

# 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 unifies CRM and ERP capabilities by delivering new purpose-built applications to help manage specific business functions. Designed to be personalized, enable greater productivity, deliver deeper insights and adapt to business needs, Dynamics 365 applications work seamlessly together to help businesses accelerate digital transformation to meet the changing needs of customers and capture the new business opportunities of tomorrow."*

-Express Information Systems

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# A bird's-eye view of Dynamics 365

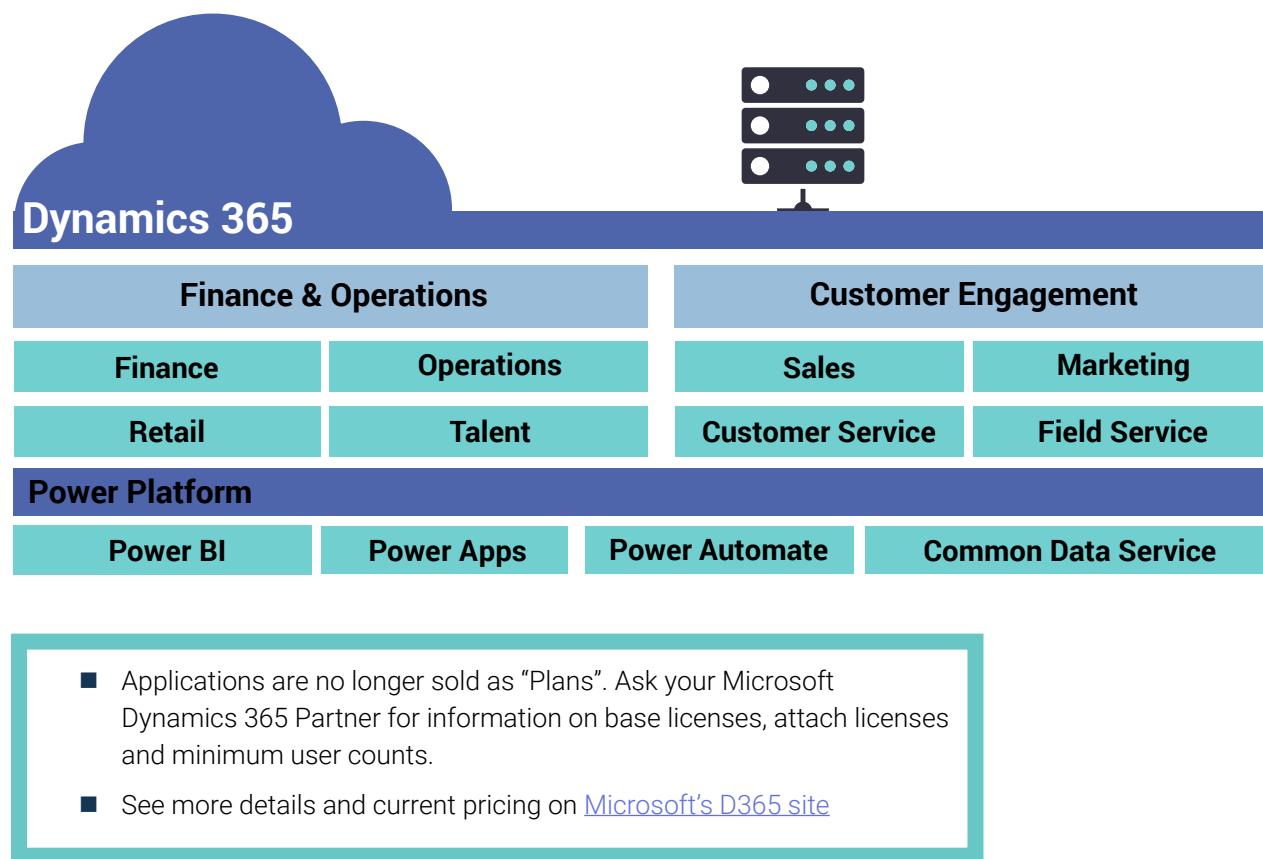
The fundamental purpose of Dynamics 365 is to manage financial, operational, and sales related business processes. Since those processes vary so much across industries and individual companies, the functionality of Dynamics has been compartmentalized into "Applications." Think of it like a Lego® set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

*"Microsoft Dynamics 365 brings together CRM and ERP cloud solutions with new powerful apps to manage your specific business functions. It alters how work is done, empowering your employees to work better, faster, and smarter. The enterprise version, with a 20 user minimum, has advanced capability across finance, operations, manufacturing, and supply chain. Robust CRM capability is included with the full Dynamics 365 purchase plan."*

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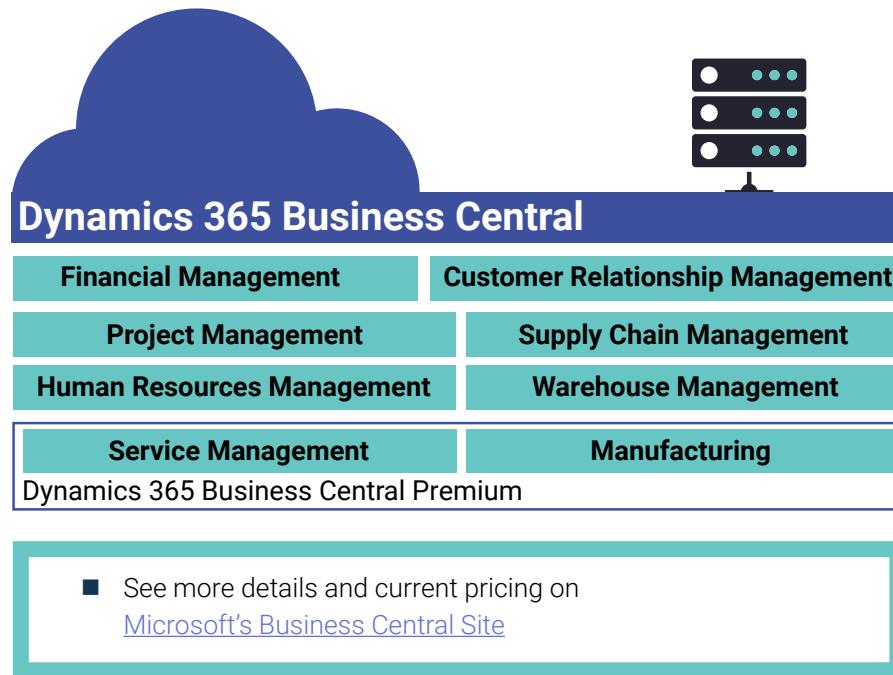


# ...but wait, how about Dynamics 365 Business Central?

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 you can get an end-to-end view of your business and let you grow beyond the limits of your basic accounting software, starting with just 1 user. It is an all-in-one business management solution that’s easy to use and adapt. Dynamics 365 Business Central has built in CRM capability, offering Outlook integration with opportunity management and customer service capability too.”*

-Express Information Systems

# 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.*

*“Dynamics GP is a workhorse with deep functionality that doesn’t break. Plus, a tremendous community of ISV add on products that add even more depth of functionality. With Dynamics 365 you do not have control over when new functionality or a new interface is rolled out. Clients that are uncomfortable with that model still gravitate to Dynamics GP as the best fit.”*

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## Microsoft Product Lifecycles

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

# 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.

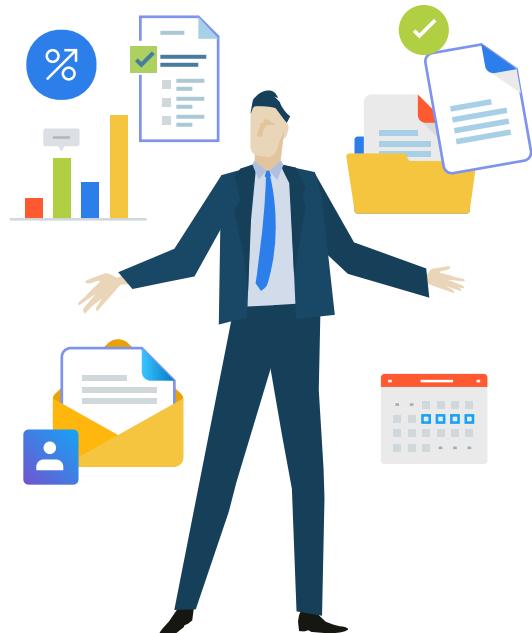
Full CRM functionality is available in Microsoft Dynamics 365 Customer Engagement; however, some CRM features are included in Business Central too.

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.



*“When you are considering a new ERP accounting solution, remember that an equally important aspect of your decision is the technology partner you choose to guide you through selection, implementation and post-implementation support. In addition to the cost of the software solution itself, the decision-making, implementation, training, and ongoing support all represent their own cost of both money and time. The right partner will help you choose the right solution and provide the best ROI.”*

-Express Information Systems

# 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.

*"With Dynamics 365 you can create more efficient processes, deliver robust reporting and analytics, and ensure regulatory compliance. The Finance and Operations application allows you to optimize your financials and operations to drive growth and make real-time, data-driven decisions at global scale—all with an intelligent, modern enterprise business application."*

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# 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.

*"Any time you replace old technology with new, you can expect some buzz around the office. You just want to be sure it's positive, that the chatter reflects the promise of "better results ahead". Even if your employees are frustrated with the status quo and are excited about the changes ahead, you still need to carefully manage the transition to ensure everyone is on board and ready to make the most of their new tools."*

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## Customer Service

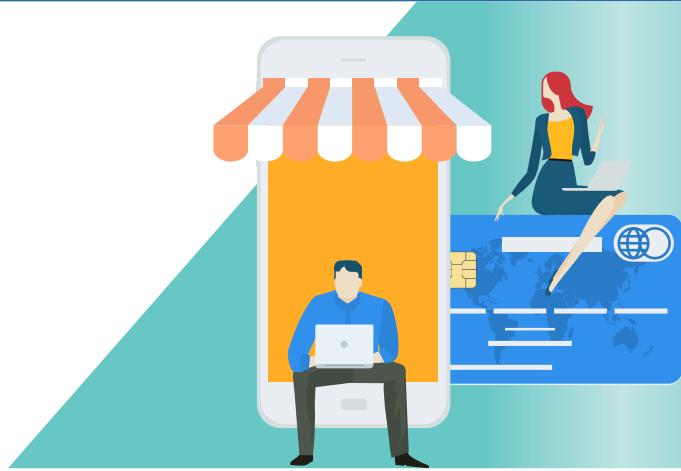
- **Automation.** Dynamically guide agents to the right actions by surfacing relevant information exactly when they need it.
- **Process Flow.** Create work orders and schedule and dispatch technicians with relevant customer information.
- **Centralized Data.** Deliver value at every touchpoint with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

*"Investing in best-in-class, cloud-based technology says, "We're agile, focused on growth, and ready for tomorrow." It sends a message to employees and business partners that imparts a commitment to efficiency and productivity—and a desire to make the most of financial and human resources. This helps guide work behaviors, attract and retain right-fit employees, and makes your business stronger."*

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## 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.

*"Cloud solutions are relatively effortless to get up and running. Unlike on-premises solutions that involve the purchase of new hardware to handle machine-based software installations, cloud software is accessed through a web browser or app. While it takes implementation time to integrate your systems, connect your data sources, configure your software, etc., the process is quicker—it's designed and deployed for your team to start using it as soon as possible."*

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- **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).

# What are all these “insights” Microsoft talks about?

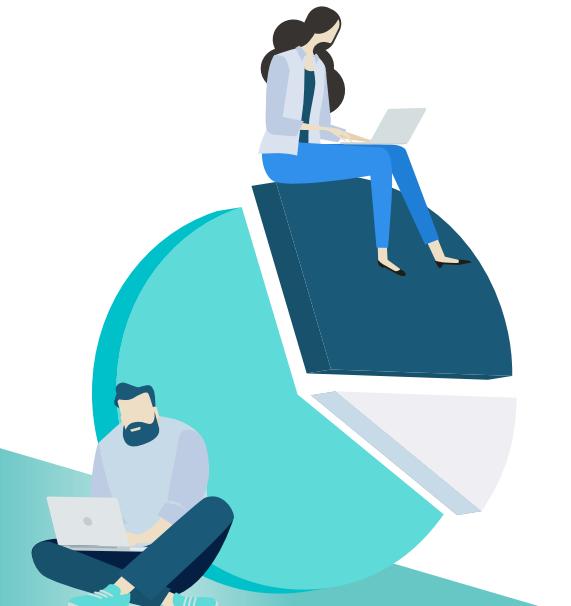
Every marketing description of Dynamics 365 includes the promise of powerful “insights” and “intelligent” processes. While there definitely is plenty of hype, the message is important. Most organizations have reached a point of overload—they are collecting more data than ever, but it is creating more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



*“Microsoft Dynamics 365 is a cloud solution that unites Microsoft’s best technology. It is designed to break down the traditional silos amongst your business processes helping you to link data across sources and drive intelligent decisions.”*

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## 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.

*"Cloud accounting software enables your finance team to leave the manual workloads behind. Instead of entering data into a spreadsheet, they can evaluate data on a report; rather than reconciling numbers for historical reports, they can run projections that impact the future. They're proactive, not reactive, conditioned and empowered by technology to think outside of the box."*

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## 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.



*"On-premise and cloud-based solutions bring their own sets of costs to the table. What's ultimately most cost-effective for your company depends on many factors, including your stage of growth, your current IT infrastructure and human resources, industry, and security and accessibility needs. This is why it's a great idea to get expert help determining the right solution for your business."*

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# Seven tips to help you choose the right implementation partner

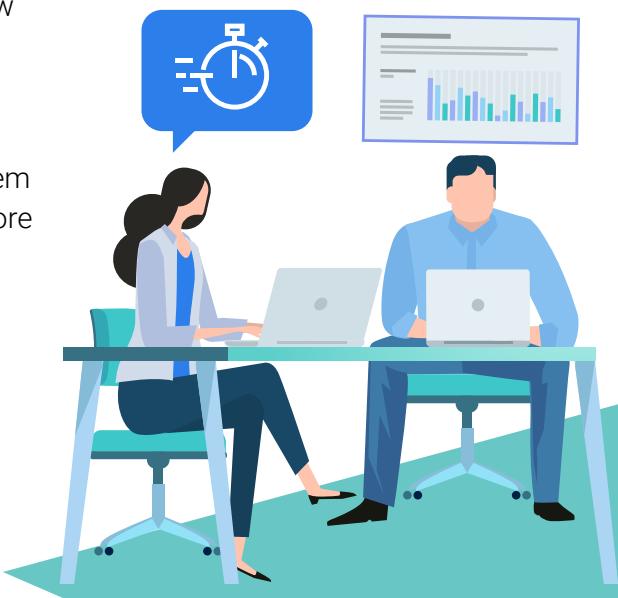
Microsoft Dynamics 365 provides the foundation of your business operations for the future. A great partner will help you make the most of your investment, helping your organization thrive in the digital world. The partner you choose should help you take full advantage of technology to improve your business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

*"Due to the knowledge and support of the consultant assigned to us from Express Information Systems, we were able to implement the new accounting system without disruption to our business."*

-Express Information Systems Client



# Next steps and resources

Finding the right partner is just as important as finding the right software solution. You need to trust the team that will be helping you transform your business operations. You can receive tremendous value from a right-sized technology partner, just as much as you can lose money by working with a partner who's not a good fit.

Download our [Guide to Finding the Right-Sized Technology Partner](#).

Express Information Systems is ready to help you, like we've helped hundreds of others, gain greater control of their financials, sales and operations.

Connect with Express Information Systems to learn more:

[Website](#) • [Success Stories](#) • [Blog](#)

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If you've got more to do than time to do it, we should talk.

[Let's start the conversation.](#)

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*"Microsoft Dynamics 365 is only as effective as the people using it. When making a recommendation, you want to declare with confidence that this is going to be the last ERP platform the company will ever need. We can help make that happen."*

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# About Express Information Systems

Express Information Systems (EIS) was founded in 1989 with corporate headquarters in San Antonio, Texas. Today we serve more than 300 mid-market clients, helping them to drive their business forward with innovative solutions to their accounting, reporting, HR, payroll, project tracking, as well as distribution and inventory management challenges. Our diverse clientele spans the industries of manufacturing and distribution, healthcare, hospitality, nonprofit, and professional services, with multi-entity/multi-location businesses being our specialty.

We're fully certified and staffed with long-tenured professionals who are experts on all editions of [Microsoft Dynamics 365](#) plus [Microsoft Dynamics GP](#) and [Sage Intacct Cloud Financials](#).

**Consider our track record – we would bring our industry-leading performance to your project:**

- 30+ years of business and software consulting experience
- 17% average reduction in overtime pay first quarter after implementation
- 100% implementation success rate
- 96% customer retention rate
- 22% faster ERP implementation rate than industry average

What drives our people is serving others, imparting knowledge and delivering on the promise to take the best technical products and wrap them into the deepest touch services possible. Going above and beyond to make that happen is what we call the "Express Heart".

We believe that helping people get more time back in their day, by working smarter with fewer steps, will make them happier with their work and help their companies thrive in a competitive landscape. Our team wants to make the process as stress-less as possible.

Like our name implies, we're in a hurry to get you where you need to be.

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