



Dynamics CRM to Dynamics 365 Sales feature comparison



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User Interface – 2011 vs 2013 vs 2016

The image displays three screenshots of the Microsoft Dynamics CRM user interface, illustrating the evolution from 2011 to 2016.

2011 Screenshot: Shows the Microsoft Dynamics CRM Overview dashboard. It features a sidebar with navigation options like Sales, Marketing, and Service. The main area contains a Sales Pipeline funnel chart, a table of Leads by Source Campaign, and a table of Cases by Priority (Per Day). The interface is characterized by a classic web-based design with a sidebar and a main content area.

2013 Screenshot: Shows the Microsoft Dynamics CRM Overview dashboard with a more modern design. It features a navigation bar at the top with tabs for DASHBOARDS, ACTIVITIES, ACCOUNTS, CONTACTS, LEADS, OPPORTUNITIES, and COMPETITORS. The main area contains a Sales Pipeline funnel chart, a table of My Open Opportunities, and a table of Top Opportunities. The interface is characterized by a ribbon-style navigation bar and a more organized layout.

2016 Screenshot: Shows the Dynamics 365 interface. It features a navigation bar at the top with tabs for Sales, Service, Marketing, Project Service, Settings, and Insights. The main area contains a Business Management section, a Customization section, a System section, and an Insights section. The interface is characterized by a modern, clean design with a navigation bar and a more organized layout.

Sales Pipeline Funnel Chart Data (2011):

Stage	Value
1-Qualify <td>\$1178,000.00</td>	\$1178,000.00
2-Develop <td>\$493,000.00</td>	\$493,000.00

Sales Pipeline Funnel Chart Data (2013):

Stage	Value
1-Qualify <td>\$1093,383.00</td>	\$1093,383.00
2-Develop <td>\$234,382.00</td>	\$234,382.00
3-Propose <td>\$488,576.00</td>	\$488,576.00
4-Close <td>\$450,000.00</td>	\$450,000.00

My Open Opportunities Table (2013):

Title	Potential Customer	Est. Close Date	Est. Revenue	Probability	Rating
Interested in Product Designer		4/2/2013	\$349,383.00	70	Hot
Interested in Product Designer	Bold Sales Accessories	6/11/2013	\$234,382.00	20	Cold
Interested in Factory Designer	Coho Winery	6/18/2013	\$182,796.00	50	Warm
Interested in Plotters	Daring Rider	7/28/2013	\$685,780.00	50	Warm
Interested in services project	Adam Smith	7/31/2013	\$450,000.00	50	Warm

Top Opportunities Table (2013):

Title	Value
Interested in 3D Pri...	31
Interested in Produc...	25
Interested in 3D Pri...	15
Interested in Factor...	10

Business Management Section (2016):

- Business Management
- Templates
- Product Catalog
- Service Management
- Mobile Offline
- Sync Error

Customization Section (2016):

- Customizations
- Dynamics Marketplace

System Section (2016):

- Administration
- Data Management
- System Jobs
- Document Manage...
- Auditing
- Email Configuration

Insights Section (2016):

- Activity Feeds Configu...
- Activity Feeds Rules
- Security
- User Settings

Footer (2016): 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 left-hand navigation pane lists 'My Work', 'Dashboards', 'Activities', 'Customers', 'Accounts', 'Contacts', 'Opportunities', and 'Management'. The main content area is divided into several sections: 'Timeline' with a note entry field and a 'What you missed' summary; 'Relationship Assistant' with a 'There are currently no insights' message; and a 'Primary Contact' section for 'Pawel Krajewski' with fields for 'Email' and 'Business'. A 'Contacts' list below shows 'Pawel Krajewski' with a 'Full Name' and 'Email' column. The bottom of the screen shows a 'Recent Opportunities' section.

This screenshot displays the Dynamics 365 CRM UCI interface for a 'Sales Activity Dashboard'. The top navigation bar includes 'Save As', 'New', 'Set As Default', and 'Refresh All'. The left-hand navigation pane lists 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Activities', 'Customers', 'Accounts', 'Contacts', 'Sales', 'Leads', 'Opportunities', 'Competitors', and 'Collateral'. The main content area features three charts: 'Open Opportunities' (a funnel chart showing stages: Close, Develop, Propose, Quality with values \$103,814.00, \$23,281,410.00, \$22,544,363.00, and 11); 'All Opportunities' (a pie chart showing status: Open, Won, Lost with values 36, 50, and 11); and 'Open Leads' (a list of leads with names and descriptions). The bottom of the screen shows a 'Sales' section and a 'Page 1' indicator.

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						
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						

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:

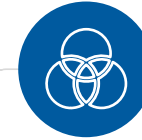
- Provides access on virtually any device (PC, tablet, phone) with any browser (IE, Chrome, Safari, Firefox, etc.) or platform (Windows, Mac, etc.)
- Removes need to rely on remote desktop or enterprise portals



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

 Microsoft Dynamics 365

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