

 Microsoft Dynamics 365

# Dynamics CRM to Dynamics 365 Customer Service feature comparison

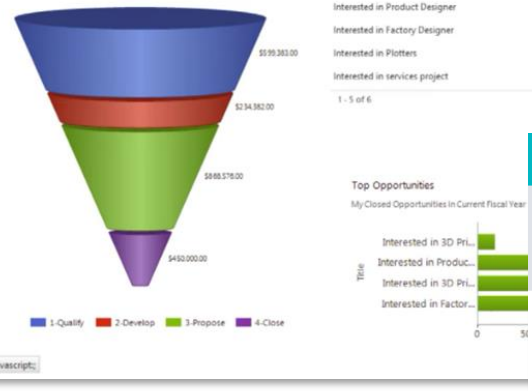


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# User Interface – 2011 vs 2013 vs 2016

Microsoft Dynamics CRM 2011 interface showing a dashboard with a sales pipeline funnel chart and a table of open opportunities.



Dynamics 365 2016 interface showing a modern navigation bar and a grid of functional areas.

Business	Customization	System	Insights
Business Management	Customizations	Administration	Activity Feeds Configur...
Templates	Dynamics Marketplace	Data Management	Activity Feeds Rules
Product Catalog		System Jobs	Security
Service Management		Document Managemen...	
Mobile Offline		Auditing	
Sync Error		Email Configuration	

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 contact record. The left-hand navigation pane includes sections for 'My Work', 'Customers', and 'Management'. The main content area is divided into several panels: a top summary section with fields for 'Annual Revenue', 'Number of Employees', and 'Owner' (Justyna Kolodziejczyk); a 'Timeline' section with a 'What you missed' notification; a 'Relationship Assistant' section; and a 'Primary Contact' section for Pawel Krajewski. A 'Contacts' list is visible at the bottom.

This screenshot shows the Dynamics 365 UCI interface for a 'Sales Activity Dashboard'. The left navigation pane is simplified, focusing on 'My Work', 'Customers', 'Sales', and 'Collateral'. The dashboard features three main visualizations: a funnel chart for 'Open Opportunities' by sales stage (Close, Develop, Propose, Quality) with values of \$103,814.00, \$23,281,410.00, \$22,544,363.00, and an unlabeled bottom segment; a pie chart for 'All Opportunities' by status (Open, Won, Lost) with counts of 11, 50, and 36; and a list of 'Open Leads' with names and brief descriptions.

# 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						
Suggest similar cases and knowledge articles to agents using embedded machine learning AI						
Supervisors get real-time and historical visibility into the operational efficiency of agents and the utilization across various channels with Omnichannel Insights						
Unified Service Desk						
Integration with Power Apps Canvas Apps						
Cascade data across all Dynamics 365 on-premises and online systems with dual-write						
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 type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Gather and track the customer metrics that matter with Customer Voice intuitive surveys	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<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 type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Deliver onsite service to customer locations with an application which combines workflow automation, scheduling algorithms, and mobility with Field Service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Real time mixed reality collaboration with Remote Assist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<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 type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

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





# Service

Functionality, Services and Tools	2011	2013	2015	2016	9.X	Cloud
Case Resolution	●	●	●	●	●	●
Author and publish a searchable knowledge base of articles for your team to find quick answers	◐	◐	◐	◐	●	●
Customize the Case Resolution dialog and the case resolution entity	○	○	○	○	○	●
Plug and play web-based integration with third-party telephony providers	○	○	○	○	○	●
Contextual customer identification, real-time notification, integrated communication, and agent productivity tools like KB integration, search, and case creation with Omnichannel	○	○	○	○	○	●
Enterprise-grade routing and work distribution engine allows customers to configure agent presence, availability, and routing rules with Omnichannel	○	○	○	○	○	●
Instantly connect and engage with their customers across digital messaging channels with Omnichannel	○	○	○	○	○	●

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# 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						

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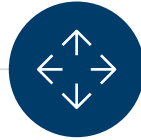
# Why make the move to Dynamics 365?



## 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 Customer Engagement apps 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 CRM 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:

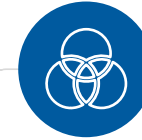
- Provides access on virtually any device (PC, tablet, phone) with any browser (IE, Chrome, Safari, Firefox, etc.) or platform (Windows, Mac, etc.)
- Removes need to rely on remote desktop or enterprise portals



## 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

 Microsoft Dynamics 365

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