

Experience Digital, Microsoft Business Solutions

Dynamics 365 Sales Features & Licensing Comparison



**experience
digital**

Gold
Microsoft Partner



Microsoft Dynamics 365












Sales Professional



License for first App: A\$89.20/user/month

License for subsequent App: A\$27.50/user/month

Key Features

-  Manage [Customers](#) (B2B, B2C)
-  Manage [Products](#) (Bundles, price lists)
-  [Lead to Cash](#) (Leads, opportunities, quotes, orders, invoices)
-  Manage [Activities](#) (Emails, phone calls, appointments, tasks and others)
-  [Dashboards](#)
-  Export to [excel](#) or open in excel online
-  [Security](#) roles for access
-  OOB Integration with [SharePoint](#) (requires configuration)
-  OOB Integration with [Outlook](#) (via D365 app for outlook)
-  OOB Integration with [Exchange](#) for emails (requires configuration)
-  Maximum [15 custom](#) entities/tables



Microsoft Dynamics 365
















Sales Enterprise



License for first App: A\$130.40/user/month

License for subsequent App: A\$27.50/user/month

Key Features

-  Dynamics 365 Sales Professional + 
-  Manage Products (Families, catalogues, relationships)
-  Embedded Intelligence
-  Sales Forecasting
-  Sales goals, Sales literature and Sales territories
-  Business card reader (10 scans/user/month)
-  Email Engagement
-  Assistant Cards
-  Auto Capture
-  Conversation Intelligence (3 hours/activated user/month)
-  Sales Accelerator (1500 records/environment/month)
-  Lead & Opportunity Scoring (1500 records/environment/month)
-  Mobile offline capabilities
-  OOB Microsoft Teams Integration (currently in preview)




Microsoft Dynamics 365

Sales Premium



License: A\$185.40/user/month

Key Features

- ☑ Dynamics 365 Sales Enterprise + 
- ☑ Business card reader (200 scans/user/month)
- ☑ Conversation Intelligence (10 hours/activated user/month)
- ☑ Sales Accelerator (full access)
- ☑ Lead & Opportunity Scoring (full access)
- ☑ Notes Analysis
- ☑ Connection Insights (*Who knows whom*)
- ☑ Pipeline Intelligence (*Predictive forecasting*)
- ☑ Relationship Analytics
- ☑ Email Engagement
- ☑ Assistant Cards
- ☑ Auto Capture














Microsoft Dynamics 365

Sales Insights Add-on



License: A\$68.70/user/month

Key Features

-  Business card reader (200 scans/user/month)
 -  Conversation Intelligence (10 hours/activated user/month)
 -  Sales Accelerator (full access)
 -  Lead & Opportunity Scoring (full access)
 -  Notes Analysis
 -  Connection Insights (*Who knows whom*)
 -  Pipeline Intelligence (*Predictive forecasting*)
 -  Relationship Analytics
 -  Assistant Cards
-
-  **Note:** Can be used on top of both Dynamics 365 Sales Enterprise and Premium
 -  Conversational Intelligence is capped at 1000 hours/tenant/month



Feature Screenshots



Lead to Cash

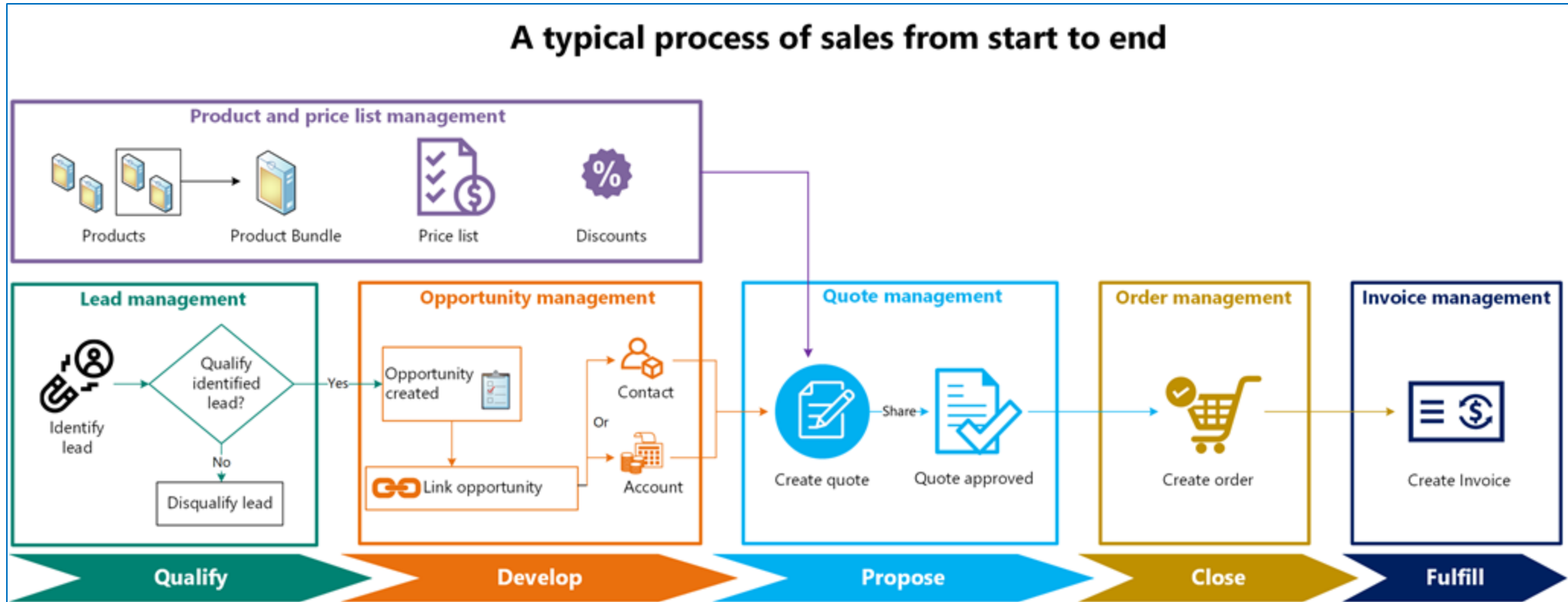


Image Courtesy: Microsoft

Relationship Analytics




Image Courtesy: Microsoft

Scoring

My Open Leads Scored ▼ Search for records 🔍

✓ Name	Topic	Lead Score	Lead Score Trend	Lead Grade	Owner	Status Reason	Created On
Bill White	Unable to contact	71	→ Steady	● Grade A	○ # CrmAdmin	New	10/25/2019 8:14 PM
Thomas Anderson	Unable to contact	71	→ Steady	● Grade A	○ # CrmAdmin	New	10/25/2019 8:21 PM
Sandra Brown	Unable to contact	71	→ Steady	● Grade A	○ # CrmAdmin	New	10/25/2019 11:24 PM
Thomas Johnson	Got this through a good lead	71	→ Steady	● Grade A	○ # CrmAdmin	New	10/25/2019 11:25 PM
Thomas Williams	Remember to call	71	→ Steady	● Grade A	○ # CrmAdmin	New	10/25/2019 11:33 PM
Joseph Jones	Got this through a good lead	71	→ Steady	● Grade A	○ # CrmAdmin	New	10/25/2019 11:33 PM
Nancy Williams	Contacted the manager	70	→ Steady	● Grade A	○ # CrmAdmin	New	10/25/2019 8:15 PM
Helen Jones	Contacted the manager	70	→ Steady	● Grade A	○ # CrmAdmin	New	10/25/2019 8:15 PM
Anthony Wilson	Remember to call	70	→ Steady	● Grade A	○ # CrmAdmin	New	10/25/2019 8:16 PM
Dorothy Brown	This is an important thing to re...	70	→ Steady	● Grade A	○ # CrmAdmin	Ne	
Bill Thonpson	This is an important thing to re...	70	→ Steady	● Grade A	○ # CrmAdmin	Ne	
Jennifer Jackson	Contacted the manager	69	→ Steady	● Grade A	○ # CrmAdmin	Ne	
Dorothy Jackson	Got this through a good lead	69	→ Steady	● Grade A	○ # CrmAdmin	Ne	

Predictive lead scoring 🗨



99

● Grade A
→ Steady

- ⚙ Industry is banking
- ⚙ Role contains IT
- 📁 Role contains IT
- 🗨 Channel is Referral
- 📧 Email count is low

Image Courtesy: Microsoft

Email Engagement

The screenshot shows the 'New Email' interface in Microsoft Dynamics 365. The interface is annotated with orange boxes and numbers 1 through 5. Box 1 highlights the 'Attachment' section, which is currently empty with the text 'No data available.' Box 2 highlights the 'Recipient Activity will not be followed.' notification in the 'Email Engagement' section. Box 3 highlights the 'Schedule email to be sent at a later time.' notification. Box 4 highlights the 'Set a reminder to follow up on this email.' notification. Box 5 highlights the 'Insert Template' button in the top navigation bar. The 'From' field is set to 'Brenden Thiel' and the 'To' field is set to 'Bart Hair'. The 'Email Engagement' section also includes a 'Follow' notification (2) and a 'Send Later' notification (3). The 'Set a Reminder' notification (4) includes a 'Set a Reminder' link. The top navigation bar includes buttons for Send, Save, Attach File, Insert Template, Insert Signature, Delete, Process, Convert To, Email a Link, Assign, Add to Queue, Queue Item Details, Share, and Flow. The 'New Email' header shows 'Normal' priority, 'Draft' status, and 'Brenden Thiel' as the owner. The 'Email Engagement' section has a title and three notifications. The 'Attachment' section has a table with columns for File Name, Followed, and File Size. The 'From' field has a green checkmark and a user icon. The 'To' field has a user icon. The 'Cc' and 'Bcc' fields are empty. The 'Subject' field is empty. The 'Designer' section has tabs for Designer, HTML, and Preview. The 'Designer' tab is active and shows a rich text editor with various formatting options like Bold, Italic, Underline, and Link. The 'Email Engagement' section has a title and three notifications. The 'Attachment' section has a table with columns for File Name, Followed, and File Size. The 'From' field has a green checkmark and a user icon. The 'To' field has a user icon. The 'Cc' and 'Bcc' fields are empty. The 'Subject' field is empty. The 'Designer' section has tabs for Designer, HTML, and Preview. The 'Designer' tab is active and shows a rich text editor with various formatting options like Bold, Italic, Underline, and Link.

5

Normal Priority | Draft Status Reason | Brenden Thiel Owner

Email | Related

From: Brenden Thiel

To: Bart Hair

Cc: ---

Bcc: ---

Subject: ---

Attachment

File Name	Followed	File Size ...
No data available.		

1

Email Engagement

- Recipient Activity will not be followed. Follow 2
- Schedule email to be sent at a later time. Send Later 3
- Set a reminder to follow up on this email. Set a Reminder 4

Image Courtesy: Microsoft

Disclaimer

- ❏ Licensing prices are correct as on 11/11/2022 AEST
- ❏ We have tried our best to provide the correct information but please excuse us if there are any minor issues
- ❏ Products and features are correct as of 11/11/2022 AEST

Thank You!

