# Dynamics 365 Sales

2021 release wave 2
October 2021-March 2022

In this guide, you will be able to learn the most important things about this release wave.

## Top things to know

### Release overview

The focus areas for the Dynamics 365 Sales wave 2 updates are:

**Enabling you to collaborate better with improvements to Teams calling with Dynamics**
More third-party telephony support and critical business insights will be available for any type of call. Embedded Teams collaboration and Teams message extensions and actions will be generally available and will include some enhancements to suggested contacts and the overall experience. You'll also be able to access sales records from within Teams meetings and have automated notifications from Dynamics to Teams. Lastly, there will be enhancements to setup and security of the Dynamics app for Teams.

**Manage your pipeline more efficiently with Deal Manager**
Deal manager will become generally available. Some updates and enhancements with the GA release will include availability of manager workspace for Accounts, Contacts and Leads, visually updating deals with the Kanban control, and improvements to quick filters with hierarchy and date-based filters.

**Build better relationships with enhancements to the LinkedIn experience with Dynamics**
Easy access to Sales Navigator, and several LinkedIn integration improvements.

**Let Dynamics do the heavy lifting with improved productivity tools and forecasting updates**
Account-based Who Knows Whom will be released in wave 2, along with a big update to streamline activity capture with Auto Capture. For forecasting, enhanced capabilities for sharing and viewing a specific forecast, attribute Insights for driving predictive scoring model clarity, more admin controls for managing and deploying forecasts, and support for new forecast view and yearly/weekly forecasts.

**Guided selling gets a boost with Sales Accelerator enhancements and data hygiene**
Lead generation and nurturing for guided selling.

**Enhancing the mobile experience for sellers on the go**
Enhancements to the mobile experience so you never miss a detail in your customer engagements, come prepared to customer engagements, find, interact and create CRM information easily, and log and share information effortlessly.

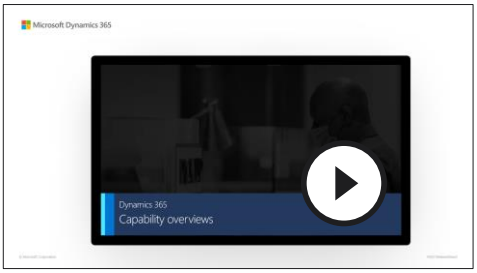
### Read the release plan

Explore the entire set of new capabilities planned for 2021 release wave 2.
Visit: aka.ms/Plan/2021RW2/Sales




### Learn more about latest updates

Watch latest capability overview videos.
Visit: aka.ms/Updates/Sales




### Join the Dynamics 365 community

Engage with experts and peers.
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### Help us improve

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Visit: aka.ms/Overview/2021RW2/Feedback

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## Overview

Dynamics 365 Sales is the market-leading sales application that empowers every organization to sell more by understanding their customers and the way they want to buy—powered by data, intelligence, and experiences that people love. Dynamics 365 Sales is centered on the customer relationship. It helps organizations understand customer needs and drives more relevant and authentic engagements, enabling sellers to sell more efficiently.

With the 2021 release wave 2 of Dynamics 365 Sales, we're launching some exciting new functionality and updates based on valuable customer feedback. Please continue to reach out at Sales Ideas, as your feedback is invaluable to us.

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## What's new and planned

**Pipeline Management**
Managing the sales pipeline is a high-impact activity. It requires rapid consumption of data and tools for quick edit actions, data visualization, collaboration, task management, and more.

In this release, we're introducing a new personalized workspace optimized for pipeline management. This workspace empowers sellers to view, manage, and execute on their opportunities by providing the in-context experiences needed to quickly filter their deals, view necessary information, and directly take action, all without navigating away from their work surface.

With the new deal manager workspace, sellers are more empowered to keep their sales pipeline healthy.

**Forecasting and pipeline analytics**
To stay ahead of the market and to meet the sales quota, sales teams are constantly pressurized to sell more and sell faster. As a seller, it's important that you spend time on the top deals, prioritizing prospects that are likely to close, and move quickly through the pipeline. It's also imperative that your team accurately projects anticipated revenues from these deals so that, as a team, you can take proactive steps if you fall short of your goals.

Forecasting and pipeline analytics provide predictive lead and opportunity scoring that helps you uncover top deals and forecast with confidence. Use the intelligent scores to know where to best invest your team's time, improve resource allocation, and increase productivity, while helping ensure that rigorous quotas can be met efficiently.

In this release, we will provide sales teams the ability to share their forecasts with other stakeholders. For example, a Sales Director can delegate the management of the teams' forecast to an assistant or another team member by simply sharing the forecast.

**Mobile**
Mobile is an essential part of solving one of the biggest challenges faced by sales organizations today - How to help sellers access what they need, when they need it, wherever they are, and make it easy for them to log and share information in real time.

**Engagement platform and productivity intelligence**
The engagement platform and productivity intelligence aims at enabling a smooth integration of Dynamics 365 Sales with different communication providers, so sellers can easily onboard the digital selling capabilities.

**Accelerator workspace**
The sales accelerator workspace offers a guided selling experience, powered by artificial intelligence (AI), to enable velocity sellers to close more deals.

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## What's new and planned

**Relationship intelligence**

Relationship intelligence helps sellers use the information in their selling system across Dynamics 365 and Microsoft 365 to identify, build, and nurture relationships with their customers.

**Collaboration Using Microsoft Teams**

The need to collaborate with colleagues in the context of customer records is a constant need for sellers of all types, industries, segments, and geographies. These needs are not isolated to instances when a seller is within Dynamics 365 or Microsoft Teams. The reality is that seller's require capabilities to collaborate contextually from both Dynamics 365 and Microsoft Teams. This experience continuum was a focus for 2021 Release Wave 1 and remains a focus for Release Wave 2.

In this release, we will be enhancing the Microsoft Teams embedded chat experience that empowers sellers to stay within their sales workflows and collaborate with stakeholders for the critical information needed to close the deal faster, all from within Dynamics 365. Chats and channels will be linked directly to sales records, enabling a contextual experience unique to the experience within Microsoft Teams. For sellers that require more contextual interactions from within Teams, we are building upon our Message Extensions & Message Actions capabilities with additional enhancements that enable sellers to receive notifications from Dynamics 365, as well as see their customer records from within the context of a Teams meeting.

To learn more about the entire set of capabilities being delivered during this release wave, visit: aka.ms/Plan/2021RW2/Sales

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## For application administrators

### End-user impacting features to the user experience enabled automatically

End-user impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "End users, automatically" in the release plan.

### Features that must be enabled by application administrators

This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their end users. For the complete list, look for all features tagged "End users by admins, makers, or analysts" in the release plan.



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## Get the most out of Dynamics 365

### Release plan
View all capabilities included in this release. aka.ms/Plan/2021RW2/Sales

### Product updates
Stay up to date on latest product updates. aka.ms/Updates/Sales

### Release calendar
Know important release milestones. aka.ms/Updates/Calendar/Sales

### Licensing
Improve your understanding of how to license Dynamics 365. aka.ms/Licensing/Sales

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Find documentation for Dynamics 365. aka.ms/Documentation/Sales

### User community
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### Upcoming events
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### Product trials
Get started with Dynamics 365. aka.ms/Trials/Sales

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