

# INTRODUCING MICROSOFT DYNAMICS 365 SALES & SERVICE APPS

# Connected Business Apps & Processes

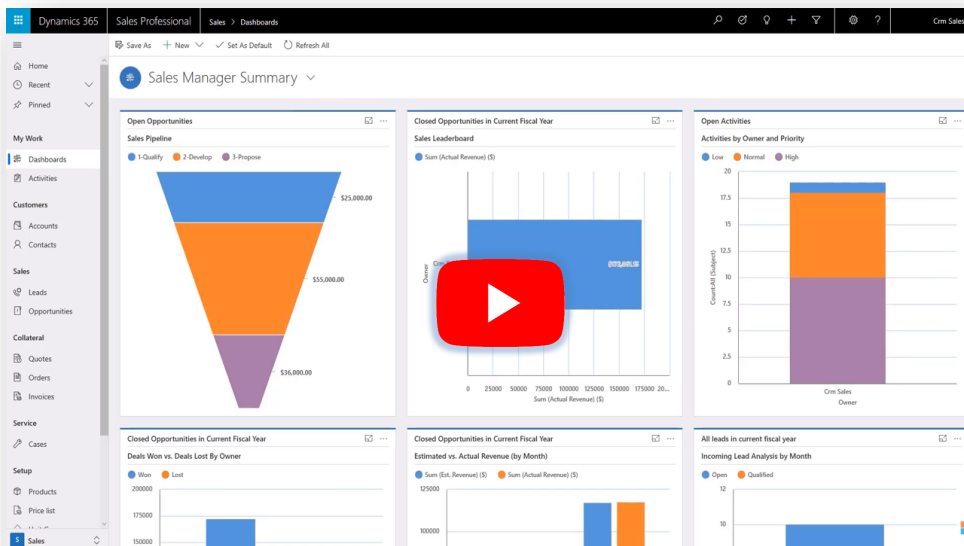
Unify your business - from data to people to processes - with modern, intelligent applications that adapt to your changing needs.

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.

				
<p><b>SALES</b></p> <ul style="list-style-type: none"> <li>Lead Management</li> <li>Opportunity Manager</li> <li>Pipeline Forecasting</li> <li>Sales Automation</li> <li>Quote Management</li> <li>Marketing Lists</li> <li>Email Marketing</li> </ul>	<p><b>CUSTOMER SERVICE</b></p> <ul style="list-style-type: none"> <li>Case Management</li> <li>SLA Support</li> <li>Account Management</li> <li>Service Automation</li> <li>Customer Web Portals</li> <li>Contract Management</li> <li>Service Analytics</li> </ul>	<p><b>PROJECT SERVICE</b></p> <ul style="list-style-type: none"> <li>Resource Management</li> <li>Project Contracts</li> <li>Project Planning</li> <li>Resource Scheduling</li> <li>Manage Work Hours</li> <li>Project Hours</li> <li>Customer Billing</li> </ul>	<p><b>FIELD SERVICE</b></p> <ul style="list-style-type: none"> <li>Work Orders</li> <li>Service Agreements</li> <li>Schedule &amp; Despatch</li> <li>Schedule Board</li> <li>Inventory Management</li> <li>Mobile Productivity</li> <li>Connected Devices</li> </ul>	<p><b>MARKETING</b></p> <ul style="list-style-type: none"> <li>Email Marketing</li> <li>Lead Scoring</li> <li>Marketing Segments</li> <li>Customer Journeys</li> <li>Event Management</li> <li>Connector for LinkedIn</li> <li>Lead Gen Forms</li> </ul>

# 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.



Introducing Microsoft Dynamics 365 for Sales

# 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.

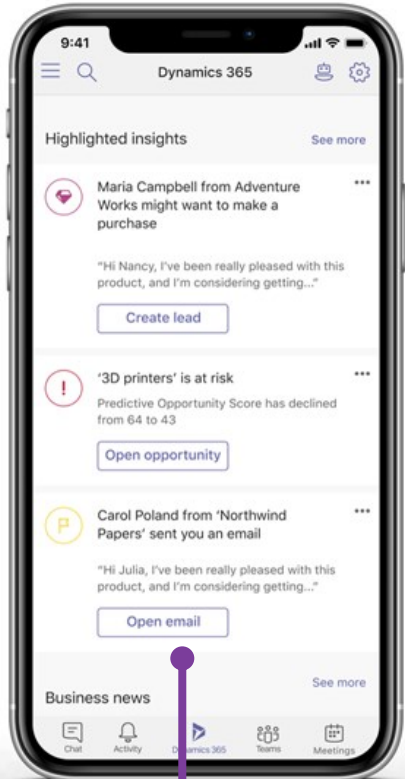
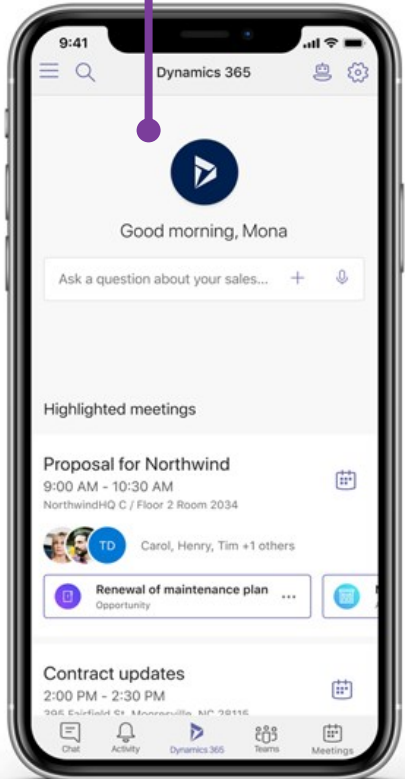
# Embedded Intelligence

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 the Dynamics 365 Sales Insights add-on which 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.



Alerts for sales users about customer questions, potential new sales opportunities and highlights suggested actions by analysing tracked emails and notes.



# 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.

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface. On the left is a navigation pane with sections for 'My Work', 'Customers', and 'Sales'. The main area is titled 'Open Opportunities' and features a 'Sales Pipeline' funnel chart and a table of opportunities.

**Sales Pipeline Data:**

Stage	Value
1-Qualify	£2,485,596.00
2-Develop	£497,500.00
3-D	£911,110.00
Final	£475,000.00

**Open Opportunities Table:**

Topic	Potential Cust...	Est. Clo...	Est. R...	Contact	Accou...
Cold - Event - Linktype	Dexter Celeber Se...	29/03/2020	£300,000...	---	Dexter Ce...
Cold - Direct Enquiry - Linktype	Sol Cuneus Prand...	27/03/2020	£150,000...	---	Sol Cuneu...
Cold - Direct Enquiry - Linktype	Pollen Quindecim...				Pollen Qui...
Cold - Event - Linktype	Vel Plenus Quadrini				Vel Plenus...
Cold - Event - Linktype	Pollen Magna Mo...				Pollen Ma...
Cold - Event - Linktype	Vulnus Fornix Lim...				Vulnus Fo...
<b>Cold - Event - Linktype</b>	<b>*Templum Venter ...*</b>	<b>17/03/20</b>	<b>£50,000.00</b>	---	<b>Templum...</b>
Cold - Event - Linktype	Tabula Panaver Filia	13/03/2020	£300,000	---	Tabula Pa

The interface also includes a calendar pop-up for March 2020, a search bar for records, and various action buttons like 'Close as Won', 'Close as Lost', and 'Reopen Opportunity'.

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

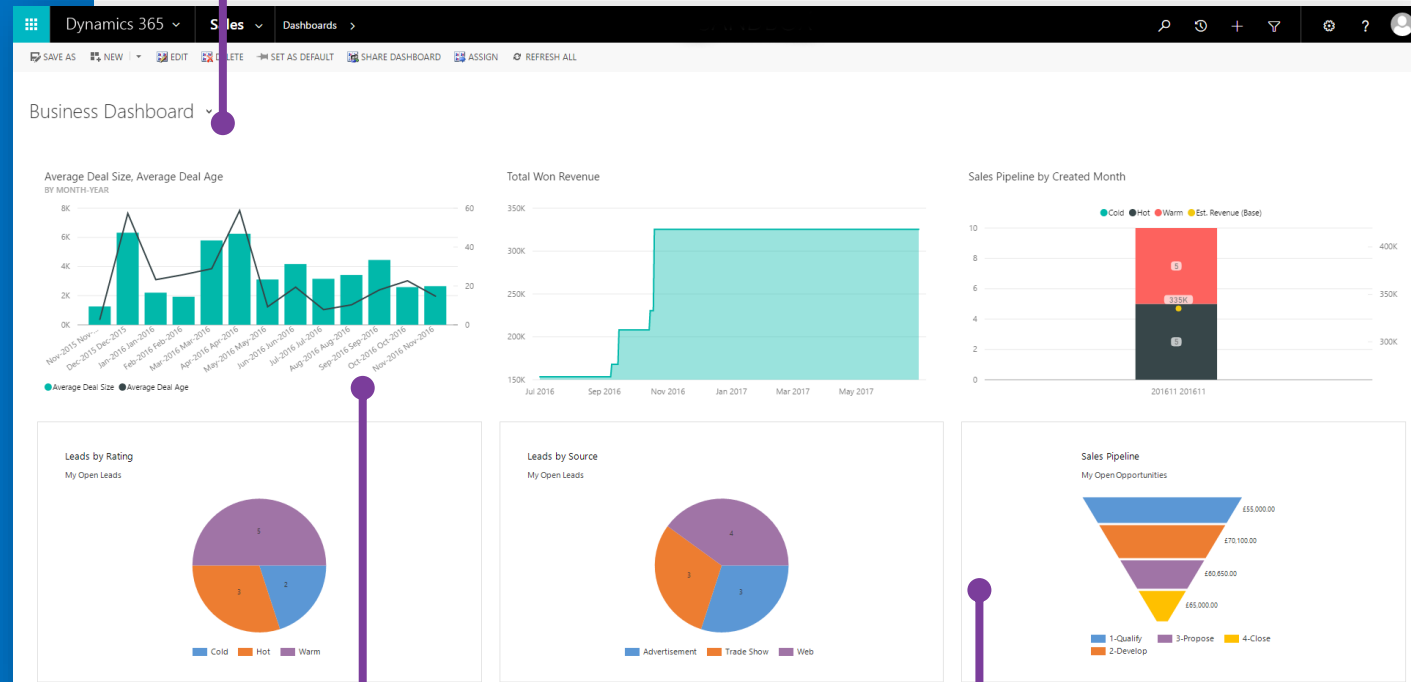
Quickly make inline edits within grid views.

## Reach Your Goals

Create dashboards and share these with other Dynamics 365 users.

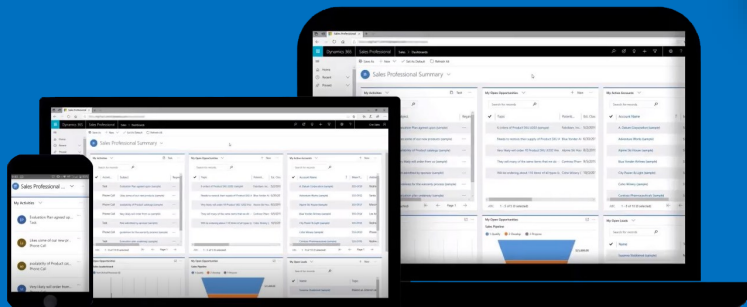
View insights about your business performance and track progress against key performance indicators.

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



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

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

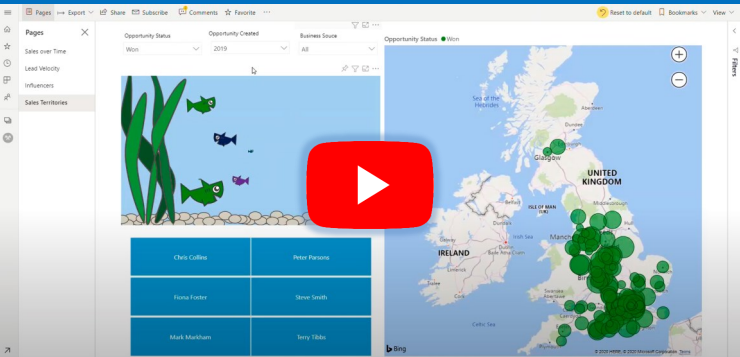


Consistent experience across desktop, tablet and mobile devices.

# Business Analytics Like Never Before

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 insights and actions, in minutes. Any data, any way, anywhere. And all from one view embedded within Dynamics 365.



How to Increase Reporting Insight with Power BI

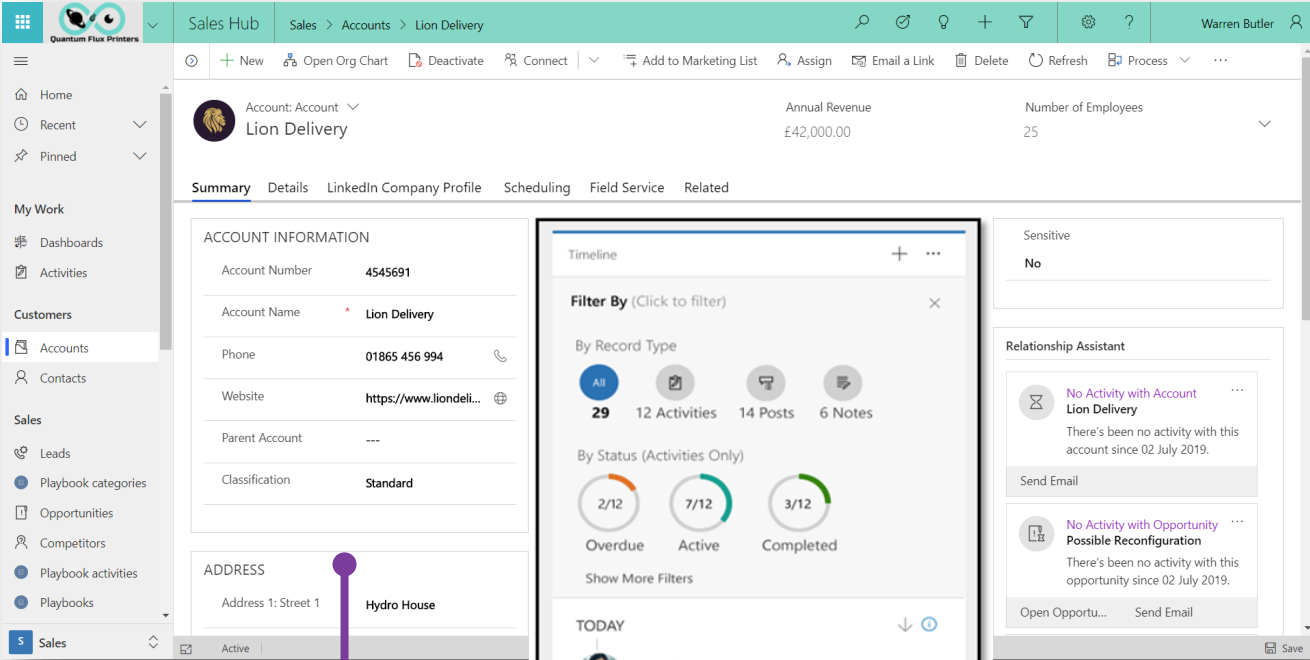




# Complete View of Every Customer

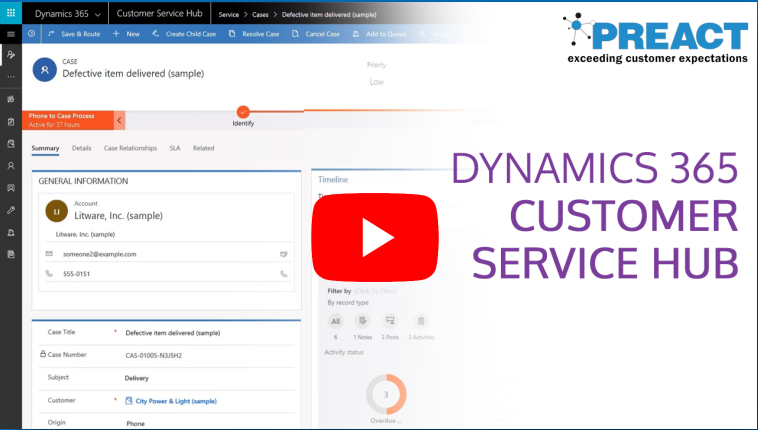
Unify and share complete customer data, across virtually any device that empowers everyone to create engaging interactions.

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



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

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



DYNAMICS 365 CUSTOMER SERVICE HUB

Dynamics 365 for Customer Service Overview

# Transform Business Processes

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

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.

The screenshot displays the Microsoft Dynamics 365 interface for a Sales Professional. The main view shows a lead record for 'Susanna Stubberod (sample)' with a 'Qualify (23 Min)' process stage active. A pop-up window for the 'Qualify' process is open, showing a checklist of steps: 'Existing Contact?' (---), 'Existing Account?' (---), 'Purchase Timeframe' (Next Quarter), 'Estimated Budget' (\$3,000.00), 'Purchase Process' (Committee), 'Identify Decision Maker' (mark complete), and 'Capture Summary' (---). A 'Next Stage >' button is visible at the bottom of the pop-up. The background shows the lead's contact information (First Name: Susanna, Last Name: Stubberod (sample), Job Title: Purchasing Manager, Business Phone: 555-0127, Email: someone2@examp) and company information (Company: Litware, Inc. (sample), Website: http://www.litwareinc.com/, Street 1: 797 Roosevelt Ave NE).

Pop open or pin process stages to understand what steps need to be completed to progress each workflow.

# Enable 24/7 Self-Service

Modernise processes by implementing on-demand self-service web portals that natively connect with Dynamics 365. Enable clients and other contacts to log service issues and check the status on their recent cases - or progress other processes such as applications.

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

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



# Connect Marketing Automation

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

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

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



Email Marketing



Event Management



Social Marketing



Form Capture



Survey



Landing Pages



Campaign Automation



SMS Messaging



Reporting



Training & Support



Web Intelligence



Lead Scoring

# Manage Any Relationship & Business Process

Dynamics 365 connects your business processes and works with familiar Office productivity tools, empowering everyone be more productive and work efficiently through a 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.

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.

Dynamics 365 | Field Service | Schedule Board

Hourly view

Filter & Map View

Filter Map View

Map View Settings

Traffic Legend Gray Road GRASS

Yarrow Point  
Minto Point  
Clyde Hill  
Medina  
Bellevue  
Lake Washington  
Roosevelt  
Beaux Arts  
W Mercer Wood  
FIRST HILL  
SE Eastst  
MERCERWOOD  
1 miles 1 km

Hours | View | 1/26/2017 - 1/26/2017 | Book | Actions

7:00 AM 8:00 AM 9:00 AM 10:00 AM 11:00 AM 12:00 PM 1:00 PM 2:00 PM

Search resources...

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Work Order - 00017 Duration: 2 hrs 20 min

Work Order - Water pressure Duration: 2 hrs 30 min

Work Order - Fuse out Duration: 2 hrs 17 min

Work Order - Garage leak Duration: 2 hrs 4 min

Work Order - 00013 Duration: 2 hrs 13 min

Work Order - 00025 Duration: 2 hrs 29 min

Work Order - Incorrect data maps Duration: 2 hrs 5 min

Work Order - 00001 Duration: 2 hrs 28 min

Work Order - Light bulbs Duration: 2 hrs 16 min

Work Order - Heating flaws Duration: 2 hrs 19 min

Work Order - 00008 Duration: 2 hrs 30 min

Work Order - 00016 Duration: 2 hrs 12 min

Work Order - 00005 Duration: 2 hrs 2 min

Booking Requirements

All | Unscheduled Work Orders | Project

Work Order	Service Account (Work Order)	Is Primary	From Date	To Date	Duration	Owner	Status	Priority	Time From Promised	Time To Prom...	Time Group	Time Window
00055	Trey Diagnostic	Yes			2 hrs	Kyle Young	Active		01/25/2017 3:36 PM	01/25/2017 7:3...		
00048	Wingtip Toys Facilities	Yes			2 hrs	Kyle Young	Active					
00042	The Phone Company	Yes			2 hrs	Kyle Young	Active					

Page 1 of 1

Improve scheduling and optimise field service resources by quickly identifying the best technician to fulfil each work order request.

**PREACT**  
exceeding customer expectations

Microsoft Dynamics 365 for Field Service




## Connects Business Apps & Data Sources

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

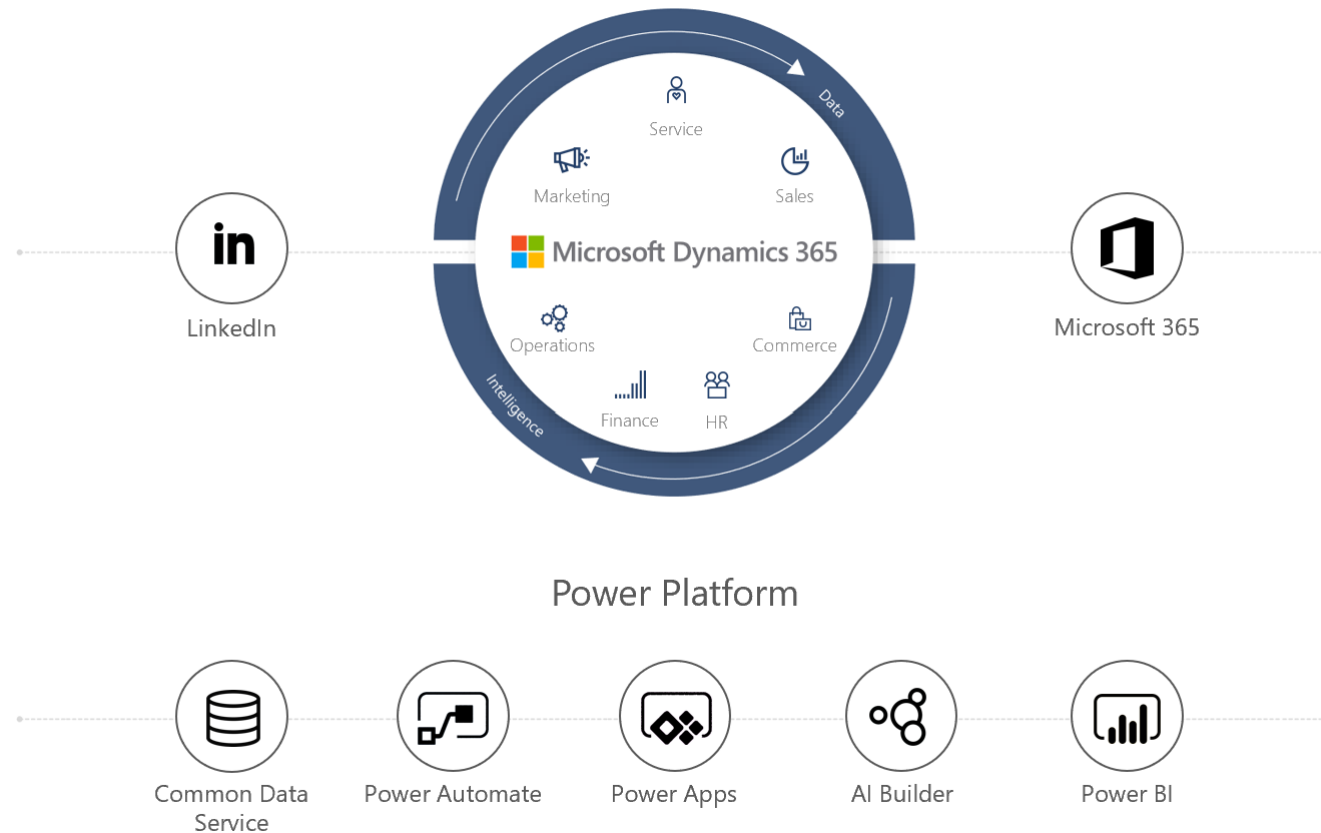
- **Accounting / ERP** - access client order histories and financial details in Dynamics 365 and send completed orders for processing.
- **Web Forms** - automatically import from new enquiry forms, sign-up forms and PDF downloads that maps form data to new or existing contacts.
- **Web Tracking** - identify 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 (*now Microsoft Customer Voice*) 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.



# Scalable Database Architecture

- Customise, extend and build connected apps across the Microsoft Business Applications Platform.
- Common Data Service unifies Dynamics 365 and Office apps to enrich 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.

## Microsoft Power Platform





# Build Custom Business Apps

Power Apps 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.

## PowerApps + Power Automate



Connect to your systems and create new data



Build apps without writing code



Publish and user apps on web and mobile

## Connect to what you already have...



SharePoint Online



Office 365



Dynamics 365



SQL Server



Microsoft Azure



Excel



Custom API's

+ many more

Create automated workflows between your favourite apps and cloud services

# Flexible Project Options and 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 who will help you achieve rapid and sustained success with Dynamics 365.

## QUICK START

Complete your initial cloud deployment in just a few days by purchasing one of our [Quick Start packs](#). Beginning with high-level scoping we will customise Dynamics 365 to fit your processes and deliver this as a fixed scope, fixed price service.

## SALES ACCELERATOR

Complete the quickest deployment of Dynamics 365 Sales by using our base build [Sales Accelerator](#). This includes more than 100 customisations to the out-of-the-box product and features new controls and capabilities to improve the user experience and reduce upfront set-up costs. *Supplied free with our managed service*

## SCOPE LED PROJECTS

For requirements that involve a combination of data migration, complex processes or third-party integrations, a [scoping consultancy](#) will be recommended. In this fixed price consultancy we will fully define and document your requirements. This will include our proposed solution with supporting project costs.

## MANAGED SERVICE

Make continuous improvements to your Dynamics 365 system with expert support and consultancy when you need it. Use managed service hours to phase your implementation and spread support costs monthly. Access additional resources including our eLearning Academy and Solutions Catalogue as part of our [managed service](#) at no additional cost.





Gold Cloud Customer Relationship Management  
Gold Cloud Business Applications  
Gold Application Development  
Gold Cloud Platform  
Gold Enterprise Mobility Management  
Gold Enterprise Resource Planning

2020/2021  
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