

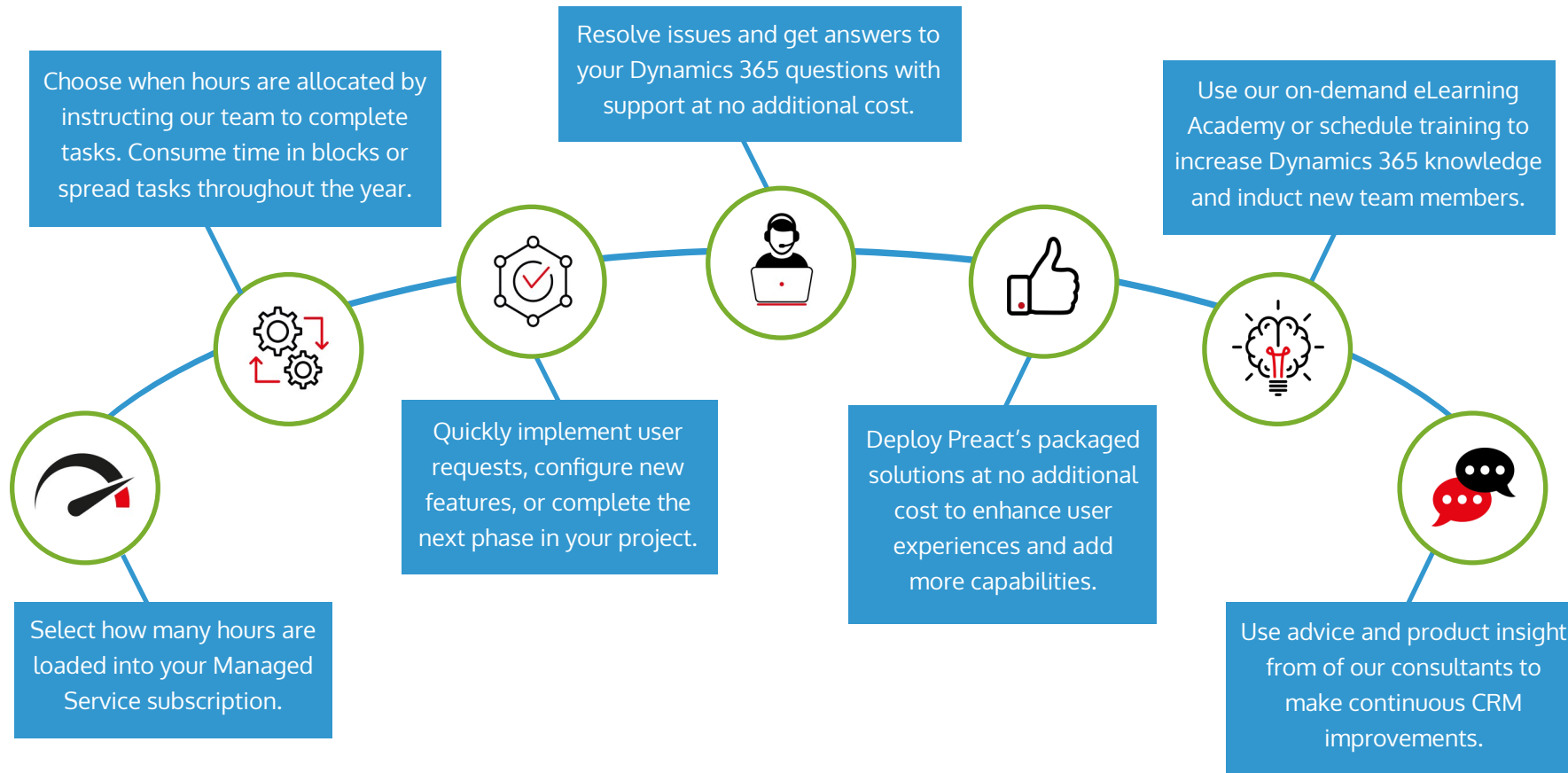
# Managed Service Table of Activities

Examples of activities available through our managed service to help organisations improve and extend their Dynamics 365 implementation.

- Deploy Dynamics 365 Apps
- ClickDimensions
- Upgrade Readiness
- Engagement Activity
- Power Apps
- Power BI
- Dynamics 365 Migration
- Web Portal Deployment
- Training
- Consultancy
- System Integration

Dynamics 365 Customer Service	Dynamics 365 Field Service	Dynamics 365 Marketing	Dynamics 365 Project Service	Dynamic 365 Sales	Upgrade Scope	Build Marketing List / Advanced Query											Mobile App Development	Sales User Training	New User Training	Configure Click Dimensions Workflows	Click Dimensions Training	Click Dimensions Onboarding	
Dynamics 365 Review Day	Update & Review Calls	Configure New Features	Global Filters	PM Project Management	Define Segments	Lead Scoring Models	Configure Goals	Configure Sales Insights	Functional Testing	Customise Order Form	Enable Customer Service Insights	Configure Virtual Assistant Bot	Cascading Rules	Customer Journeys	Event Management Processes	User Security Profiles	Build Model-Driven Apps	Field Service Training	System Administrator Training	Click Dimensions Update			
Technical Account Management	Consultancy Call	Update Project Management	Automatic Record Creation Rules	Field Mappings	Solution Design & Build	Server-Side Sync Set-up	Requirement Scoping & Write Up	Investigation & Research	Configure Dynamics 365 App for Outlook	Update User Settings	Configure Customer Insights	Approval Controls	Workflow Creation	Sitemap Editing	Email Templates	Record Reassignment	Replace legacy HTML with PowerApps	Marketing Training	User Acceptance Training	Web Portal Build			
Go-Live Support	UAT Testing Support	Transition from Deprecated Features	Entity Build	Unified Interface Transitioning	Create Unified Interface App	Update SSL Certificates	Form Rules	SLA Service Level Agreements	Customize List Views	Add Form Sub-Grid	Documentation	Configure Queues	Account Territories	Risk Analysis	Field Removal	Next Phase Implementation	Build AI Model	Power Automate (MS Flow) Training	Project Service Automation Training	Web Portal QA Testing			
Migrate Solution	Data Migration	Code Audit & Solution Check	123 Auto-Numbering Records	Configure Products & Price Lists	Rollup Fields	Price List Item Workflows	System Take On	Work Order Workflows	Calculation Fields	Process Flow Build	Configure Quick Create	Consent Tracking	Calendar Changes	Configure Schedule Board	Geocode Plug-In	Add / Hide Form Tabs	Bespoke Consultancy	Dashboard & Charts Training	Campaign Automation Training	Customise Portal Views			
Migration Planning	Trial Migration	Update Go-Live Support	Bulk Edit Processes	Code Update	Proof Of Concept Build	Custom Scripting & Plugins	Code Guidance	Script Debug	Configure Forms Pro Surveys	Invoice Reporting	Round Robin Scheduling	Build Feedback Processes	Entity Attribute Configuration	Configure Sandbox Environment	Refresh Sandbox	Review & Optimize Cloud Storage	Merge Records	Train the Trainer Session	Training Workshop	Reskin Portal Theme			
Import Products & Price Lists	Migration Review	Configure Version Upgrade	Bulk Deletion Workflows	Setup Dynamics 365 Knowledge	System Health Check	123 Auto Field Population	Restore from Audit Logs or Backup	Set-Up Hierarchies	Data Cleansing	Data Enrichment	Create & Customise Entity Forms	Configure Anonymisation	Report Customisation	Manage Contracts / Agreements	Workflow Review	Azure Attachment Management	Button Creation	Create Training Materials & Resources	Bespoke Training	Bespoke Portal Customisations			
On-Premise Migration to Cloud	Create Power BI Report	Power BI Familiarization	Power Automate Queries	Microsoft Word Templates	Mapping Controls	Quote Template	Document Process Wireframes	Apply Currency Converter	Case Management Set-Up	Custom Report Design	LinkedIn Sales Navigator Integration	Azure DevOps Integration	Facebook Integration	Web Form Integration	Adobe Sign Integration	DocuSign Integration	QuickBooks Integration	Xero Integration	Pre-UAT Training	Portal Review			
Power BI Consultancy	Power BI Scoping	Power BI Customisations	Microsoft Teams Integration	Scribe Install & Data Upload	Scribe Query Change	API Integration & Testing	Creditsafe Integration	SQL / SSIS Integration	Exchange Integration	SharePoint Integration	Configure dotDigital Connector	Hubspot Integration	Mailchimp Integration	D365 Business Central Integration	Dynamics Nav Integration	PandaDoc Integration	Sage 50 / Sage 200 Integration	Phone Integration	Custom Integration	Configure Knowledge for Portals			

# Managed Service Overview



[www.preact.co.uk](http://www.preact.co.uk)

0800 381 1000 | 01628 661 810

[info@preact.co.uk](mailto:info@preact.co.uk)

Gold  
Microsoft Partner



2020/2021  
INNERCIRCLE  
for Microsoft Business Applications