

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

DYNAMICS 365 COMMERCE
Retail management

- AI product recommendation
- Digital commerce
- Fraud protection integration
- Pricing
- B2B & B2C e-commerce
- Shift management
- Stores management
- Omni-channel excellence
- Dynamics 365 Commerce app marketplace
- Assortment management
- Inventory movement between in-store locations from POS
- Customer segmentation and targeting
- Product categories
- Employee management
- Retail server
- Call centers
- Loyalty management
- Cloud scale unit
- Cloud POS & Modern POS
- Replenishment management
- Online stores
- Retail HQ
- Microsoft Teams Integration
- PayPal payments connector

DYNAMICS 365 HUMAN RESOURCES
Human resource management

- People management
- Task management
- Compensation management
- Compliance
- HR programs optimization
- Alerts management
- Leave and absence management
- Employee and manager self service
- Employee development
- Organization and personnel management
- Employee transfer management
- Personal management
- Benefits management
- Learning
- Business processes management
- Performance management
- LinkedIn integration
- Skills management

DYNAMICS 365 BUSINESS CENTRAL
Enterprise resource management for small and medium sized companies

- Bank and payment reconciliations
- Warehouse management
- Assembly management
- Production management
- Analytics
- XBRL
- Task management
- Service management
- Finance management
- Self service portal
- Accounts payable
- Treasury
- Inventory management
- Planning functionality
- Workflow
- Accounts receivable
- Budgeting
- Project management
- Human resource management
- CRM
- Microsoft Power Platform integration
- Fixed assets

CRM Solutions

DYNAMICS 365 SALES
Sales management solution

- Client management
- Engagement platform
- Contact management
- Marketing
- Forecasting and Gamification
- Digital selling
- Pipeline manager 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

DYNAMICS 365 CUSTOMER SERVICE
Customer service management

- Customer service center
- Connected customer service
- Agent experiences & productivity
- AI-suggested cases
- Queue management
- Case management
- Task management
- Service calendar management
- Product information management
- Client management
- Service management
- Omni-channel voice
- Integration with Dynamics 365 Virtual Agent for Customer Service
- Unified intelligent routing
- Knowledge management
- Service scheduling migration tool

DYNAMICS 365 FIELD SERVICE
Field service and maintenance management

- Connected field service
- Competence management
- Resource planning & management
- Proactive service delivery
- Resource scheduling dashboard
- Empower frontline workers
- Customer assets management
- Service orders management
- IoT alert AI-based suggestions
- Contracts/Offers management
- Service operations optimization
- Sales
- Return management
- Billing
- Procurement management

DYNAMICS 365 MARKETING
Marketing management

- AI powered analytics
- Customer journey
- Deep personalization experience
- Event management
- Client management
- Digital marketing
- Marketing campaign management
- Deeply personalized emails campaigns
- Layout editor
- Email A/B testing
- Support approvals using Microsoft Automate
- Microsoft Teams for virtual events support
- Customer journey management
- Logistic management
- Customer Insights integration

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 to manager
- Customer satisfaction (CSAT) dashboards
- AI-assisted authoring
- Integrated Power Virtual Agents

DYNAMICS 365 FRAUD PROTECTION
AI anti fraud solution

- Adaptive AI technology
- Fraud protection network
- Loss prevention scale motion
- Transaction acceptance booster
- Behavioral and mobile fingerprinting
- Test and verify rules
- Risk decisioning dashboard
- Customer escalation support tool
- Payment Service Provider (PSP) support
- Loss prevention

DYNAMICS 365 CONNECTED STORE
Real-time observational data to improve in-store operations

- Shopper analytics
- Intelligent Command Center
- Integrated workflows with Microsoft Power Platform
- Inventory recommendations
- Venue/Zone management
- Equipment failures control
- Daily Summary dashboards
- Customer acquisition funnel
- Integration with video camera's
- Anomaly detection

DYNAMICS 365 FINANCE INSIGHTS
Built-in AI tools to improve cash flow

- Customer payment predictions
- Forecast bank balance
- Intelligent budget proposal
- Treasurer workspace
- External data for cash flow forecasting
- Shift management recommendations
- Queue management analytics
- Display effectiveness analytics
- Triggered real-time alerts
- Integration with IoT

MICROSOFT CUSTOMER DATA PLATFORM (CDP)
Solution to the problem of disconnected customer data systems

- Unify data for real-time insights
- Marketing customer profile
- Sales customer profile
- Customer service profile
- Multi-source data analysis
- Predefined connectors

Mixed Reality Solutions

DYNAMICS 365 REMOTE ASSIST
Mixed reality remote presence tool

- HoloLens-based
- 3D models 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

DYNAMICS 365 GUIDES
Holographic instruction tool

- Capture work processes tool
- 3D models working
- Non-linear (branching) workflows
- Spatial Triggers
- Guides constructor
- Attachments support
- Step by step instructions
- Instructor cards management
- Productivity dashboards

DYNAMICS 365 IMPORT TOOL
Tool importing 3D models to MR solutions

- Optimize the converted 3D models
- Convert 3D models to GLB
- Layouts support
- Send models to Microsoft
- HoloLens support
- Visio add-in support

Power Platform

POWER AUTOMATE
Robotic process automation

- Alerts
- Synchronization management
- Transparent processes between systems
- Predefined integration templates
- Mobile support
- Tasks automation
- Steps recorder
- Microsoft Teams integration
- UI Flows connector
- AI Builder integration
- Power Automate Desktop
- Document automation solution
- Solution-based flows
- Process advisor
- Robotic Process Automation

POWER BI
Business intelligence solution

- Predefined dashboards
- Power Automate visual
- Power BI Insights Apps
- Embedded analytic
- Big data foundation
- AI visualization
- Power BI Mobile
- Power BI Service
- Smart Narrative
- Microsoft Dataverse for Analytics

AI BUILDER
Artificial intelligence solution

- Predefined AI models
- Data connectors
- Power Apps integration
- Power Automate integration
- Form processing
- Invoice processing
- Receipt processing
- IDs processing
- AI Builder features in Microsoft Teams
- Signature detection

POWER APPS
Business solutions tool

- Process automation
- Application constructor
- Microsoft Dataverse for Apps
- Built-in to Dynamics 365 products
- Built-in mixed reality
- Build apps for Microsoft
- Teams
- Converged mobile app
- Testing and debugging tool
- Async OnSave events
- Export to different formats

POWER VIRTUAL AGENT
Intelligent virtual agents

- AI chatbots
- Bots analytics
- Voice interactions
- Adaptive Cards
- AI-assisted authoring
- Entities management
- Graphical interface
- No code development
- Integration with Bot Framework Composer
- Multi-turn topic suggestions
- Predefined connectors

POWER APPS PORTALS
Portal management

- Portal content management
- Knowledge base management
- Microsoft Azure Analysis Services support
- Authentication management
- Relevance search integration in portals

MICROSOFT DATAVERSE
Cloud-based, low-code data service and app platform

- Scheduled integration with other systems
- Transform and import data using Power Query
- One-time import of data
- Interacting with tables
- Business rules & flows
- Business logic with code
- Data archival
- Workflow

POWER APPS MOBILE
Mobile solution for Power Apps

- Model-driven apps
- Canvas apps
- Built-in integration with Dynamics 365
- Optimization tool for offline capabilities

Microsoft Cloud for Industry

MICROSOFT CLOUD FOR HEALTHCARE
Capabilities to manage health data in healthcare organizations

- Connected patient experiences
- Patient insights
- Virtual health
- Health team productivity
- Data interoperability
- Clinical analytics
- Operational analytics

MICROSOFT CLOUD FOR FINANCIAL SERVICES
Capabilities to manage financial services data for financial services organizations

- Unified customer profile
- Remote sales and service
- Customer onboarding
- Banking customer engagement
- Loan manager
- Financial crime protection
- Risk analytics

MICROSOFT CLOUD FOR NONPROFIT
Capabilities to manage nonprofits organizations

- Volunteer Engagement
- Volunteer Management
- Nonprofit marketing template
- Deliver effective programming
- Accelerate mission outcomes

MICROSOFT CLOUD FOR MANUFACTURING
Capabilities to manage manufacture organizations

- Frontline worker empowerment
- Learning and knowledge management
- Operational visibility
- Asset productivity
- Production operations
- Supply chain visibility
- Digital twins and digital thread
- Product development
- Digital selling

MICROSOFT CLOUD FOR RETAIL
Capabilities to manage retail organizations

- E-commerce personalization
- Digital advertising
- Digital and smart stores
- Loss and fraud prevention
- Anywhere commerce conversion
- Multichannel fulfillment
- Integrated customer service
- Shopper analytics
- Inventory management
- Retail media

MICROSOFT CLOUD FOR SUSTAINABILITY
Help companies measure, understand and take charge of their carbon emissions

- Connect emissions data sources into one view
- Customers a sustainability scorecard
- Customers emission reduction goals
- Emissions reporting

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