

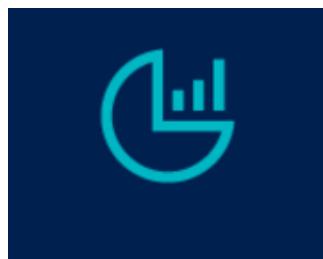
INTRODUCING MICROSOFT DYNAMICS 365 SALES & SERVICE APPS



Connected Business Apps & Processes

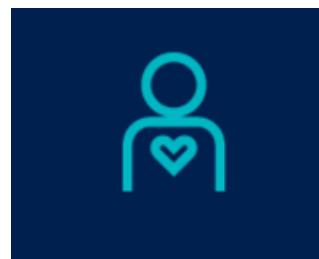
Unify your business - from data to people to processes - with modern, intelligent applications that adapt to your changing needs.

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.



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

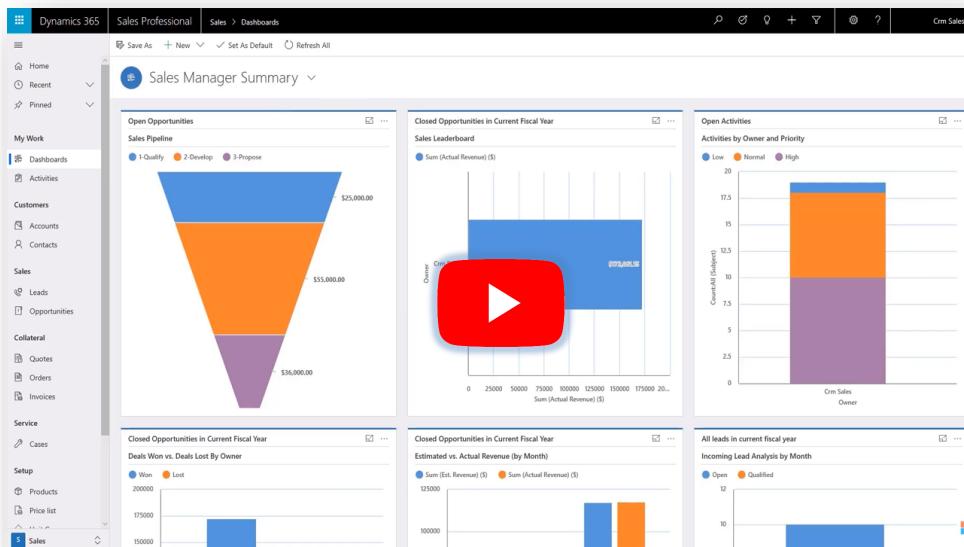


MARKETING

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

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.

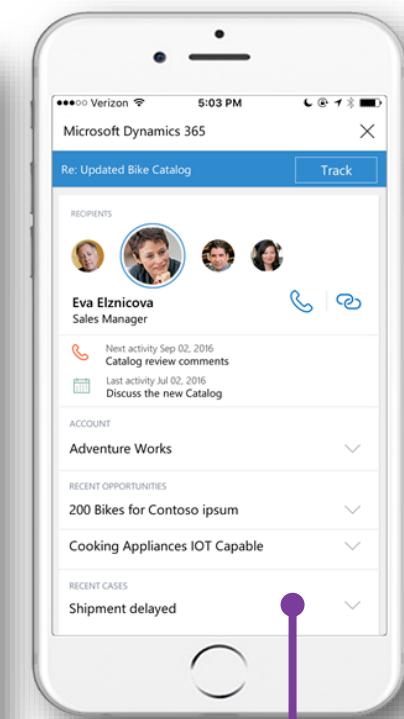


Introducing Microsoft Dynamics 365 for Sales

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.

The screenshot shows the Microsoft Outlook ribbon with the 'Message' tab selected. A purple callout box points to the 'Dynamics 365' icon in the ribbon. The main content area displays an email message with a subject 'Brochure and Guide'. The body of the email contains a message from 'Warren Butler' to 'Matt Delaney' with an attached PDF file named 'CRM-Charity-Guide.pdf'. A purple callout box points to the Dynamics 365 ribbon icon with the text 'Create Dynamics 365 records, run searches and access insights.' Another purple callout box points to the Dynamics 365 pane on the right with the text 'Track Outlook emails to an existing Dynamics 365 record in a single click, or save as a new record.' A third purple callout box points to the 'Contact' section of the Dynamics 365 pane with the text 'Schedule activities on records directly from a tracked Outlook email.' A fourth purple callout box points to the 'Next Activity' section of the Dynamics 365 pane with the text 'View and edit summary detail for each email sender or recipient.'



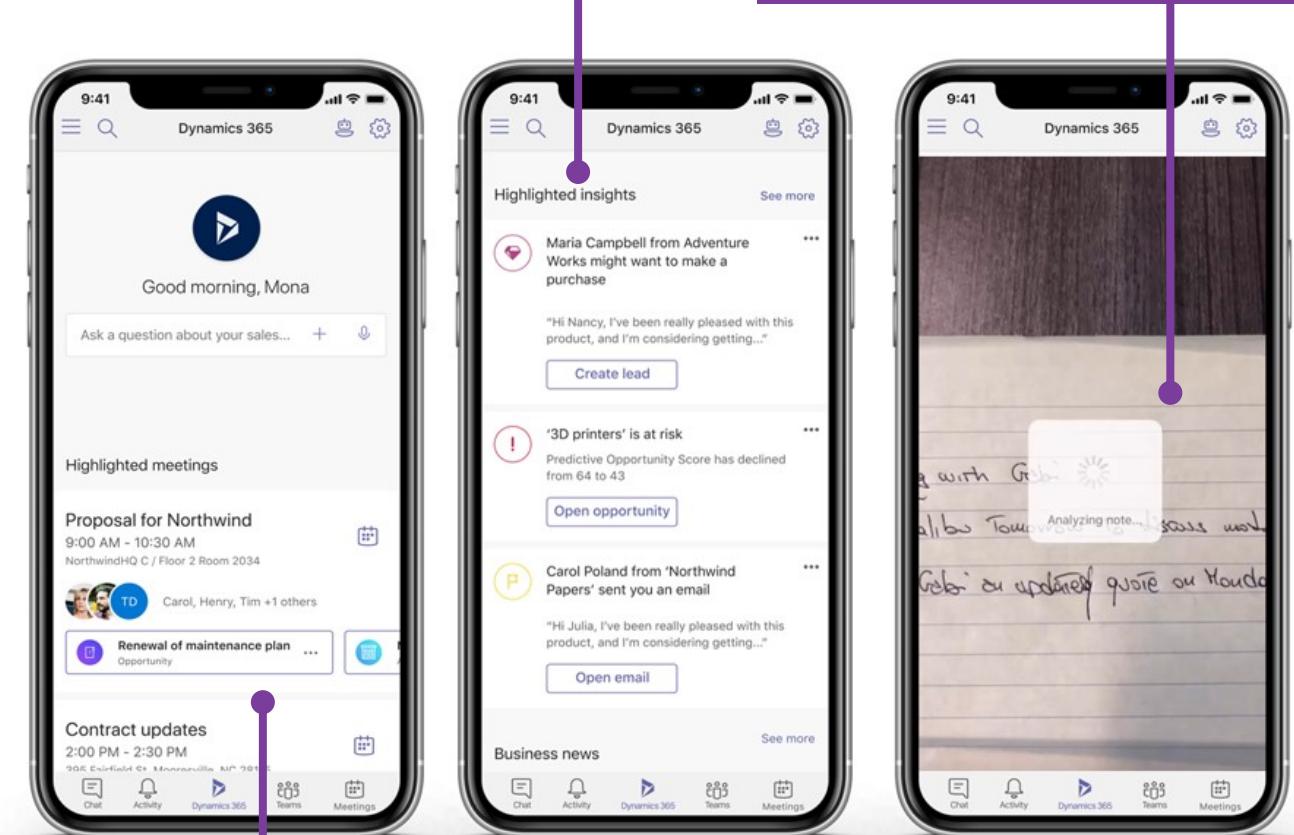
Embedded Intelligence

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

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

Optical character recognition analyses and converts hand-written notes into digital entries.



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

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.

Sales Pipeline

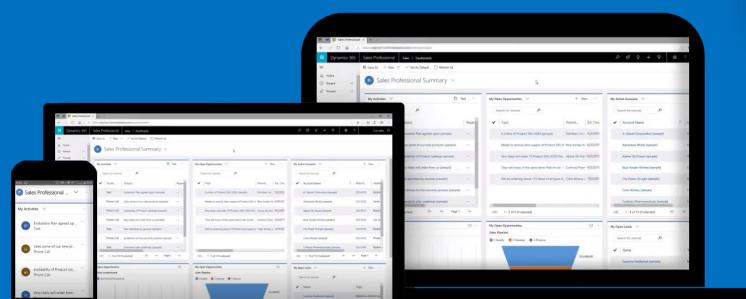
Group By: (no grouping)

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...
Cold - Event - Linktype	* Templum Venter ...	17/03/2C	£50,000.00	---	Templum...
Cold - Event - Linktype	Tabula Panaver Filia	13/03/2020	£300 000	---	Tabula Pa...

Reach Your Goals

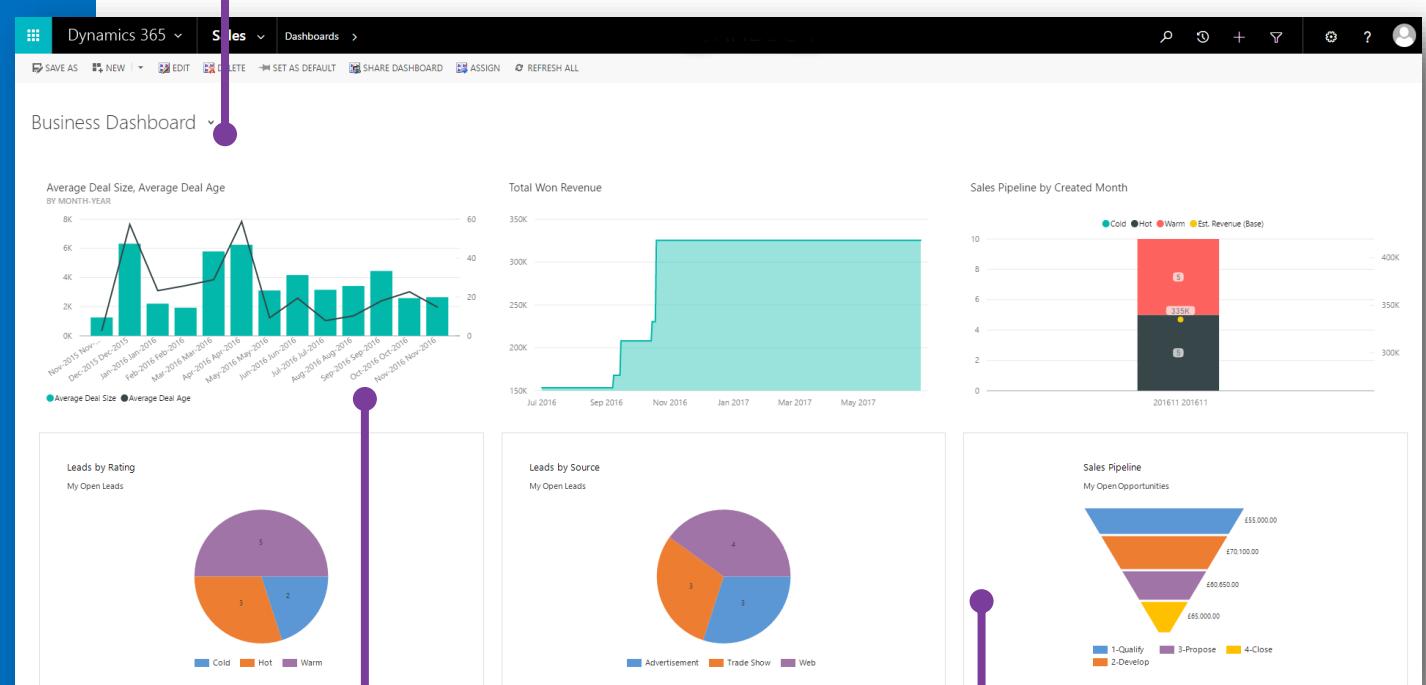
View insights about your business performance and track progress against key performance indicators.

- 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.

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 visualizations in Dynamics 365 with embedded Power BI dashboards and tiles.

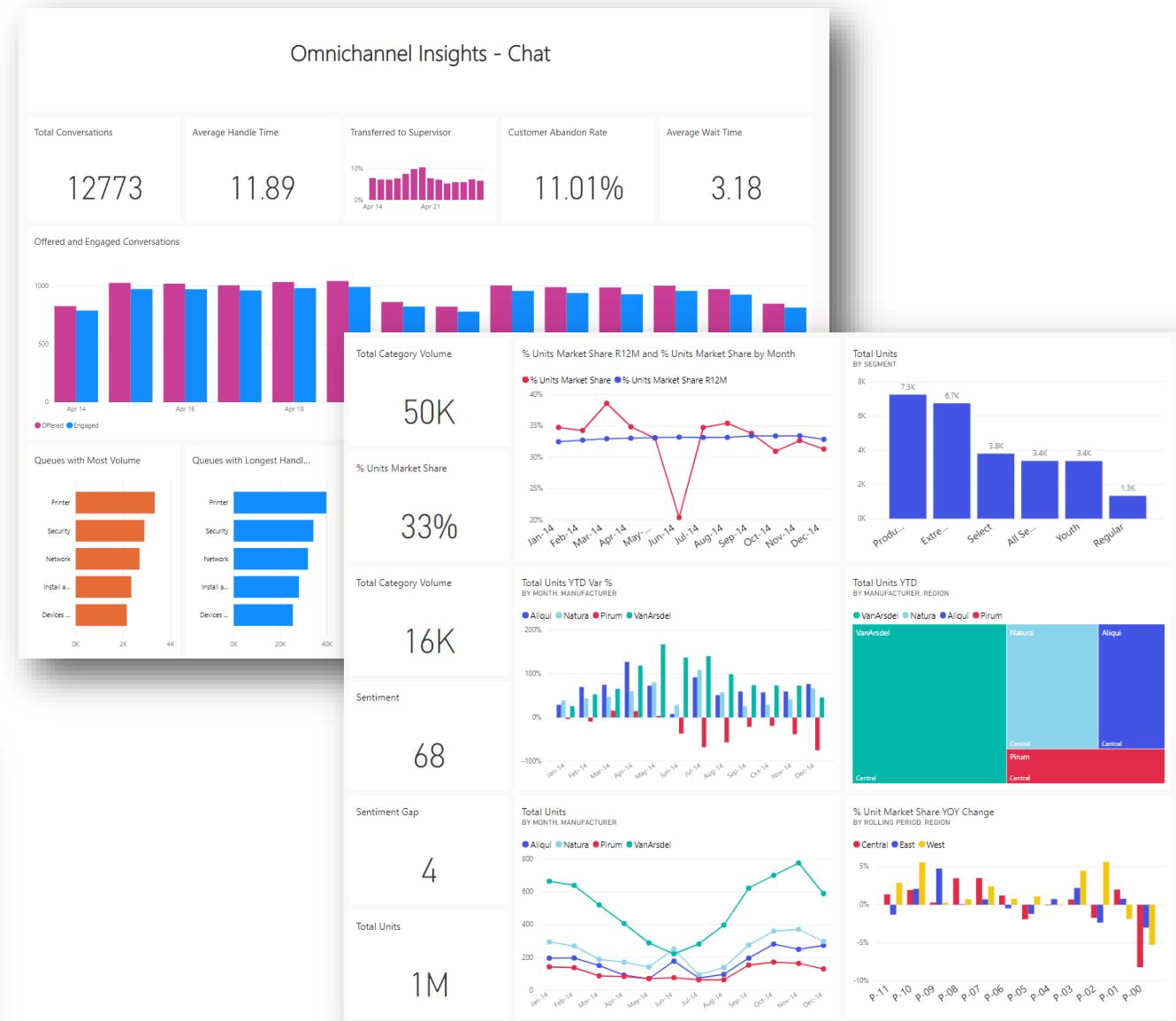
Business Analytics Like Never Before

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 actions in minutes. Any data, any way, anywhere. And all in one view that can be embedded within Dynamics 365.



**POWER BI
SHOWCASE**



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.

The screenshot shows the Microsoft Dynamics 365 Customer Service Hub interface. A red play button icon is overlaid on the screen, indicating a video component. The main view displays a case record for 'Defective item delivered (sample)'. The record includes fields for Case Title (Defective item delivered (sample)), Case Number (CAS-01005-N35H2), Subject (Delivery), Customer (City Power & Light (sample)), and Origin (Phone). The timeline section shows activity status filters for All, Notes, Posts, and Activities. The overall theme is 'DYNAMICS 365 CUSTOMER SERVICE HUB'.

Dynamics 365 for Customer Service Overview

The screenshot shows the Microsoft Dynamics 365 Sales Hub interface. A purple callout box highlights the 'ACCOUNT INFORMATION' section, which displays details like Account Number (4545691), Account Name (Lion Delivery), Phone (01865 456 994), Website (https://www.liondeli...), Parent Account (---), and Classification (Standard). Another purple callout box highlights the 'Timeline' section, which shows a summary of activities: 29 total activities, 12 posts, 14 posts, and 6 notes. It also displays status filters for Overdue (2/12), Active (7/12), and Completed (3/12). The timeline lists recent interactions: a note from 'Note by You - Just Now' (Product Model), a phone call from 'Phone by Kim Glynn - at 18:20' (Lorem ipsum...), and an email from 'Email by Kim Glynn - at 10:20' (Re: Introduction, Hi Kate, I looked at the proposal. This).

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.

The screenshot shows the Microsoft Dynamics 365 Sales Professional interface. A purple callout box at the top right states: "Guided processes ensure data quality and help users reach successful outcomes by following your business rules and methodology." Below this, a purple callout box on the right side of the screen says: "Pop open or pin process stages to understand what steps need to be completed to progress each workflow." The main view displays a lead record for "Susanna Stubberod (sample)" with a "Qualify (23 Min)" button highlighted. The interface includes a sidebar with navigation links like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Sales (Leads selected), Opportunities, Collateral, Quotes, Orders, Invoices, Service, Cases, Setup, Products, Price list, and Sales. The lead record shows contact information such as First Name (Susanna), Last Name (Stubberod (sample)), Job Title (Purchasing Manager), Business Phone (555-0127), Mobile Phone (---), and Email (someone12@example.com). It also shows company information for Litware, Inc. (sample) with address details: Street 1 (797 Roosevelt Ave NE) and Street 2 (---). A "Next Stage >" button is visible at the bottom of the qualification stage.

Enable 24/7 Self-Service

Meet rising customers expectations by implementing on-demand self-service portals that are natively integrated with Dynamics 365.

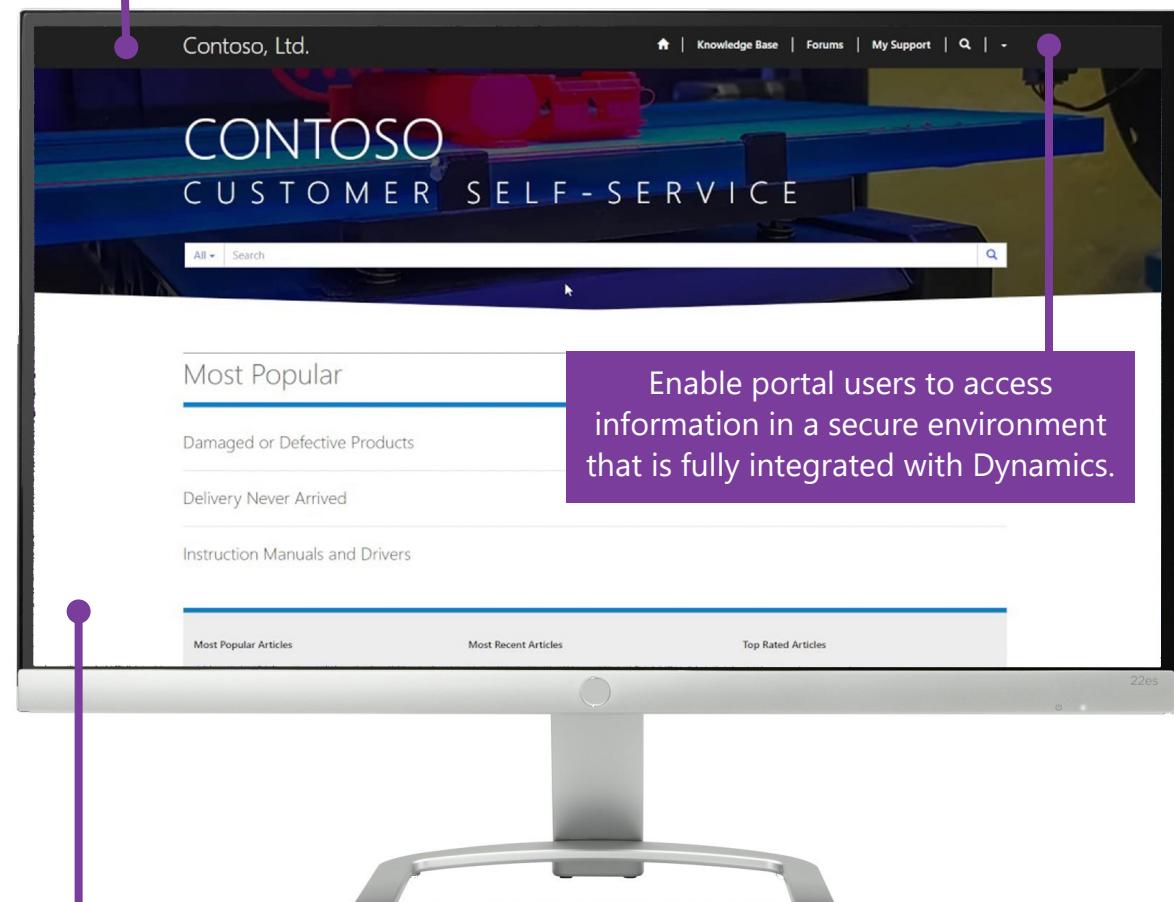
Enable clients and other contacts to log service issues and check the status on their recent cases - even when your office is closed.

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.



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.



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

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.

The screenshot shows the Microsoft Dynamics 365 Field Service interface. At the top, there's a navigation bar with "Dynamics 365", "Field Service", and "Schedule Board". Below it is a "Hourly view" section. On the left, a "Map View" shows a map of a geographic area with various locations like Yarrow Point, Clyde Hill, Medina, and Bellevue. A legend indicates "Traffic" and "Road". To the right of the map is a list of technicians with their names, availability, and skill levels. The main right side of the screen is a "Schedule Board" for the date 1/26/2017. It displays a grid of work orders with their descriptions, durations, and start times. A vertical purple line highlights the technician list and the schedule board.

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					

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:

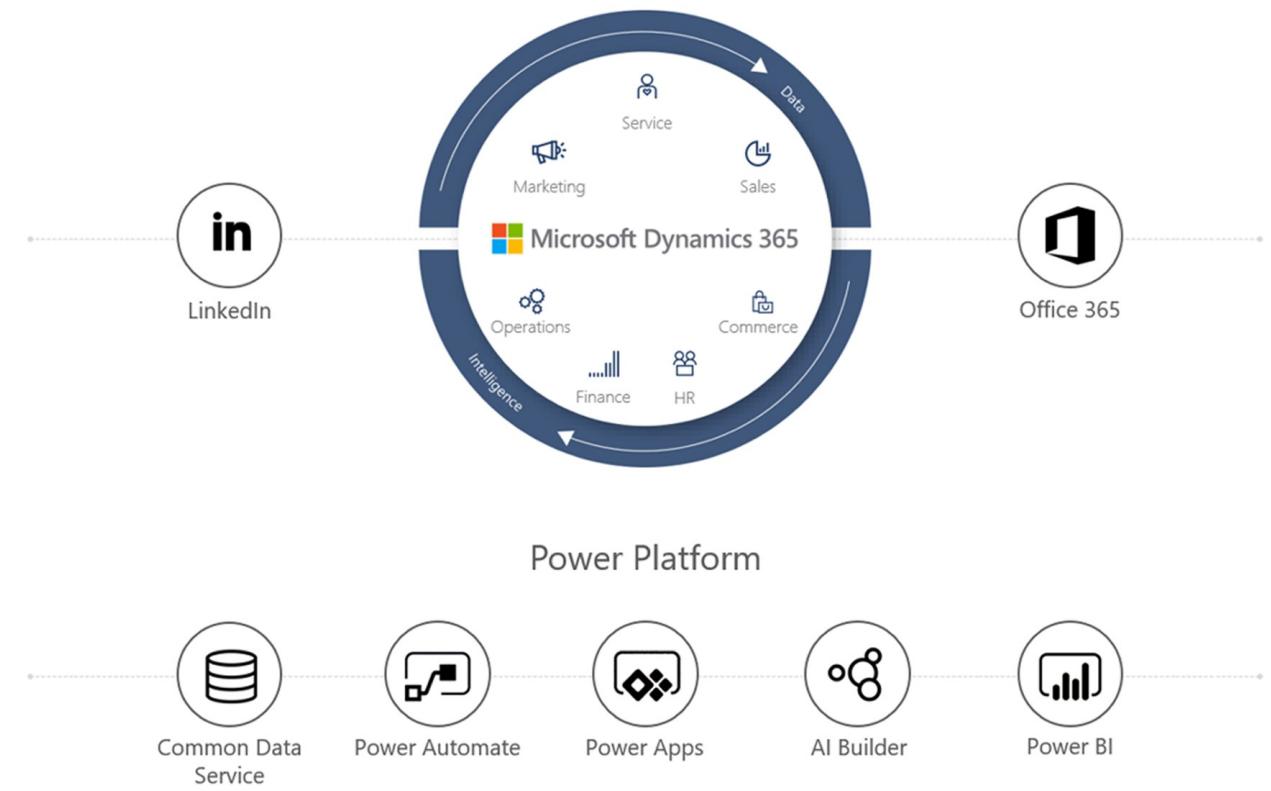


- **Accounting / ERP** - access client order histories and financial details in Dynamics 365 and send completed orders for processing.
- **Web Forms** - automatically import from new enquiry forms, sign-up forms and PDF downloads that maps form data to new or existing contacts.
- **Web Tracking** - identify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

Microsoft Power Platform



Build Custom Business Apps

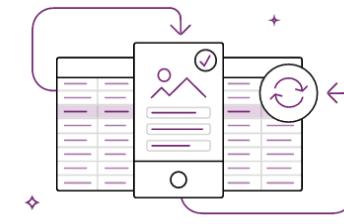
PowerApps uses visual drag and drop tools to quickly create new web and mobile connected apps.

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

PowerApps + Microsoft Flow



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

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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Gold Cloud Customer Relationship Management
Gold Cloud Business Applications
Gold ISV

2019/2020 INNERCIRCLE for Microsoft Business Applications

