Unleashing Dynamics 365 Cloud Power

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Introduction to Microsoft Dynamics 365 Cloud

- Cloud-Based SaaS platform combining CRM and ERP

- Built on Azure: secure, scalable, flexible

- Integrated with Power Platform: Power BI, Power Apps, Power Automate

Why Dynamics 365 Cloud Matters

- Scalability – grow with your business

- Accessibility – work anywhere on any device

- Integration – seamless with Office 365 & Power Platform

- Updates – continuous improvement with no downtime

- Cost Efficiency – predictable subscription pricing

- Unified platform: CRM + ERP + Power Platform

- Benefits: Real-time insights, automation, AI, remote access

- Business owners: Visibility, Finance: Reporting, Sales: Lifecycle mgmt, IT: Extensibility
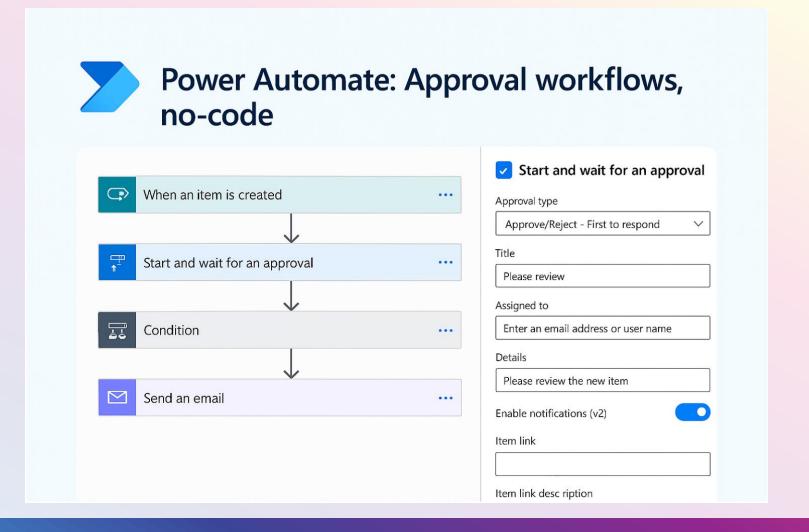
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Practical Tools for End Users

- Power Automate: Approval workflows, no-code
- Power BI: Embedded dashboards for decision-making
- Copilot: AI-powered summarization, email drafts
- D365 Sales – sales pipeline management
- D365 Customer Service – omnichannel support
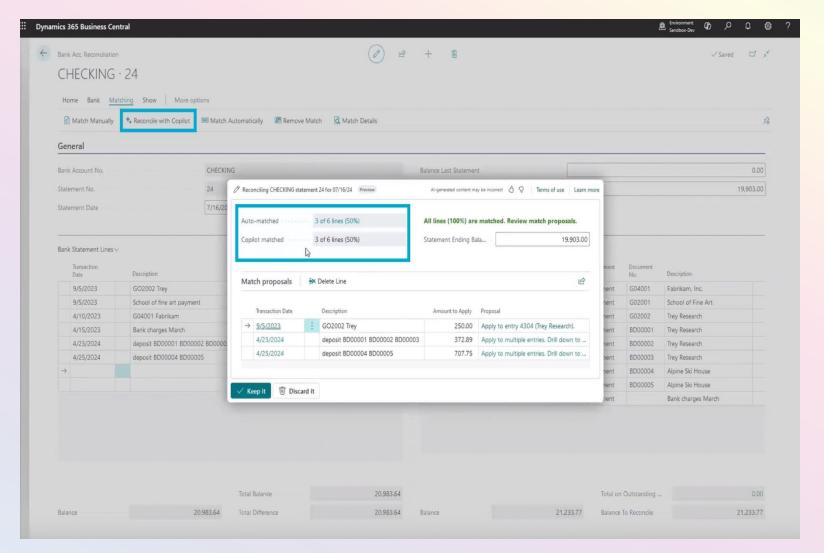- Outlook/Mobile Integration: CRM from anywhere

Power Automate

Power Automate: Approval workflows, no-code

When an item is created

Start and wait for an approval

Condition

Send an email

☑ Start and wait for an approval

Approval type

Approve/Reject - First to respond

Title

Please review

Assigned to

Enter an email address or user name

Details

Please review the new item

Enable notifications (v2)
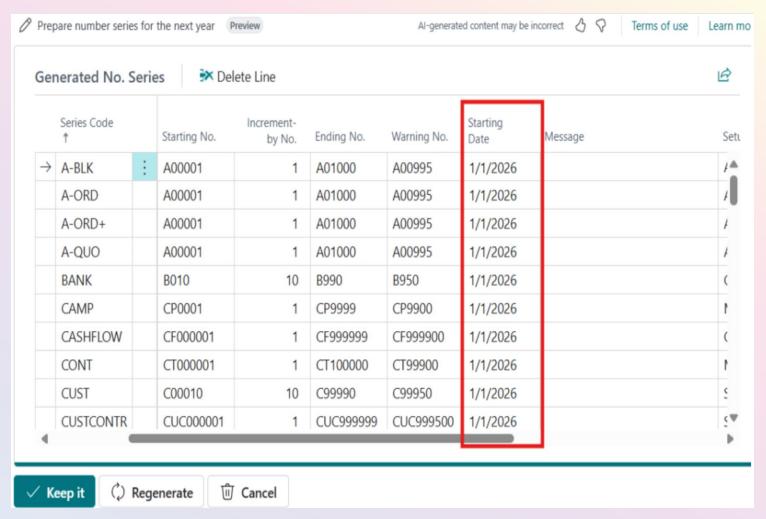
Item link

Item link desc ription

Power BI

COPILOT – Bank reconciliation

No series generation using copilot

Tools for IT Teams & Developers

- DevOps: CI/CD with DevOps

- Admin Center – centralized user & system mgmt.

- Security Roles – role-based access and compliance

Real-World Use Cases

Scenario	Challenge	Cloud Solution	Outcome
NGO with remote sites	Frequent downtime due to local server failures and power outages	Moved to Dynamics 365 Cloud for anytime-anywhere access	Reliable access across all field offices
Copilot for Analytics	Many customized reports	Copilot generates custom reports using natural language	Unlimited insights without customization
Automated Workflows	Manual emailing of onboarding info and statements	Power Automate handles onboarding and sends statements	Faster processing, fewer errors
Upgrade Burden	Downtime, cost, and effort required for upgrades	D365 Cloud provides seamless automatic updates	Always on latest version with zero effort

Best Practices for Maximizing Dynamics 365

- Automate routine tasks with Power Automate

- Empower users through training & champions

- IT: Build governance, not gatekeeping

- Mngment: Use Power BI for real-time insights

Resources: Microsoft Learn, AppSource, Community

Conclusion – Empower Your Organization

- D365 Cloud transforms operations and decisions

- End users get intuitive, powerful tools

- IT teams gain robust admin & monitoring

- Drives scalable, flexible digital transformation

Microsoft Learn, AppSource, Community

Q&A

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