

# What's new and planned for Dynamics 365 Sales Release Wave 2 - 2021

This topic lists features that are planned to release from October 2021 through March 2022. Because this topic lists features that may not have released yet, **delivery timelines may change and projected functionality may not be released**. For more information, go to [Microsoft policy](#).

For a list of the previous wave's release plans, go to [2021 release wave 1 plan](#).

In the **General availability** column, the feature will be delivered within the month listed. The delivery date can be any day within that month. Released features show the full date, including the date of release.

This check mark (✓) shows which features have been released for public preview or early access and for public preview, early access, and general availability.

## Accelerator workspace

The sales accelerator workspace offers a guided selling experience, powered by AI, to enable sellers to close more deals.

| ACCELERATOR WORKSPACE  |   |                |               |                      |
|--|---|----------------|---------------|----------------------|
| Feature  | Enabled for   | Public preview | Early access* | General availability |
| <a href="#">Coach sellers with manager dashboards and improve seller efficiency with seller KPIs</a>         | Users by admins, makers, or analysts                  | Dec 2021       | -             | -                    |
| <a href="#">Focus sellers on the right actions with a worklist ownership enhancement</a>                     | Users by admins, makers, or analysts                  | -              | -             | Oct 2021             |
| <a href="#">Boost sales productivity using an intelligent worklist</a>                                       | Users, automatically                                  | -              | ✓ Aug 2, 2021 | Oct 2021             |
| <a href="#">Build better relationships with automation and structured workflows with sequence management</a> | Admins, makers, marketers, or analysts, automatically | -              | -             | Nov 2021             |

**ACCELERATOR WORKSPACE**

| <b>Feature</b>   | <b>Enabled for</b>                                    | <b>Public preview</b> | <b>Early access*</b> | <b>General availability</b> |
|--|---|-----------------------|----------------------|-----------------------------|
| Manage better sales process outcomes for sequences using grid view                                     | Users by admins, makers, or analysts                  | -                     | -                    | Nov 2021                    |
| Focus on the highest impact activities with advanced filtering and sorting                             | Users by admins, makers, or analysts                  | -                     | -                    | Nov 2021                    |
| Quickly implement sequences using ready-to-use and preconfigured templates                             | Admins, makers, marketers, or analysts, automatically | -                     | -                    | Dec 2021                    |
| Leverage the power of LinkedIn actions as part of smart sequences                                      | Users by admins, makers, or analysts                  | -                     | -                    | Dec 2021                    |
| Move sequences between environments seamlessly to enable sellers to get started as quickly as possible | Admins, makers, marketers, or analysts, automatically | -                     | -                    | Dec 2021                    |
| Quickly find the context that you need with more complete views of worklist cards                      | Users by admins, makers, or analysts                  | -                     | -                    | Dec 2021                    |
| Improve seller productivity with better quality leads with Data hygiene                                | Users by admins, makers, or analysts                  | Nov 2021              | -                    | Jan 2022                    |
| Automatically route leads to the right sellers to improve lead qualification outcomes                  | Admins, makers, marketers, or analysts, automatically | -                     | -                    | Jan 2022                    |

## Collaboration using Microsoft Teams

Enhance the sales collaboration experience within Dynamics 365 Sales through the integration of Microsoft Teams.

**COLLABORATION USING MICROSOFT TEAMS**

| <b>Feature</b>  | <b>Enabled for</b>                   | <b>Public preview</b> | <b>Early access*</b> | <b>General availability</b> |
|---|--------------------------------------|-----------------------|----------------------|-----------------------------|
| Easily edit a Dynamics 365 record within a Microsoft Teams conversation | Users by admins, makers, or analysts | Dec 2021              | -                    | -                           |

| COLLABORATION USING MICROSOFT TEAMS  |                                      |                |               |                      |
|--|--------------------------------------|----------------|---------------|----------------------|
| Feature  | Enabled for                          | Public preview | Early access* | General availability |
| Seamlessly add activities and notes to Dynamics 365 records from within a Microsoft Teams chat or channel                    | Users by admins, makers, or analysts | Dec 2021       | -             | -                    |
| Share Dynamics 365 records in a Microsoft Teams message  | Users by admins, makers, or analysts | Dec 2021       | -             | -                    |
| Run Teams meetings with full context of leads and opportunities and get AI-powered recommendations before and after meetings | Users by admins, makers, or analysts | Jan 2022       | -             |                      |
| Keep additional stakeholders in the loop by sending automated chat notifications from Dynamics 365 to Microsoft Teams        | Users by admins, makers, or analysts | Feb 2022       | -             |                      |
| Collaborate with key stakeholders using Microsoft Teams chat from within Dynamics 365  | Users by admins, makers, or analysts | Sep 2021       | -             | Mar 2022             |
| Quickly add relevant stakeholders to Microsoft Teams chat using suggested contacts   | Users by admins, makers, or analysts | Oct 2021       | -             | Mar 2022             |

## Engagement platform and productivity intelligence

The engagement platform and productivity intelligence enables a smooth integration of Dynamics 365 Sales with different communication providers, so sellers can easily onboard digital-selling capabilities.

| ENGAGEMENT PLATFORM AND PRODUCTIVITY INTELLIGENCE                   |                                      |                |               |                      |
|---|--------------------------------------|----------------|---------------|----------------------|
| Feature   | Enabled for                          | Public preview | Early access* | General availability |
| Make and receive calls and join meetings directly from Dynamics 365 | Users by admins, makers, or analysts | Feb 2022       | -             | Mar 2022             |

## Forecasting and pipeline analytics

Forecasting and pipeline intelligence with predictive scoring helps sales teams uncover top deals and forecast with confidence.

**FORECASTING AND PIPELINE ANALYTICS**

| <b>Feature</b>  | <b>Enabled for</b>                   | <b>Public preview</b> | <b>Early access*</b> | <b>General availability</b> |
|---|--------------------------------------|-----------------------|----------------------|-----------------------------|
| Get streamlined views of forecast hierarchies with user filters to more efficiently manage your forecasts | Users by admins, makers, or analysts | -                     | -                    | Oct 2021                    |
| Manage permissions to include relevant users in the forecasting process                                   | Users by admins, makers, or analysts | -                     | -                    | Oct 2021                    |
| Improve predictive scoring by enabling intelligent field augmentation                                     | Users by admins, makers, or analysts | ✓ Aug 1, 2021         | -                    | Oct 2021                    |
| Maintain better visibility of revenue forecasts with additional calendar views                            | Users by admins, makers, or analysts | -                     | -                    | Jan 2022                    |
| Update quotas more easily with inline editing and rollups   | Users by admins, makers, or analysts | -                     | -                    | Jan 2022                    |

**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.

**MOBILE**

| <b>Feature</b>  | <b>Enabled for</b>                   | <b>Public preview</b> | <b>Early access*</b> | <b>General availability</b> |
|---|--------------------------------------|-----------------------|----------------------|-----------------------------|
| Easily find, interact, and create CRM information while on the go                         | Users by admins, makers, or analysts | Dec 2021              | -                    | Mar 2022                    |
| Effortlessly log and share information using text or voice on the mobile app              | Users by admins, makers, or analysts | Dec 2021              | -                    | Mar 2022                    |
| Prepare for your meeting using the mobile app to increase your chance at winning the deal | Users by admins, makers, or analysts | Dec 2021              | -                    | Mar 2022                    |
| With a single click, make a Microsoft Teams call and auto-capture engagement details      | Users by admins, makers, or analysts | Jan 2022              | -                    | Mar 2022                    |

# 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.

| RELATIONSHIP INTELLIGENCE  |                                      |                |               |                      |
|--|--------------------------------------|----------------|---------------|----------------------|
| Feature  | Enabled for                          | Public preview | Early access* | General availability |
| <a href="#">Accelerate deal velocity by identifying additional stakeholders with account-based contact discovery</a>           | Users by admins, makers, or analysts | Jan 2022       | -             | -                    |
| <a href="#">Get a complete view of target account engagements with the inclusion of custom activities in relationship KPIs</a> | Users by admins, makers, or analysts | -              | -             | Dec 2021             |

\* You are able to opt in to some features as part of early access on August 2, 2021, including all mandatory changes that affect users. To learn more, go to [Early access FAQ](#).

Description of **Enabled for** column values:

- **Users, automatically:** These features include changes to the user experience and are enabled automatically.
- **Admins, makers, marketers, or analysts, automatically:** These features are meant to be used by administrators, makers, marketers, or business analysts and are enabled automatically.
- **Users by admins, makers, or analysts:** These features must be enabled or configured by the administrators, makers, or business analysts to be available for their users.