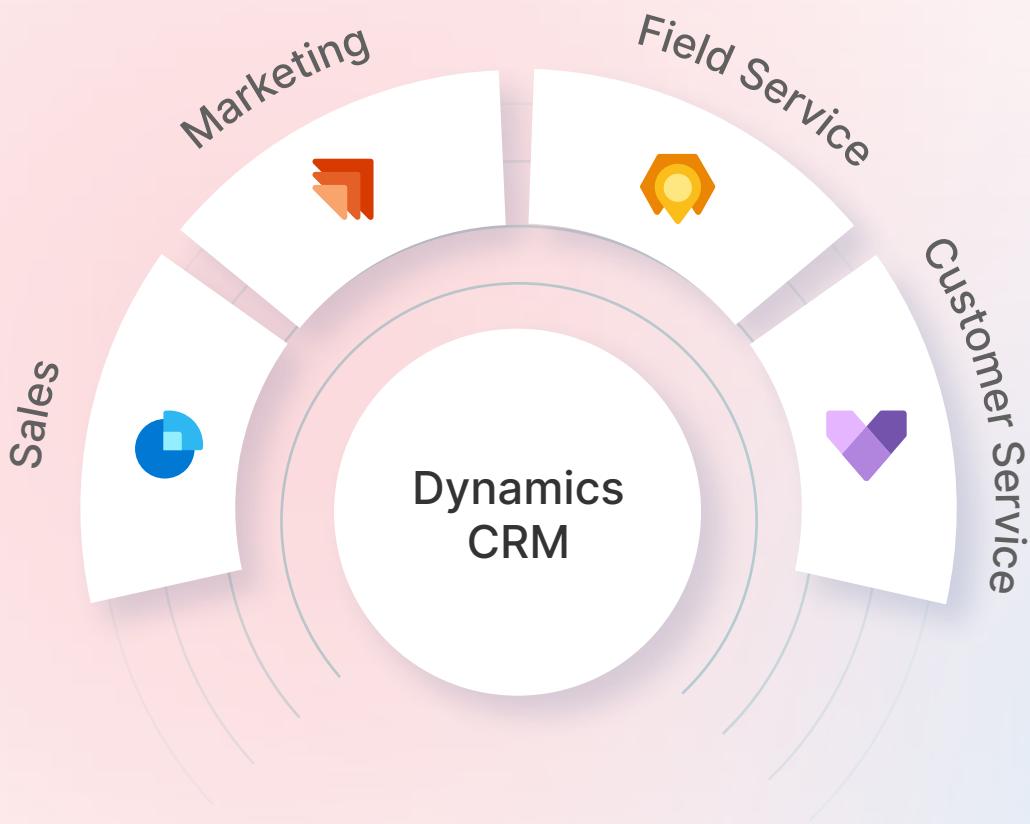


# A Complete Guide to Dynamics CRM



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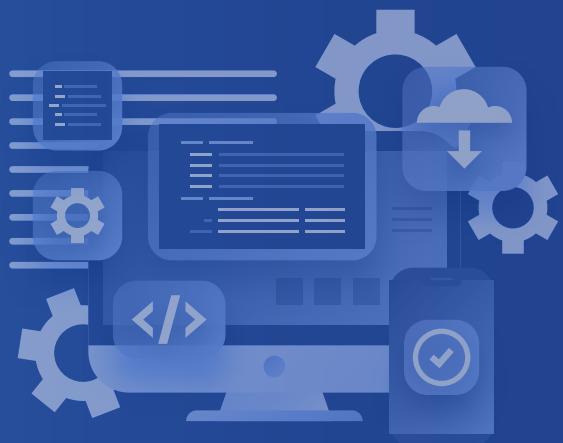
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# Overview



Microsoft Dynamics CRM is simple yet powerful tool that can help businesses streamline the entire customer relationship journey. Dynamics 365 CRM is a flexible and customizable tool that offers numerous capabilities, including tracking sales leads, managing marketing campaigns, accelerating sales performance, nurturing sales-ready leads, and customer tracking.



Businesses say that CRM software has improved their access to customer data.

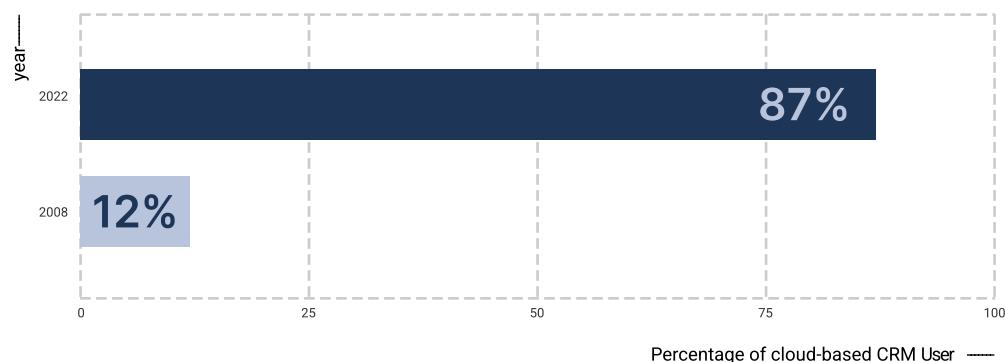
But before we get into the depths of Dynamics 365 CRM, let's take a step back and understand the need for CRM for modern businesses.

## Need of CRM for Modern Businesses?

Organizations used to deal with misplacing of clients' information that could cost a financial loss. Also, such scenarios cause the loss of more than one client.

Businesses need proactive data management strategies to eliminate such cases. Even so, salespeople try to convert the same prospect altogether, leading to an unfriendly environment for the team.

The right CRM solution can eliminate all such issues by centralizing the database and establishing a connection between the team, leveraging the power of AI and BI to build a constant flow of sales journeys.



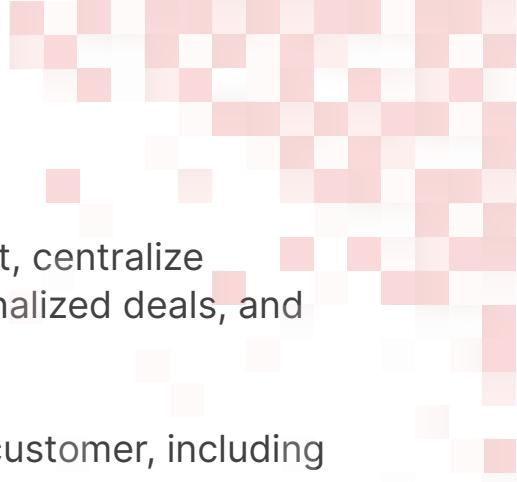
The sole aim of a suitable CRM solution is to help organizations build, develop, and retain healthy relationships with customers. The captured customer data makes the sales team pitch them with attractive offers for new customers and personalized offers for existing customers.



Business report increase in productivity accessing CRM using Mobile device

## What is Microsoft Dynamics 365 CRM?

Microsoft Dynamics 365 is a CRM application designed to improve and streamline customer relationships and keep them interested throughout the sales process.



It enables salespeople to manage customer support, centralize customer data, leverage sales insights, offer personalized deals, and much more.

A business contains a lot of information about the customer, including demographics, age, work, and income, whereas an advanced application like Dynamic 365 CRM allows businesses to manage, record, and maintain all such information effortlessly. It provides seamless features and capabilities to the users, allowing them to track all customer engagement and nurture it further.

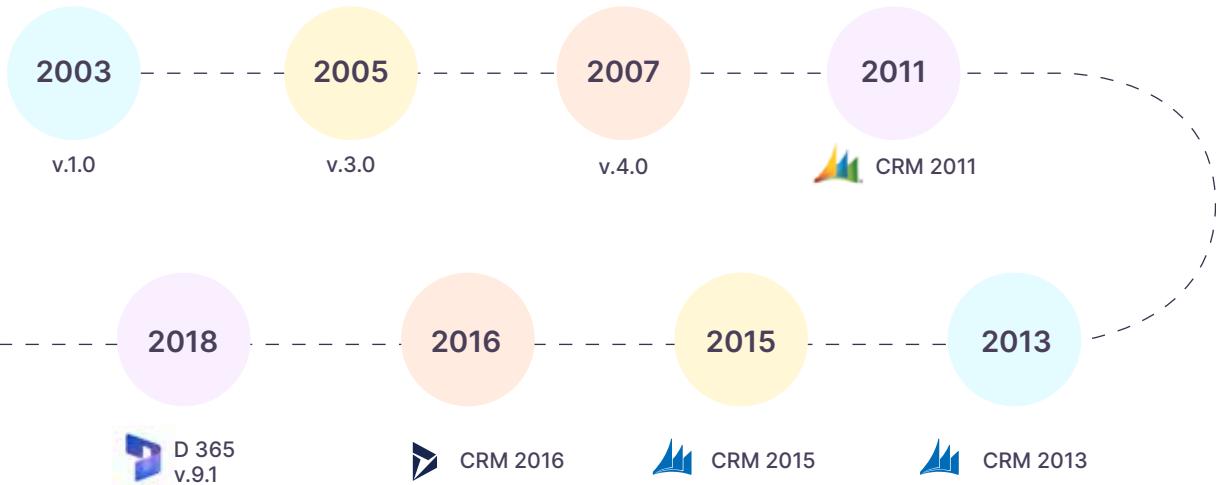
In 2016, Microsoft released an update where Dynamics CRM evolved into a totally new version with the name Microsoft Dynamics 365 Customer Engagement. But, before getting into more details, let's know the history.

# History of Dynamics CRM



For the last 10 years, small, medium, and large industries have been using Microsoft Dynamics CRM. During these years, Microsoft has been working to increase the performance and meet the modern requirements of the business.

Since then, more than seven versions have been released, which are:



## Microsoft Dynamics CRM 1.0 (2003)

It was formerly known as Microsoft Business Solutions Customer Relationship Management 1.0 and later changed to CRM 1.0 to simplify its name. This version empowers the customers to view the open activities, access quick-create menus, navigate between different data panels, use sales and service environments, and utilize statistics data.

## **Microsoft Dynamics CRM 3.0 (2005)**

It was a powerful tool to aid businesses in streamlining their sales, service, and marketing processes. MS Dynamics CRM 3.0 was the first version to offer different server deployment options for all industries.

## **Microsoft Dynamics CRM 4.0 (2007)**

It possesses powerful features, including direct mail joining, enhanced data security, importing and exporting insights, unified access to multiple users, and inbuilt support for the Windows operating system. It was the first CRM that supported more than 25 languages.

Mainstream support for 4.0 and previous versions ended in 2015, and extended support ended in April 2018.

## **Microsoft Dynamics CRM 2011**

It became the first version that offered customization, web resources installation, and real-time data insights for insightful decisions. With this version, Microsoft started releasing updates twice or thrice a year with automatic installation with cloud deployment.

## **Microsoft Dynamics CRM 2013**

MS Dynamics CRM offers real-time data management with anywhere and anytime access to data or any process using any device, whether web, mobile, or PC. The user interface becomes simple and responsive across all devices.

## **Microsoft Dynamics CRM 2015**

This version of MS Dynamic CRM is released with a robust user-friendly experience, access to social engagement, enhanced CRM capabilities, stable data security, and much more. Technologies like business intelligence were added to provide a more seamless customer experience.

## Microsoft Dynamics CRM 2016

This version was one of the finest versions, containing enhanced BI capabilities, customer engagement, data reporting, marketing campaigns, tracking real-time data, and more. Later, this application was added to Microsoft Dynamics 365; a complete suite of ERP and CRM applications.

MS Dynamics 365 is a powerful suite of applications for total business management. It covers a wide range of application areas such as sales, marketing, service, finance, commerce, and supply chain.

The latest version was released in 2018 as Microsoft Dynamics 365 Version 9.1.

# Apps of Microsoft Dynamics CRM

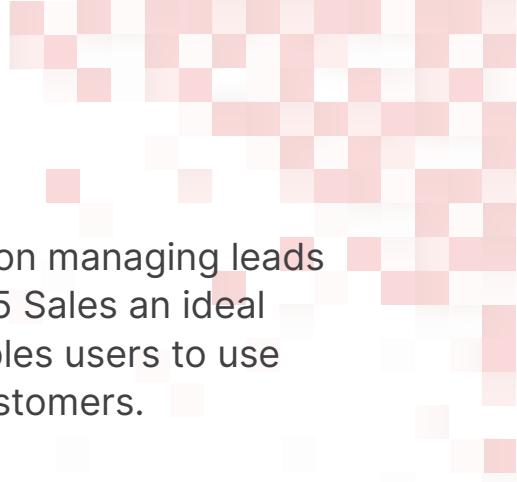


Microsoft Dynamics 365 Customer Engagement consists of a few applications, which are Dynamics 365 Sales, Customer Service, Marketing, Field Service, Customer Insights, Customer Voice, and Project Operations.



## Microsoft Dynamics 365 Sales

From capturing a lead to nurturing it, MS **Dynamics 365 Sales** allows the sales team to streamline the entire sales process. The MSD365 sales application integrates the customer's data, shortlists the leads based on different parameters, and shares the data with the sales team for further nurturing process.



Dynamics Sales empowers the sales team to focus on managing leads and building customers' trust, making Dynamics 365 Sales an ideal solution for growing organizations. D365 sales enables users to use data insights to generate personalized offers for customers.

### The Top Features of Dynamics 365 Sales:

- It helps in nurturing deals faster using personalized offers.
- Automate manual tasks like sales reports and forecasts.
- It provides customer satisfaction with reduced response time.
- Good customer record keeping.
- It enables users to build strong relationships with customers.

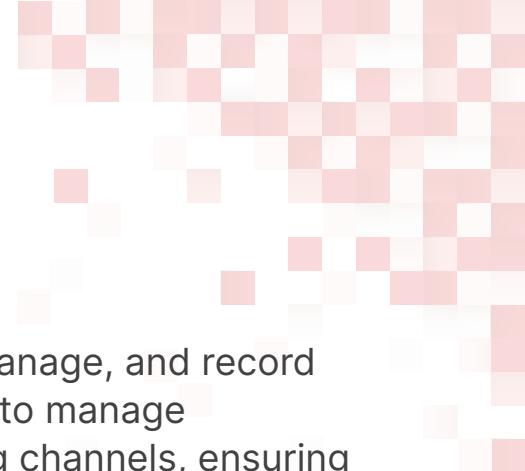
## Dynamics 365 Customer Service

The Dynamics 365 Customer Service allows the organization to simplify the customer requirements, issues, and queries, and process them with the best possible solution. This application comes with various automated applications, like chatbots and customer portals, capable of managing standard queries with accurate answers.

**D365 Customer Service** offers a unified portal for various assisted services, including customer service portals, ticket management, and self-assistance.

### Top features of D365 Customer Service:

- Customer tracking based on open tickets.
- Set priority on queries.
- Share terms and conditions to the customers.
- Create dashboard and reports based on customer's data and share with the team.
- Putting cases on queue based on priority.



## Dynamics 365 Marketing

Dynamics 365 Marketing enables users to track, manage, and record marketing campaigns in real-time. It enables users to manage campaigns across multiple platforms and marketing channels, ensuring consistent data flow across all channels and resulting in more lead conversions.

**Dynamics 365 Marketing** offers users the ability to create interactive and attractive landing pages using a drag-and-drop method. Such landing pages can be personalized based on customer information with more signs of conversion. Also, it has a built-in event management function to manage the entire task with more ROI.

Top features of D365 Marketing:

- Build customers trust more effectively.
- Easily integrates the website with CRM.
- Build credibility among customers via marketing campaigns.
- Helps understand customer as well as competitor behavior.
- Create reports and dashboards for team with accurate customer insights.

## Dynamics 365 Field Service

The D365 Field Service application allows the organization to deliver on-site solutions with real-time tracking and record management. Also, it comes with task scheduling, workflow management, record keeping, and automation of manual tasks.

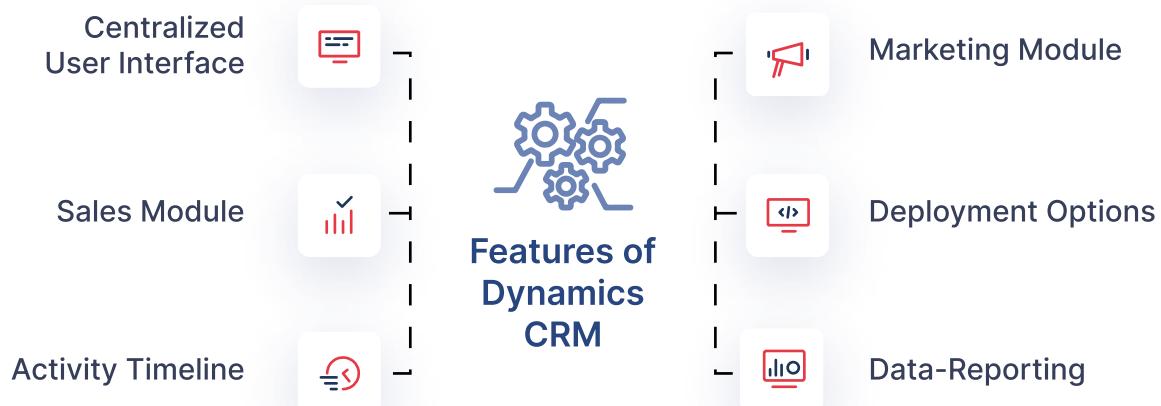
**D365 Field Service** can be configured to share the information and real-time updates about the ticket with the customer, making them aware of the status of their query. It provides an integrated platform for the sales team, technician, agent, vendor, and customer for a collaborative approach with a smooth issue resolution journey.

Top feature of Dynamics 365 Field Service:

- Uses AI to resolve standard queries.
- Connect customer, agents, and users altogether.
- Provides real-time tracking of technicians.
- Enable customers to schedule appointment.
- Records all data including billing, warranty, terms and conditions, and material.

# Features of Microsoft Dynamics 365 CRM

Dynamics 365 CRM includes a plethora of features and capabilities that assist users in understanding data insights and building stronger customer relationships. Some of the features are listed below:



## Centralized User Interface

MS Dynamics 365 CRM offers a structured user interface across all platforms. With integrations and specific customizations, users can avail themselves of clean navigation throughout the application. Using the cloud, the changes in data will be updated to all users in real-time.

## Sales Module

Microsoft Dynamics 365 CRM business software comes with a sales module to track, report, and improve the methods implemented in sales for better conversions with fewer resources. It shows exact sales metrics, team performance, and value reports to know the sales status of a business.

## Activity Timeline

The Activity Timeline tracks all the actions made by users on a task and daily basis. Also, this enables the user to find the exact information using the timeline in case of need.

## Marketing Module

The marketing module lets the users track the marketing campaign, report the data, and calculate ROI. It helps the users to establish a connection with lucrative offers.

## Deployment Options

Microsoft Dynamics 365 CRM offers three deployment options for all industries: cloud, on-premises, and hybrid deployment. Cloud deployment is used to store data on Microsoft Azure servers for 24X7 data availability. On-premises allows you to store data on company premises. A hybrid deployment provides a mix of both.

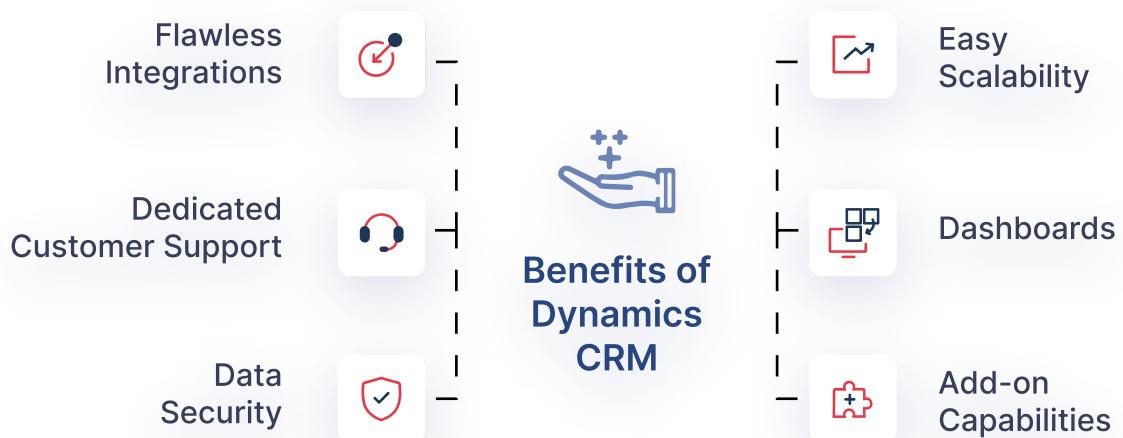
## Data-Reporting

The data reporting feature in Microsoft Dynamics 365 CRM is a must-have feature in all CRM applications. It tracks, records, and visualizes all data and its status, making it available whenever it is needed. Also, it enables users to submit data requests for clients, activities, and contracts.

# Benefits of Microsoft Dynamics 365 CRM



Dynamics CRM provides a unified platform to facilitate all the customer relationship management processes and operations from a single dashboard. It provides numerous benefits to transform the customer relationship as strongly as possible. Some of the benefits are discussed below:



## Flawless Integrations

Integration of native and third-party applications makes the system more powerful and stable while reducing user effort. MS Dynamics CRM allows app integrations leveraging the power of AI, ML, and the cloud.

## Dedicated Customer Support

The dedicated customer support allows the users of MS Dynamics to regulate and classify queries based on priority easily. Even so, users can create tickets for queries with real-time status accessible to all, whether they are customers or team members.

## Data Security

This application is built on a fully secured platform that offers full safety of data along with the trust of Microsoft. The data remains secure throughout the data flow from one port to another.

## Easy Scalability

A growing company needs more resources to handle the complexity of operations. Through this application, the company can collaborate with its dynamic implementation partner to boost the servers' performance and capacity.

## Dashboards

A company has a sizable database of clients based on several criteria and classifications. Data utilization is made simple and efficient by MS Dynamic CRM, which enables users to create and share dashboards based on categorized data.

## Add-on capabilities

With 200+ apps and services, MS Dynamics CRM enables users to automate difficult and time-consuming processes. This application has access to AppSource, which simplifies the process of installing or integrating the apps.

# Dynamics 365 CRM Pricing and Licensing



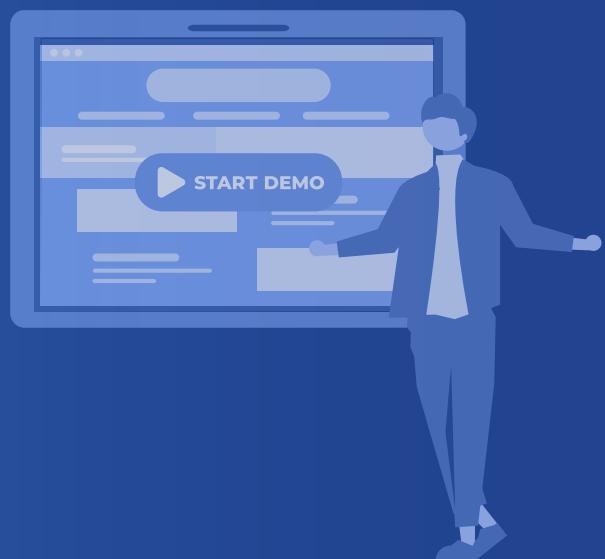
The Dynamics 365 CRM license and the pricing of all apps are based on a subscription model. Users can avail of the whole Dynamics 365 app or a standalone app on a per-month basis. The pricing is listed below:

Sales	Per user / month	Subsequent Price(Tenant)
Sales Professional	£49	£15.10 per user/month
Sales Enterprise	£71.60	£15.10 per user/month
Sales Premium		£101.80
Microsoft Relationship Sales		£108.34

Service	Per user / month	Subsequent Price(Tenant)
Customer Service Professional	£37.70	£15.10 per user/month
Customer Service Enterprise	£71.60	£15.10 per user/month
Field Service	£71.60	£15.10 per user/month

Marketing	Per user / month	Subsequent Price(Tenant)
Marketing	From £1,131.20	£565.60 per user/month

# How to get Microsoft Dynamics CRM trial?



If you want to use the CRM and its features for your business or not, you can avail Microsoft Dynamics CRM trial free for 30 days.

- To avail the trial offer, go to Microsoft Dynamics 365 CRM trial page and select the app you want to access; as shown in below picture.

The screenshot shows a web browser window with the URL [dynamics.microsoft.com/en-us/dynamics-365-free-trial/](https://dynamics.microsoft.com/en-us/dynamics-365-free-trial/). The main heading is "Get started with a Dynamics 365 free trial". Below it, a sub-headline reads: "Experience what Dynamics 365 has to offer. Try it free and learn how these intelligent business applications go beyond traditional CRM and ERP to help you adapt, innovate, and delight every customer." A large circular image on the right shows a woman working on a laptop. The navigation bar at the top includes links for Sales, Service, Marketing, Customer data platform, Commerce, Finance and operations, Supply chain, Customer feedback, and Human resources. On the right side, there are three small icons: a speech bubble, a pencil, and a magnifying glass. The "Sales" section is expanded, showing a sub-section for "Dynamics 365 Sales" with the text: "Activate digital selling to meet buyers where they are—helping you build better relationships and close more deals." A prominent "Try for free >" button is located at the bottom of this section.

- Select the app you want to use as a trial and click on Try for Free button.
- Once you click on it, a pop-up will be displayed containing further details to access the trial; as shown in below picture.



## Try Dynamics 365 Sales free for 30 days

Help your team activate digital selling to close more deals and increase revenue. In this trial, you'll learn how to:

- Accelerate your sales.
- Manage your opportunities.
- Forecast your revenue.
- Work on the go with the mobile app.

Use sample data or your own. No credit card required or software to install.

The screenshot shows a sign-up form for a free trial of Dynamics 365 Sales. At the top right is a close button (X). Below it is the Dynamics 365 Sales logo. The main heading is "Let's get started". A sub-instruction says "Enter your email to start your free trial." followed by a red asterisk. There is a text input field for the email address. Below the input field is a terms and conditions agreement section. It includes a checkbox, a statement about agreeing to Microsoft's online subscription agreement and supplemental terms, and a note that some preview features may be enabled by default. A "Learn More" link is provided for the terms. At the bottom is a blue "Start your free trial" button.

- Enter the e-mail ID and you can start using your free trial.

# Dynamics 365 CRM Integration



The Dynamics 365 CRM integration works best to make the system more efficient, powerful, and smooth across all devices. This makes the data flow smoother and aids the sales team in enhancing the customer support experience.

Managing customer communications on time may get laborious because you have to frequently check Outlook or any other third-party email software to stay updated. Users may easily manage all mailing requirements by integrating Dynamics CRM with Outlook 365 to streamline communication.

Users may avail themselves of a handful of capabilities by integrating Outlook 365 for Dynamics CRM, including receiving emails in real-time, more email recipient details, scheduling meetings, receiving reminders, monitoring email status, generating new records, and much more.

Additionally, the integration of Microsoft Dynamics CRM Online with Office 365 provides enormous capabilities for improving productivity, client connections, keeping real-time data, tracking activities, and much more.

Microsoft Office 365 contains numerous apps, including Excel, PowerPoint, and Word, to help increase the overall efficiency of users, and the integration of Microsoft Dynamics CRM with Office 365 simplifies sales, marketing, and customer support operations.



# Comparison of Microsoft Dynamics 365 CRM with others

Microsoft Dynamics 365 CRM is an ideal tool for businesses to manage their sales and marketing departments, making the processes smoother and more efficient.

In the market, various other CRM tools are available on the market. It is important that you should be aware of all the top comparisons to select the right CRM for your business to boost growth and scalability.

## Dynamics 365 CRM VS Salesforce

One of the top CRM competitors in the market today is Salesforce. It facilitates team cooperation and helps users with the sales process. It is Microsoft CRM's main rival. Below are the details of Dynamics 365 CRM vs Salesforce.

 Dynamics CRM	 Salesforce
Flexible and low-cost pricing structure	High-cost pricing model
Best CRM for SMBs	Best for Large organisations
Cloud and On-premises deployment available	Only Cloud deployment available
Simple and responsive interface	A bit difficult user interface
Availability of Operations Management features	Operations Management features missing
Responsive user-experience across all devices	Slightly different user-experience across devices
Unlimited technical assistance	Limited assistance and support
Offer good customization (native and third-party)	Offer native customizations only

## Dynamics 365 CRM vs Dynamics 365 Business Central

 Dynamics 365 CRM	 Business Central
CRM (customer relationship management) solution for small and large industries.	ERP (enterprise resource planning) solution for SMBs.
Built to manage sales, marketing, and customer experience.	Built to manage business processes of finance, manufacturing, shipping, and more.
Advanced level solutions to track, acquire, and convert leads	Entry level solution to manage basic operations

## How to choose right Dynamics 365 CRM Partner?

No matter the industry, there are many Dynamics 365 CRM partners on the market who assert that they are the best option for Dynamics CRM setup.

Before selecting the **best CRM partner**, the customer must take into account a number of factors, such as

- Company's portfolio
- Industries it serves
- Customer service
- Feedback from previous clients
- Type of implementation (standard or customised).

A right Microsoft Dynamics CRM consultant will help you grow your business, but a wrong choice would cause the business to suffer financial loss with a decline in growth.



# Why choose Dynamics Square as Dynamics 365 CRM implementation partner?

There are many reasons to choose Dynamics Square as your Dynamics 365 CRM implementation partner.

- We have a proven track record of delivering successful projects on time and on budget.
- Our experienced consultants have extensive knowledge in accurately implementing almost all applications that fall under the Dynamics 365 umbrella.
- We have a team of experienced and certified consultants who are experts in implementation, upgrade, and support services to help you get the most out of your investment.
- We also offer a comprehensive suite of services to support your implementation or upgrade services, including training, change management, and ongoing support.

[Schedule a free Dynamics 365 CRM Demo](#)

And let our team help you with getting D365 CRM to work the way you need.