

But really...what is Dynamics 365?

The not-too-technical, not-too-salesy guide to Microsoft's new cloud business management solution.



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But really...what is Dynamics 365?

If you are confused about Microsoft's new business solution product lineup, you are not alone. The names and branding for their Dynamics ERP and CRM solutions have changed so often recently, it is hard to keep up. In fact, they don't even use the terms ERP and CRM anymore.

To help clear up some of the confusion, we'll try to cut through the marketing hype to help you understand just what Dynamics 365 is and what it could mean to your organization. This is only intended as an introduction, we'll cover topics at a high level and recommend resources when you are ready to dig deeper.

Contents

1. A bird's-eye view of Dynamics 365
2. ...but wait, how about Dynamics 365 Business Central?
3. Common questions about the other Dynamics solutions
4. Which one do I need?
5. Bottom line: How can Dynamics 365 improve my business?
6. What are all these "insights" Microsoft talks about?
7. Six tips to help you choose the right implementation partner
8. Next steps and resources



"Dynamics 365 is perfect for businesses looking for an all-in-one business management solution to connect business processes, improve customer interactions, and speed growth. With this system you can break down silos created by traditional ERP and CRM solutions for a complete view of your customers and operations. Custom solutions that are built on Microsoft Dynamics 365 offer seamless integration with Microsoft Office 365. Plus, you can take advantage of all the Microsoft has to offer, including integrations with thousands of additional apps and solutions."

-2B Solutions



1 A bird's-eye view of Dynamics 365

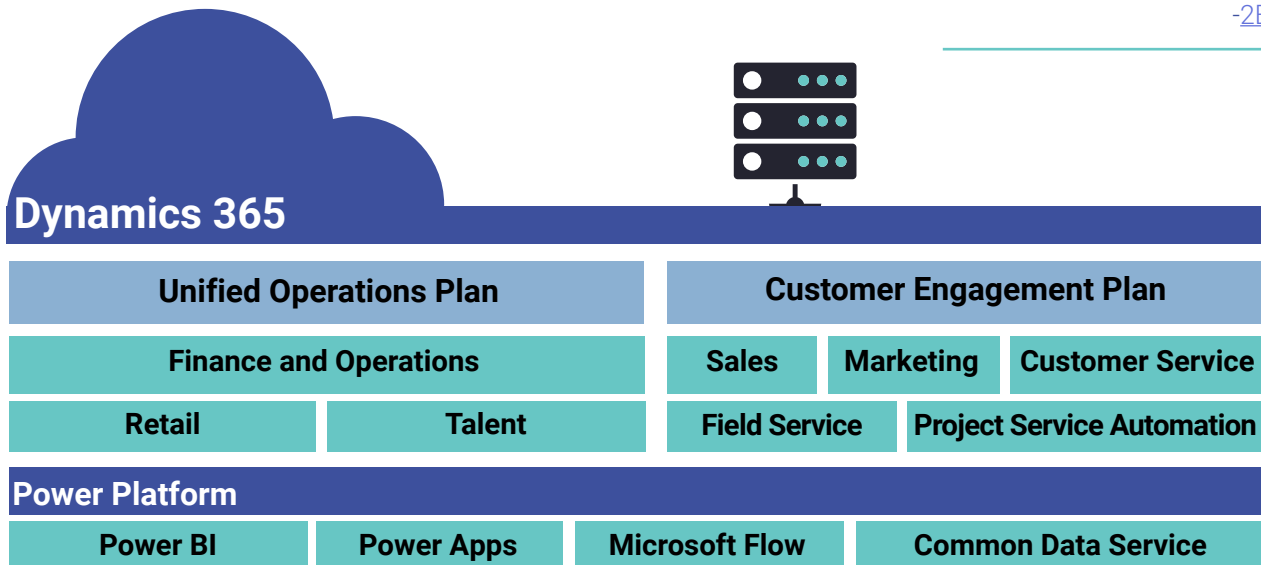
The fundamental purpose of Dynamics 365 is to manage financial, operational, and sales related business processes. Since those processes vary so much across industries and individual companies, the functionality of Dynamics has been compartmentalized into "Applications." Think of it like a Lego® set of modules that organizations can put together to fit their business needs. You can purchase the entire system or individual "apps" for the functionality you need.

Underpinning the business management functionality is shared data that drives the continuous flow of information and processes across the boundaries of departments, business units, and geographies.

Dynamics 365 Unified Operations (the ERP apps) can be deployed in the cloud or on-premises. Dynamics 365 Customer Engagement (the CRM apps) can also be deployed both ways, however some functionality is limited or unavailable in an on-premises deployment.

"Creating custom solutions for Microsoft Dynamics 365 allows customers to manage basically anything. Custom solutions take business practices far beyond traditional customer-centric Dynamics 365 functionality. You get a solution that understands what makes your business thrive, what information needs to be tracked, by whom, and how it needs to be displayed and leveraged to facilitate better business decisions."

-2B Solutions



Basic monthly pricing as of January 2019:

- Dynamics 365 Customer Engagement Plan from \$115 per user
- Dynamics 365 Unified Operations Plan from \$190 per user
- Dynamics 365 Plan from \$210 per user
- See more details and current pricing on [Microsoft's D365 site](#)

2

...but wait, how about Dynamics 365 Business Central?

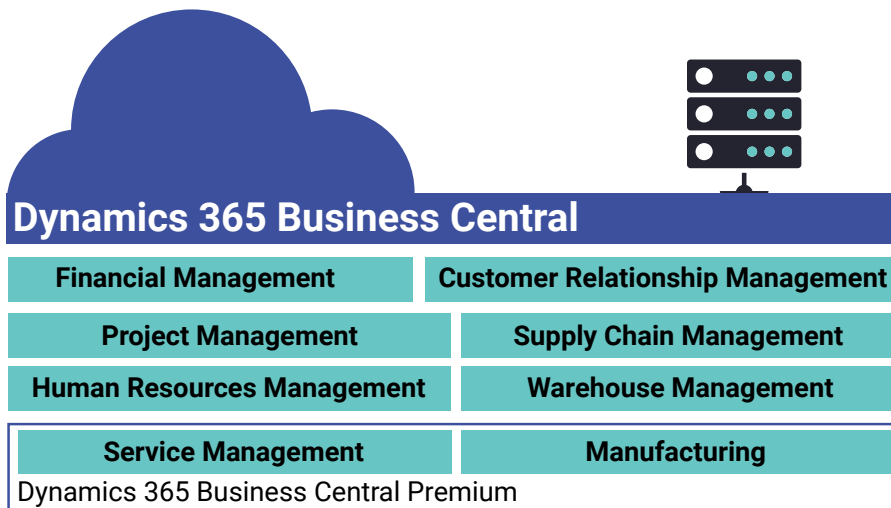
Even though it has a confusingly similar name, Microsoft Dynamics 365 Business Central is a completely separate product under the "Dynamics 365" brand umbrella. It includes full ERP and limited CRM functionality.

While the full Microsoft Dynamics 365 is targeted at larger, enterprise-level companies (more than 250 employees), Microsoft Dynamics 365 Business Central is generally recommended for small and mid-sized companies. Business Central is particularly suited to those in wholesale distribution and manufacturing. Core functionality supports basic business management processes, supply chain, warehouse, and project management, while the premium version supports more complex processes, such as assembly, manufacturing, and service management. With seamlessly integrated add-ons (extensions), it also fits professional services, construction companies, and e-commerce.

Dynamics 365 Business Central can be deployed in the cloud or on-premises.

"When our company's client base tripled in the course of one year, 2B Solutions responded with a CRM solution to meet our expanding data management needs. The customized database recently implemented immediately eliminated hundreds of data-entry hours, resulting in a measurable increase in productivity. CRM's integration with other Microsoft products moves us toward a paperless office. 2B Solutions met our challenge to update the way we gather, store, and report data. Their ability to tailor the Microsoft CRM packaged product to our specific needs demonstrates 2B Solutions' commitment to their customers."

-2B Solutions Client



Basic monthly pricing as of January 2019:

- Dynamics 365 Business Central Essentials from \$70 per user
- Dynamics 365 Business Central Premium from \$100 per user
- See more details and current pricing on [Microsoft's Business Central Site](#)

3

Common questions about the Dynamics solutions

What is the relationship of the Dynamics 365 solutions to the previous Dynamics ERP suite of solutions?

- “Microsoft Dynamics 365 Business Central” was Dynamics NAV.
- “Microsoft Dynamics 365 for Finance and Operations” was Dynamics AX.
- “Microsoft Dynamics 365 Customer Engagement” was Dynamics CRM.

Are Microsoft Dynamics NAV, AX, or CRM still available for purchase?

- New customers can only buy the Dynamics 365 versions of the software. Existing customers can still add licenses and modules as long as they are on annual support.
- Microsoft Partners are still actively working with and supporting NAV, AX, and CRM.

What about Dynamics GP and Dynamics SL?

- Microsoft Dynamics GP and Microsoft Dynamics SL are still independent products sold and supported by a dedicated group of Microsoft partners and used by tens of thousands of companies worldwide.
- While the majority of new development will be done for Dynamics 365, Microsoft has repeatedly confirmed their commitment to ongoing development and support for Dynamics GP and Dynamics SL. The last update was in 2018, with more updates already slated through 2028.
- Through Intelligent Edge, Dynamics GP and SL users can integrate with Dynamics 365 Business Central to take advantage of advanced cloud-based analytics and reporting.

Note: Existing Dynamics GP and SL customers can get a 40% discount on Microsoft Dynamics 365 subscription pricing through at least June 2020.

“2B Solutions has been working with all aspects of Microsoft CRM, since version 1.2. Now it is called Microsoft Dynamics 365, but the new name does not change the fact that it is the same base product. Our experience covers general customer relationship management such as sales, marketing, and service for out of the box implementations as well as custom CRM solutions that are commonly referred to as xRM solutions.”

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Microsoft Product Lifecycles

Check on the lifecycle support dates for your product by visiting the [Microsoft Lifecycle Policy](#) site.

4

Which one do I need?

Unfortunately, there is no easy answer to this question. On the ERP side, the first obvious decision point is cost, since Dynamics 365 Business Central can be less than half the price of Dynamics 365 for Finance and Operations which has a 20-user minimum. There was a time when Microsoft used the number of users to guide businesses to the “Enterprise” versions of software, but it’s not as clear cut today.

The complexity of the business processes that an organization uses has become more of a driver to the edition of the software. If you’ve got a tight budget and a limited number of users, it’s smart to see if Business Central can support the processes that run your organization. For those larger businesses with more complex requirements and more people who need to interact with the financial and operations management software, looking at Dynamics 365 for Finance and Operations makes sense.

Full CRM functionality is available in Microsoft Dynamics 365 Customer Engagement; however, some CRM features are included in Business Central too.

The modular configuration of Dynamics 365 helps those businesses that have complex needs in a specific function, like retail or field service. Both editions take full advantage of Microsoft’s strength in connections to productivity tools (Office 365), business intelligence, and mobile capabilities.

Partner guidance

In the end, looking to an expert to help you determine which of the two flavors of Dynamics 365 best suits your business is likely to save you time, money, and headaches. Many Dynamics certified partners have spent years, if not decades, working with the Microsoft ERP and CRM solutions and have witnessed the evolution of Dynamics 365.

Experienced Microsoft Dynamics partners start by understanding your business requirements and then match the solution that best fits. They will help you understand the implications and limitations of licensing, which in themselves can be daunting. Most importantly, they can help you establish the right software and technology foundation to support your long-term business strategies.



“Choosing Microsoft Dynamics CRM and 2B Solutions was absolutely the right decision for us. Compared to the other specialized systems we evaluated, we essentially got a custom solution that gives us more benefits and at a savings of more than \$15,000 our first year alone. Plus, to customize the other systems we would have had to pay an hourly rate on top of their base price. There is a real need for this kind of solution (2B-Law) in the legal industry and I would absolutely recommend Microsoft Dynamics CRM and 2B Solutions.”

-2B Solutions

5

Bottom line: How can Dynamics 365 improve my business?

Switching to a new business management system is a big decision for any organization. The time taken to evaluate systems, migrate data, and train employees interrupts regular business. All this effort needs to be worth the time and frayed nerves.

How can Dynamics 365 improve the day-to-day operation of your business as well as the long-term results? For most organizations, moving to a modern, cloud-based business management solution delivers the most impact in three main categories:

- Automated processes and workflows
- Cross-department data and process flow
- Centralized data management

Through automated processes, the most common tasks, such as creating invoices and purchase orders are done efficiently and with fewer errors. Invoices that are correct and go out faster mean you get paid more quickly.

Removing the barriers between departments also creates efficiencies to move a product order through manufacturing, turn a sales order into a shipment, and send the invoice for a service call. The digital flow of business processes reduces the miscommunication, lag times, and workarounds that plague most organizations.

Centralized data management is the key to unlock the digital transformation that everyone talks about these days. When you control the data flowing in, through, and out of your business, you really can transform operations. You can deliver personalized information, predict customer behavior, optimize inventory, and much more.

"2B Solutions made us really look at our processes as well as have us the tools to change what wasn't working. From the planning, coding, converting data, to training, 2B Solutions has been very helpful and great to work with. They are great business associates, but thru this process, they have also become friends. I recommend them to anyone that has a similar need."

-2B Solutions



How Dynamics 365 can improve business

Let's take a look at how the automation, process flow, and centralized data that Dynamics 365 brings to your business can impact different departments. These examples are simplified and limited but will give you some perspective. **The possibilities are endless when fueled by your creativity and a good partner to help you make them happen.**

Sales

- **Automation.** Notify sales teams when a customer enters a service ticket or inquiry.
- **Process Flow.** Shorten ramp up times and increase deal size with event-driven sales process that guides your sales rep's actions.
- **Centralized Data.** Centralize customer interactions and transactions—both current and historic—to keep salespeople on task.

Field Service

- **Automation.** Automatically schedule the technician with the right job skills and best location to fit in more appointments per day.
- **Process Flow.** Provide mobile access to back office information so technicians can update work order details and initiate the billing process.
- **Centralized Data.** Synchronize and track inventory down to the truck level with real-time visibility for higher first-time fix rates.

"Salesforce.com was customizable, but it had so many disparate solution providers to make it meet our needs. With Salesforce.com, we felt no one company would be responsible to support our solution, and that made us nervous. Having every step of the process in one central place saves us so much time and stress. We also now trust the data we get out of Dynamics 365, making business decisions easier."

-2B Solutions Client

Customer Service

- **Automation.** Dynamically guide agents to the right actions by surfacing relevant information exactly when they need it.
- **Process Flow.** Create work orders and schedule and dispatch technicians with relevant customer information.
- **Centralized Data.** Deliver value at every touchpoint with a 360-degree view of each customer's journey.

Project Service Automation

- **Automation.** Enable intelligent and relevant skills-based assignments with real-time visibility to resources using a unified scheduling engine.
- **Process Flow.** Prioritize project-based sales opportunities with built-in intelligence to plan for successful outcomes.
- **Centralized Data.** Anticipate resource demand and ensure the right resources are on the right projects, keeping utilization high.

Marketing

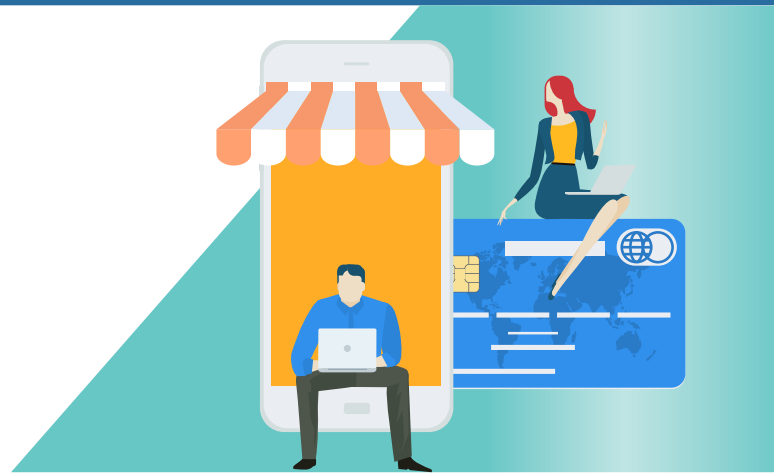
- **Automation.** Use configurable templates, reusable content blocks, design tools, and videos to deliver content based on customer engagement.
- **Process Flow.** Prioritize leads, automate hand-off, and track progress with shared information and connected processes between sales and marketing.
- **Centralized Data.** Improve marketing ROI with embedded intelligence and analytics that track marketing performance.

Finance and Operations

- **Automation.** Optimize workforce productivity with role-based workspaces that provide intelligent automation, task prioritization, and integration with Office 365 applications.
- **Process Flow.** Minimize operational costs across business geographies with financial process automation, encumbrance, budget planning, budget control, and three-way matching.
- **Centralized Data.** Improve product quality by identifying and resolving issues through real-time insights and predictive intelligence.

"2B Solutions has been an ideal IT partner for us; they took us seriously and easily adapted as we implemented best practice IT procedures. 2B was also instrumental working with my team to get our investment in CRM working well for us (reducing CRM trouble tickets by 75%). We look forward to a continued relationship with 2B and the ongoing development of our mobile capabilities."

-2B Solutions Client



Talent

- **Automation.** Welcome new hires with personalized onboarding checklists and clearly defined processes that reduce administrative burden.
- **Process Flow.** Collaborate during the hiring process, sharing candidate information through talent sourcing, recruiting, and selection.
- **Centralized Data.** Support professional development by tracking employee accomplishments, certifications, and training.

Retail

- **Automation.** Acquire inventory from the right vendor at the right price and allocate and replenish stores based on season, market demand, and competitive pressures.
- **Process Flow.** Give customers the convenience and flexibility to buy in-store, pick up in other locations, or get home delivery through connected ordering and fulfillment.
- **Centralized Data.** Support omni-channel buying with real-time product, customer, inventory, and order visibility.

How Dynamics 365 Business Central can improve business

Dynamics 365 Business Central is the more affordable option likely to appeal to small and mid-sized companies. Business Central includes standard configurations for most business processes, but you can change the configuration to suit your business' needs. **With the help of a good partner, you'll be able to apply the full potential of the solution to meet your organization's unique requirements.**

- **Financial management.** Processes across accounting, sales, purchasing, and inventory support cross-department workflow. Built-in Power BI dashboards provide end-to-end visibility into operations.
- **Customer relationship management.** Centralized customer information and lead tracking allows sales people to work from a single source. Guidance on best upsell, cross-sell, and renewal opportunities can increase sale values.
- **Project Management.** Create, manage, and track customer projects using timesheets along with advanced job costing and reporting capabilities. Budget management helps ensure project profitability.
- **Supply chain management.** Built-in intelligence helps to predict when and what to replenish. With dynamically updated inventory levels, employees know what is in stock and available to ship.

"We used to spend hours tracking kits down and sometimes wouldn't succeed. We couldn't prove that it was shipped and to where, so we ended up sending new kits that cost us more time and money. 2B Solutions has been excellent to work with. When we transferred data to Microsoft Dynamics CRM, they broke things down to make it simple. They were always there to answer any questions and to give guidance along the way."

-2B Solutions Client

- **Human resource management.** Maintain detailed records of your employees, including employment contracts, confidential information, qualifications, and employee contacts.
- **Warehouse management.** Support efficient order fulfillment, tracking item transactions, and movement. Set up bins based on warehouse layout and storage unit dimensions.
- **Service management.** Monitor service tasks, workloads, and employee skills to effectively assign resources and accelerate case resolution.
- **Manufacturing.** Calculate and optimize manufacturing capacity and resources to improve production schedules and meet customer demands.



Need More? You can choose from hundreds of add-ons, also called extensions, for the entire Dynamics 365 product line, from the marketplace at [AppSource.microsoft.com](https://appsource.microsoft.com).

6

What are all these “insights” Microsoft talks about?

Every marketing description of Dynamics 365 includes the promise of powerful “insights” and “intelligent” processes. While there definitely is plenty of hype, the message is important. Most organizations have reached a point of overload—they are collecting more data than ever, but it is creating more confusion than clarity.

Through a number of business intelligence, analytics, and machine learning tools, Microsoft is helping organizations break down silos of data, organize it, and turn it into usable information. In addition, they are introducing the next generation of data management to the masses with machine learning, artificial intelligence, and augmented reality. Let’s take a very high-level look at the most common data management tools.

Power BI

Power BI is the workhorse of the Microsoft business analytics solution set. Delivered through visual dashboards, the cloud-based business intelligence service can connect to a variety of sources. By integrating Power BI with other tools, including Microsoft Excel, most users can get up to speed quickly to:

- Connect to hundreds of data sources both on premises and in the cloud.
- Use Power Query to simplify data collection, transformation, integration, and enrichment.
- Create reports using built-in visuals or create your own custom visuals.

“Prior to implementing [2B-Events](#) we manually counted heads and tracked attendance on pieces of paper. When we decided to move into electronic tracking, 2B Solutions was one of the only few companies that could provide us with the service and flexibility we needed.”

-[2B Solutions Client](#)



Microsoft Power platform

A combination of PowerApps, PowerBI, and Microsoft Flow, Microsoft Power platform is built on the Common Data Service for Apps. The Power platform is designed to help businesses support their unique workflows and business processes through “apps” created with a combination of these tools. The point-and-click approach to app building makes it easy for anyone familiar with Microsoft Office to customize and extend Dynamics 365 and Office 365.

More insights

Microsoft Dynamics 365 AI

Microsoft is beginning to build their catalog of artificial intelligence tools to support predictive modeling. At publication time, there are three out-of-the-box Dynamics 365 AI applications which can also be customized to address different scenarios via the power of Microsoft Azure.

- Dynamics 365 AI for Sales: Provides insights into trends and predicts the behavior of customers.
- Dynamics 365 AI for Customer Service: Optimizes support operations and creates better customer service experiences.
- Dynamics 365 AI for Market Insights: Uses social and web insights to understand and engage with customers.

"Microsoft Dynamics CRM has evened out our work immensely. Instead of having two weeks that are hectic and then a three week lull, we have a manageable stream of activity at all times. With this steady workload, we are able to pre-package so we're ready for incoming orders and able to timely serve the needs of the teachers."

-2B Solutions Client

Mixed reality

Microsoft is also introducing mixed reality to the broader market through a selection of mixed reality extensions for Dynamics 365. Microsoft Dynamics 365 Remote Assist helps field service technicians collaborate with remote experts. Microsoft Dynamics 365 Layout provides a hologram experience for 3D models. Both of these solutions use Microsoft HoloLens to connect users with the virtual experiences.

"In just the first year, WIMS for STEM helped The Einstein Project reduce inventory costs by approximately \$45,000. The solution is expected to continue driving savings as they gain ever-better insights into which products & kits to add, and which to eliminate."

-2B Solutions Client



7

Seven tips to help you choose the right implementation partner

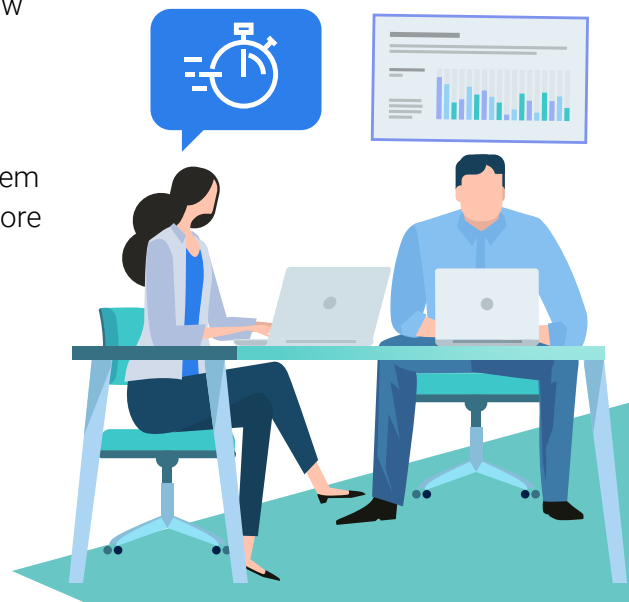
Microsoft Dynamics 365 provides the foundation of your business operations for the future. A great partner will help you make the most of your investment, helping your organization thrive in the digital world. The partner you choose should help you take full advantage of technology to improve your business processes for a long-term return on investment.

- 1. Pay attention to how they respond from the start.** If you have trouble getting quick response during the sales cycle, that's a clear warning sign.
- 2. Talk about your current processes honestly.** They should be interested in how your business currently operates and be looking for opportunities to streamline processes.
- 3. Ask them about their relationship with Microsoft.** Your partner should be well connected with Microsoft experts. Ask them what kind of training their team receives to stay up to date.
- 4. Get references from their previous clients.** Don't be afraid to ask for customers that are in the same industry as yours. Create a list of questions to ask during the call or visit, so you cover all the topics that are important to your decision.
- 5. Understand their processes.** They should be able to clearly define their implementation processes, backed up by project plans and time frame estimates.
- 6. Discuss what the training program will look like.** Find out exactly what kind of training they will provide to your team, how long it will take, and if there will be ongoing options.
- 7. Ask them about support after the implementation is done.** Many partners offer different levels of support to meet the unique requirements of clients. You might also want to ask them what percentage of their clients have worked with them for more than five years.

Above all, the partner you choose should be invested in your success. They should be eager to answer all your questions and demonstrate their expertise and professionalism. Ask the hard questions and demand straight answers.

"2B Solutions really listened to what we needed and made it happen. In fact, they thought about things we never would have and continue to support us through any modifications or new reports we ask for. I've had some bad experiences with vendors in the past, but I have nothing but positive things to say about them."

-2B Solutions Client



8 Next steps and resources

2B Solutions specializes in custom building Dynamics 365 and mobile applications to allow our customers to manage any kind of resources from company car/truck fleets, to medications throughout a pharmacy, to dog trainers and their schedules. We improve the ability of businesses to respond to their customers and critical events from anywhere.

Learn more about our custom solutions available for Microsoft Dynamics 365:

- [Legal Practice Management](#): 2B-LAW 365 is an easily-customized web-based mobile-optimized software system for streamlining every aspect of firm, client and matter management.
- [Inventory, Warehouse and Store Management](#): WIMS 365 is a customizable software system built on Microsoft Dynamics 365 to track and manage all elements of the warehousing, inventory and asset world.
- [STEM Materials Management](#): WIMS 365 - STEM edition streamlines your inventory, procurement and centralizes school and teacher data.
- [Event, Attendee and Ticket Tracking](#): 2B-Events 365 is a solution built for Microsoft Dynamics 365 to give you event attendance and ticket management.
- [NCR Counterpoint Solutions](#): Solutions that extend NCR Counterpoint ranging from mobile applications to integration services.
- [Custom Solutions](#): Custom solutions can connect your business resources in ways that save you time and money.

If you would like to find out more about Microsoft Dynamics 365 directly from Microsoft, here are several helpful sites:

- [Experience Dynamics 365](#) has links to community, trial subscriptions, product roadmap and more.
- [Dynamics 365](#) overview site.
- [Dynamics 365 Business Central](#) overview site.

For more information on the business analytics and intelligence tools from Microsoft, check out these sites:

- [Power BI and Microsoft Power platform](#) overview site.
- [Microsoft Dynamics 365 AI](#) overview site.

"2B Solutions offers customized, mobile-ready solutions – built on Microsoft Dynamics 365 and retail platforms.

What do you want to build?

9 About 2B Solutions

2B Solutions specializes in custom building Dynamics 365 and mobile applications. And we provide consulting services that help people use technology to drive their business. We are a Microsoft Partner with competencies in Microsoft Mobility Solutions, Microsoft Business Solutions and ISV/Software Solutions.

Specializing in Microsoft Dynamics 365 (CRM), xRM and mobile application development and integration, we have over 30 years combined experience in Microsoft technologies, infrastructure and solutions that enhance business productivity. 2B Solutions has been working with all aspects of Microsoft CRM (now Microsoft Dynamics 365) since version 1.2 including installation, configuration, customization, development, data import/integration, reporting and more.

Our experience covers general customer relationship management (sales, marketing, and service) for out of the box implementations as well as custom CRM solutions (commonly referred to as xRM solutions).

2B Solutions is a company of experienced professionals that differentiate ourselves through focus, value, and innovation.

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