

# Dynamics 365 Sales

2021 release wave 1

April 2021-September 2021

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

## Top things to know

### Release overview summary

With the 2021 release wave 1 of Dynamics 365 Sales, we're releasing some exciting new functionality, making some updates and optimizations based on valuable customer feedback, and including some bug fixes. Your continued feedback is important to us, so please reach out to us at [Sales Ideas](#).

The focus areas included in our 2021 release wave 1 are:

**Saving you time:** Get tasks done more easily to keep the focus on selling.

Sellers need to take several steps to identify the right customers and the next actions to take. We're excited to introduce more automation and sequences that will adapt to the changing needs and behaviors of your customers. The record side panel will allow you to customize your workspace to your unique business requirements and trigger key actions, all in the same place. The deal manager workspace will allow sellers to quickly view the right deals, get the right context, and take action in no more than one click.

**Intelligence at your fingertips:** Provide data-driven insights to help with decision making.

Sellers want data to help inform their day-to-day decisions, but also require important insights to be surfaced to help parse through the noise. Conversation intelligence will provide insights on top of video calls and calls with multiple participants. New filters in the deal manager workspace will allow sellers to easily find opportunities by searching, quickly setting a column filter, or choosing a time-based slicer. We're also introducing new, out-of-the-box data visualizations that will be both interactive and configurable. Sellers will now also be able to select "stats," out-of-the-box calculated metrics to help them quickly understand their pipeline.

**Helping you on the go:** Enhancing the mobile experience for sellers on the go.

Field sellers need to be able to manage their work from their mobile devices. With the Dynamics 365 Sales mobile experience, sellers can get up-to-date LinkedIn information on meeting participants, insights about a deal, account and contacts integrated with AI, and easy access to files, notes, emails, and more. Sellers can now also easily manage their activities and take follow-up actions promptly. Lastly, Microsoft Teams customer calls or online meetings can be transcribed and assigned to a Dynamics 365 record, with AI giving sellers access to insights, sentiment, and follow-up actions.

### Read the release plan

Explore the entire set of new capabilities planned for 2021 release wave 1.

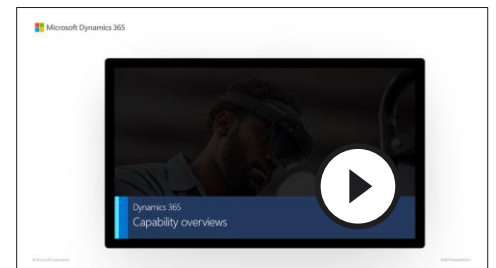
Visit: [aka.ms/Plan/2021RW1/Sales](https://aka.ms/Plan/2021RW1/Sales)



### Learn more about latest updates

Watch latest capability overviews in this wave.

Visit: [aka.ms/Updates/Sales](https://aka.ms/Updates/Sales)



### Join the Dynamics 365 community

Engage with experts and peers.

Visit: [aka.ms/Community/Sales](https://aka.ms/Community/Sales)

### Help us improve

Is this guide helpful?

Visit: [aka.ms/Overview/2021RW1/Feedback](https://aka.ms/Overview/2021RW1/Feedback)

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## Release summary

Dynamics 365 Sales continues to be the market-leading sales tool 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, drives more relevant and authentic engagements, and makes it more efficient for you to sell.

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The focus areas included in our 2021 release wave 1 are:

**Saving you time:** Get tasks done more easily to keep the focus on selling.

Sellers need to take several steps to identify the right customers and the next actions to take. We're excited to introduce more automation and sequences that will adapt to the changing needs and behaviors of your customers. The record side panel will allow you to customize your workspace to your unique business requirements and trigger key actions, all in the same place. The deal manager workspace will allow sellers to quickly view the right deals, get the right context, and take action in no more than one click.

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## What's new and planned

### 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. As part of our commitment to simplify customer experiences and help sellers focus on selling, we're introducing an intuitive mobile experience to offer quick access to customer information and make it easy to keep this information current.

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This application will provide experiences optimized for the core day-to-day seller's scenarios, leveraging Microsoft assets and the device's features. Using the new sales application, available on iOS and Android platforms, field sellers can be productive anywhere, anytime.

## Digital selling

Inside sellers manage customer lists. Sales organizations vary—some manage leads that need to be converted, others manage opportunities that need to be won. Our vision is to tailor Sales acceleration to meet specific business needs, whether managing leads, opportunities, or any custom entity.

## Collaboration with Microsoft Teams

Sales is a team sport. Sellers need to access subject matter expertise in the context of a deal, collaborate with account teams across the globe, and share artifacts with customers throughout the sales lifecycle. Integrating the powerful collaboration capabilities within Microsoft Teams represents a significant opportunity to accelerate workflow efficiency by bringing together all necessary stakeholders in the context of the deal they are pursuing.

Extending on the Microsoft Teams integration work already in market, a deeper set of capabilities will be introduced to integrate the power of Microsoft Teams into Dynamics 365, leveraging CRM data as an organizing layer for a user's collaboration activities. Chats and channels will be linked directly to sales records, enabling a contextual experience unique to the experience within Microsoft Teams. A full Microsoft Teams-embedded chat experience allows sellers to stay within their CRM workflows and collaborate with stakeholders for the critical information needed to close the deal faster.

## Pipeline manager workspace

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 pipeline manager workspace, sellers are more empowered to keep their sales pipeline healthy.

## Forecasting and pipeline analytics

Organizations need to accurately forecast and predict sales to truly understand business health and to make accurately informed strategic decisions. CEOs need to foresee demand for every product to undertake strategic business transformations, COOs need to understand the scope of the business to allocate resources efficiently, and CFOs need visibility into upcoming cash flows to craft financial plans for business growth. However, organizations often struggle to develop accurate sales forecasts that can truly inform these strategic decisions.

## Engagement platform

Aims to enable a smooth integration of various communication providers with Dynamics 365 Sales, so sellers can easily onboard digital selling capabilities.

## Quote to cash

This product area includes capabilities and experiences delivering a rich, intuitive, end-to-end quoting business process for sellers and their customers.

To learn more about the entire set of capabilities being delivered during this release wave, visit: [aka.ms/Plan/2021RW1/Sales](https://aka.ms/Plan/2021RW1/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/2021RW1/Sales](https://aka.ms/Plan/2021RW1/Sales)

### Product updates

Stay up to date on latest product updates.

[aka.ms/Updates/Sales](https://aka.ms/Updates/Sales)

### Release calendar

Know important release milestones.

[aka.ms/Updates/Calendar/Sales](https://aka.ms/Updates/Calendar/Sales)

### Licensing

Improve your understanding of how to license Dynamics 365.

[aka.ms/Licensing/Sales](https://aka.ms/Licensing/Sales)

### Product documentation

Find documentation for Dynamics 365.

[aka.ms/Documentation/Sales](https://aka.ms/Documentation/Sales)

### User community

Engage with Dynamics 365 experts and peers in the community.

[aka.ms/Community/Sales](https://aka.ms/Community/Sales)

### Upcoming events

Find and register for in person and online events.

[aka.ms/Events/Sales](https://aka.ms/Events/Sales)

### Product trials

Get started with Dynamics 365.

[aka.ms/Trials/Sales](https://aka.ms/Trials/Sales)

