

Microsoft Dynamics CRM Online

# Small and medium business – frequently asked questions

# Answers to frequently asked questions by prospects

Use this document to get answers to frequently asked questions about Microsoft Dynamics CRM Online for small and medium businesses. For help determining the right technology solution for your business, including the license requirements and pricing information, consult with a Microsoft Dynamics Certified Partner. This document does not supersede or replace any of the legal documentation covering use rights. Microsoft Corporation reserves the right to revise the existing version without prior notice.

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# 1. Product capabilities

## 1.1 What is Microsoft Dynamics CRM Online?

Microsoft Dynamics CRM Online is an easy-to-use, mobile-ready business solution that can help small and medium businesses accelerate sales and nurture existing customer relationships. It provides a complete customer relationship management (CRM) solution that helps you effectively manage customer and sales information and gives you more visibility into your business operations.

## 1.2 What can Dynamics CRM Online help us do?

Dynamics CRM Online provides capabilities to manage contacts, nurture leads, drive sales, and amaze customers. Better manage your opportunities with centralized information about leads and customers—accessible anytime, anywhere, from virtually any device. Spend less time with paperwork and more time with customers using automated processes that help manage daily tasks. And make better, faster decisions with real-time data and business insights that help you anticipate customer needs and stay ahead of your competition. Learn more about new features and capabilities by reviewing the [Dynamics CRM Online basics guide](#).

## 1.3 How does Dynamics CRM Online work with Office 365?

Dynamics CRM Online delivers familiar tools that work hand-in-hand with Office 365 to increase productivity and collaboration across your organization. Here are a few examples of what you can accomplish by using these powerful tools together:

- Create leads, view customer data, or open CRM support cases from your Outlook inbox.
- Craft professional quotes and sales orders using Word templates in CRM.
- Update data using Excel inside CRM, and easily import, export, and share information.
- Attach meeting notes and customer interaction details using OneNote in CRM.
- Store and sync documents in one centralized SharePoint location accessible via CRM.
- Stay connected and collaborate with colleagues and customers using Skype for Business.

[Explore additional ways](#) that Dynamics CRM Online and Office 365 are better together.

## 1.4 How can my organization learn more about Dynamics CRM Online?

Sign up for a [free Dynamics CRM Online trial](#) to connect with a Microsoft expert who will work with you to understand your needs, provide an overview of the solution, and guide you through the personalized trial experience.

## 1.5 Are there industry-specific Dynamics CRM Online solutions?

[Microsoft Dynamics Labs](#) provides business process templates to help organizations follow best practices for common industry scenarios. These powerful, customizable, community-supported templates are available for free with your solution.

- [Retail industry templates](#)
- [Professional services industry templates](#)
- [Manufacturing and distribution industry templates](#)
- [Financial services industry templates](#)
- [Public sector industry templates](#)
- [Other industry templates](#)

## 1.6 Is it possible to customize Dynamics CRM Online?

Yes. Dynamics CRM administrators and partners are available to help you customize Dynamics CRM Online to fit the specific needs of your organization. Additionally, the tools you need to personalize your CRM

experience are already included, so you can adapt your solution as your needs grow. Watch this video for [6 ways to customize CRM \(without writing any code\)](#) and review the [product documentation](#) for more details.

### 1.7 How can we be sure our data is secure?

Dynamics CRM Online is powered by the security-enhanced, enterprise-grade Microsoft cloud, so you can be confident that all your data is stored with advanced protection. Additionally, the [security model of Dynamics CRM Online](#) gives you the control to assign users specific access to the information required to do their jobs.

### 1.8 Should we install it on our in-house servers or go to the cloud?

Dynamics CRM Online powered by the Microsoft cloud frees up your staff to focus on running your business rather than managing IT. With all your CRM resources accessible online, you can retrieve your customer information, sales and marketing analytics, service records, or anything you need for customer management, at any time, from any device.

### 1.9 Will Dynamics CRM Online work on a variety of mobile devices?

Dynamics CRM Online is a mobile-ready solution available for tablets and phones powered by [iOS](#), [Android](#), and [Windows](#).

### 1.10 Can I go from quote to order to invoice using Dynamics CRM Online?

Yes. Microsoft Dynamics CRM Online supports robust quote, sales order, and invoice building. For more information, please refer to the [detailed product documentation page](#).

### 1.11 How does Dynamics CRM Online work with our business website and the applications our organization already uses?

[Microsoft Dynamics CRM web services](#) can be used to exchange information with third-party applications. Dynamics CRM Online also supports single sign-on with cloud-based applications that use Microsoft Azure Active Directory for authentication.

## 2. Pricing and licensing

### 2.1 How much does it cost?

For small and medium businesses, increasing sales and delighting customers can cost less than the price of a cup of coffee a day. A complete CRM solution subscription costs approximately \$62.60 USD per user, per month. This includes Microsoft Dynamics CRM Online Professional (\$50 USD/user/month) plus Microsoft Office 365 Business Premium (\$12.60 USD/user/month). If you already have Office 365 Business Premium or higher SKU then you can add on Microsoft Dynamics CRM Online Professional for \$50 USD/user/month. Your final price depends on your requirements and business needs, all of which can be discussed with a Microsoft partner. For more details, review the [Dynamics CRM Online licensing and pricing guide](#).

### 2.2 Is there a minimum seat count?

Yes. The minimum purchase requirement is five seats.

### 2.3 Is there a special rate for non-profits?

Qualified non-profit organizations can obtain a Microsoft Dynamics CRM Online license at non-profit pricing. Please refer to [Non-profit pricing](#) for more details.

### 2.4 Can we start with a few users and then add more seats as we hire new employees?

There is a minimum five-seat purchase requirement, however you can easily add more users as your business expands or your needs change.

## 2.5 Can we cancel subscriptions if employees or temporary workers leave?

Yes, you can cancel at any time. No cancellation fees are charged if you reduce users within the first month of your paid Dynamics CRM Online subscription. After your first month, cancellation fees plus applicable per-user taxes will be assessed for changes to your subscription. For more details, please refer to the [Dynamics CRM Online licensing and pricing guide](#) and [billing FAQ](#).

# 3. How to try Dynamics CRM Online

## 3.1 How can we get a demo of the product?

You can sign up for a [free Dynamics CRM Online trial](#) that will be guided by a Microsoft expert and personalized for your organization. A Microsoft expert will connect with you to discuss your needs, provide an overview of the solution and connect you to a Microsoft partner to give you a personalized demo and get you started on your free 30-day Microsoft Dynamics CRM Online trial.

## 3.2 How do we start the trial?

Starting your trial is easy. [Sign up for a free Dynamics CRM Online trial](#), and a Microsoft expert will call and help you to get set up.

## 3.3 How long is the trial?

Your free trial gives you 30 days to experience the full functionality of Dynamics CRM Online.

## 3.4 What happens during the trial?

A Microsoft expert will call you to gather more details about your specific requirements and get you set up in the trial environment. Additionally, you'll be connected with a Microsoft partner who can walk you through the trial experience, and guide you in purchasing and customizing the solution for your organization.

## 3.5 How many users can we include in the trial?

The Dynamics CRM Online trial includes up to 25 user licenses.

## 3.6 Will Microsoft help us move data from our old system?

You can review guidance on easily importing [contacts](#) and [accounts and leads data](#) into your trial instance. For more complex data migration needs, it is recommended that you work with a [Microsoft partner](#).

## 3.7 What happens after the trial period is over?

After your organization's free trial period of Dynamics CRM Online is complete, you can either convert your account to a paid subscription or disable your account and delete your customer data. If you need additional time to extract your customer data, you also have the option to retain your data in a limited functionality account for up to 60 days from the end of your trial subscription. For more tips on getting the most out of your trial period, refer to [Run a successful trial in your organization](#).

# 4. How to buy Dynamics CRM Online

## 4.1 Who are Microsoft partners?

Microsoft Dynamics CRM Online is sold, implemented, and supported by a global network of Microsoft-approved solution consultants called partners. These local partners will meet with you to discuss your requirements and then create a price quote based upon your business needs. Microsoft Dynamics partners and Rapid Start Services will have you up and running quickly, with less disruption to your business. Chat with a Microsoft expert when you [sign up for your free trial](#) to be connected with a partner best suited to your needs, or search [Microsoft Pinpoint](#), our directory of Microsoft partners.



#### 4.2 How can we find partners that operate in our industry or location?

Use [Microsoft Pinpoint](#) to search for Microsoft partners based on your specific criteria, like proximity, industry focus, or areas of expertise.

#### 4.3 Can we buy directly from Microsoft?

The recommended way to buy is to connect with a Microsoft partner by signing up for a [free Dynamics CRM Online trial](#) or searching [Microsoft Pinpoint](#). Your partner will work with you to determine your unique needs, purchase the product, and implement the solution that works best for your business.

#### 4.4 How much does it cost to work with a Microsoft partner?

[Connect with a Microsoft partner](#) in your area to discuss your business needs and goals, and get a customized quote specific to your request.

#### 4.5 How soon can we be up and running with Dynamics CRM Online?

Implementation time can vary depending on a number of factors. Your Microsoft Dynamics Partner will work with you to determine the optimal setup solution to meet your unique business needs, and can use resources such as the [Microsoft Dynamics CRM Sure Step Guide](#) to successfully and reliably complete your deployment on time and on budget.