

MICROSOFT CRM COMPARISON GUIDE

COMPARE THE 3 DIFFERENT MICROSOFT
CRM & SALES PROFESSIONAL OPTIONS

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Dynamics 365 offers 3 options for CRM software.

Below you can see the difference between the 3 options. The first is basic Relationship Management functionality within Dynamics 365 Business Central, Microsoft's SMB ERP software. The second and third are license variations of Dynamics 365 for Sales, Microsoft's dedicated CRM solution.

BUSINESS CENTRAL: RELATIONSHIP MANAGEMENT

WHAT

Dynamics 365 Business Central is Microsoft's finance and ERP solution targeted at SMBs. It's designed to support businesses by managing their finances and operations, including a basic Relationship Management module to track pre-sales processes such as contact management and opportunity tracking. The solution is focussed on the ease of producing accurate finances.

WHY

If your primary reason to change software is to improve the management of your financials and operations, but you also need some very basic capabilities to track and report on contacts and opportunities. Integration with other Office 365 tools such as Outlook and Teams isn't a priority and you don't envisage your company needing more CRM functionality in the foreseeable future.

SALES PROFESSIONAL

WHAT

Dynamics 365 Sales Professional is Microsoft's core CRM offering. It offers all the comprehensive sync capabilities with emails, appointments, Teams etc. as well as the most commonly used CRM processes and capabilities, such as contacts, accounts, leads, opportunities and email marketing etc.

It also offers standard integration with Dynamics 365 Business Central as well as a platform to further enhance this integration as your business requirements change.

WHY

Your primary reasons to consider a new CRM system is to consolidate and centralise your current sales processes, improve visibility and reporting and utilise your existing Office 365 tools to improve your sales conversions.

A strong integration with Outlook is required to help track emails, manage tasks and appointments and contact customers through email marketing.

Though you may not need it day one, you'd like some flexibility to customise the out-of-the-box process to further tailor the solution to your business needs.

You may also want the possibility to upgrade your CRM solution to a more comprehensive and customisable solution within the next few years.

SALES ENTERPRISE

WHAT

Dynamics 365 Sales Enterprise is Microsoft's feature-rich CRM solution. As well as providing all functionality and Office 365 collaboration within Sales Professional, it offers unrestricted customisation of processes and entities – meaning you can tailor the solution to your exact needs.

It offers advanced sales features such as territories, business units, competitor tracking, sales goals, playbooks and forecasting.

WHY

Your primary reason to consider a new CRM system is to develop a solution that meets all your business needs without compromise. As well as adopting standard sales processes, you'd like to create custom entities to control data around concepts that are unique to your business or industry.

Though you may not need it day one, you may be interested in utilising other Dynamics 365 applications such as Customer Service, Field Service or Project Operations so that all your systems are under one roof.

	RELATIONSHIP MANAGEMENT	SALES PROFESSIONAL	SALES ENTERPRISE
FUNCTIONALITY			
Contact Management	Customer & Vendor Contacts Only	Yes	Yes
Account Management	Customer & Vendor Contacts Only	Yes	Yes
Opportunity Management		Yes	Yes
Pipeline Tracking	Yes	Yes	Yes
Production Management	Yes	Yes	Yes
Price Lists	Yes (inventory module required)	Yes	Yes
Task/Activity Management	Yes (inventory module required)	Yes	Yes
Contact & Account History	-	Yes	Yes
Marketing Lists	-	Yes	Yes
Sales Cycles & Stages	-	Yes	Yes
Sales Campaigns	-	-	Yes
Sales Goals	-	-	Yes
Territory Management	-	-	Yes
Forecasting	-	-	Yes
Product Families & Relationships	-	-	Yes
Competitor Tracking	-	-	Yes
Sales Teams	-	-	Yes
Sales Playbooks	-	-	Yes
Knowledgebase	-	-	Yes
Embedded Intelligence	-	-	Yes
Business Units	-	-	Yes
OFFICE CONNECTIVITY			
Email Tracking	Limited	Yes	Yes
Calendar Appointments	-	Yes	Yes
Task Tracking	-	Yes	Yes
SharePoint Link	-	Yes	Yes
Standard Power BI App Available	-	Yes	Yes
Mobile/Tablet app	-	Yes	Yes

FINANCE INTEGRATION			
Business Central Integration	Native	Standard	Standard
Custom Integration	-	Yes (Development required)	Yes (Development required)
CONFIGURATION CAPABILITIES			
Custom Entities	-	15	Unlimited
Guided Process Flows	-	5	Unlimited
Queues	-	15	Unlimited
Forms & Views	Standard Only	2 per entity	Unlimited
Third Party App Installs	Unlimited	10	Unlimited
LICENSING			
License Required	D365 Business Central Essentials	D365 Sales Professional or D365 Sales Enterprise Attach	D365 Sales Enterprise or D365 Sales Enterprise Attach
Team Member License Available	Yes	Yes	Yes
Additional Storage Space Per User	-	-	Yes – 250MB Database & 2GB File Capacity
D365 Customer Voice Entitlement	-	-	2000 survey responses
PowerApps Entitlement	-	-	Unlimited
Upgrade Path	-	Yes – to Sales Enterprise	N/A
IMPLEMENTATION			
Dynamics Fanatics Implementation Packs	Relationship Management pack (as part of a new or existing BC Implementation)	Sales Professional Implementation pack	Contact Dynamics Fanatics



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GET IN TOUCH TODAY

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