INTRODUCING MICROSOFT DYNAMICS 365 SALES & SERVICE APPS
Microsoft Dynamics 365

Connected Business Apps & Processes

Unify your business - from data to people to processes - with modern, intelligent applications that adapt to your changing needs.

Tailor pre-packaged Dynamics 365 role-based apps to fit your unique requirements and do even more with connected custom apps that will help you analyse, act and automate.
Reduce costs and digitally transform your business.

By managing your customers and sales leads within a unified, cloud-based environment of connected apps, you’ll be better able to delight clients, manage growth, protect data and empower employees - wherever they work.
Tap into the Power of Dynamics 365 from Outlook

Use the familiar Outlook interface to integrate core functionality from Dynamics 365 and connect Outlook contacts.

Track Outlook emails to an existing Dynamics 365 record in a single click, or save as a new record.

Create Dynamics 365 records, run searches and access insights.

Schedule activities on records directly from a tracked Outlook email.

View and edit summary detail for each email sender or recipient.

View contextual information from Dynamics 365 about each sender and recipient including upcoming activities, open cases and leads.

Consistent experiences across Outlook for desktop, web and mobile.
Cloud services and embedded artificial intelligence continually analyses data stored in Dynamics 365 and across Exchange Online emails to present alert card notifications that prompt action and increase sales productivity.

Leverage further AI powered capabilities with Dynamics 365 Sales Insights add-on that includes predictive lead scoring, relationship analytics, aggregated KPIs and visualisations to support proactive leadership and effective coaching.

Sales Assistant app notifies users about upcoming sales meetings and events.

Optical character recognition analyses and converts hand-written notes into digital entries.
Focus On What Matters

Quickly create personalised views that dynamically lists the data that matters most to you.

Gain real-time insights across all teams and business processes including service, sales and marketing.

Continually monitor KPIs and interpret data using contextual charts and drill down for further analysis.

Quickly make inline edits within grid views.

Microsoft Dynamics 365
Reach Your Goals

View insights about your business performance and track progress against key performance indicators.

- Real-time actionable insight
- Embedded Power BI analytics
- Drill-down dashboards
- Nimble decision-making

Dynamics 365 provides a consistent experience across desktop, tablet and mobile devices.

Microsoft Dynamics 365

Create dashboards and share these with other Dynamics 365 users.

Add interactive, real-time visualizations in Dynamics 365 with embedded Power BI dashboards and tiles.

Add any Dynamics chart and list view to create user-defined dashboards.

PREACT exceeding customer expectations
Microsoft Power BI dashboards transform Dynamics 365 data into graphical reports and analytics that support informed, nimble decision making.

Track your key metrics and go from data to actions in minutes. Any data, any way, anywhere. And all in one view that can be embedded within Dynamics 365.
**Complete View of Every Customer**

Unify and share complete customer data, across virtually any device that empowers everyone to create engaging interactions.

Gain visibility into past and planned customer interactions and activities across marketing, sales and service teams.

**Microsoft Dynamics 365**

Timeline filters and visualisations help users quickly navigate record notes, posts, emails and tasks.

Customise record forms to show contextual data that is relevant to each job role and user.
Transform Business Processes

Develop intelligent business processes using Dynamics 365 to help target and win customers.

Implement processes that facilitate natural tailored experiences to increase satisfaction and earn customer loyalty.

Apply guided processes to handle any repetitive workstream including lead qualification, opportunity management, support requests, complaint handling and application processing.

Microsoft Dynamics 365

Guided processes ensure data quality and help users reach successful outcomes by following your business rules and methodology.

Pop open or pin process stages to understand what steps need to be completed to progress each workflow.
Enable 24/7 Self-Service

Meet rising customers expectations by implementing on-demand self-service portals that are natively integrated with Dynamics 365. Enable clients and other contacts to log service issues and check the status on their recent cases - even when your office is closed.

Deflect potential service issues by developing a library of knowledge articles that empower customers to find answers to frequent issues and questions at any time.

Promote the convenience of your web portal to handle other service requests, increase engagement, capture ideas and stand out from the crowd.

Microsoft Dynamics 365

Get started quickly with no-code, intuitive design tools and pre-built portal templates for customers, partners and communities.

Enable portal users to access information in a secure environment that is fully integrated with Dynamics.

Define portal themes and styles to match your branding and main website.
Connect Marketing Automation

Unify email marketing, web forms and CRM with embedded marketing automation within Dynamics 365.

Empower marketing teams to reduce admin so they can focus on building high impact campaigns with personalized messages.

Use real-time marketing engagement data in Dynamics 365 to uncover leads, initiate new campaigns and align activities with sales teams.
Manage any Relationship & Business Process

Microsoft Dynamics 365 pulls together all your business processes and works with familiar Office 365 tools to help everyone be more productive and work efficiently using a single connected solution.
Field Service Automation

Get the right person to the right place, at the right time, with the right skills and equipment.

Ensure customer satisfaction and maximise field service resource productivity by fitting in more appointments.

Microsoft Dynamics 365

Automatically create and schedule work orders, dispatch technicians with the right skill-sets and equipment - and enable them to access customer information from their mobile device.

Improve scheduling and optimise field service resources by quickly identifying the best technician to fulfil each work order request.
Connects Business Apps & Data Sources

Built on an extensible platform with shared data and digital intelligence, Dynamics 365 gives you a single view of your data - and a single platform for business growth. This integrates with:

- **Accounting / ERP** - access client order histories and financial details in Dynamics 365 and send completed orders for processing.

- **Web Forms** - automatically import from new enquiry forms, sign-up forms and PDF downloads that maps form data to new or existing contacts.

- **Web Tracking** - identify which companies visit your website and track these clicks to uncover new prospects and increase online ROI.

- **Surveys** - match customer satisfaction responses from Microsoft Forms Pro and other survey tools to contact records.

- **Document Libraries** - connecting Dynamics 365 with the document management capabilities of SharePoint and OneDrive.

- **Microsoft Teams** - increase collaboration by pinning Dynamics records and views to Teams channels, open a Teams channel within Dynamics that includes integrated file sharing.

+ Dynamics 365 integrates with many more applications & data sources.
Scalable Database Architecture

- Customize, extend and build connected apps across the Microsoft Business Applications Platform.

- Common Data Service unifies Dynamics 365 and Office 365 to enrich customer relationships, increase productivity and improve communication.

- Intuitive tools to configure record forms, views, reports, workflow and security.

- Have an app for every task that features powerful workflow automation and built in intelligence.
Build Custom Business Apps

PowerApps uses visual drag and drop tools to quickly create new web and mobile connected apps.

Pull data from multiple sources to extend the capabilities of Dynamics 365, other business applications and services.

Connect to what you already have...

Sharepoint Online  Office 365  Dynamics 365  SQL Server  Microsoft Azure  Excel  Custom API’s

Create automated workflows between your favourite apps and cloud services
Fixed Price Implementation & Managed Service

From requirements scoping to system build we take a fixed price approach so you can maintain firm control over your project costs.

A Microsoft Gold Partner since 2009, and a member of the elite Inner Circle for Microsoft Business Applications, you can be sure of working with a trusted provider that help you achieve rapid and sustained success with Dynamics 365.

**QUICK START**

Includes all the essentials to complete your initial cloud deployment in just a few days. Beginning with high-level scoping we'll customize Dynamics 365 to fit your processes, provide training and deliver this as a fixed scope, fixed price service.

**SCOPE LED PROJECT**

Beginning with a fixed price scoping consultancy we'll fully define and document your requirements. This approach is recommended if your project requires external integration, if it involves multiple custom entities or complex processes.

**MANAGED SERVICE**

Access expert support to answer questions and use inclusive service hours to phase your implementation, spread service costs monthly, increase user skills and make continual improvements to your Dynamics system.
Our business is built on helping organisations achieve outstanding success with Dynamics 365 and Microsoft Business Applications.

With hundreds of implementations under our belt since 1993 we would be delighted to discuss your requirements and explore how Dynamics 365 will help you improve performance.

Contact us today to learn about our fixed price implementations and arrange a quotation.

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