

MICROSOFT DYNAMICS Ecosystem Map August 2021

ERP Solutions

DYNAMICS 365 FINANCE

Finance management for medium and large sized companies

- Revenue Recognition
- Credit management
- Intercompany
- Treasury
- Organization administration
- Accounts receivable
- Budgeting
- Audit workbench
- Accounts payable
- Cash and bank management
- Credit and collections
- Cost management
- Financials embedded Power BI
- Consolidations
- General ledger
- Fixed assets
- Expense management
- Payroll
- Asset leasing
- Human resources management
- Tax
- Power Apps mobile support
- Finance insights
- Microsoft Dataverse support

DYNAMICS 365 SUPPLY CHAIN MANAGEMENT

Supply chain management for medium and large sized companies

- Asset management
- Master planning
- Self service portal
- Retail headquarter management
- Transportation management
- Inventory management
- Production control
- Product information management
- Procurement and sourcing
- Service management
- Cost allocation
- Sales and marketing
- Questionnaire
- Project management and accounting
- Warehouse management
- Vendor collaboration
- Time and attendance
- Mixed Reality integration
- Inventory visibility
- Distributed hybrid topology
- Scale Unit Manager
- Rebate management
- Face recognition sign-in for production floor workers
- IoT Intelligence

DYNAMICS 365 PROJECT OPERATIONS

Project management

- Project sales management
- Project accounting
- Subcontractor Management
- Inventory-based projects
- Invoice summary page
- Price list management
- Microsoft Project integration
- Billing
- Project contracts management
- Requirements management
- Resource planning
- Schedule table
- Offer management
- Lead management
- Time and expense management
- Client management
- Teams collaboration
- Comprehensive project operations
- Upgrade from Dynamics 365 PSA

CRM Solutions

DYNAMICS 365 SALES

Sales management solution

- Client management
- Engagement platform
- Contact management
- Marketing
- Forecasting and Gamification
- Digital selling
- Pipeline management workspace
- Order management
- Proposal management
- Lead management
- Product information management
- Competitors management
- Microsoft Teams Integration
- Microsoft Relationship Sales integration
- Dynamics 365 Sales mobile
- Business process management

DYNAMICS 365 SALES PROFESSIONAL

Sales management for professionals

- Accelerator workspace
- Visual insights
- Simplified opportunity-to-invoice process
- Pipeline management
- Customer 360 view
- Relationship intelligence
- Business process flow
- Documents templates
- Document management
- Outlook add-in
- Microsoft Teams Integration
- Forms pro support
- Sharepoint support

MICROSOFT RELATIONSHIP SALES

Build customer relationships at scale with relationship selling

- LinkedIn Sales Navigator integration
- Relationship visualization
- Opportunity risks management
- Contacts analysis
- Next best action
- PointDrive integration
- InMail communications support

Services

DYNAMICS 365 PLANNING OPTIMIZATION

External micro service for planning

- Multi-tenant
- What if analysis
- Planning insights
- Hyper Scale
- External Signals support
- Scheduling with finite capacity
- Capability-based resource allocation
- Process manufacturing support

INVENTORY VISIBILITY ADD-IN FOR DYNAMICS 365 SCM

External micro service for inventory

- Inventory allocation
- Allocation rules
- Fallback shared inventory pool
- Soft reservation

GLOBAL INVENTORY ACCOUNTING ADD-IN FOR DYNAMICS 365 SCM

External micro service for inventory accounting

- Costing ledger
- Cost object policy
- Input measurement basis policy
- Cost flow assumption policy
- Dual currencies & valuations

CONFIGURABLE BUSINESS DOCUMENTS REPORTING

External micro service to setup documents

- Predefined templates
- Document lifecycle management
- Extended Data Model
- Routing

ELECTRONIC INVOICING SERVICE

External micro service to setup documents

- Out-of-the-box integration with Dynamics 365 Apps
- Electronic invoice process configuration
- Regulatory Configuration Services (RCS) support
- Multiple e-invoice formats (XML, JSON, TXT, CSV)
- External web services including certification handling
- Configurable exception message handling

TAX CALCULATION SERVICE

External micro service for taxes

- Out-of-the-box integration with Dynamics 365 Apps
- Configuration of tax service through the RCS
- Configurable tax matrix to automatically determine tax codes, rates, VAT ID
- Configurable tax calculation designer to define formulas and conditions
- Shared tax determination and calculation solution across legal entities

FINANCIAL DIMENSION SERVICE

External micro service for financial dimensions

- Improve resolving financial dimensions thru importing
- Support large numbers of importing journals
- Operate on the data in parallel

Modular Solutions

DYNAMICS 365 INTELLIGENT ORDER MANAGEMENT

Order management solution

- Automate order fulfillment
- Smart fulfillment orchestration
- Real-time omnichannel inventory data
- Real-time visibility into orders
- Integrated operational efficiency dashboards
- Order journey visibility
- Integration management

DYNAMICS 365 UNIVERSAL RESOURCE SCHEDULING

Schedule any data in Customer Engagement

- Multi-resource scheduling
- Facility scheduling
- Resource pools
- Fulfillment preferences
- Schedule board tab
- Resource crew scheduling

FIELD SERVICE MOBILE APP

Mobile solution for Field Service

- Server data in real time
- Signature support
- Email integration
- Push notifications
- Access documents

DYNAMICS 365 OMNICHANNEL FOR CUSTOMER SERVICE

Connect with customers thru different channels

- Communication panel management
- Next best action
- Single interface
- Agent configurator
- Agent dashboard / work items
- Video / audio calls support

LIFECYCLE SERVICES

Collaboration portal to manage the application lifecycle

- Environment management
- Business process library
- Updates management
- Implementation process control
- User management
- Customization analysis
- Asset library
- License sizing estimator
- System diagnostic

DYNAMICS 365 APP FOR OUTLOOK

Customer Engagement solution for Microsoft Outlook

- Contacts and leads
- Link emails to contacts
- Relationship assistant
- Email templates
- Global search
- Phone calls and tasks

DYNAMICS 365 CONNECTOR FOR LINKEDIN

Seamless synchronization of LinkedIn leads

- LinkedIn authentication
- Matching strategy management

DYNAMICS 365 UNIFIED SERVICE DESK

Framework for call centers

- Note capturing
- Agent scripting
- Application integration
- Configurable toolbars
- Audit trails
- Session management
- Configurability
- UX themes

DYNAMICS 365 FOR PHONES AND TABLETS

Unified CRM app for phones and tablets

- Unified Interface
- Access to all apps
- Offline work support

DYNAMICS 365 CUSTOMER VOICE

Enterprise feedback management application

- Personalized surveys
- Departmental capacity management
- Question builder
- Survey key driver analysis
- Integrated customer data platform
- Partial response
- Pause and resume survey
- Personalize survey
- Real-time insights
- Feedback solution templates
- Multichannel survey distribution

CUSTOMER PORTAL FOR DYNAMICS 365 SUPPLY CHAIN MANAGEMENT

Power Apps portals template that create business-to-business (B2B) website

- Authentication and authorization
- Invitation process for customers to use the website
- Ability to view order history
- Ability to create orders
- Ability to view account information
- Pre-configured user roles and entity permissions

MICROSOFT VACCINATION MANAGEMENT

Vaccination management Power app solution

- Support and assistance portal
- Registration and appointment scheduling portal
- Provider and support portal
- Frontline worker app

AI Solutions

DYNAMICS 365 SALES INSIGHTS

AI-driven insights in sales

- Sales accelerator
- Notes analysis
- Natural language support
- Relationship intelligence
- Talking points
- Business data dashboard
- Predictive lead/opportunity scoring
- Assistant studio
- Conversation intelligence
- Advanced forecasting and pipeline intelligence
- Sales Coaching & Call Intelligence

DYNAMICS 365 CUSTOMER SERVICE INSIGHTS

AI-driven insights and virtual agents in customer service

- Automated AI-driven cases grouping
- Agent suggestions
- Data proofing capabilities
- Customer satisfaction dashboard
- Intelligent workflow
- Topic details dashboard
- Case resolution dashboard
- Virtual agents
- KPI summary dashboard
- Incoming cases dashboard
- Teams and Power Automate add-in
- Knowledge search historical analytics
- Natural language support

DYNAMICS 365 CUSTOMER INSIGHTS

Power personalized engagement with customer insights

- Data enrichment / Segmentation
- Customer journey
- Profile unification
- Next best interaction
- Customer cards
- Profile search & discovery
- Teams and Power Automate add-in
- Azure Synapse Analytics integration
- Segment analysis
- Synapse workspace
- Relationship management
- Next best offer recommendations
- Engagement insights
- Audience insights
- Metrics builder
- Integration with Microsoft Clarity
- Integration with Microsoft Advertising

DYNAMICS 365 VIRTUAL AGENT FOR CUSTOMER SERVICE

Virtual agent configuration tool

- Power Automate integration
- Virtual agent designer
- No code customizing
- Microsoft Dataverse integration
- Conversation tracing
- Transfer chat's to manager
- Customer satisfaction (CSAT) dashboards
- AI-assisted authoring
- Integrated Power Virtual Agents

Mixed Reality Solutions

DYNAMICS 365 REMOTE ASSIST

Mixed reality remote presence tool

- HoloLens-based
- Knowledge and service insights
- Video calling
- File sharing
- Service and repairs
- Surveys and walkthroughs
- Remote cooperative work
- Asset Capture
- Mobile support
- Integration with Teams

DYNAMICS 365 PRODUCT VISUALIZE

Place a 3D digital twin of product in real life

- Predefined integration with Dynamics 365 for Sales
- 3D animation
- View product in context
- Share key sales details
- Notes support
- Mobile support
- Predefined integration with Teams

Microsoft Platform

MICROSOFT 365

Office solutions

- Sharepoint
- Outlook
- Word
- Skype
- Teams
- Excel
- Project
- Visio
- Planner
- Excel

MICROSOFT AZURE

Cloud computing solution

- Azure Bot
- Machine Learning
- Logic Apps
- IoT Suite
- Cloud computing
- Cognitive Services
- DevOps
- AppSource
- Regression Suite Automation Tool

MICROSOFT GRAPH

Gateway to data and intelligence

- Manage employee profiles
- Excel integration
- Convert documents
- Real-time updates
- Microsoft Graph API

MICROSOFT VIVA

Employee experience platform

- Viva Topics
- Viva Connections
- Viva Learning
- Viva Insights