

But really...what is Dynamics 365?

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



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.

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"Dynamics 365 Business Central is a game changer in the cloud-based ERP space for small to mid-market businesses. It's affordable, extendable, scalable and most importantly easy to use and quick to deploy with feature rich functions small to medium sized businesses need."

-OTT, Inc.



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A bird's-eye view of Dynamics 365

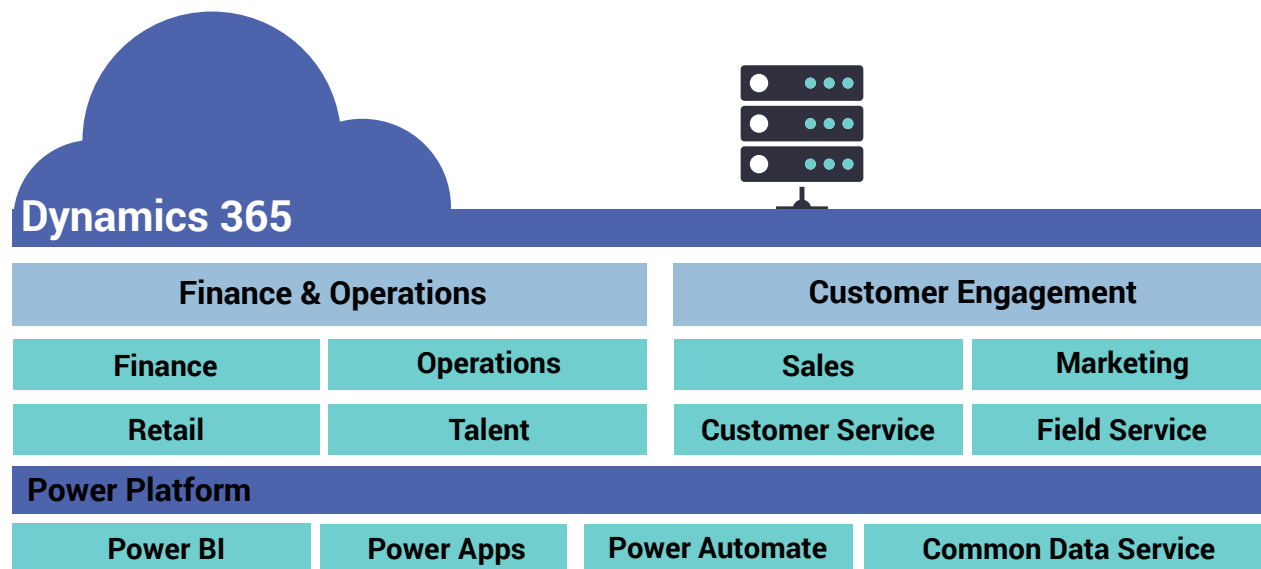
The fundamental purpose of Dynamics 365 is to manage financial, operational, and sales related business processes. Since those processes vary so much across industries and individual companies, the functionality of Dynamics has been compartmentalized into "Applications." Think of it like a Lego® set 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 Finance and 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.

"The Dynamics 365 brand encompasses many different solutions. It is important to engage with a quality, reputable Dynamics 365 Partner to help evaluate your needs and find the right solution for your business."

-OTT, Inc.



- Applications are no longer sold as "Plans". Ask your Microsoft Dynamics 365 Partner for information on base licenses, attach licenses and minimum user counts.
- See more details and current pricing on [Microsoft's D365 site](#)

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...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.

"Dynamics 365 Business Central is an excellent horizontal application to meet the needs of your business. It may simply be financial accounting or if you extend into inventory management, distribution, manufacturing or field services the solution can meet your needs. It can be extended for more niche / vertical environments as well."

-OTT, Inc.



The diagram features a blue cloud icon on the left and a server rack icon on the right. Below them is a dark blue header bar with the text "Dynamics 365 Business Central". Underneath is a grid of light blue boxes, each containing a business management function. The functions are arranged in two columns: Financial Management, Project Management, and Human Resources Management on the left; Customer Relationship Management, Supply Chain Management, and Warehouse Management on the right. A separate box at the bottom left contains "Service Management", and a separate box at the bottom right contains "Manufacturing". Below the grid is a dark blue bar with the text "Dynamics 365 Business Central Premium". At the bottom of the diagram is a white box with a blue border containing a link to Microsoft's Business Central Site.

Dynamics 365 Business Central	
Financial Management	Customer Relationship Management
Project Management	Supply Chain Management
Human Resources Management	Warehouse Management
Service Management	Manufacturing
Dynamics 365 Business Central Premium	

■ See more details and current pricing on [Microsoft's Business Central Site](#)

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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 2019, 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 may be eligible to receive a discount on Microsoft Dynamics 365 subscription pricing.

“Functionally, Dynamics 365 Business Central is not a brand new product. It was developed from the foundation of Dynamics NAV (Navision). It is mature and comes with a ton of functionality out of the box. It is being rapidly adopted in the marketplace.”

–OTT, Inc.



Microsoft Product Lifecycles

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

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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.



“Dynamics 365 Business Central is available in the Essentials edition or Premium edition. If you are a manufacturer or engaged in field services you will deploy Premium. All other industries you can deploy Essentials. Both include a full suite of different modules.”

—OTT, Inc.

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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.

“Dynamics 365 allows you to eliminate silos of data and external spreadsheets all while streamlining your processes. Dynamics 365 is a suite of applications that can extend across your entire enterprise and leverage tools like Power BI and Microsoft Flow to meet your specific needs.”

—OTT, Inc.



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.

"Dynamics 365 has a very affordable Team Member licensing model that allows everyone in your organization to be on the system and have access to the critical information they need to make decisions and better serve your customers and stakeholders."

—OTT, Inc.

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

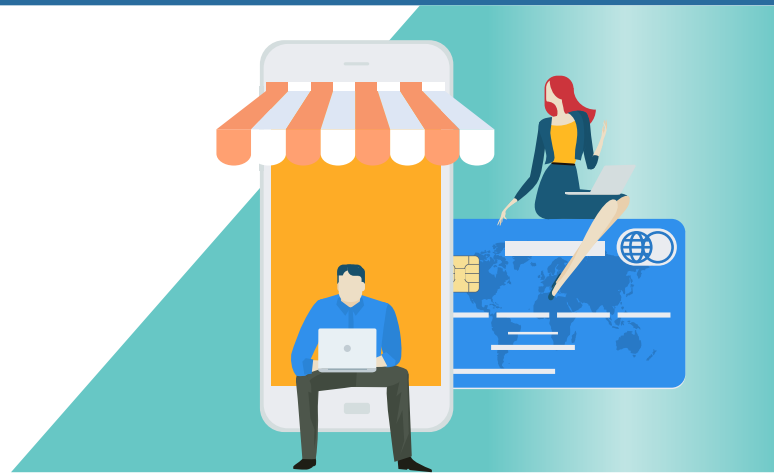
- **Automation.** Use configurable templates, reusable content blocks, design tools, and videos to deliver content based on customer engagement.
- **Process Flow.** Prioritize leads, automate hand-off, and track progress with shared information and connected processes between sales and marketing.
- **Centralized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

"Dynamics 365 has hundreds of apps available in AppSource that can quickly extend the solution to add specific functions you may need like shipping integration, e-commerce, credit card processing, etc."

—OTT, Inc.



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.

"The dashboards and analytics in Dynamics 365 Business Central are outstanding and provide real time, relevant information to help you make not only day to day decisions but also more strategic long term decisions."

—OTT, Inc.

- **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).

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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.

“Dynamics 365 leverages business intelligence, workflow, analytics and machine learning tools all from the Microsoft Cloud platform. The system learns your trends and needs along with you as you grow and expand.”

—OTT, Inc.

Microsoft Power platform

A combination of PowerApps, PowerBI, and Microsoft Power Automate (formerly 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.

"If you need to setup process flows for your team to perform their critical functions, it's easy to leverage Microsoft Flow to create the workflows you need for your business to operate in a continuous streamlined fashion."

—OTT, Inc.

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.



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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.

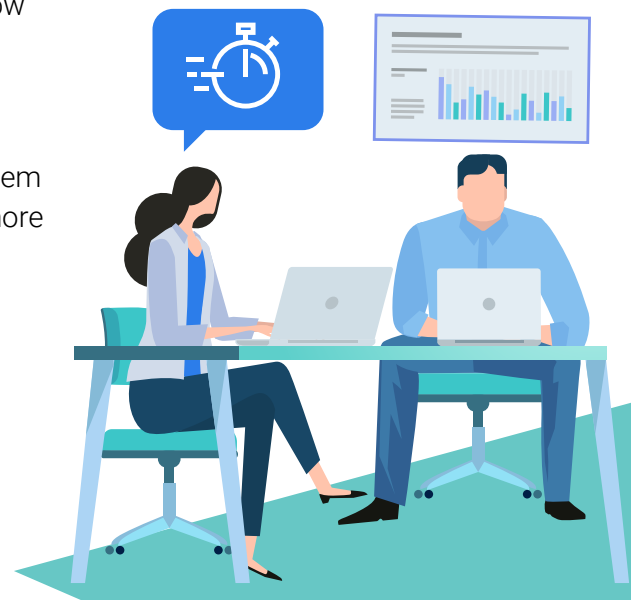
- 1. Pay attention to how they respond from the start.** If you have trouble getting quick response during the sales cycle, that's a clear warning sign.
- 2. Talk about your current processes honestly.** They should be interested in how your business currently operates and be looking for opportunities 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.

"Make sure you choose a partner that meets the following credentials:

- 1. Strong competencies in accounting and business*
- 2. Expertise in both CRM and ERP*
- 3. A proven methodology*
- 4. History of strong customer service and ability to deliver*
- 5. Relevant references*
- 6. Resources with deep experience in your industry*
- 7. Offer ongoing support services*
- 8. A partner that is a key advisor to your business just like your CPA and Attorney"*

—OTT, Inc.



8 The Trusted Partner Path

To ensure client success, every project we undertake follows OTT, Inc.'s proven five-step methodology to deliver improved productivity, efficiency and profitability. The Trusted Partner Path defines how we will work with you to produce measurable business performance, bottom-line rewards, and a technology framework for sustained growth.

- 1. Assessment:** We gather information about your business.
- 2. Analysis:** We review all your key business processes.
- 3. Planning:** We define goals, expectations and project scope.
- 4. Implementation:** Our methodology streamlines implementation.
- 5. Measurement:** We confirm that all success criteria are met.

Education, communication, and support are well defined for each step in the path. Our experience and consistent methodology will assure a smooth transition to cloud ERP.

"To ensure client success, every project we undertake follows OTT Inc.'s proven five-step methodology to deliver improved productivity, efficiency and profitability."

"The Trusted Partner Path defines how we will work with you to produce measurable business performance, bottom-line rewards, and a technology framework for sustained growth."

Contact us directly to help evaluate your needs.

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About OTT, Inc.

OTT, Inc. is the midwestern Cloud ERP Partner equipped to answer the hard questions.

At OTT Inc., we focus on learning your business and your business processes to provide the right solutions to help you grow your business. Committed to be your trusted business solutions partner, we can help you with automated accounting, enterprise resource planning, customer relationship management, business intelligence, document management, electronic commerce and cloud computing.

We leverage industry leading applications like Microsoft Dynamics CRM, Microsoft Dynamics GP, Microsoft Dynamics 365, NetSuite, Microsoft Office 365 and complementary independent software vendor solutions. All delivered with expert business analysis, training, implementation and ongoing support services.

OTT, Inc. is headquartered in Minneapolis/St. Paul, Minnesota. We have worked with hundreds of companies like yours, helping them take advantage of cloud technologies to improve productivity, control costs and build for the future. Let's talk about how the cloud can help your business grow.

Contact us for a FREE 2-hour Cloud Feasibility Assessment.

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your trusted business
solutions partner.™