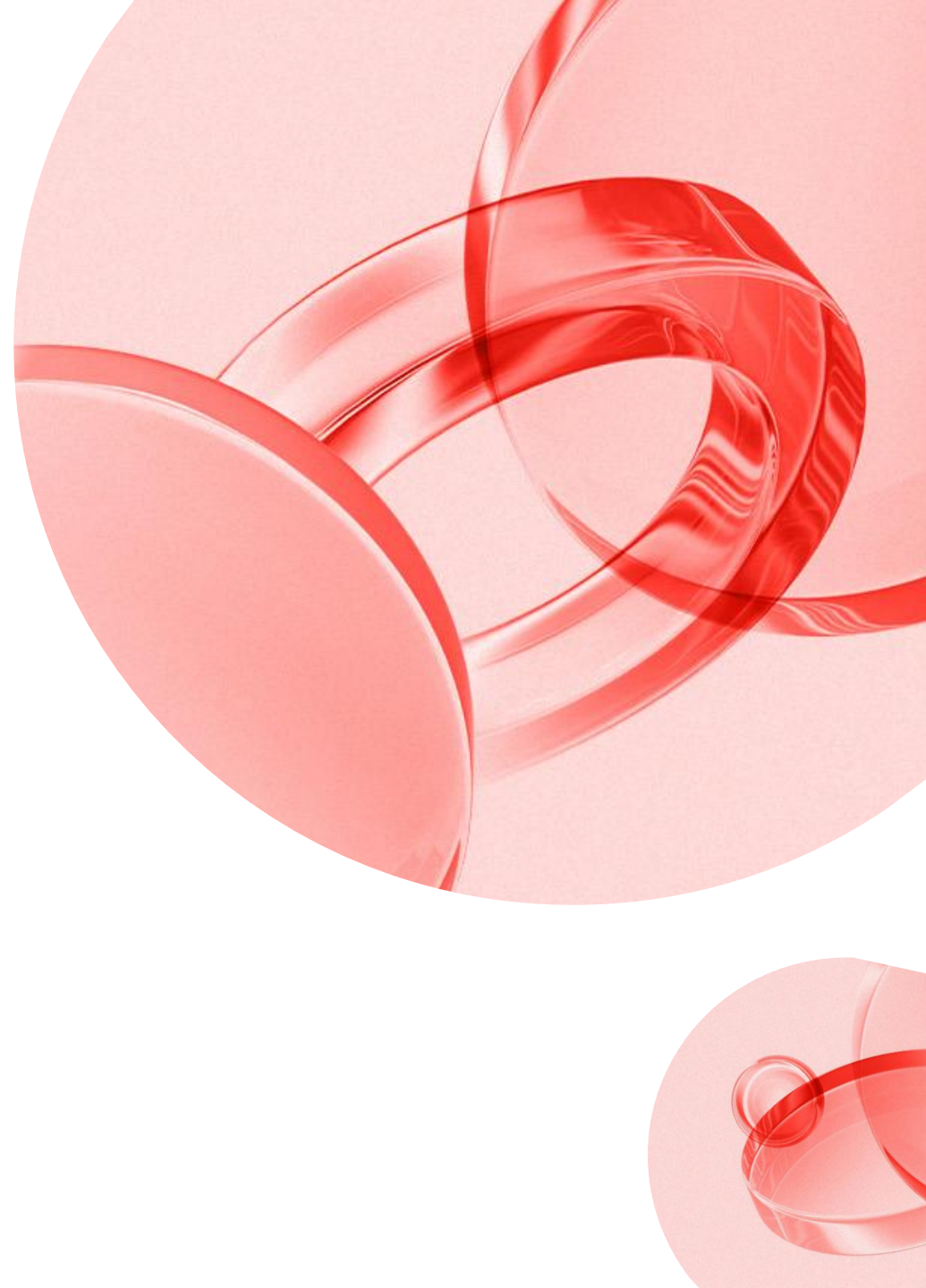
Item	N/U	Deadline	Benefits / Observations
Access Copilot for Sales from Outlook Mobile	New	January/2026	<p>All users of the Microsoft Outlook app on Android and iOS devices automatically get mobile features. As a seller, you can use key features from the mobile app by selecting the ... menu in an email to open the Copilot for Sales app. This app gives you access to features available on the desktop, such as:</p> <ul style="list-style-type: none"><li>• AI-generated email responses</li><li>• AI-generated email and opportunity summaries</li><li>• Tracking Outlook activities to CRM</li><li>• Creating and editing contacts or other CRM objects</li></ul>





# Customer Insights Data

 [Link to documentation](#)



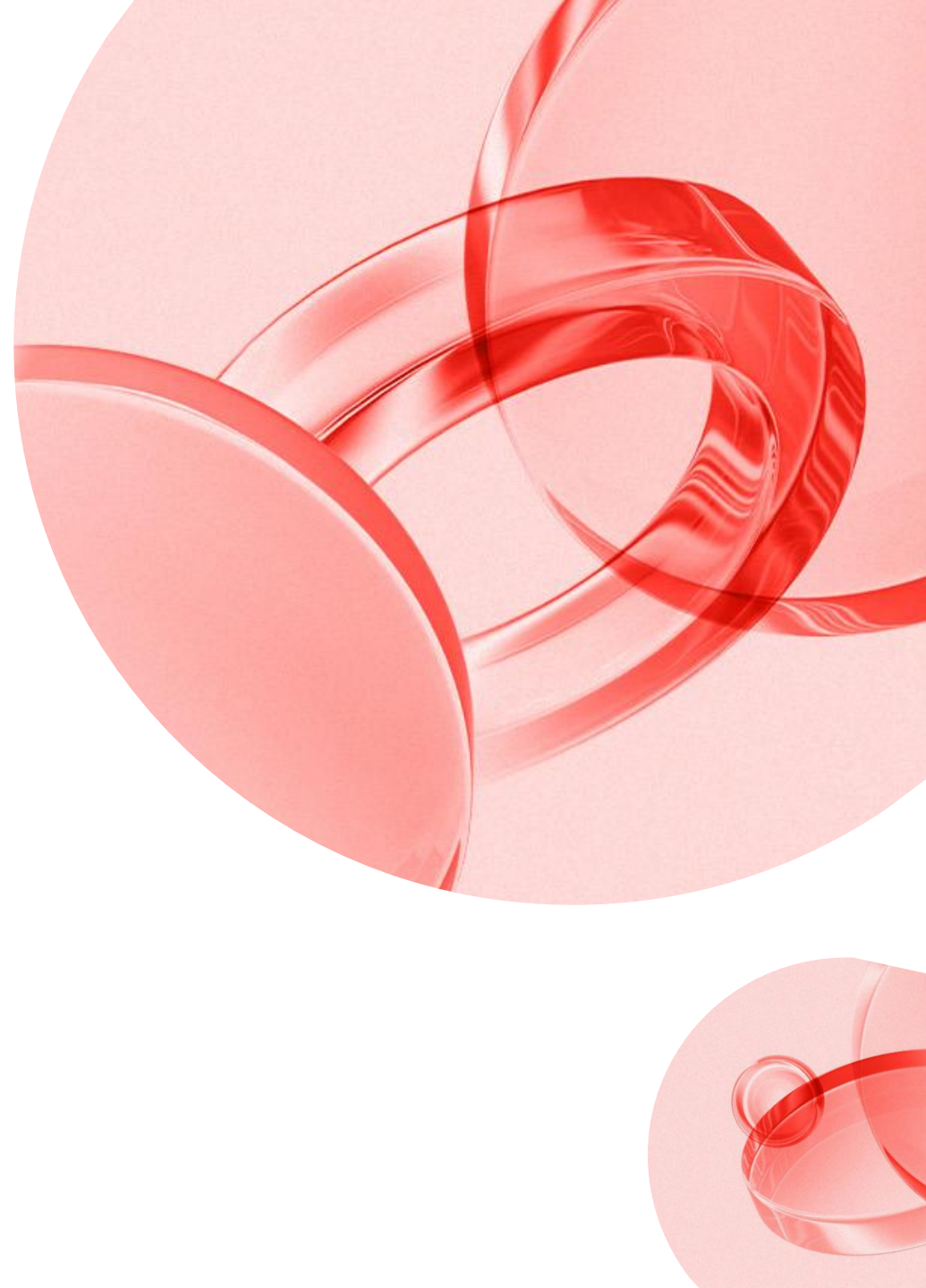
# Customer Insights – Turbocharge your pipeline to drive growth

Item	N/U	Deadline	Benefits / Observations
<b>Target right audience based on signals from earlier campaigns</b>	New	June/2026	To refine your engagement strategy, you need to understand how customers respond to your communications efforts. When you create segments in Customer Insights - Data and use them in Customer Insights - Journeys campaigns, the interaction data captured by Customer Insights - Journeys can now be accessed and used in Customer Insights - Data segments to refine your segments based on how customers responded to your campaign. This capability enables customer experience teams to combine the power of unified profiles with insights from Customer Insights - Journeys.



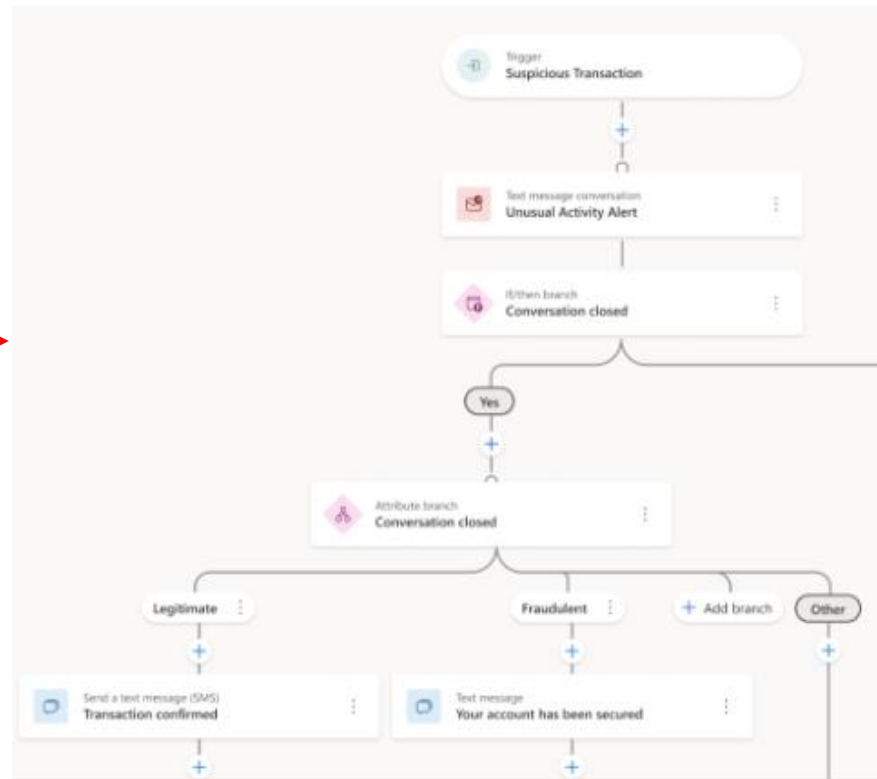
# Customer Insights Journey

 [Link to documentation](#)




# Customer Insights – Agents and Copilot

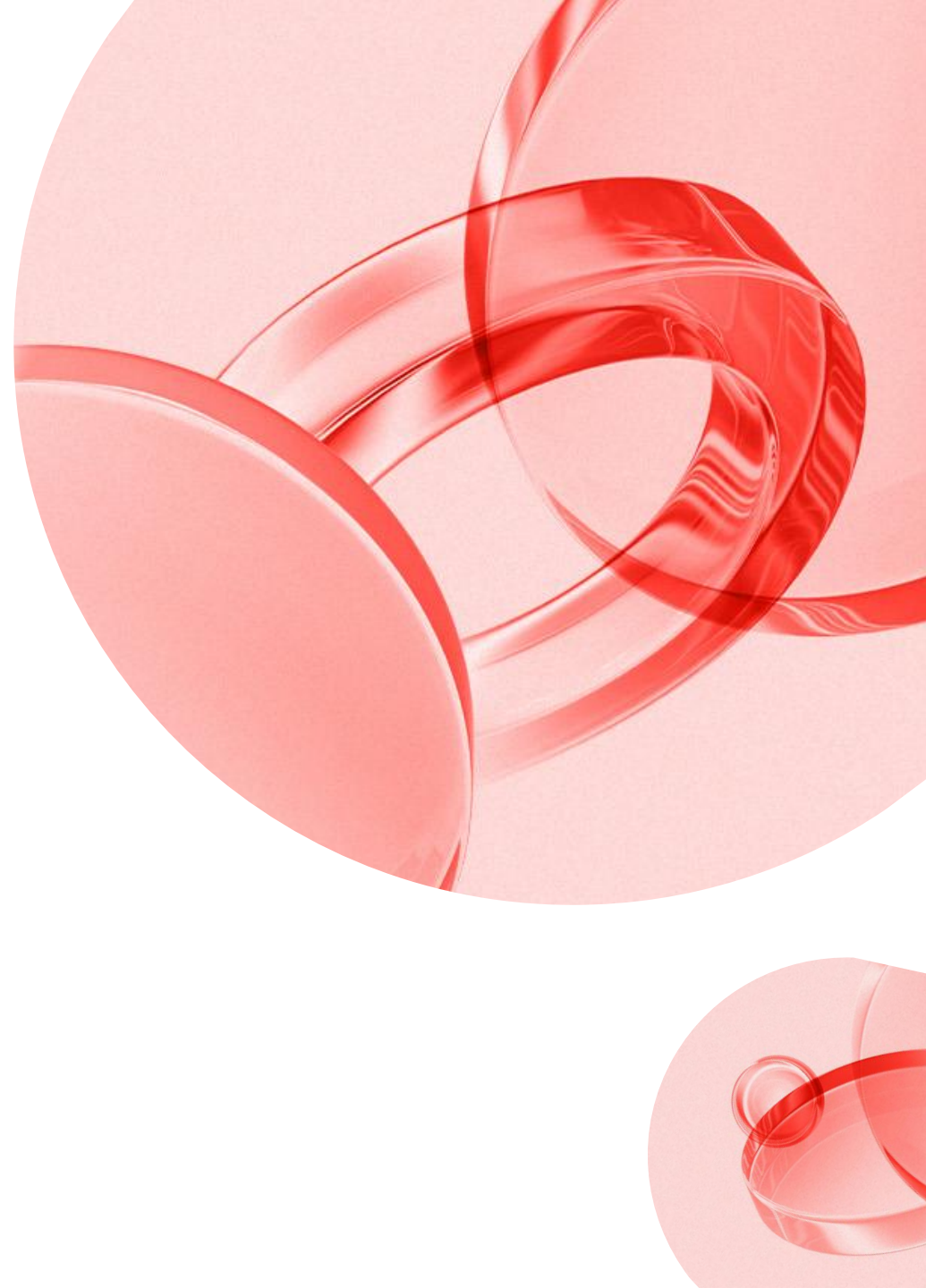
Item	N/U	Deadline	Benefits / Observations
<b>Boost engagement with Copilot-powered conversational text messages</b>	Updated	April/2026	Incorporating text messaging into your marketing strategy is highly effective thanks to high open and response rates. However, customer response options are often limited to one word. Limiting customers' interactions to single keywords restricts their ability to fully express their needs, preventing you from tailoring the experience to their preferences. With Dynamics 365 Contact Center integration, you can now leverage Copilot Studio agents to deliver rich, personalized SMS conversations with your customers, allowing them to precisely communicate their needs and therefore receive greater customer service.





# Customer Service

 [Link to documentation](#)



# Customer Service – Administrator experiences

Item	N/U	Deadline	Benefits / Observations
<b>Simulate AI case enrichment with Case Management Agent</b>	Updated	March/2026	<p>Simulation enables administrators to assess how the Case Management Agent performs case enrichment, evaluate the quality of those predictions before enabling the feature in production, and streamline the testing process by reducing the time required for manual validation.</p> <p>Administrators can run case enrichment simulations using:</p> <ul style="list-style-type: none"><li>• Historical case records</li><li>• Uploaded Excel files</li><li>• Email or conversation transcripts</li></ul>
<b>Protect sensitive information in e-mails with data sensitivity labels</b>	Updated	May/2026	<p>By adding data sensitivity labels to emails, you enhance your data security when service representatives classify and protect sensitive information. This feature enables secure collaboration, reduces the risk of data breaches, and offers customization flexibility for managing different types of sensitive information.</p>

# Customer Service – Copilot and AI innovation

Item	N/U	Deadline	Benefits / Observations
<b>Simulate case-resolution flows before production</b>	Updated	April/2026	Safely validate Case Management Agent resolution logic before it impacts customers and catch configuration and instruction issues early. Provide clear, reviewable evidence (accuracy, tone, actions) to speed approvals for pilots and autonomous use. Estimate resolution quality, operational impact, and credit usage upfront to justify scope and investment.
<b>Use shadow mode for Case Management Agent predictions</b>	Uupdated	May/2026	Reduce risk and accelerate AI adoption by validating Case Management Agent performance on real cases without impacting customers or operations.  Enable shadow mode in Case Management Agent settings for selected lines of business or case rules. The system generates predicted outcomes only, including: <ul style="list-style-type: none"><li>• Identified customer intent.</li><li>• Drafted response content.</li><li>• Proposed field updates.</li><li>• Recommended follow-up or resolution actions.</li></ul>
<b>Configure custom instructions in Copilot Ask a question</b>	Updated	February/2026	Custom instructions let organizations define persistent preferences that guide how Copilot responds in Ask a question. Instead of providing the same guidance in every prompt, customers can specify upfront how they want Copilot to behave across conversations. Instruction types can include: <ul style="list-style-type: none"><li>• Preferred tone (for example, concise, formal, or conversational)</li><li>• Level of detail (summary versus in-depth analysis)</li><li>• Formatting preferences (bulleted lists, tables, or structured sections)</li><li>• Role or context for Copilot to assume (for example, a customer service representative)</li></ul>

**Ask a question:** Let representatives chat with AI. [Manage prompt](#)

**Custom instructions:** Provide custom instructions for copilot to follow when responding to users.

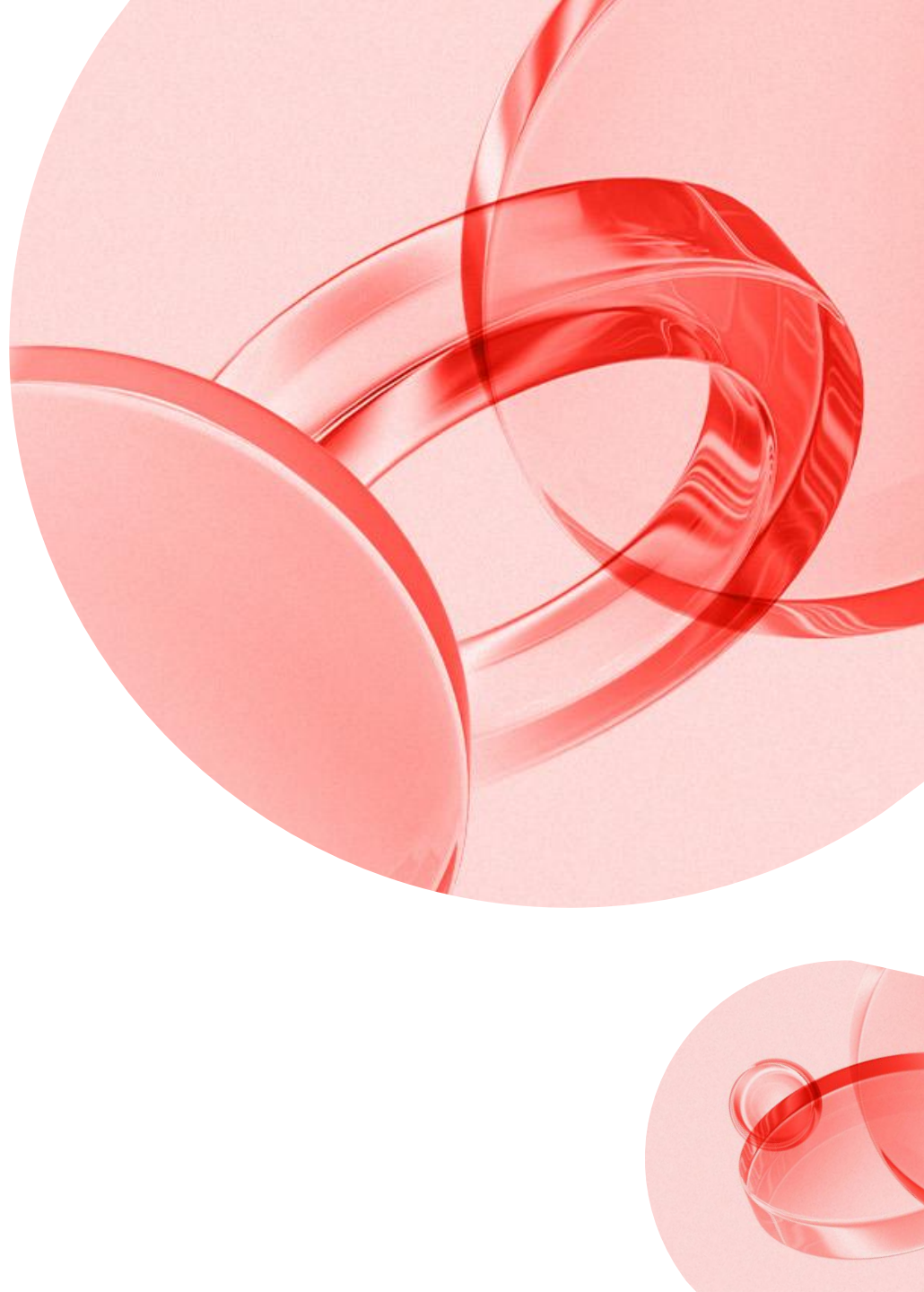
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# Contact Center



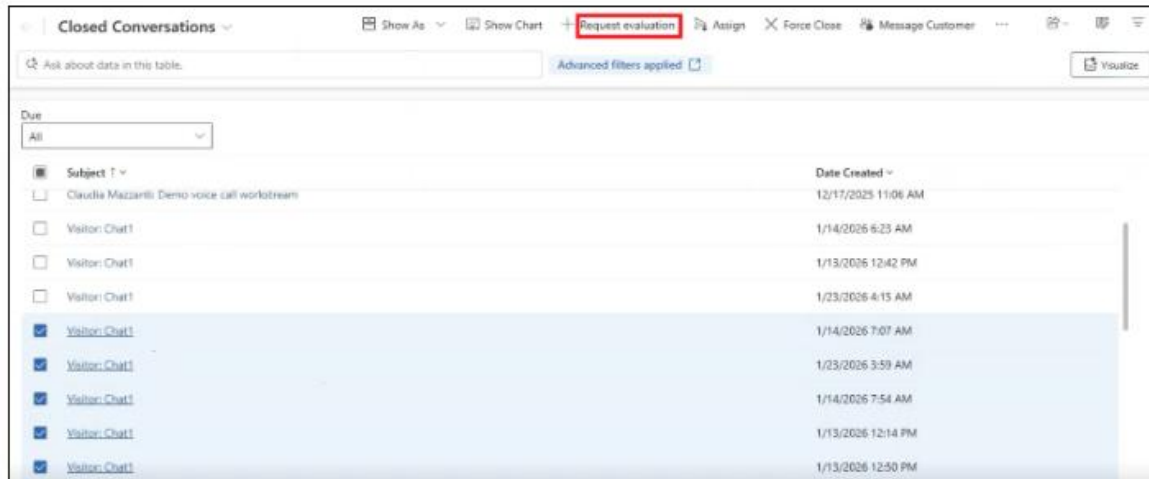
[Link to documentation](#)



# Contact Center – Copilot and AI innovation

Item	N/U	Deadline	Benefits / Observations
Evaluate multiple conversations using Quality Evaluation Agent	Updated	April/2026	Supervisors and quality managers can evaluate multiple closed conversations on demand from the Conversation list view to improve operational efficiency. Historical closed conversations can also be evaluated daily using evaluation plans.  Key capabilities include: <ul style="list-style-type: none"><li>On-demand evaluations from the conversation list: Users can select multiple closed conversations directly from the conversation list view and run evaluations immediately.</li><li>Daily evaluation plan runs: Evaluation plans support daily evaluations of closed conversations, enabling automated processing of historical conversations.</li></ul>
Evaluate closed conversations with Quality Evaluation Agent	Updated	January/2026	Supervisors use the Evaluation Framework to define evaluation criteria and create evaluation plans. When these plans run, requests go to the Quality Evaluation Agent to evaluate closed conversations. The Quality Evaluation Agent processes these requests and generates evaluation responses with detailed reasoning for predicted answers. It also produces quality scores and evaluation summaries, including action plans for AI supervisors.

## Conversation list view



# Contact Center – Omnichannel customer experiences

Item	N/U	Deadline	Benefits / Observations
<b>Understand outcomes of proactive engagements</b>	Updated	January/2026	Organizations can set up predefined actions for scenarios where the calling party is unreachable or busy during proactive engagement campaigns. For example, a journey author can create a rule to automatically retry calling a customer two hours later if the call goes to voicemail or schedule another call for the next day if the customer isn't reachable. This flexibility ensures more effective customer outreach, improves the chances of successful contact, and maximizes campaign value.
<b>Leverage rich media messaging across channels</b>	Updated	March/2026	Rich media messaging helps customers, agents, and customer service representatives engage in support conversations effortlessly, without the need for extensive typing. Agent-driven rich media messages help agents quickly gather more information from customers, facilitating better self-service. Additionally, rich media messaging helps enhance customer service representative productivity by enabling representatives to swiftly collect information from customers in the expected format.



# Field Service

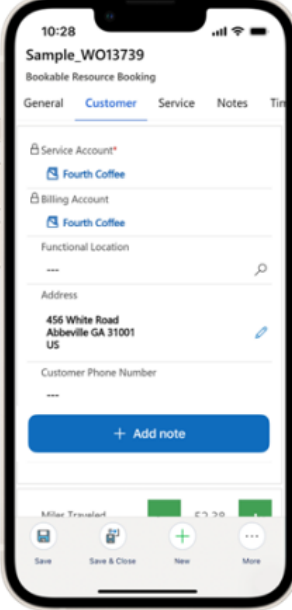
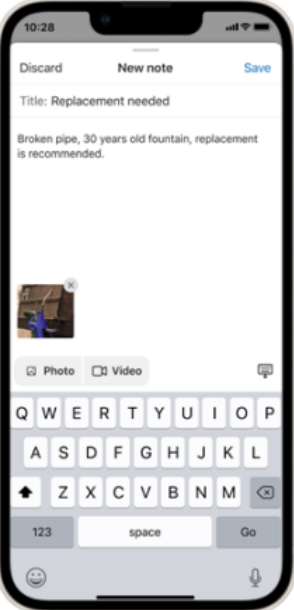
 [Link to documentation](#)



# Boost technician productivity

## Field Service

Item	N/U	Deadline	Benefits / Observations
<b>Review notes with mobile note consumption control</b>	<b>NEW</b>	June/2026	The Note Consumption control introduces an optimized, mobile-first layout for reading notes on entity forms. When you add this control to a form, it replaces the default note-viewing experience with a clean, intuitive design that displays text, images, and videos with rich previews, improved touch targets, and a layout built for fast on-site interpretation. The control renders note-type activities only; other activity types don't appear in this view. If you use custom note scripts or embedded viewers, test compatibility to make sure Timeline content loads as expected. The control is available for mobile use only and doesn't change the web experience. Make sure your form design provides enough vertical space so images and videos render cleanly.
<b>Add notes with the simplified mobile note-taking control</b>	<b>UPDATED</b>	March/2026	Keep your team in the flow of work by enabling them to capture rich notes (text, images, video) directly on the record. Faster documentation reduces task interruptions, improves context for follow-ups, and increases data quality in the timeline.



# Thank you!



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