

Dynamics CRM to Dynamics 365 Sales feature comparison



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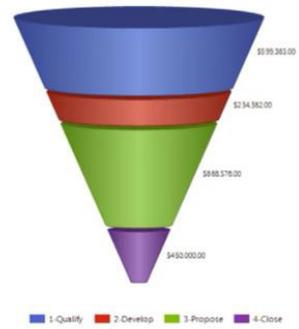
User Interface – 2011 vs 2013 vs 2016

Microsoft Dynamics CRM Overview

Sales Pipeline

Leads by Source Campaign

Cases By Priority (Per Day)



Dynamics 365 | Sales | Dashboards

Sales | Service | Marketing | Project Service | Settings | Insights

Business: Business Management, Templates, Product Catalog, Service Management, Mobile Offline, Sync Error

Customization: Customizations, Dynamics Marketplace

System: Administration, Data Management, System Jobs, Document Manage..., Auditing, Email Configuration

Insights: Activity Feeds Configu..., Activity Feeds Rules, Security, User Settings

There is no data to create the Sales Pipeline chart.

User Interface – 9.X vs UCI

This screenshot displays the Dynamics 365 CRM 9.X interface for a CRM account. The top navigation bar includes 'Sales', 'Accounts', and 'Intersys Group Sp. z o.o.'. The main content area is divided into several sections: a 'Timeline' with a note entry field and a 'What you missed' section showing 'Past due (1)', 'New posts (1)', and 'New activities (1)'; a 'Relationship Assistant' section with a note 'There are currently no insights.'; and a 'Primary Contact' section for 'Pawel Krajewski' with fields for 'Email' and 'Business'. A 'Contacts' table below lists 'Pawel Krajewski'. The left sidebar shows navigation options like 'My Work', 'Dashboards', 'Activities', 'Customers', 'Accounts', 'Contacts', 'Opportunities', and 'Management'.

This screenshot displays the Dynamics 365 UCI interface for a 'Sales Activity Dashboard'. The dashboard features three main visualizations: an 'Open Opportunities' funnel chart, an 'All Opportunities' pie chart, and an 'Open Leads' list. The funnel chart shows the 'Opportunity Pipeline by Sales Stage' with values: Close (\$103,814.00), Develop (\$23,281,410.00), Propose (\$22,544,363.00), and Quality. The pie chart shows 'Opportunity by Status' with 50 Open, 36 Won, and 11 Lost opportunities. The 'Open Leads' list includes names like Alex Wu, Allison Brown, Brian LaMee, Cat Francis, Cathan Cook, Claire Beauchamp, and Counts Vong (sample). The left sidebar shows navigation options like 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Activities', 'Customers', 'Accounts', 'Contacts', 'Sales', 'Leads', 'Opportunities', 'Competitors', and 'Collateral'.

User Interface

Functionality, Services and Tools	2011	2013	2015	2016	9.X	Cloud
Tailored user experience for every workstream with apps						
Branding with a custom logo and colors						
Configure Bing-like keyword search across tables						
Access recently used items and pin favorites						
Easily search across up to 10 record types						
Use Export to Excel to download worksheets						
Immersive Excel Online experience available from Export to Excel						
Rich in-line editing directly from grids and sub grids on the web or tablet apps						
Matching experience on mobile and browser						
Rich multi-media in context guided help						
Streamlined intuitive user interface to track a process through stages to completion						

Note: This table provides only a graphical representation. For detailed functionality please refer to the product guide



Documents & Reporting

Functionality, Services and Tools	2011	2013	2015	2016	9.X	Cloud
Quickly upload and download files and images associated with specific records with File and Image fields						
Database connected document storage which associates files with records and respects the security model without consuming database capacity						
SharePoint and OneDrive Integration						
Fetch based SSRS reports						
SQL based SSRS reports						
Power BI analytics in Dynamics 365 dashboards						

Note: This table provides only a graphical representation. For detailed functionality please refer to the product guide



Intelligence & Integrations

Functionality, Services and Tools	2011	2013	2015	2016	9.X	Cloud
Assistant notifies you of recent and upcoming activities to act						
Gather and track the customer metrics that matter with intuitive surveys with Customer Voice						
Integration with Power Apps Canvas Apps						
Cascade data across all Dynamics 365 on-premises and online systems						
Integration with Microsoft Teams						
Seamless and responsive integration between Outlook and Dynamics with App for Outlook						
Use OneNote to take or review customer notes from within a Dynamics 365 record						

Note: This table provides only a graphical representation. For detailed functionality please refer to the product guide



Process Automation

Functionality, Services and Tools	2011	2013	2015	2016	9.X	Cloud
Add logic to forms and editable grids without code						
Automatically perform calculations and build aggregations on dates, numbers or text						
Dynamics automation with a built-in workflow engine						
Process dialog guided page by page user interface for data entry						
Cross technology automation with Power Automate						

Note: This table provides only a graphical representation. For detailed functionality please refer to the product guide



Related Products

Functionality, Services and Tools	2011	2013	2015	2016	9.X	Cloud
Empower your teams to win more contracts, optimize resource utilization, accelerate project delivery, and get business insights from sales to project financials with Project Operations	<input type="radio"/>	<input checked="" type="radio"/>				
Provide a web-based user interface for your Dynamics data for customer self service with Power Apps Portals	<input type="radio"/>	<input checked="" type="radio"/>				
Bring together transactional, behavioral, and demographic data in real time to create a 360-degree view of your customers with Customer Insights	<input type="radio"/>	<input checked="" type="radio"/>				

Note: This table provides only a graphical representation. For detailed functionality please refer to the product guide



Sales & Marketing

Functionality, Services and Tools	2011	2013	2015	2016	9.X	Cloud
Campaigns and Marketing Lists	●	●	●	●	●	●
Lead to Opportunity tracking	●	●	●	●	●	●
Opportunity Quote Order Invoice	●	●	●	●	●	●
Customize the Opportunity Close dialog and the opportunity close entity	○	○	○	○	○	●
Better understand your business relationships, evaluate your activities in relation to previous successes, and choose the best path forward with Sales Insights	○	○	○	○	○	●
Connect LinkedIn data with Dynamics 365 Sales	○	○	○	○	○	●
Native integration with social channels (Facebook, Twitter, LinkedIn) with the modern Dynamics 365 Marketing app	○	○	○	○	○	●
Create seamless customer journeys to nurture leads and empower sales teams with the modern Dynamics 365 Marketing app	○	○	○	○	○	●
Conduct high value campaigns, create targeted marketing lists and manage events with the modern Dynamics 365 Marketing app	○	○	○	○	○	●

Note: This table provides only a graphical representation. For detailed functionality please refer to the product guide



Why customers should care?

Functionality, Services and Tools	2011	2013	2015	2016	9.X	Cloud
New end user experience with enhanced UI						
Reduce customizations due to added functionality. (e.g., Field Service, Omnichannel)						
Reduce hardware upgrade costs and IT maintenance						
Platform flexibility and elasticity						
Built-in intrusion security, high availability and disaster recovery						
Mobile-ready and access anywhere with cross-platform UI support						
Seamless integration with productivity tools						

Note: This table provides only a graphical representation. For detailed functionality please refer to the product guide



Why make the move to Dynamics 365?



Security

Take advantage of Microsoft's \$1 billion security investment and create robust security and access controls for apps and data with built features included in Dynamics 365 Finance & Supply Chain Management including:

- Physical data center, network connectivity, and service hosting platform
- Capabilities of Microsoft Azure - the built-in disaster recovery and 24/7 technical support to ensure cybersecurity



Flexibility

Gain benefits with monthly subscription model, including:

- Flexibility on operational cost vs capital costs
- Potential cost savings as you only buy what you need
- Elasticity to scale and grow based on needs



Reduce your IT maintenance

Reduce costs on company's server maintenance, including:

- Eliminate buying servers and required licenses supporting on-premise solution
- Avoid server room maintenance, monitor and update the underlying platform (*Windows, SQL Server*) and the application itself
- Reduce IT staff ERP system maintenance hours

Why make the move to Dynamics 365?



Cross-platform support

Ensure seamless business operations from anywhere at any time through Dynamics 365 - powered by a native HTML5 browser-based user interface that:

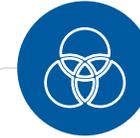
- Provides access on virtually any device (PC, tablet, phone) with any browser (IE, Chrome, Safari, Firefox, etc.) or platform (Windows, Mac, etc.)
- Removes need to rely on remote desktop or enterprise portals



Stay up-to-date with new functional enhancements

Take full advantage of Dynamics 365 evolving features and newest functionality:

- Seamless application updates to all customers
- New Dynamics platform updates to improve performance and user experience



Native in-built modern ecosystem

Seamless connections with Microsoft 365 apps, Power Platform apps and other external data sources in the industry:

- Native integration with Microsoft 365, Power BI, Teams, SharePoint, etc.
- Built-in connectors allow interaction with data in Adobe, Salesforce, Facebook, and SAP for example
- Configure business processes quickly with tools like Power Apps, Power Virtual Agents and Power Automate

Get started today!

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Learn more at aka.ms/D365Migrate

