INTRODUCING MICROSOFT DYNAMICS 365 SALES & SERVICE APPS

CRM PREACT

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.

SALES

Lead Management
Opportunity Manager
Pipeline Forecasting
Sales Automation
Quote Management
Marketing Lists
Email Marketing

CUSTOMER SERVICE

Case Management
SLA Support
Account Management
Service Automation
Customer Web Portals
Contract Management
Service Analytics

PROJECT SERVICE

Resource Management
Project Contracts
Project Planning
Resource Scheduling
Manage Work Hours
Project Hours
Customer Billing

FIELD SERVICE

Work Orders
Service Agreements
Schedule & Despatch
Schedule Board
Inventory Management
Mobile Productivity
Connected Devices

MARKETING

Email Marketing
Lead Scoring
Marketing Segments
Customer Journeys
Event Management
Connector for LinkedIn Lead Gen Forms

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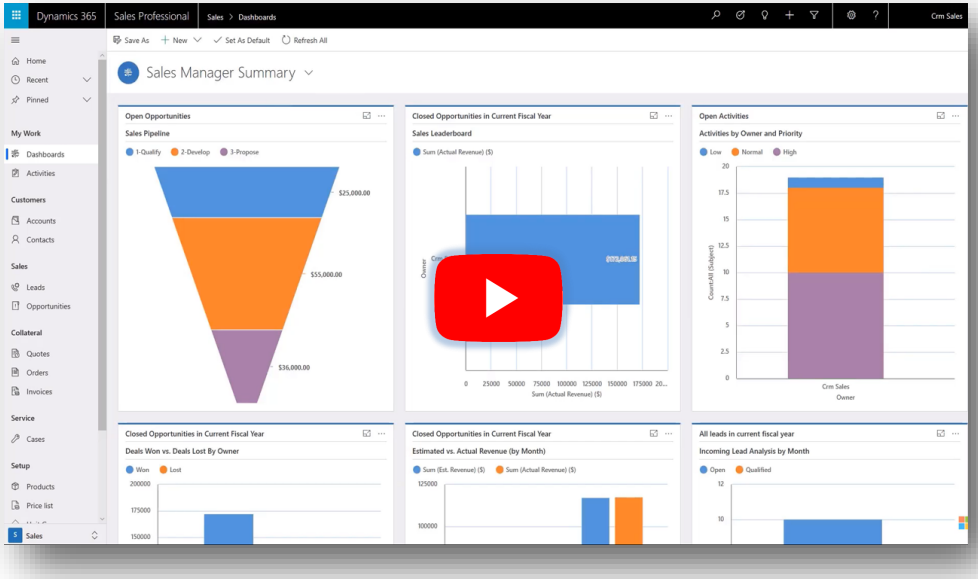
Reduce costs and digitally transform your business

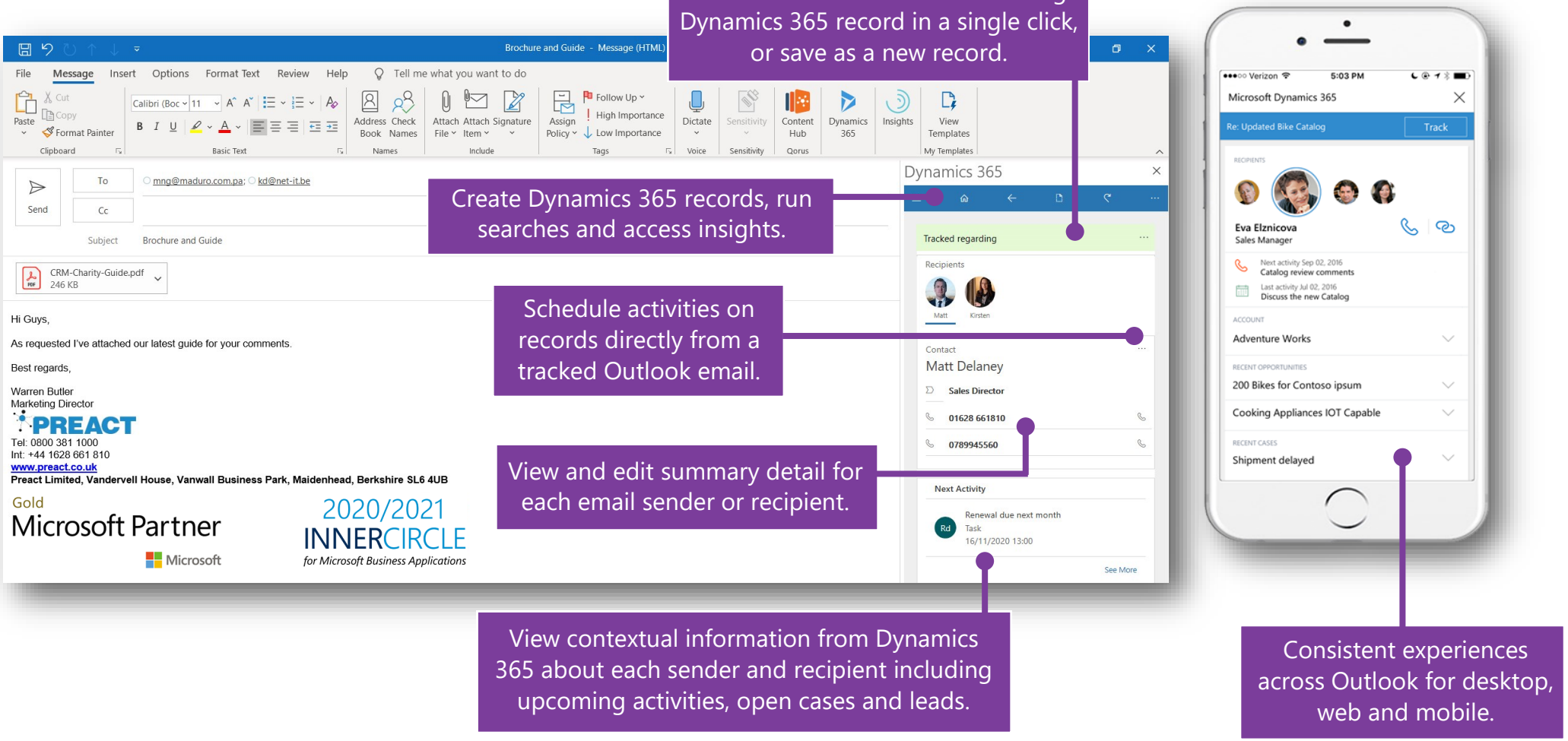
By managing your customers and sales leads within a unified, cloud-based environment of connected apps, you'll be better able to delight clients, manage growth, protect data and empower employees - wherever they work.



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.



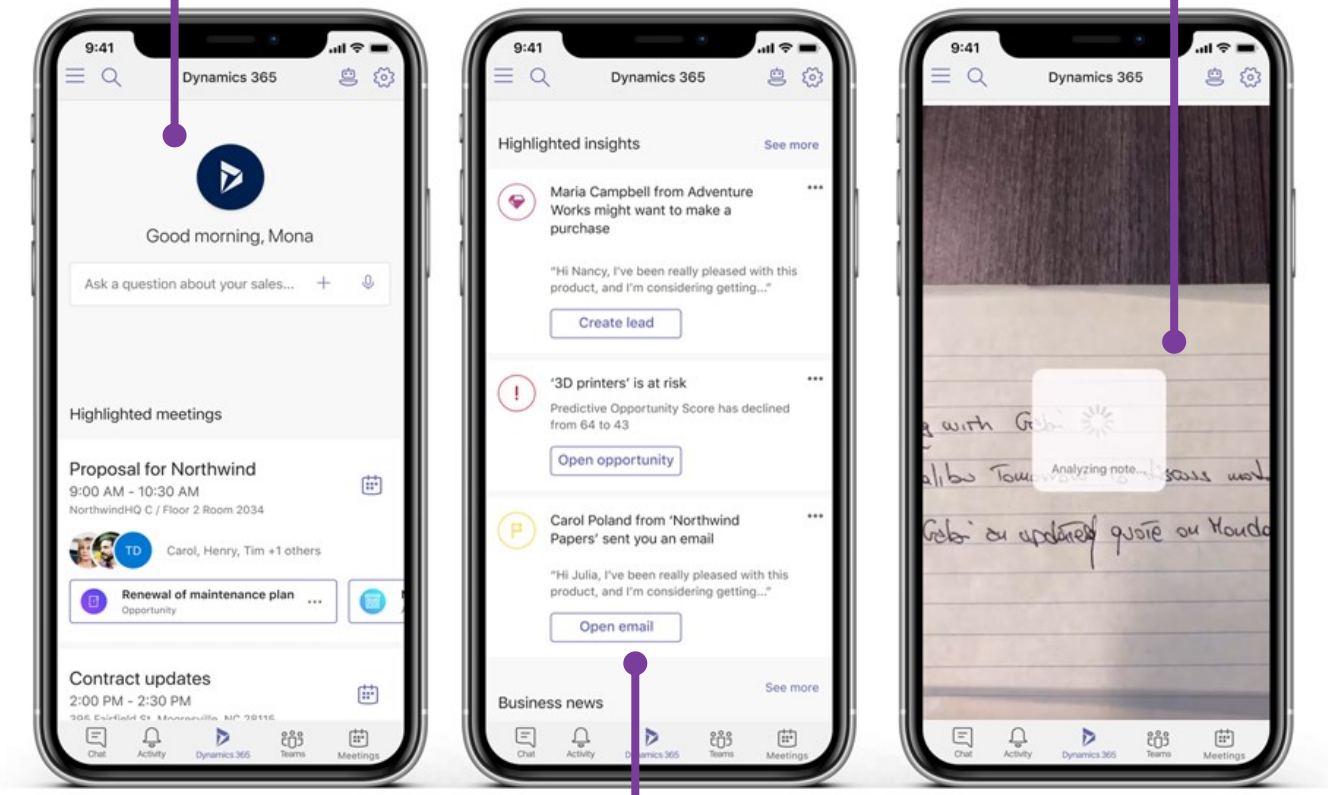
Embedded Intelligence

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.

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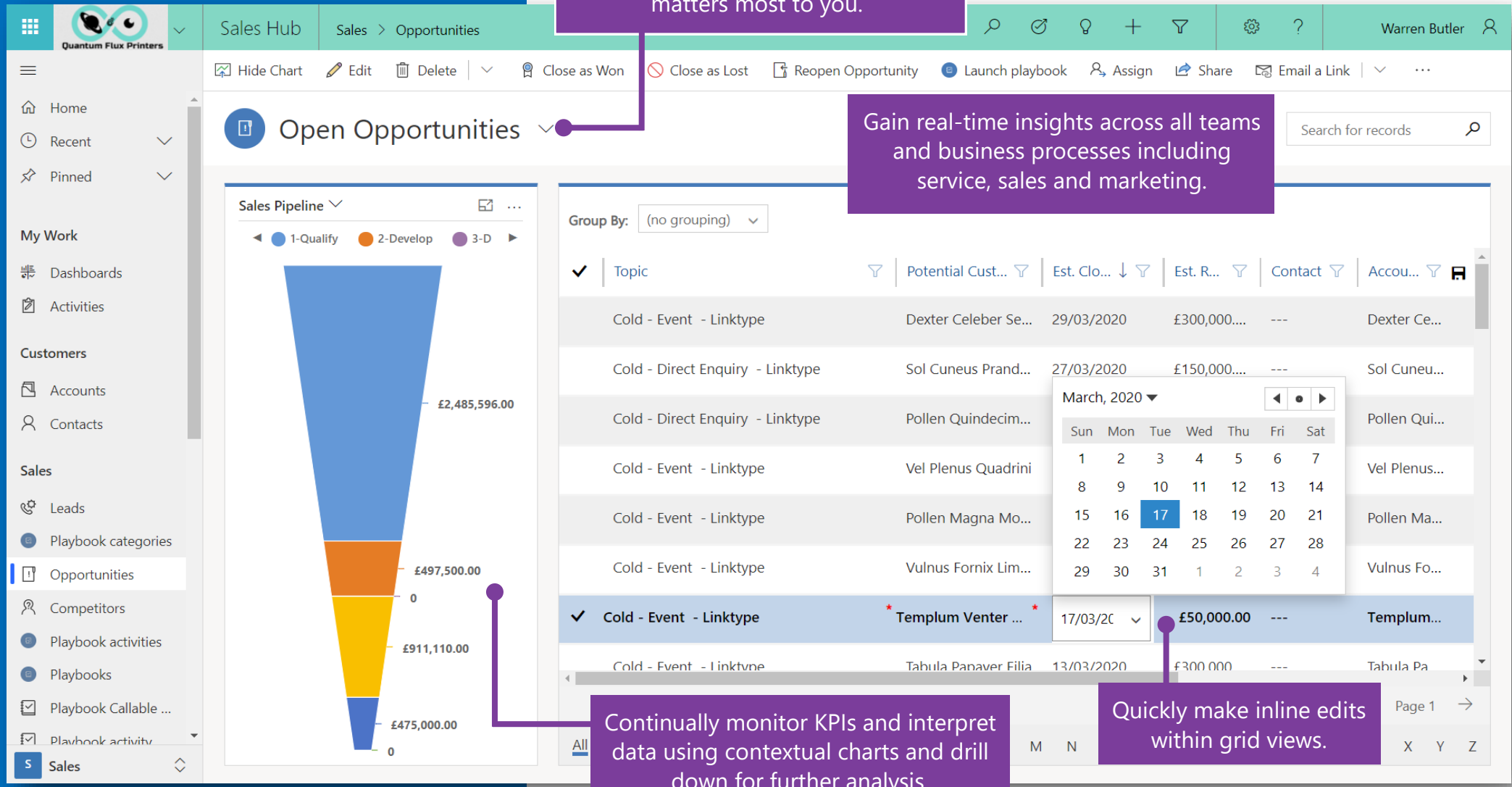
Focus On What Matters

Microsoft Dynamics 365

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.

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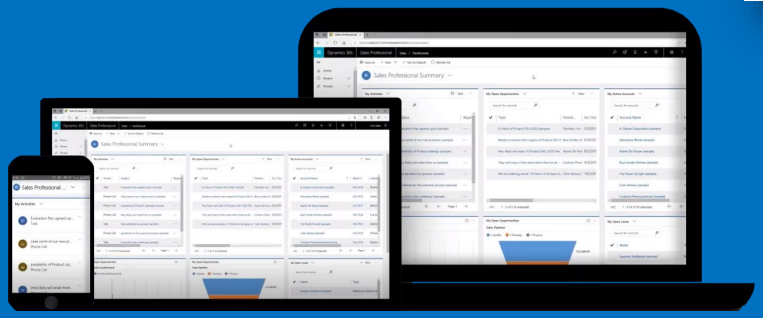
Reach Your Goals

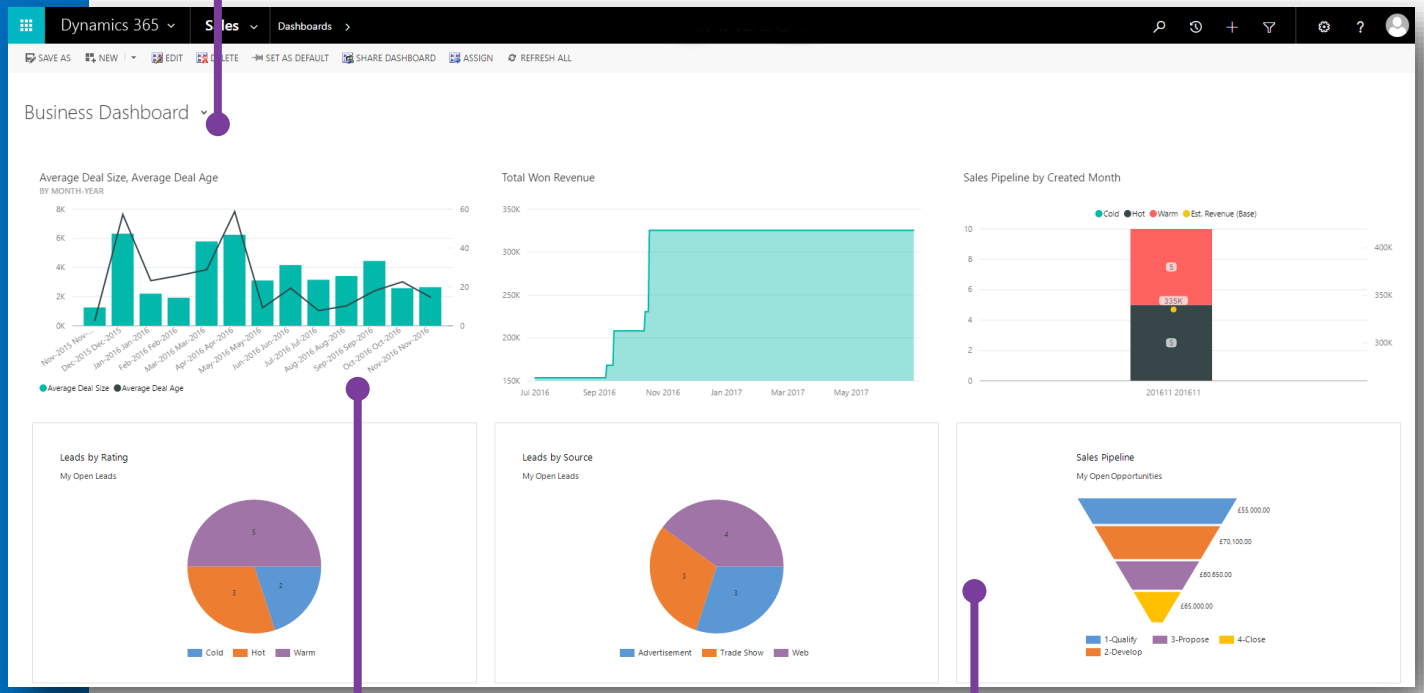
View insights about your business performance and track progress against key performance indicators.

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



Consistent experience across desktop, tablet and mobile devices.

Create dashboards and share these with other Dynamics 365 users.



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.

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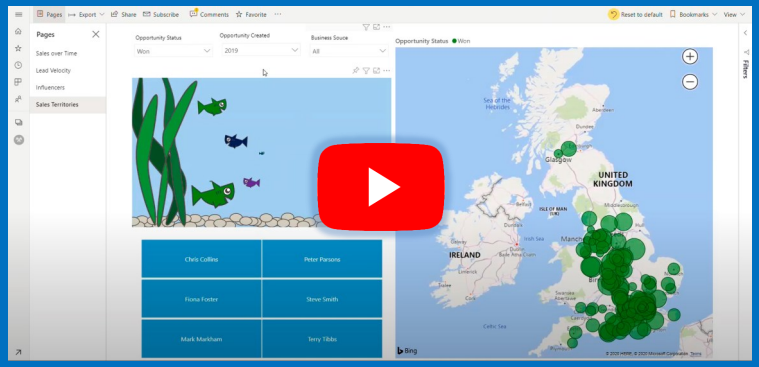
Business Analytics Like Never Before

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

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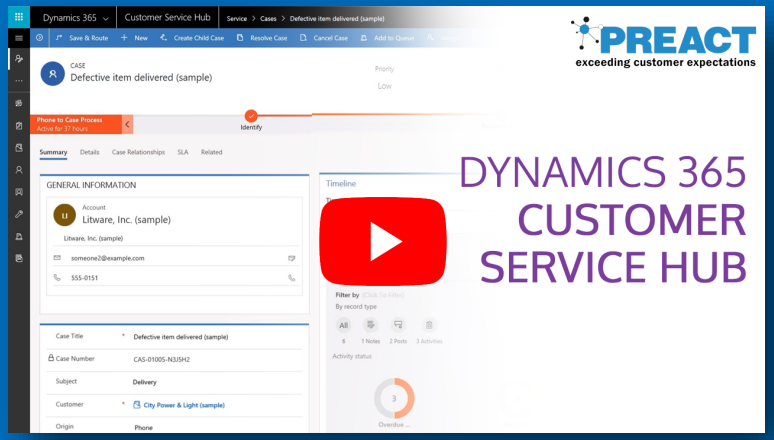
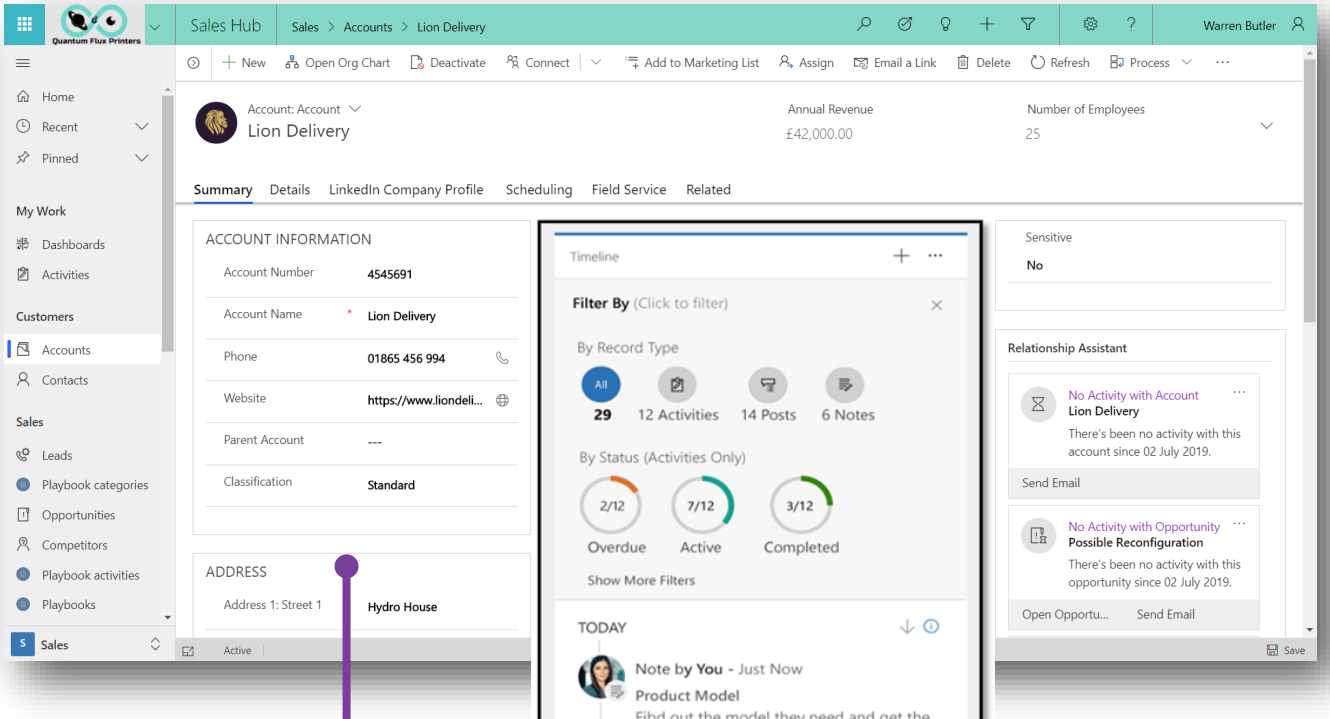
Complete View of Every Customer

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.



Dynamics 365 for Customer Service Overview



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

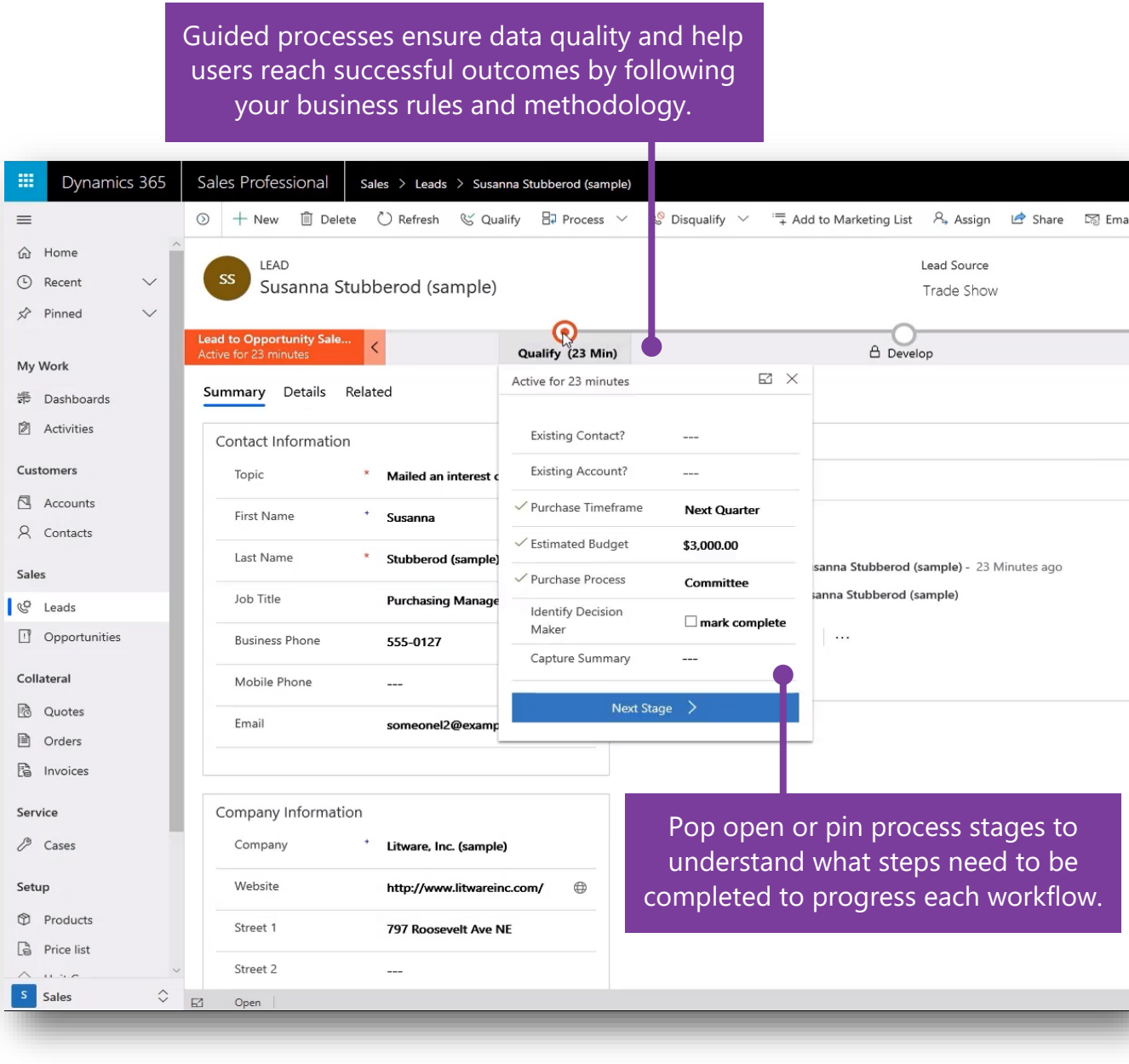
Timeline filters and visualisations help users quickly navigate record notes, posts, emails and tasks.

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.



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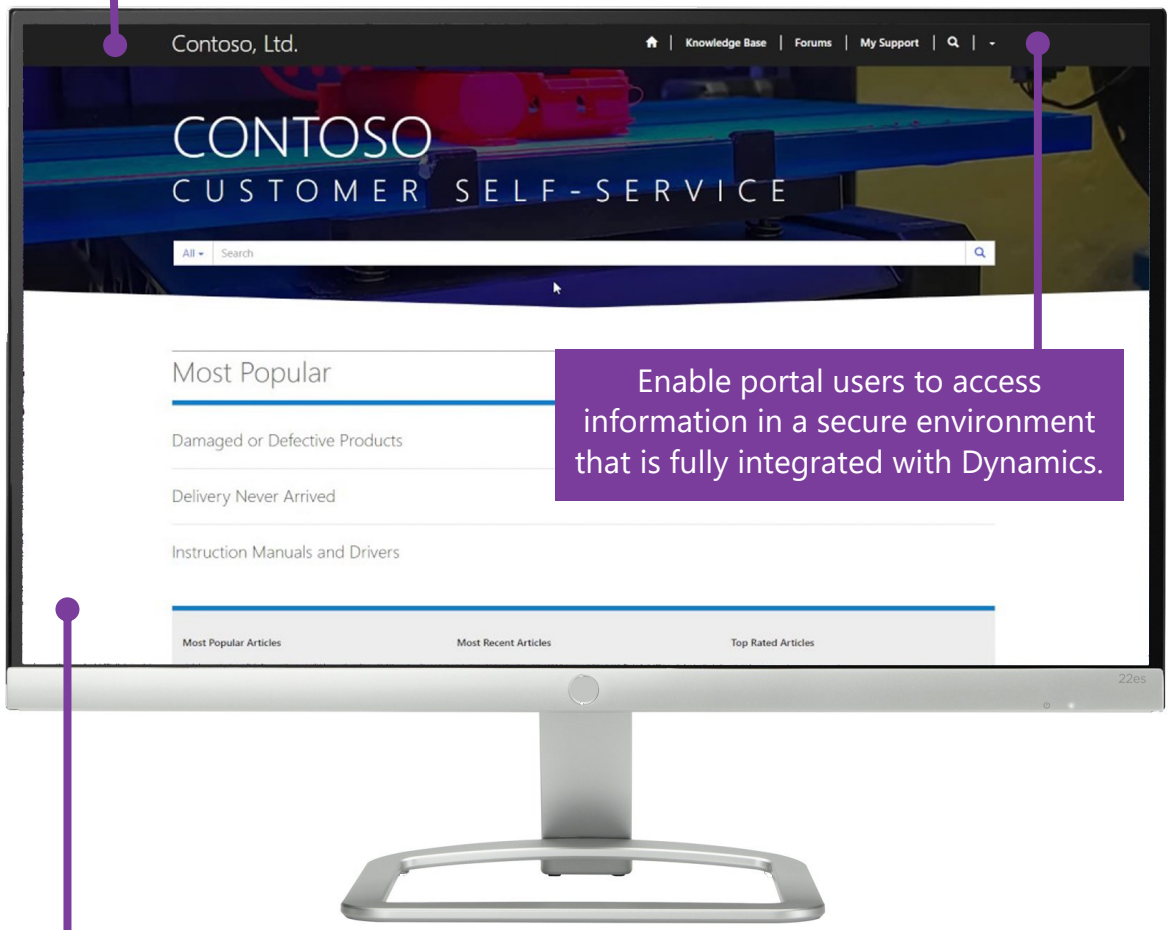
Enable 24/7 Self-Service

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.

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 web portal themes and styles to match your branding and main website.

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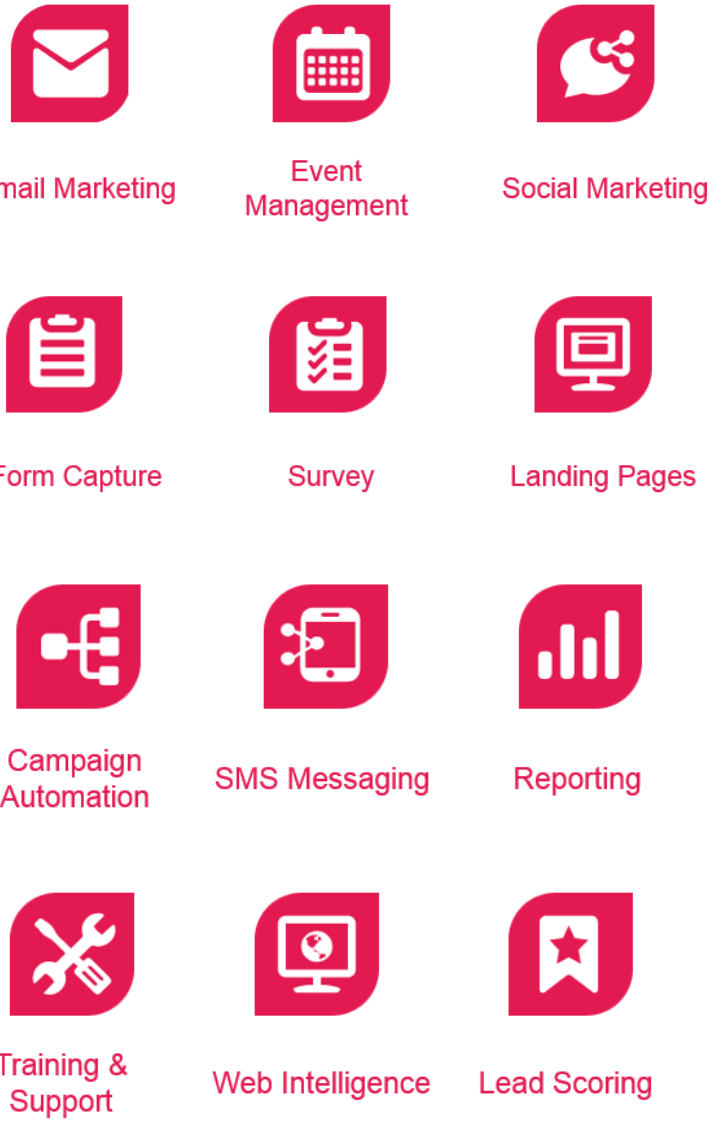
Connect Marketing Automation

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.



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Manage Any Relationship & Business Process

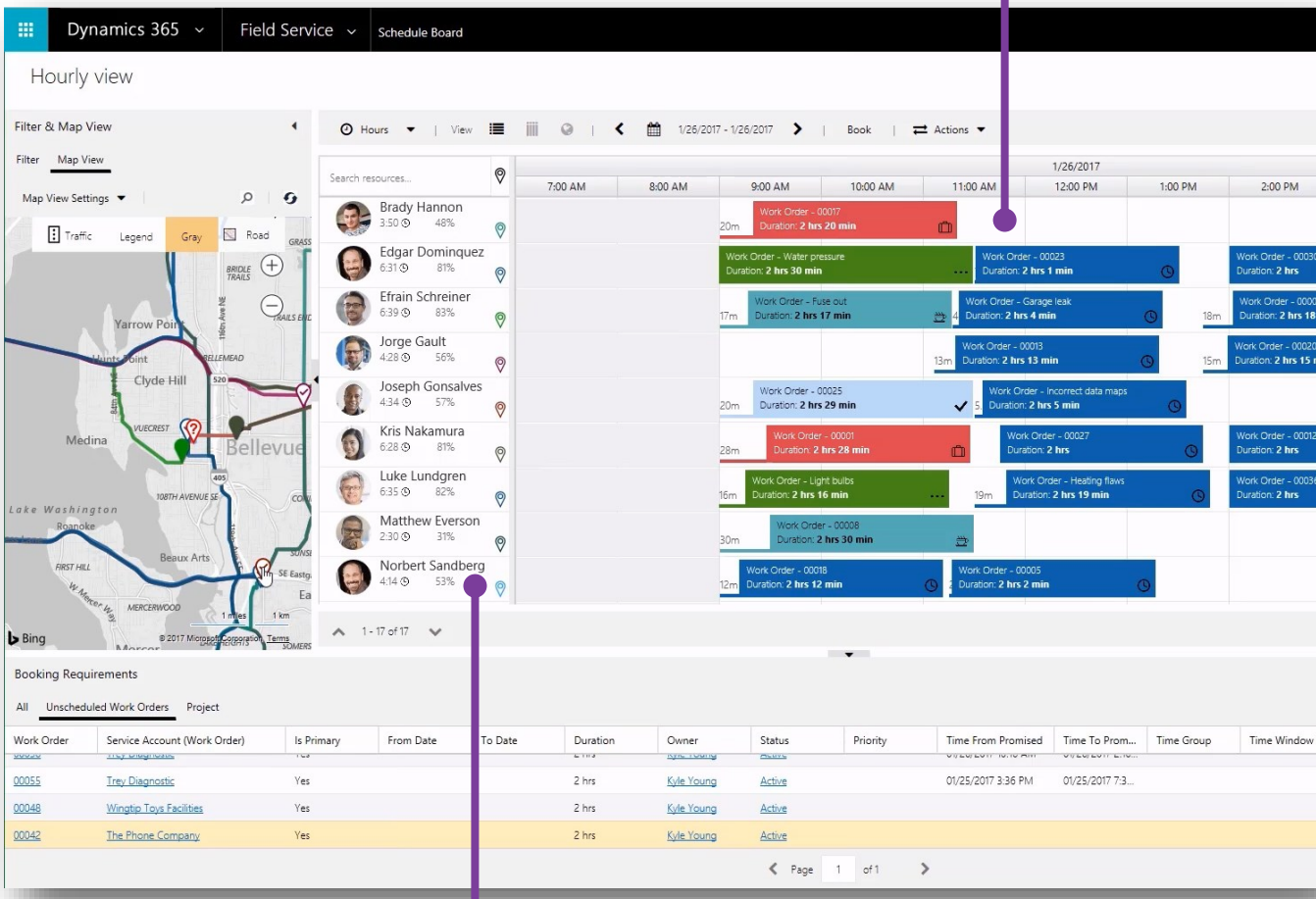
Dynamics 365 connects your business processes and works with familiar Office productivity tools, empowering everyone be more productive and work efficiently through a connected solution.

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.



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 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.

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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

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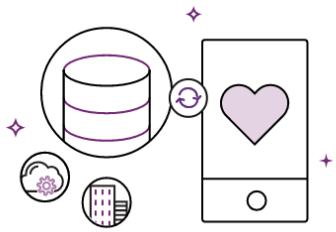
Build Custom Business Apps

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

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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.

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Our business is built on helping organisations achieve outstanding success with Dynamics 365 and Microsoft Business Applications.

With hundreds of CRM projects under our belt since 1993, we would be delighted to discuss you requirements and explore how Dynamics 365 will help your organisation.

Contact us today to learn about our approach and arrange a quotation.

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