Microsoft Dynamics 365

Dynamics CRM to Dynamics 365 Sales feature comparison

Start your migration journey
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User Interface – 2011 vs 2013 vs 2016

User Interface – 9.X vs UCI

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

Least ○ ◔ ◑ ◕ ● → Most

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	○	○	○	◔	◔	●

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Least ○ ◔ ◑ ◕ ● Most

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	○	○	○	○	○	●

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Least ○ ◔ ◑ ◕ ● Most

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	○	○	○	○	◔	●

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Least ○ ◔ ◐ ◕ ● Most

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	○	○	○	○	○	●
Provide a web-based user interface for your Dynamics data for customer self service with Power Apps Portals	○	○	○	○	○	●
Bring together transactional, behavioral, and demographic data in real time to create a 360-degree view of your customers with Customer Insights	○	○	○	○	○	●

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Least ○ ◔ ◑ ◕ ● Most

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	○	○	○	○	○	●

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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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Least ○ ─ ◔ ─ ◐ ─ ◕ ─ ● → Most

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
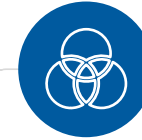
Native in-built modern ecosystem

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

Microsoft Dynamics 365

Get started today!
Migrate with Microsoft

Learn more at aka.ms/D365Migrate