

# Managed Service Table of Activities

## for Microsoft Dynamics 365 Customer Engagement

Dynamics 365 for Sales		Dynamics 365 for Customer Service		Dynamics 365 for Field Service		Dynamics 365 for Project Service		Dynamics 365 Talent		Dynamics 365 for Marketing		Upgrade Scope		PM Project Management		Click Dimensions Onboarding		Configure Click Dimensions Workflows		Create Landing Pages, Surveys & Web Forms																	
Deploy Dynamics 365 CE Apps	Engagement Activity	Dynamics 365 Migration	Consultancy	Upgrade Readiness	ClickDimensions	Power BI	Web Portal Deployment	System Integration	Training	Complimentary Training (Premium Only)	Introduction Training	Next Phase Implementation	Sales User Training	Click Dimensions Training	Record Reassignment	Power User Training	New Feature Training	Web Portal Scoping	Field Service Training	System Administrator Training	Web Portal Build																
Dynamics 365 Review Day	Update Calls	Configure New Features	Quote Template	Process Write Up	Solution Design & Build	Proof Of Concept Build	Build New CRM Report	Calculation Fields	Rollup Fields	Cascading Rules	Workflow Creation	Azure Attachment Management	User Security Profiles	Configure User Accounts	Add / Hide Form Tabs	Field Service Training	System Administrator Training	Web Portal Build	Technical Account Management	Consultancy Call	Update Project Management	Automatic Record Creation	Field Mappings	Server-Side Sync Set-up	Requirement Scoping & Write Up	Investigation & Research	Configure Dynamics 365 App for Outlook	Update User Settings	Email Router Install	Approval Controls	Review & Optimize Cloud Storage	Sitemap Editing	Email Templates	Global Filters	Marketing Training	User Acceptance Training	Web Portal QA Testing
Go-Live Support	Kick-Off Call	Transition from Deprecated Features	Entity Build	Unified Interface Consultancy	Update SSL Certificates	Form Rules	Service Level Agreements	Customize List Views	Customise Order Form	Documentation	Configure Queues	Data Enrichment	Risk Analysis	Field Removal	Configure Goals	Microsoft Flow Training	Project Service Automation Training	Portal Review	Migrate Solution	Data Migration	Pre-Update Code & Solution Check	Auto-Numbering Records	Configure Products & Price Lists	Price List Item Workflows	System Take On	Work Order Workflows	Configure Relationship Insights	Process Flow Build	Configure Quick Create	Consent Tracking	Calendar Changes	Configure Schedule Board	Geocode Plug-In	Bespoke Consultancy	Dashboard & Charts Training	Campaign Automation Training	Power BI Scope
Migration Planning	Trial Migration	Update Go-Live Support	Design Unified Interface App	Code Update	Custom Scripting	Code Guidance	Script Debug	Configure Mobile App	Invoice Reporting	Create Voice of the Customer Surveys	Build Feedback Processes	Entity Attribute Configuration	Configure Sandbox Environment	Case Management Set-Up	Merge Records	Train the Trainer Session	Training Workshop	Create Power BI Report	Import Products & Price Lists	Migration Review	Configure Version Upgrade	Bulk Deletion Workflows	Setup Dynamics 365 Knowledge	Auto Field Population	Restore from Audit Logs or Backup	Set-Up Hierarchies	Microsoft Social Engagement	Account Territories	Create Entity Forms	Configure Anonymisation	Report Customisation	Manage Contracts / Agreements	Workflow Review	Button Creation	Create Training Materials & Resources	Bespoke Training	Power BI Consultancy
Integration Call	Integration Scoping	API Integration & Testing	Scribe Install	Scribe Data Upload	Scribe Upgrade	Scribe Query Change	SQL Integration	Exchange Integration	SharePoint Integration	dotdigital Connector Integration	Hubspot Integration	Mailchimp Integration	Web Form Integration	Dynamics Nav Integration	Sage 50 / Sage 200 Integration	Phone Integration	PandaDoc Integration	Power BI Training / Familiarization																			