DYNAMICS GO
Solutions feature/functions comparison

Sales pipeline/management functionalities

Description: The sales pipeline is a series of phrases that a prospect goes through to enable users to close a deal and make a sale. Each phase has a distinct purpose and tasks/activities associated with it, which contributes towards the users ability to close then purchase.

Feature	Training solution
Creating leads Allows users to record information from new sales enquiries.	✓
Creating opportunities Allows users to qualify new sales leads as a customer, so they can send the customer a quote on the product they are interested in.	✓
Creating quotes Allows users to create quotes to send to customers for sales they are trying to win.	✓
Creating orders Allows users to confirm a sale has been won so they can accurately provide the customer with the products or services they have paid for.	✓
Creating activities Allows users to create activities in their systems time-line, so they and others can keep track of customer activities performed in chronological order.	✓
Creating invoices Allows users to create invoices so they can receive payment for the products or services they have supplied to their customers.	✓
Discounting Allows users to discount products/service prices and set up special offers and discounts.	✓
Currency conversion Provides users with the ability to change currency.	✓
Course bookings Allows users to take bookings from people who want to attend their courses.	✓
Application form trackers Allows users to track if new customers have been sent application forms for their service.	✓
Student welfare tracker Allows users to record welfare information on their students.	✓
Course packages Allows users to sell lessons in blocks so individual customers can book on to a series of lessons.	✓
Funding type Allows users to record how their students are funding their courses.	✓

Managing product/service functionalities

DESCRIPTION: This feature allows users to perform all the necessary tasks needed to run a service and how they sell a service/product.

Feature	Training solution
Adding price lists Allows users to add prices to products.	✓

Managing product/service functionalities cont.

Feature	Training solution
Customer price lists Allows users to create price lists that are specifically set to certain customers, as well as allowing users to charge customers different prices for the same product or service.	✓
Creating an event/course Allows users to add an event/course to the system so they can initiate, for example, quoting for the event/course, planning/budgeting and/or selling places/tickets.	✓
Task lists Allows users to create task lists to help them plan, which can include, for example, setting budgets, key dates, booking venues and setting deadlines.	✓
Task list templates Allows users to save task lists as templates so they can repeat the steps of previous tasks.	✓
Setting event/course capacity Allows users to set the capacity for event venues so that they do not oversell tickets.	✓
Attendee check-in Allows users to check/register attendees onto scheduled events/courses.	✓
Learning outcome tracker Allows users to track and record what learning outcomes have been achieved inside courses.	✓

Template functionalities

DESCRIPTION: Templates contain pre-populated data that users can specify, such as contact names, addresses and product information. This means users don't have to re-enter the same information for each email, Word document or quote.

Feature	Training solution
Email signatures Allows users to add the number of products they have in stock for any given product.	✓
Email templates Allows users to create email templates for functions such as marketing campaigns.	✓
Word templates Allows users to create Word templates, such as quotes, invoices and training certificates.	✓
Quote email templates Allows users to standardise their quoting communications so they can quickly send a quote email with descriptions such as customer name and sales person name/contact automatically entered into the email text.	✓
Lead email templates Allows users to standardise their customer communications so they can quickly reply to leads, providing them with information such as the sales contact for the event/service they are interested in.	✓

Sales pipeline performance analysis reports

DESCRIPTION: Allows users to analyse critical stages of the sales pipeline to understand which areas their product/services sales process are performing well and which require improvement.

Feature	Training solution
Sales pipeline stages reports/tracking Allows users who are sales managers/team leaders to view the progress of specific stages of the sales pipeline that are linked to specific sales team members.	✓
Leads value data Allows users to estimate the total possible value each potential customer has for their business.	✓
New customer lead reports Allows users to analyse how many new leads have been received in any given month.	✓
Lead to opportunity conversion data Allows users to track and analyse how many leads have been converted to opportunities, at both a company-wide and an individual events salesperson level.	✓
Lead to closure conversion rate fields Allows users to enter data so they can analyse their lead to close conversion rates, which enables them to monitor and analyse their event sales performance.	✓
Lead source conversion report Allows users to track their lead sources and to analyse which sources are most likely to result in a sale and which sources are not performing.	✓
Opp source conversion report Allows users to track their opp sources and to analyse which sources are most likely to result in a sale and which sources are not performing.	✓

Service/sales performance analysis reports

DESCRIPTION: Allows users to view reports on key service/product sales performance metrics so they can analyse performance and identify problem areas.

Feature	Training solution
Profitability reports Allows users to create / view reports on their products/service profitability.	✓
Event cost report Allows users to analyse data on the costs involved in planning and running events.	✓
Marketing reports Allows users to analyse the effectiveness of their event marketing campaigns, so problem areas can be identified and improved upon for future event campaigns.	✓
Attendance demographics reports Allows users to analyse and track the demographics of the people attending their events, to identify areas for improvement and where to target future marketing funds.	✓
Attendance data Allows users to view and analyse the attendance figures for events/courses they own and/or have organised for customers' parties.	✓

Service/sales performance analysis reports continued

DESCRIPTION: Allows users to view reports on key service/product sales performance metrics so they can analyse performance and identify problem areas.

Feature	Training solution
Event/course type reports Allows users to view and analyse the type of events/course they have run in a given time period, which allows users to look for patterns and themes for future event/course promotions.	✓
Number of events/courses by venue reports Allows users to view and analyse the number of event/courses they have run in comparison with venues, to identify patterns and themes.	✓
Event/course type versus location report Allows users to view and analyse the event/course type against the location it was held in, identify areas of improvement for future events/courses.	✓
Event/course task completion data Allows users to monitor the progress which the events/course team are making in the completion of all organisational task outcomes. Users can then view which events/courses are behind schedule and which are ahead.	✓
Attendee capacity reports Allows users to view the number of tickets/places available and sold for any given event/course in relation to the venue capacity.	✓
Customer invoice reports Allows users to view all paid and unpaid invoices.	✓
Task completion data (for general tasks) Allows users to view all completed and overdue tasks.	✓
Course funding reports Allows users to view, track and analyse the budget for externally funded courses	✓
Student progress tracker Allows users to track the progress of students on any of their training courses.	✓
Student attendance history report Allows users to view all of the lessons/course individual students have attended over time	✓
Post course student outcome reports Allows users to track the outcomes of their students after they have completed their training courses	✓
Service user demographics reports Allows users to report on the demographics of the people using their service.	✓
Course dropout report Allows user to record and report on the number of students that drop out of courses.	✓
Assignment due date tracker Allows users to enter the due dates for student assignments and report on which students have assignments that are close to or overdue.	✓

General reporting and analysing data functionalities

DESCRIPTION: Allows users to create reports, view and analyse any data that is inside the system.

Feature	Training solution
Reports Allows users to create / view reports on data stored within the system.	✓
View filtering Allows the customers to filter their data to extract the information they need.	✓

Analysing staff activity functionalities

DESCRIPTION: Allows users to analyse and track their staff activities and to keep up-to-date with staffs productivity levels.

Feature	Training solution
Staff activity report Allows users to analyse sales actions performed by the sales team members – for example: lead close rate, Opp close rate, number of sales tasks created, number of sales activities performed (phone calls, emails, meetings).	✓
Activity timeline Allows users to record/view everyone's activities in chronological order, for the benefit of all teams.	✓
Timeline/activity management Allows users to track activities (phone calls, emails, meetings, etc.) that have been performed by team members.	✓
Customer contact tracker Allows users to mark key milestones within their customers' correspondence, so they can monitor when they last contacted their customers and when they plan to contact them again.	✓
Customer email tracker Allows users to track customer emails.	✓
Calendar control Allows users to view all of their activities in a calendar view, rather than a listed view.	✓
Contact tracker Allow users to track all the different types of contact (email, phone, visit, etc) they have had with the people using their service.	✓

Contact management functionalities

DESCRIPTION: Allows users to segment contacts into groups to organise and better cater to them. Users can gather crucial customer data and bolster their marketing strategies when introducing new products. It also improves the personalisation of all contacts with customers, making them feel important and catered to.

Feature	Training solution
Social media contact fields Allows users to attach a contacts social media handle and/or profile URLs into their contact details.	✓
Creating a contact Allows users to setup a contact for anyone the user is doing business with.	✓
Student wellbeing Allows users to save information on the wellbeing of the students on their courses.	✓

Contact management functionalities continued

DESCRIPTION: Allows users to segment contacts into groups to organise and better cater to them. Users can gather crucial customer data and bolster their marketing strategies when introducing new products. It also improves the personalisation of all contacts with customers, making them feel important and catered to.

Feature	Training solution
Secondary contact Allows users to record a secondary contact/next of kin against the main contact.	✓

Dashboards and charts

DESCRIPTION: Allows users to view statistics in a highly visual, engaging and customised perspective. They offer real-time data updates and help users to make data-driven decisions.

Feature	Training solution
Dashboards Provide users with the ability to create personalised or system-wide boards to display views and/or charts of business data, making it easier to analyse data and make data-driven decisions.	✓
Charts Provides users with the ability to create visualisations of unique business data, to aid the user's analysis to see patterns, trends and themes, making it easier to analyse data and make data-driven decisions.	✓

Duplication management

DESCRIPTION: Prevents users from corrupting their data with duplication errors.

Feature	Training solution
Duplicate detection rules Allows users to set rules which help them to avoid duplicating data inside their system, such as entering contact details for the same person.	✓
Merging tool Allows users to merge any accounts, contacts and leads that have been accidentally duplicated inside the system.	✓

Outlook integration

DESCRIPTION: Allows users to: view or link email messages, meetings and appointments; synchronise contacts and related information; add email templates, knowledge articles and sales literature.

Feature	Training solution
Tracking appointments Allows users to track appointments which are saved in their Outlook calendars from within the dynamics system and vice versa.	✓
Tracking emails Allows users to track emails via the Outlook app.	✓

Data export/import

DESCRIPTION: Allows user to quickly add and extract data into/out of the system.

Feature	Training solution
Data export Allows users to extract data into Excel, so they can share data with external clients such as accountants or create their own reports inside Excel.	✓
Data import Allows users to upload data in bulk from Excel files, providing them with quick methods to enter information - for example migrating contact lists or new product inventories.	✓

Marketing campaign functionalities

DESCRIPTION: Allows users to plan, execute, track and analyse marketing initiatives.

Feature	Training solution
Targeted marketing lists Allows users to filter customers based on details such as their purchase history, whether they have received a quote, or their location, so users can add specific customers to marketing campaigns.	✓
Marketing quick campaigns Allows users to send mass emails to a selected lists of customers or clients.	✓

Customisation functionalities

DESCRIPTION: Customisations allow users to change their CRM as the user's business evolves.

Feature	Training solution
Custom fields Allows users to enter data that is custom-built and unique to their business, such as the products they are selling.	✓
Creating business rules Allows users to quickly configure rules for record forms to help speed up and increase the accuracy of the data entry process – for example: displaying or hiding specific fields when a specific option is selected while inputting data.	✓
Adding columns to views Allows users to temporarily configure the UI so they can see data that is specific to their needs.	✓
Personal views Provides users with the ability to personalise the data table UI, so they can see data that is specific to their needs.	✓
Sharing personal views Provides users with the ability to share their personalised data table view UI, which allows team members to collaborate and discuss specific items of data saved within the system.	✓
System views Provides users with the ability to share a personalised data table UI to the entire system, making it easier to discuss specific items of data saved within the system.	✓

Document storage

Feature	Training solution
File storage Allows users to attach documents to records inside their CRM solution.	✓
Connect files to Sharepoint Allows users to attach documents to a file store location that can be accessed from anywhere.	✓

Miscellaneous features

Feature	Training solution
Department hierarchy Provides users with the ability to view who team members report to.	✓
Dynamics for mobile Allows users to access their Dynamics solution on their mobile devices.	✓
Global search tool Allows users to search their system for categories such as, accounts, contacts, products, leads, opportunities, quotes, orders and invoices.	✓

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