Important information to help you transition to Microsoft Dynamics 365 from Dynamics CRM

The Microsoft Suite consists of:

- Office 365
- Microsoft Dynamics 365
- Power BI
- Cortana Intelligence Suite
- Azure IoT

Common application platform: PowerApps, Microsoft Flow & Common Data Service
Microsoft Dynamics 365
Licensing Comparison to Dynamics CRM Online Professional

**Simplified Licensing**
Choose from two licence types for full or light usage.

**Non Production Instance**
Includes a non-production instance for testing and development.

**Generous Cloud Storage**
Twice as much default data storage (10GB) and easier to accrue more storage (extra 5GB per 20 x Dynamics 365 full licences).

**Includes Web Portal**
Increase capacity with self-service portals for customers, partners, communities or employees.

**Full Social Engagement**
Plans & apps fully integrated with Microsoft Social Engagement

**Full Knowledge Capabilities**
Knowledge sharing and management in a single offering.

**Includes Voice of the Customer Surveys**
Gather customer feedback with integrated surveys and gain insight with survey analytics.

**Licence by User or Device**
Mix and match user or device licences to fit all scenarios.

**AI Features**
Powered by advanced analytics and machine learning.
Microsoft Dynamics 365
Comparing Licence Types

**Licence by App**
- Operations
- Field Service
- Sales
- Customer Service

License individual users by a single application defined by their role, e.g. Sales app

**Licence by Plan**
- Operations
- Field Service
- Sales
- Customer Service

Utilise functions across all apps to fit specific user roles for greater flexibility

---

**Team Member Licence**

- Share Microsoft Dynamics 365 with everyone in the businesses including individuals who only need light usage across all apps at a low price per seat
- Team Members access included in all Apps and Plans
- Consume data and reports, and complete light tasks including activities, knowledge articles and time entries
MICROSOFT DYNAMICS 365

Plan 1 Overview

Choose Enterprise Edition Plan 1 for the best value with these Dynamics 365 apps and entitlements

- **Sales App**
- **Customer Service App**
- **Project Service App**
- **Field Service App**

**Microsoft Social Engagement**
Social listening, intent analysis and CRM integration - includes tracking for up to 20k posts per month

**Web Portal**
Includes one self-service CRM integrated web portal for customers, partners or employees

**Surveys**
Power Voice of the Customers survey integration

**Gamification**
Apply the concept of fantasy sports to drive CRM participation

**Knowledge**
Full knowledge capabilities including authoring

**Mobile Apps**
Free Tablet and Mobile apps for iOS, Android and Windows devices.

- **10GB Cloud Storage**
- **x 1 CRM Sandbox**
- **PowerApps**
- **Microsoft Flow**

**App for Outlook**
Track emails and check contact interactions from virtually any device in Outlook

**Microsoft Office Online**
Includes web apps for Excel, Word, Powerpoint and OneNote for non-Office 365 users
Microsoft Dynamics 365
Sales App - at a Glance

- For users engaging in field sales, inside sales, sales management, partner sales, or any other sales role. This plan is also suitable for marketing users.
- Same core functionality as Dynamics CRM Online (with the exception of the Service model including Cases)

Access anywhere: web app, tablet, mobile app and via Outlook

Read access capabilities across all Dynamics 365 applications including customer service

Leads
Quotes
Price Lists
Marketing Lists
Accounts
Sales Goals
Custom Entities
Opportunities
Contacts
Quick Campaigns
Marketing Campaigns
Mobile Offline
Activities
Territory Management

Also Includes:
- PowerApps for Sales
- Microsoft Social Engagement
- Voice of the Customer
- Non-Production Licence
- AI Features
Microsoft Dynamics 365
Customer Service App - at a Glance

- For users engaging in any customer service role from basic support desks to more advanced call centre scenarios.
- Includes the core service capabilities of Dynamics CRM Online including case management, SLA's and contracts

**ACCESS**
Access anywhere: web app, tablet, mobile app and via Outlook

**READ**
Read access capabilities across all Dynamics 365 applications including sales and project service

**EDIT**
- Case Management
- Service Level Agreements
- Contracts
- Entitlements
- Service Queues
- Resources
- Work Hours
- Unified Service Desk
- Accounts
- Contacts
- Knowledge
- Voice of the Customer
- Mobile Offline
- Custom Entities

**ALSO INCLUDES**
- PowerApps for Service
- Microsoft Social Engagement
- Mobile Offline
- Non-Production Licence
- AI Features
Microsoft Dynamics 365  
Project Service Automation App - at a Glance

- For users engaging in a project or resource management role
- Includes end to end functions spanning the project lifecycle from estimating, planning and scheduling resources
- Includes Project Online and Project Online Desktop

**ACCESS**
Access anywhere: web app, tablet, mobile app and via Outlook

**READ**
Read access capabilities across all Dynamics 365 applications including sales and customer service

**EDIT**
- Project Management
- Project Expenses
- Project Contracts
- Work Hours
- Resource Competencies
- Custom Entities
- Project Estimates
- Resource Availability
- Project Invoices
- Resource Management
- Approve Project Entries
- Contacts & Accounts

**ALSO INCLUDES**
- PowerApps for PSA
- Microsoft Social Engagement
- Mobile Offline
- Voice of the Customer
- AI Features
Microsoft Dynamics 365
Field Service App - at a Glance

- For users engaging in any kind of field scheduler or field technician role
- Includes all core field Field Service functionality featuring work order management and resource scheduling

ACCESS
Access anywhere: web app, tablet, mobile app and via Outlook

READ
Read access capabilities across all Dynamics 365 applications including project service and sales

EDIT
Work Order Management  Scheduling Assistant
Schedule Board  Resource Bookings
Inventory Management  Field Service Invoices
Repair & Return  Customer Agreements
Work Hours  Territory Management
Resources  Custom Entities
Accounts & Contacts  Activities

ALSO INCLUDES
Mobile Offline
PowerApps for Field Service
Microsoft Social Engagement
Voice of the Customer
AI Features
Microsoft Dynamics 365
Marketing App

AVAILABLE QUARTER 2, 2017
Microsoft Dynamics 365
Team Member - Functions at a Glance

- Light usage across all Microsoft Dynamics 365 apps
- Use standalone, or in combination with applications and plans
- Execute basic customer and business processes
- Gain insights from data
- Tiered pricing discounts for larger seat volumes
- Comes with Project Online Essentials

ACCESS
Access anywhere: web app, tablet, mobile app and via Outlook

READ
Full read access across all Dynamics 365 applications: sales, customer service, project service automation and field service.

EDIT
Accounts
Contacts
Activities
Knowledge Articles
Custom Entities

Sales Opportunities
Leads
Sales Quotes & Orders
Cases
Marketing Lists
Quick Campaigns
Transition from Microsoft Dynamics CRM to Dynamics 365

Transitioning pricing is available to existing Dynamics CRM Online subscribers

You can transition from Dynamics CRM Online now, or wait until the renewal of your current annual subscription term.

Transition to Microsoft Dynamics 365 now

Why wait? Transition now and get immediate access to the new apps and licensing entitlements.

Choose a licence type for each Dynamics 365 user

Not ready to transition to Dynamics 365 yet?

Continue using your Dynamics CRM Online licences until the end of your agreement while you decide which Dynamics 365 options work best for your users.

For Light Users

Team Members
Read any data across all Dynamics 365 apps with limited write permissions

For Full Users

Apps
Choose one from many role based apps including Sales, Customer Service, Project Service and Field Service

Plan 1
Full access across Sales, Customer Service, Marketing (coming soon), Project Service, and Field Service apps

Plan 2
As Plan 1 + Operations app (formerly Dynamics AX) - minimum of 20 users
## Microsoft Dynamics 365 Licence Comparison

<table>
<thead>
<tr>
<th>Selected Dynamics 365 Capabilities</th>
<th>Team Member</th>
<th>Sales App</th>
<th>Customer Service App</th>
<th>Project Service App</th>
<th>Field Service App</th>
<th>Plan 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read / Limited Access to Dynamics 365 Data</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Accounts, Contacts, Activities &amp; Notes</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Search &amp; Advanced Find</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Mail Merge</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Mobile &amp; Tablet Apps</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Create &amp; Publish Knowledge Articles</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Use Dashboards &amp; Charts</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Dynamics 365 for Outlook</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Create Personal Views</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Run Workflows &amp; On-Demand Processes</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Custom Entities</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Microsoft Social Engagement</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Voice of the Customer Surveys</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Mobile Offline Sync</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Leads Management</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Opportunity Management</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Products &amp; Price Lists</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Quotes, Orders &amp; Invoices</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Marketing Lists &amp; Quick Campaigns</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Territories</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Full Case Management</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Contracts &amp; Entitlements</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Configure SLA’s</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Projects &amp; Project Expenses</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Project Contracts &amp; Project Invoices</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Manage Work Hours</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Resource Availability View</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Resource Schedule Management</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Work Orders &amp; Service Agreements</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Schedule &amp; Despatch Capabilities</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Configure Schedule Board</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Purchase Orders &amp; Invoices</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Includes Dynamics 365 Hosted Web Portal</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>

Download the full Microsoft licence guide: [www.preact.co.uk/365licensing](http://www.preact.co.uk/365licensing)
License users for only for the functionality needed. Mix and match licences across Plans, Applications and Team Members.
Microsoft Dynamics 365
Build Custom Business Apps

PowerApps uses visual drag and drop tools to quickly create new web and mobile connected apps that pull data from multiple sources to extend the capabilities of Dynamics 365 and other business applications.

Connect to your systems and create new data
Build apps without writing code
Publish and user apps on web and mobile

Connect to what you already have...

Sharepoint Online  Office 365  Dynamics 365  SQL Server  Microsoft Azure  Excel  Custom API’s

Create automated workflows between your favourite apps and cloud services

Microsoft Flow is a workflow of the Microsoft Cloud connecting PowerApps with cloud applications. Workflows can span multiple apps in Dynamics 365, Office 365 and the wider landscape including Twitter, Dropbox, OneDrive, Yammer, Facebook and more.

Start with a template

Find a Flow template and create automated workflows to get notifications, sync files, collect data and more.
Microsoft Dynamics 365
Each app Supports Named Users & Devices

User Licence
Named user licence enabling employees to access an applications across multiple devices.

Device Licence
Enables any number of individuals to access an application from the same device using a shared device ID.

Transitioning Questions?
Preact will help you determine the best licensing decisions for your business. Contact us to discuss getting started with Microsoft Dynamics 365.

www.preact.co.uk | 0800 381 1000