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Our Guide to Dynamics 365 CRM



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Beginners Guide to the “Microsoft” Dynamics 365 Landscape



There's more to Dynamics than NAV

If you've been buried in the world of NAV then you could be forgiven for thinking that the only Dynamics 365 product is Dynamics 365 Business Central (also known as D365 BC), but that simply isn't the case. There's a whole world of brilliant Dynamics 365 products out there wearing the Dynamics 365 badge. In this article we'll attempt to give you a brief glimpse of the landscape to see what could be on your horizon.

The History of Microsoft Dynamics

Back in 2005 Microsoft introduced the Dynamics brand name to the world, and just over 10 years later we saw the brand evolve to Dynamics 365 in 2016. Prior to that there was Navision (which became Dynamics NAV), Axapta (which became Dynamics AX), Great Plains (which became Dynamics GP), Solomon (which became Dynamics SL) and Microsoft CRM (which became Dynamics CRM). Microsoft love a rebrand!

Over the years, the common factor across all these products were that they were all in some way or another pieces of software that supported businesses processes. These days they are more commonly known as Business Applications (or you might hear people refer to them as “BizApps”).

What's important to note is that all of these components of software came from very different technical lineages, they weren't all cooked up in a room at Microsoft in Redmond. The majority of these were created by companies that Microsoft had acquired over time. As a result, they acted like totally independent products, with very little integration between them, and quite a lot of functional overlap.

Over the last 20 years Microsoft have focused on streamlining these offerings, investing huge sums in some, and end of life-ing others. As of today, there are three that continue to thrive: D365 Business Central, (previously NAV), D365 Finance and Supply Chain Management (D365 F&SCM), previously AX, and D365 CRM (more on that in a moment).

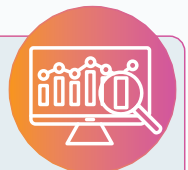


ERP

The two D365 products known as “ERP” (Enterprise Resource Planning) solutions are D365 Business Central and D365 F&SCM. If you're not familiar with the term ERP, it refers to software that manages the internal processes of a business, such as stock, sales, manufacturing, finance, and more.

So why do Microsoft still have two offerings for ERP? Very simply, they're aimed at two different types of businesses. D365 Business Central is aimed at small to medium sized businesses that are looking for a solution which is feature rich and yet allows for cost efficient customisation so that it can be adapted to fit the needs of your business. D365 F&SCM on the other hand is a bigger, more complex solution, which is suited to larger companies with intricate, global operations.

Of course, there's huge overlap between the two products, and it isn't as simple as small companies get one, and big companies the other. It is key to understand the specific area of functionality that your business requires to align the product that is better suited to the operating requirements (e.g. warehousing, manufacturing etc).



CRM

Unlike D365 Business Central and D365 F&SCM, the Microsoft approach to the D365 CRM product wasn't to keep it as a single product, but instead to "explode" it into a family of products. As a result, we now have the following:

D365 Customer Insights

Customer Insights is what you'd traditionally call a "Marketing" platform. It's comprised of two parts:

Customer Insights – Data: This product is all about bringing together prospect and client data into one unified place. By consolidating information from various sources, it creates a comprehensive single view of your customers that can be used across your business to drive informed decisions and tailor strategies.

Customer Insights – Journeys: This component focuses on orchestrating personalised customer journeys. It enables marketers to design, automate, and optimise multi-channel campaigns that trigger targeted communications and engagement activities based on customer behaviours and interactions.

Dynamics 365 Sales

This product is aimed squarely at organisations with dedicated sales teams, especially those whose salespeople are on the road visiting prospects and customers. It offers robust tools for managing leads, tracking opportunities, and streamlining the entire sales process, ensuring that every interaction contributes to a clear, actionable sales pipeline.

Dynamics 365 Customer Service

This application is designed to empower customer support teams by providing a unified platform for case management, self-service portals, and AI-driven insights. With access to a complete customer history, agents can resolve issues quickly and deliver a consistent, high-quality service experience. The platform's intuitive design and advanced features ensure that support teams can work efficiently and effectively, ultimately enhancing customer satisfaction and loyalty.

Dynamics 365 Field Service

For businesses that deliver on-site services, Dynamics 365 Field Service ensures your field operations are efficient and responsive. It offers advanced scheduling, mobile capabilities, and predictive maintenance features, enabling technicians to be dispatched with the right tools and information to resolve issues on location. This minimises downtime and enhances customer satisfaction.

Dynamics 365 Contact Center

Tailored for organisations managing high-volume communications, Dynamics 365 Contact Center streamlines customer interactions across voice, chat, email, and social media channels. With real-time analytics and AI-infused routing, it ensures that customers are connected with the right agents quickly, providing a seamless, personalised support experience.

Dynamics 365 Project Operations

Ideal for businesses that run projects, this product integrates project planning, resource management, time tracking, and financial oversight in a single solution. By unifying these functions, Dynamics 365 Project Operations helps teams manage every aspect of a project's lifecycle, ensuring projects are delivered on time, within budget, and with optimal profitability.



Working Together

Given their diverged histories, there are three distinct technological platforms that exist within the modern Microsoft Dynamics world. The job to rewrite all of the products to be based on one single technology stack isn't something that seems to be in Microsoft's plans for the foreseeable future. Interestingly, there were rumours of them trying this once, if anyone remembers the fabled "Project Green". Instead, however, Microsoft have been working hard to bring the access to data and business logic together using the Microsoft Power Platform.

At this point it's worth talking briefly about the Power Platform and where it came from. The core component of the Power Platform (certainly in terms of data and business logic) is something called the Dataverse. If you trace back the history of Dataverse far enough you'll find that it was once called the Common Data Service (CDS), which was built on the database technology used for Dynamics 365 CRM. So, under the hood, Dataverse is the exact same technology that the entire Dynamics 365 CRM set of products is built on.

By continually investing in the various products, particularly with the Power Platform and Dataverse, Microsoft have in essence created that utopian unified Dynamics solution.

The future of Microsoft Dynamics 365 is therefore platform from which you can pick and choose the pieces you need for your specific business requirements. You might need Business Central's finance features but aligned with Dynamics 365 Sales for your blossoming sales team. Or you might want to take Dynamics 365 Contact Center, hook it up with Dynamics 365 Customer Service and Field Service to make the ultimate system for managing your fleet of engineers on the road. Similarly, you might just take the warehouse module from Dynamics 365 F&SCM and connect it to Business Central if you've started to outgrow the WMS capabilities of BC.

This ability to mix and match is the true superpower of Microsoft Dynamics 365, the ultimate combination of power and flexibility of business applications.



The Microsoft Dynamics CRM Product Landscape



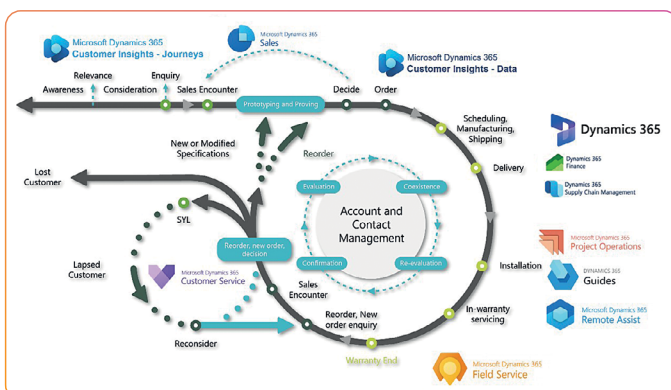
CRM, CXM, Call Centre, Field Service, Sales Management - the process of looking after your customer has many names. So it can be daunting to find the right solution to support your CRM journey.

As part of the Microsoft Dynamics family, we are very fortunate to have a series of integrated modules that, after many years of evolution have emerged as a robust solution for organisations looking to better manage and enhance their customer engagement.

Later in the guide we will dive into the specific areas, but for now let's explore what are the key offerings and features that make up the Dynamics CRM landscape.

Understanding Microsoft Dynamics 365

Microsoft Dynamics 365 is a suite of solutions that includes Dynamics CRM. The suite combines the customer relationship management (CRM) platform alongside enterprise resource planning (ERP) capabilities, such as those delivered from Business Central. Dynamics CRM is designed to help businesses manage customer relationships, track sales, and improve service levels. Over the years, Microsoft has evolved its CRM offerings to cater to a diverse set of business needs, its flexibility ensuring that it can deliver a solution for small startups to large enterprises.



Key Components of Microsoft Dynamics CRM

The Microsoft Dynamics CRM landscape consists of various components that work together to provide a comprehensive customer management solution.

Key components include:

Sales

The Sales module, designed to help organisations manage their sales processes effectively. It allows sales teams to track leads, opportunities, and customer interactions. Features such as lead scoring, opportunity management, and sales forecasting help users to identify potential revenue and prioritise their efforts effectively. Moreover, integration with tools like LinkedIn Sales Navigator enhances prospecting capabilities, making it easier for sales representatives to connect with potential clients.

Customer Service

Customer service is another critical component of Dynamics CRM. It enables businesses to provide exceptional support by managing customer enquiries, complaints, and service requests efficiently. The Customer Service module offers features like case management, knowledge base, and service level agreements (SLAs) to ensure timely responses to customer needs. It supports multi-channel engagement, allowing customers to interact via various platforms such as email, chat, and social media.

Marketing

The Marketing module in Dynamics CRM focuses on automating marketing processes and enhancing campaign management. Users can create targeted marketing campaigns, track performance, and analyse customer

engagement metrics. Features like email marketing, social media integration, and event management help organisations reach their audience effectively. The integration with Microsoft Power Automate further streamlines workflows, enabling marketers to automate repetitive tasks and focus on strategic initiatives.

Field Service

Dynamics CRM also includes a Field Service module, which is particularly beneficial for businesses with mobile workforces. This component helps organisations manage work orders, track field technicians, and optimise resource allocation. Features like scheduling and dispatching, inventory management, and customer communication tools ensure that service delivery is efficient and meets customer expectations.

“Microsoft Dynamics CRM provides a versatile set of tools that allow for extensive customisation without compromising the integrity of the deployment or hindering future upgrades.”

Contact Center

Dynamics 365 Contact Center is a cloud-based solution designed to enhance customer service by integrating intelligence and automation across various communication channels. It leverages AI, particularly Copilot, to empower agents with tools like real-time assistance, automated task completion, and insightful conversation summaries. This platform aims to create seamless, omnichannel customer experiences through features like AI-driven self-service, unified routing, and comprehensive analytics, ultimately improving customer satisfaction and operational efficiency. It's designed to work with various CRM systems, and provide a modern contact centre experience.

Project Operations

Dynamics 365 Project Operations unifies sales, resourcing, project management, and finance into a single application, streamlining the entire project lifecycle for service-based businesses. It combines capabilities from Project Service Automation and Finance and Operations, enabling organisations to efficiently manage project delivery from initial sales through to completion and invoicing. With features like integrated project planning, resource optimisation, time and expense tracking, and robust financial management, Project Operations provides real-time insights and enhances collaboration. This comprehensive platform empowers businesses to improve project profitability, optimise resource utilisation, and deliver exceptional customer experiences.

Integration with Microsoft Ecosystem

One of the significant advantages of Microsoft Dynamics CRM is its seamless integration with other Microsoft products and services. Organisations using Microsoft Office 365 can leverage tools like Outlook, Excel, and SharePoint to enhance their CRM capabilities. For instance, users can track emails and appointments directly within the CRM, ensuring that customer interactions are recorded and accessible.

The integration with Microsoft Power BI provides advanced analytics and reporting features, enabling organisations to visualise and analyse customer data effectively. This holistic view of customer interactions allows businesses to make informed decisions and tailor their strategies accordingly.

Customisation and Extensibility

Microsoft Dynamics CRM provides a versatile set of tools that allow for extensive customisation without compromising the integrity of the deployment or hindering future upgrades. This ensures that businesses can fully utilise the robust 'out-of-the-box' features while addressing their unique needs. As we know, rarely does one size fit all, but with Microsoft Dynamics CRM, you can tailor the system to fit your specific requirements seamlessly. Users can create custom entities, fields, and forms, ensuring that their CRM aligns perfectly with their business processes. Furthermore, the platform supports extensibility through Microsoft Power Apps, enabling businesses to build custom applications that integrate with Dynamics CRM.

Deployment Options

Want to put it where you want it? Don't worry, Microsoft Dynamics CRM is available in various deployment options, providing flexibility to organisations. Businesses can choose between on-premises, cloud-based, or hybrid deployment models, depending on their specific requirements and infrastructure. The cloud-based option offers the advantages of scalability, automatic updates, and reduced IT overhead, making it a popular choice for many organisations.

Security and Compliance

We're in an era where data security and compliance are at the forefront of our everyday concerns and as you would expect, Microsoft Dynamics CRM adheres to strict security protocols. It offers role-based access controls, data encryption, and secure data storage, ensuring that sensitive customer information is protected. Microsoft complies with various regulatory standards, including GDPR, making it suitable for organisations operating in regulated industries.

What's The Future of Microsoft Dynamics CRM

As businesses continue to evolve, so does the landscape of customer relationship management. Microsoft is committed to enhancing Dynamics CRM by incorporating emerging technologies such as their artificial intelligence (AI) feature, Copilot, machine learning (ML) and Customer Insights. These advancements will enable organisations to gain deeper insights into customer behaviour, predict trends, and automate routine tasks. Ultimately driving a better customer experience and after all, who doesn't want the best experience they can get?

A Guide to Dynamics 365 Licensing



The products in the Dynamics 365 (D365) range are all licensed via Office 365, and all the licences can be applied in one of two ways: either assigned on a user basis, or applied to the 365 tenant.

User Licence

User licences are for individual users and can be used on any device. Licences can be assigned in the user management area of Office 365. These user licences sometimes come in different levels, offering different features and functionality for each product. For example, Dynamics 365 Commerce, Project Operations, and Human Resources all have a single edition user licence, assigned to users via Office 365. Dynamics Customer Service, on the other hand, has Professional and Enterprise options, where Enterprise gives a wider range of functionality than a Professional licence. Dynamics 365 Sales gives you three different options: Professional, Enterprise, and Premium. Each providing more functionality than the previous edition. Device Licences are also part of the 'assigned' licences category, and they are for specific devices that can be used by more than one person.

User based products include:

- Dynamics 365 Sales
- Dynamics 365 Commerce
- Dynamics 365 Customer Service
- Dynamics 365 Human Resources
- Dynamics 365 Field Service
- Dynamics 365 Project Operations
- Dynamics 365 Finance
- Dynamics 365 Business Central
- Dynamics 365 Supply Chain Management

Tenant Licence

Tenant licences, on the other hand, are for features or services that all users in an organisation can use. These include full app access, cross-app access, and extra storage. An example of a tenant-licensed product is Dynamics 365 Customer Insights; once a license has been applied to the tenant all users can access Customer Insights. Some products have a mix of licence types; within Dynamics 365 Supply Chain Management, licences for the product are assigned to users, but licences for additional capacity, like extra Assets, can be added to the tenant, giving access to the additional Assets to all users.

Tenant based products include:

- Dynamics 365 Marketing
- Dynamics 365 Customer Insights
- Dynamics 365 Fraud Protection
- Dynamics 365 Intelligent Order Management

D365 Business Central

Let's take a more in depth look at a specific product. Dynamics 365 Business Central is licensed on a per user basis, within a Tenant.

There are two types of full user licence:

Essentials and Premium. An Essentials licence includes all the core functionality of Business Central, covering areas like finance, contact management, HR, supply chain management, and warehouse management. Premium licences, which are slightly more advanced, include everything from Essentials, plus manufacturing and service order management. Both Essentials and Premium licences are user based, assigned to individuals in Office 365. A given user can only have either an Essentials licence or a Premium licence, not both.

As well as these two full user options, there's a more limited licence called a Business Central (BC) Team Member. This gives users access to Business Central, but largely in a read-

only capacity. A BC Team Member licence includes some write functionality but doesn't allow users to post anything. For example, a BC Team Member can edit an existing customer card but cannot create a new customer card. It's a far cheaper option than a full user, which can really help to reduce costs where the license can align to the users requirements.

There's also a BC Device licence which, rather than being assigned to users, gets assigned to specific devices – for example a mobile device in a warehouse. This device can be used by any number of people, who don't require their own user licence. This is ideal for a warehouse, where multiple members of staff might need access to Business Central at different points throughout the working day. This allows for a large group of people to share a few device licences, rather than consuming a user licence each.

Customer Engagement (aka CRM)

There are multiple applications that fall under the Customer Engagement suite.

D365 Sales and D365 Customer Service both have three predominant tiers of user licensing, Professional, Enterprise, and Premium. Professional is generally aimed at small organisations with a single team but still cover the basics of the application areas i.e. Lead to Opportunity with pipeline management for Sales, and Case management with knowledge base and SLAs for Customer Service. Enterprise is the standard license that starts to include additional features such as team structures, goals and forecasting, surveys, scheduling, offline application usage, Copilot and other AI features within the application, etc. Premium then adds the latest AI capabilities to the applications such as notes analysis, connection insights, predictive forecasting, and relationship analytics for sales, and contact centre capabilities for Customer Service.

D365 Field Service has a single primary user license which covers all the primary functions of Work Order creation, scheduling, dispatch, and the dedicated mobile application. Field Service licensing now also includes the use of Remote Assist, and the 3D Guides capability aimed at assisting field workers with complex tasks. There is a second license to allow external contractors to work directly with your Field Service data.

D365 Customer Insights (previously marketing) has a single tenant wide license that gives all users the capability to use the platform to segment the customer base, proactively communicate with customers in bulk or on personalised journeys and run events.

D365 Contact Center, the latest application in the suite, allows users to support customer inbound communications over any channel, in a single interface, including voice calls

and digital channels such as SMS, WhatsApp, Facebook, and chat. There are three user licenses associated with Contact Center, Dynamics 365 Contact Center Digital for users just dealing with the digital channels, Dynamics 365 Contact Center Voice for users just dealing with inbound voice calls, and Dynamics 365 Contact Center for users who deal with both digital and voice inbound communication.

Dynamics 365 Project Operations, for companies who sell Professional Services in a project and need to understand profitability of the resources, has a single user license that covers all users in the process including sales, project management, resourcing, and project accounting

Finally, there is a Dynamics 365 Team Member user license for any user who doesn't fall into one of the above licenses but needs to contribute. This license gives the ability to update accounts, create and update contacts, create and update activities, and submit time entries.

All the above licenses give users read only access to all data that is outside of their license scope.

Generally, users will only require a single licence since licenses are designed to allow the user to fulfil a specific role. However, there may be instances when a particular user plays multiple roles in the company and needs multiple user licenses, especially in smaller businesses. In these circumstances, each of the Customer Engagement licenses has an attach license variance so that users pay full price for the main license and then a much cheaper price for the second attach license.

Customer Insights also has an attach tenant wide license which is available to any organisation that has 10 or more full user based licenses of any other application across the entire Dynamics 365 suite of applications, including Business Central, Customer Engagement, and Finance & Operations.

Power Platform

Like the majority of D365 licences, the Power products are also generally licensed on a per user basis, with some exceptions.

Power BI licences come in a few different options: Power BI Free, Power BI Pro, and Power BI Premium. Each edition granting the user more reporting features and content than the previous. Most of the time, Power BI users need a user licence, however there's also an option to add Premium Capacity which does allow people who don't have a Power BI licence to view content created by licensed users.

Another product in the Power family is Power Apps. Again, licences are assigned to each user. There's a Power Apps Per App option which allows a user to run one application in a given environment. The upgraded licence option is Power Apps Premium which lets a user run unlimited applications.

Power Automate has many different licences, giving the options to assign licences to users who can then run unlimited flows or to assign licences to bots which can run business processes automatically without licensing individual users. There's even an option to license a given flow so that it can be used by any number of people within a Tenant.

Power Pages is licensed in a slightly different way, as it's the visitors to web pages who are counted, rather than internal Office 365 users. These visitors are licensed either as Authenticated users (i.e., people who need to log into), and Anonymous users (who don't log in). Within each type you would then need to choose an appropriate pack of users, depending on how many visitors are needed.

Copilot

Microsoft Copilot also comes under the 'per user' category. However, Copilot differs slightly as users need to have a qualifying licence already, to be eligible for a Copilot licence. Here are the prerequisite licences from Microsoft:

- Microsoft 365 Apps for enterprise or Microsoft 365 Apps for business
- Microsoft 365 Business Basic, Business Standard, or Business Premium
- Exchange Online Kiosk, Plan 1, or Plan 2
- OneDrive for Business Plan 1 or Plan 2
- Microsoft 365 E3, E5, F1, or F3
- SharePoint Online Plan 1 or Plan 2
- Office 365 E1, E3, E5, or F3
- Teams Essentials or Teams Enterprise

Fabric

Microsoft Fabric capacity is licensed at the tenant level, where the computing power you need is measured in Capacity Units (CU). It's these CUs which are licensed for the tenant, rather than the users. These CUs can be scaled up or down as needed, ranging from 2 CUs per month (F2), all the way up to 2,048 monthly CUs (F2048). As a bonus, if 64 CUs or more are licensed, then licences for Copilot in Fabric are included too. Importantly, Capacity can be paid for as you go or can be paid via an annual reservation, and you can even license more than one Fabric Capacity per tenant and then assign the workspaces to each Capacity.

As well as the computing power, the amount of storage space consumed also needs to be licensed. In Fabric, the data is stored in OneLake. OneLake storage is also paid for on a pay-as-you-go model, based on the amount of data used.

If Fabric content is going to be shared via Power BI, then each user would need to be covered by a Power BI Licence. However, if Fabric is licensed for an F64 Capacity and above, Power BI licenses aren't required for users to view the data in Power BI.



Conclusion

In summary, the licensing models for the different Dynamics 365 products vary, providing different levels of functionality and access. The licences required will depend on the requirements of individual users, and the business. Microsoft provides flexible options to meet the different needs. Talk to us to find out what's best for you.

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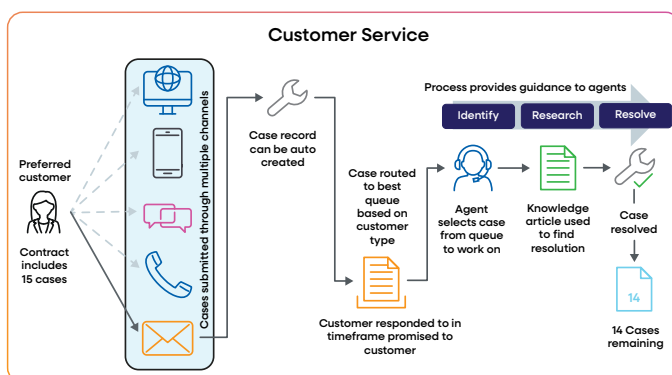


Dynamics 365 Customer Service: An Overview



Microsoft Dynamics 365 Customer Service commonly known as 'CE Customer Service' is a comprehensive application that helps businesses to manage customer interactions, resolve issues efficiently, and provide personalised support across the various channels that a business interacts through. It's more than just a help desk; it's a platform for building stronger customer relationships, improving loyalty and helping to turn satisfied customers into advocates for your business.

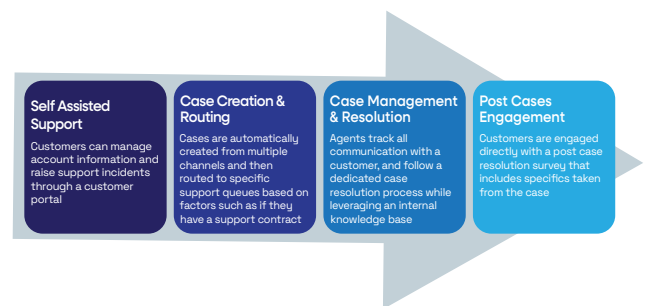
Great customer service is critical to any organisation's success. These days customers are well-informed and quite reasonably expect seamless, personalised experiences across various channels. Dynamics 365 Customer Service ensures that organisations meet these expectations by providing the tools to manage customer issues efficiently, leverage knowledge bases, and gather valuable feedback for continuous improvement. The modern Customer Service journey is shown below.



Trends for shaping customer service include the rise of mobile devices and social media as key interaction channels, the demand for self-service options, and the growing importance of the Internet of Things (IoT) for proactive and predictive support. By embracing these trends and use the comprehensive features of Dynamics 365 Customer Service, organisations can deliver exceptional customer experiences while building stronger relationships. See the typical customer support journey diagram:

With an exceptional customer experience being crucial, the Dynamics 365 Customer Service platform can help you deliver this in the following ways:

Scenario: Typical Customer Support Journey



Improved Customer Satisfaction: Providing efficient, personalised, and proactive service, organisations can significantly enhance customer satisfaction and loyalty.

Increased Efficiency: Intelligent routing, and a unified platform streamline service processes, reducing resolution times and improving agent productivity.

Omnichannel Engagement: Connect with customers across their preferred channels – email, phone, chat, social media – all within a single platform, ensuring consistent and seamless interactions.

Data-Driven Insights: Gain valuable insights into customer behaviour, service performance, and trends to identify areas for improvement and optimise service strategies.

Enhanced Agent Empowerment: Supplying agents with the tools and knowledge they need to resolve issues quickly and effectively.

Proactive Service: Identify and address potential issues before they impact customers, preventing escalations and building trust.

Scalability and Flexibility: Adapt to changing business needs and growth with a flexible and scalable platform that can be customised to specific requirements.

Integration with other Microsoft Products: Seamlessly integrate with other Dynamics 365 applications, such as Sales and Marketing, for a unified view of the customer and a more connected business.

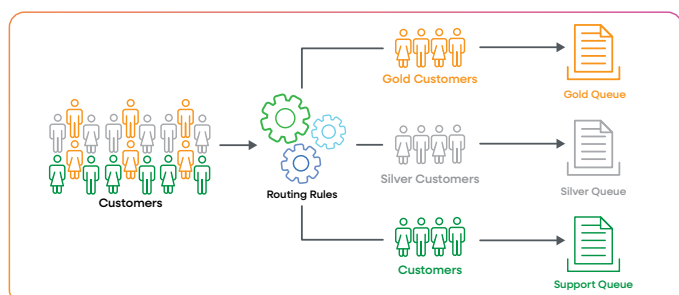
So, what does Dynamics 365 Customer Service offer?

Case Management

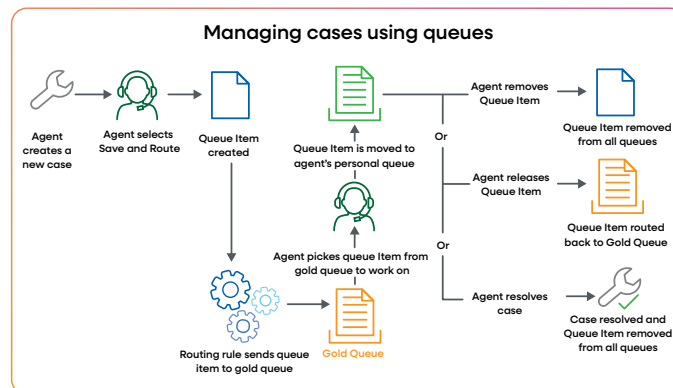
A “case” is a central record representing any customer interaction requiring resolution, such as questions, requests, or issues. Dynamics 365 offers flexible case creation to accommodate various scenarios. Cases can be automatically generated from sources like social media interactions or created manually by representatives during customer calls. Self-service portals also enable customers to log their own issues. While various methods exist, manual creation and activity conversion are the most common approaches for entering cases into the system. A robust case management strategy should consider all potential entry points to ensure comprehensive coverage. This level of integrated system ensures efficient case handling and improved customer service.

Queue Management

Queue management is a crucial process for organising, prioritising, and distributing work items (like cases and activities) among customer service agents. Think of queues as virtual holding areas where incoming requests are stored until they can be addressed. Effective queue management ensures that no requests fall through the cracks, agents work on the most pressing issues first, and overall service efficiency is maximised. The image illustrates how different customers who have different levels of support can be categorised into the corresponding queue.



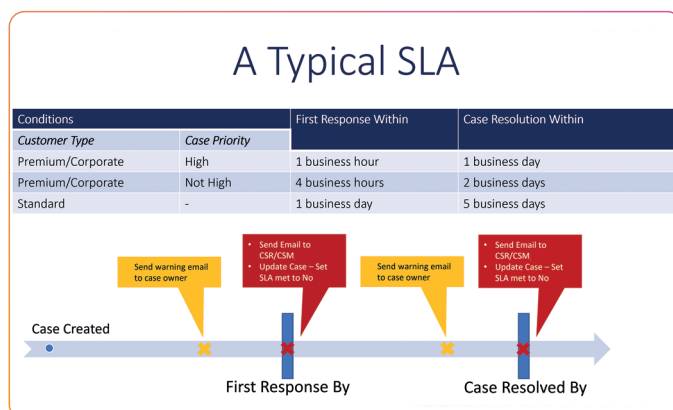
In essence, queue management in Dynamics 365 Customer Service is a vital component for delivering exceptional customer service. It provides the structure and tools necessary to handle a high volume of requests efficiently, prioritise work effectively, and ensure that every customer receives timely and appropriate support. The illustration demonstrates how queues can be used in managing cases improving customer service.



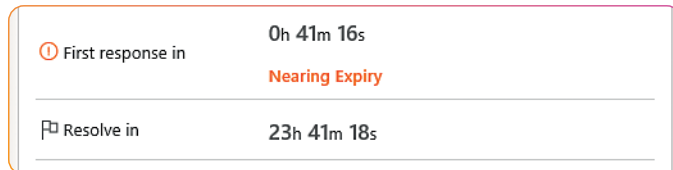
Service Levels & Entitlements

Entitlements define the scope of support a customer is entitled to, such as which channels are covered and the level of support provided, essentially acting as a support contract. Service Level Agreements (SLAs) then define the expected performance standards for that support, specifying metrics like response and resolution times. When a case is created, the system uses the customer’s entitlement to determine the appropriate SLA, ensuring they receive the correct level of support within the agreed-upon timeframes. Entitlements answer what support, while SLAs answer how quickly that support should be delivered.

“SLAs in Dynamics 365 aren't just static agreements; they drive dynamic actions through automated timers, tracking the progress of a case against defined metrics and triggering next steps automatically.”

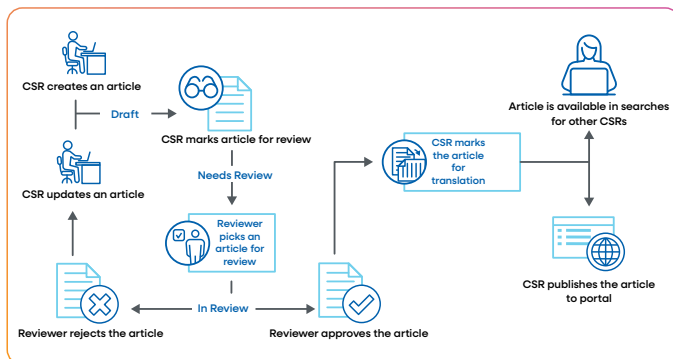


SLAs in Dynamics 365 aren't just static agreements; they drive dynamic actions through automated timers. These timers track the progress of a case against the defined metrics and can automatically trigger next steps, such as sending reminders to agents, escalating the case to a supervisor, or even initiating formal escalation processes if deadlines are missed. Visually, these timers provide agents with a clear, real-time view of the case status, highlighting potential bottlenecks and helping them prioritise their workload to ensure timely resolution and adherence to the agreed-upon service levels. This proactive approach helps maintain customer satisfaction and ensures that service commitments are met.

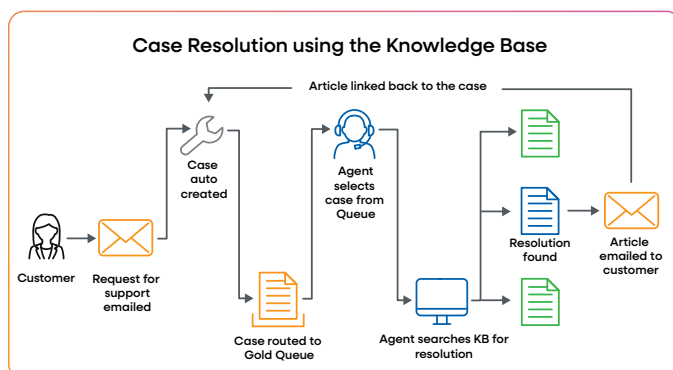


Knowledge Base Management

Knowledge management makes it easy to create and share helpful information. You can create engaging knowledge articles with rich text and multimedia and then manage their entire lifecycle from creation to retirement using built-in workflows. Keeping articles up to date is simple with version tracking, and you can even offer translations for a global audience. Publishing is flexible – schedule articles to make them live immediately, publish at a later date, as well as setting expiration dates. Plus, you can track how often articles are used to see what's resonating with your audience and make improvements. The image shows a typical knowledge base article lifecycle.



A huge benefit of Dynamics 365's knowledge management is how easily agents can access helpful information right from a customer's case. The built-in Knowledge Base Search automatically searches for articles related to the case title, so agents don't have to leave their workflow. They can view, link, or even email articles directly to the customer, all within



the case record. Plus, linking an article to a case creates a connection that managers can analyse to understand which articles are most effective at resolving specific issues.

Customer Service Scheduling

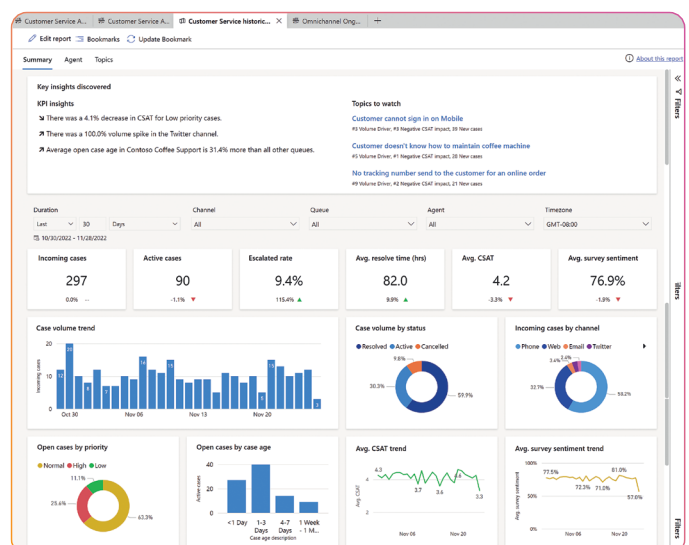
Many organisations offer service-based activities, often requiring field dispatch or in-house appointments. Scheduling these services in an effective way is crucial, ensuring timely completion, by qualified personnel with the necessary equipment. Dynamics 365 Customer Service, using Universal Resource Scheduling, simplifies this process. When scheduling a service, the system considers factors like time required, equipment, and resource qualifications. It then provides scheduling options, taking into account existing workloads to avoid double-booking and ensuring only available resources are suggested. This helps streamline scheduling and optimises resource utilisation.

Customer Voice

Dynamics 365 Customer Voice complements Customer Service by gathering feedback to improve customer journeys. While Customer Service resolves immediate issues, Customer Voice Surveys capture customer sentiment at various touchpoints, providing actionable insights for process improvements and personalised interactions. Integrating feedback data with Customer Service case information enables closed-loop feedback and data-driven decisions, leading to optimised service strategies and enhanced customer experiences. Essentially, Customer Voice provides the "voice" of the customer, informing and improving how Customer Service operates.

Reporting

Customer Service Insights empowers both agents and managers to improve customer satisfaction through AI and analytics. It provides out-of-the-box AI and BI capabilities, including historical analytics, topic clustering for cases, knowledge search analytics, and AI-powered suggestions for similar cases and knowledge articles. Embedded within the Customer Service hub and workspace, Insights helps agents resolve issues faster and more effectively, while managers gain valuable data-driven insights into service performance and customer trends. The premium AI features use natural language understanding and generation, enabling agents to focus on high-impact tasks and deliver better customer experiences.



Teams Integration & Swarms

Dynamics 365 Customer Service recognises that agents cannot know everything and provides several collaboration tools to facilitate teamwork and expert assistance. To make it easy for agents to find and work with colleagues, the platform offers embedded chat via Teams, allowing agents to start or link chats directly within Dynamics 365 without losing context. Customer support swarming through Teams enables agents to quickly assemble the right experts to tackle complex issues. Finally, agents can seamlessly share Dynamics 365 records within Teams, ensuring everyone has the necessary information without switching applications. These features combine to create a unified customer service centre, improving efficiency and resolution times.

Copilot for Service

For customer service representatives, speed and accuracy are crucial, especially in high-volume environments. Microsoft Copilot in Dynamics 365 Customer Service provides real-time AI assistance to help agents work more efficiently. Copilot can save agents valuable time by helping them respond to customer questions, compose emails, draft chat responses, and summarise cases and conversations, allowing them to handle more cases effectively and provide better customer service.



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Conclusion

Dynamics 365 Customer Service is a powerful tool for organisations looking to transform their customer service operations. By using its comprehensive features and focusing on customer-centricity, businesses can build stronger customer relationships, improve efficiency, and drive growth. It empowers organisations to move beyond reactive service and deliver proactive, personalised experiences that exceed customer expectations.

Empower your customers, citizens, and business partners to self-serve, reducing the volume of high-volume/low complexity service requests that your agents need to manually action.

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Unleashing the Power of Connected Conversations: An Introduction to Dynamics 365 Contact Center

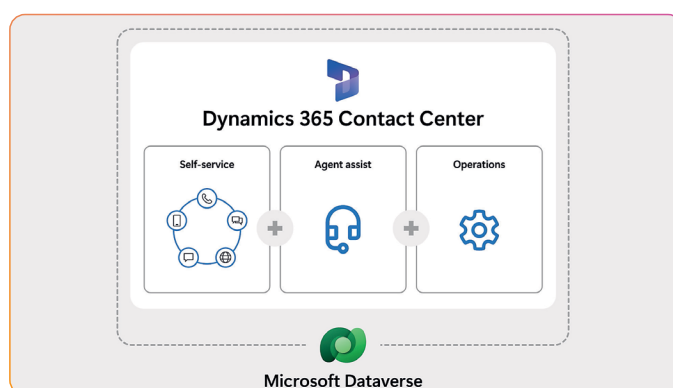
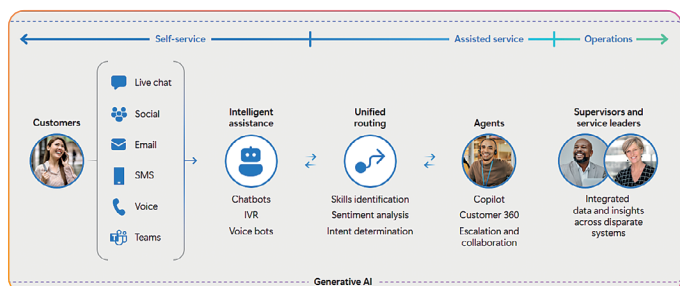


In today's hyper-connected world, customer expectations are higher than they have ever been. Customers demand seamless, personalised, and efficient experiences across their preferred channels and meeting these demands requires more than just a traditional call centre; it requires a digital-first approach.

Enter Dynamics 365 Contact Center, a powerful solution designed to transform customer interactions and empower agents to deliver exceptional service.

What is Dynamics 365 Contact Center?

Dynamics 365 Contact Center is a comprehensive, cloud-based solution that unifies communication channels, empowers agents with intelligent insights, and personalises customer experiences. It's built on the robust foundation of the Dynamics 365 platform, seamlessly integrating with other Dynamics 365 applications like Sales, Marketing, and Customer Service. This unified platform provides a 360-degree view of the customer, enabling agents to deliver contextually relevant and personalised service.



Empowering Agents with Copilot's Conversational Intelligence

The infusion of Copilot into contact centre workflows represents a paradigm shift from rigid, scripted interactions to dynamic, intelligent conversations. Instead of forcing agents to adhere to pre-defined pathways, Copilot provides real-time, context-aware assistance. By using generative AI, Copilot can analyse customer sentiment, surface relevant knowledge base articles, and even suggest personalised responses, allowing agents to engage in more natural and empathetic dialogues. This not only enhances customer satisfaction but also empowers agents to become problem-

solvers, creating a more fulfilling work experience. This shift away from heavily scripted scenarios enables agents to adapt to unique customer needs, resulting in more effective and personalised service.

Intelligent IVR and Routing with Voice Bots

Modernising the Interactive Voice Response (IVR) system with AI-powered voice bots significantly improves the customer's initial experience. Instead of navigating complex menu trees, customers can engage in natural language conversations with a virtual agent. These voice bots can understand intent, gather relevant information, and intelligently route calls to the appropriate teams or agents based on factors like customer history, issue type, and agent availability. This streamlined routing reduces wait times, minimises the callers frustration, and ensures that customers are connected with the right resources from the outset. By integrating these bots with backend systems allows them to perform tasks like checking order status or updating account information, freeing up agents for more complex interactions.

Expanding Contact Centre Capabilities Beyond External Customer Interactions

The contact centre's capabilities extend far beyond external customer service. It can serve as a centralised hub for internal communications and inquiries, streamlining employee support and knowledge sharing. By using the same omnichannel capabilities and AI-powered tools used for customer interactions, organisations can create a seamless experience for employees seeking assistance with HR, IT, or other internal departments. This unified approach improves efficiency, reduces response times, and fosters a more connected and informed workforce. For example, internal knowledge bases can be integrated with the contact centre, ensuring that both external customers and internal employees have access to the most up-to-date information. This consolidation of communication channels enhances operational efficiency and strengthens internal collaboration.

Architecture of Dynamics 365 Contact Center

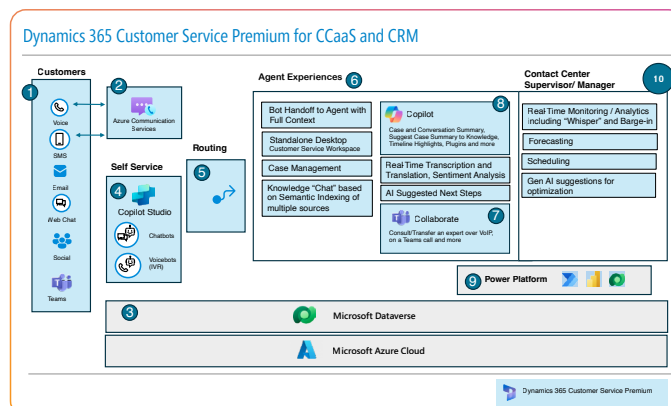
This architecture outlines a comprehensive, AI-driven contact centre solution built on Dynamics 365 Customer Service and Azure. It enables omnichannel customer engagement, leveraging Microsoft Telephony and IVR for voice calls, and Copilot Studio for customisable self-service bots. AI permeates every stage, from intelligent routing that delivers contextual information to agents, to Copilot-enhanced agent tools like case summaries and automated drafts. Agents can collaborate through Teams, and post-interaction, AI generates summaries and suggests follow-up actions. Supervisors gain real-time insights into contact centre performance, with AI-driven recommendations for agent coaching and operational improvements such as Whisper (to transcribe audio files) and Barge In (allowing supervisors to listen to a call and step in if required). This approach ensures a seamless, efficient, and intelligent customer service experience.

What's the best approach for my business?

Full Modernisation with Dynamics 365 Customer Service Premium

This approach is for organisations seeking to consolidate into a single, unified platform. Dynamics 365 Customer Service

Premium offers comprehensive omnichannel capabilities, deeply integrated generative AI (Copilot), and robust CRM functionality. While providing a future-proof solution with enhanced productivity and customer experiences, as a replace all solution, it does require significant migration effort, change management, and a higher upfront investment.



Targeted CRM or CCaaS (Contact Center as a Service) Replacement

For those content with parts of their existing infrastructure, Microsoft offers targeted solutions. Dynamics 365 Customer Service Enterprise focuses on CRM replacement, integrating seamlessly with existing CCaaS platforms, offering improved customer data management, but with less built-in AI compared to the premium edition it requires strong CTI capabilities from the existing CCaaS solution. Conversely, Dynamics 365 Contact Center replaces the CCaaS layer, integrating with existing CRM systems and providing modern omnichannel features and cloud scalability. Both options necessitate careful integration planning and data synchronisation to avoid disruptions.

AI Infusion with Copilot

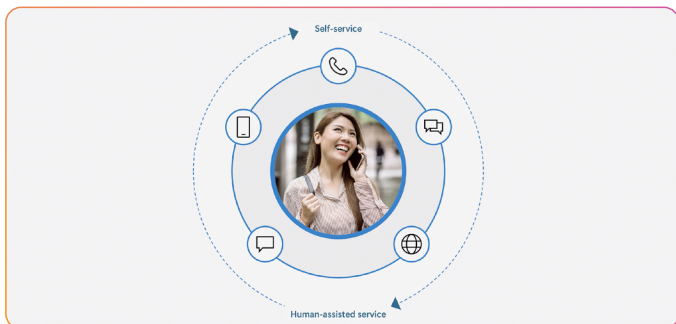
Organisations wanting to enhance their existing contact centre with generative AI but without the need for wholesale replacements can leverage Copilot for Service and Copilot Studio. This approach adds AI-powered self-service and agent assist capabilities, minimising disruption and offering a quicker time to value for AI implementations. However, integration complexity and data access limitations must be addressed, and the unified experience will not match a full platform solution.

Key Decision Factors

When selecting a solution, organisations must weigh factors such as the extent of modernisation desired, budget constraints, integration complexities, and change management requirements. A full platform approach offers maximum benefits but demands significant investment, while targeted replacements and AI infusion provide incremental improvements with less disruption. Careful consideration of these factors will ensure alignment with long-term goals and a successful contact centre modernisation strategy.

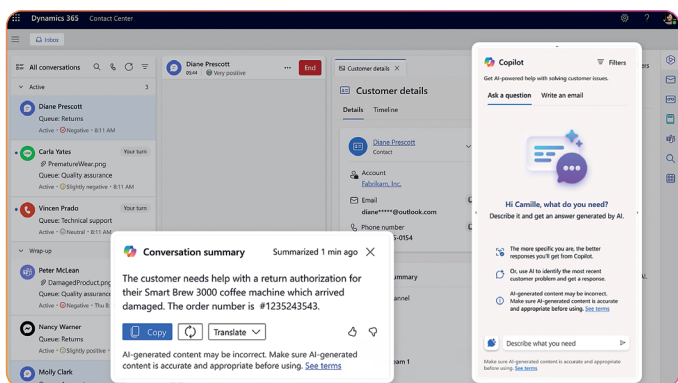
Key features of Digital Contact Center include:

Omnichannel Engagement: Connect with customers across a wide range of channels, including chat, SMS, email, social media (like Facebook/ X), and voice, all within a single interface. This eliminates the need for agents to switch between different systems, streamlining workflows and improving efficiency.



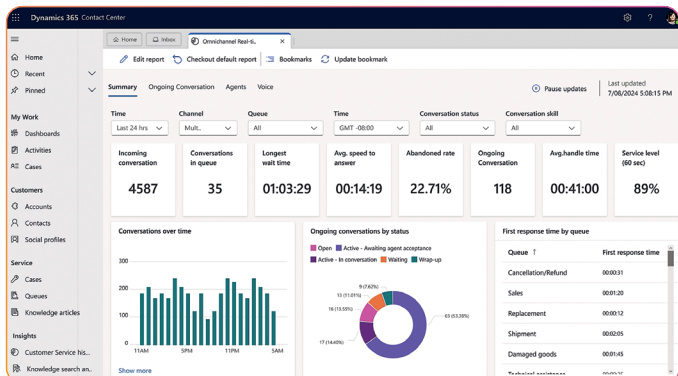
Unified Agent Desktop: Empower agents with a single, intuitive workspace that provides all the information they need to effectively serve customers. This includes customer history, interaction summaries, knowledge articles, and real-time insights, enabling faster resolution times and improved customer satisfaction.

AI-Powered Insights: Leverage the power of artificial intelligence to personalise interactions, predict customer needs, and automate routine tasks. AI-powered chatbots can handle simple inquiries, freeing up agents to focus on more complex issues. Sentiment analysis helps agents understand the emotional tone of customer interactions, allowing them to tailor their responses accordingly.



Personalised Customer Journeys: Orchestrate personalised customer journeys across all touchpoints, ensuring consistent and relevant experiences. By understanding customer preferences and past interactions, organisations can proactively engage with customers and offer tailored solutions.

Real-time Analytics and Reporting: Gain valuable insights into contact centre performance with real-time dashboards and reports. Track key metrics like first response time, resolution time, and customer satisfaction to identify areas for improvement and optimise operations.



Integration with Existing Systems: Seamlessly integrate Digital Contact Center with existing CRM, ERP, and other business systems to create a unified view of the customer and streamline workflows.

Why Should Organisations use Digital Contact Center?

In today's competitive landscape, delivering exceptional customer service is no longer a luxury, but a necessity. Dynamics 365 Digital Contact Center offers a compelling value proposition for businesses looking to elevate their customer experience and drive business growth:

Enhanced Customer Experience: Digital Contact Center empowers companies to provide seamless, personalised, and efficient customer experiences across all channels. This leads to increased customer satisfaction, loyalty, and advocacy.

Improved Agent Productivity: By unifying communication channels and providing agents with intelligent insights, Digital Contact Center streamlines workflows and reduces the time it takes to resolve customer issues. This empowers agents to be more productive and efficient.

Reduced Costs: Automating routine tasks with AI-powered chatbots and streamlining workflows can significantly reduce operational costs. By improving first-call resolution rates and reducing handling times, businesses can optimise their contact centre operations and save money.

Increased Revenue: By providing exceptional customer service, organisations can build stronger customer relationships and drive repeat business. Personalised interactions and proactive engagement can also lead to increased sales and revenue.

Data-Driven Insights: Digital Contact Center provides valuable data and insights into customer behaviour and contact centre performance. This data can be used to identify areas for improvement, optimise operations, and make informed business decisions.

Scalability and Flexibility: As a cloud-based solution, Digital Contact Center is highly scalable and flexible. Organisations can easily add or remove agents and channels as needed, ensuring they can adapt to changing business needs.

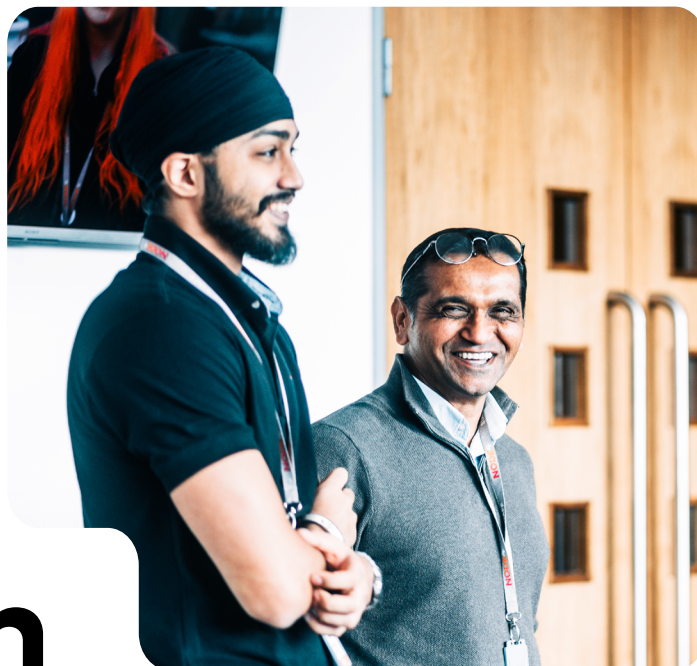
Competitive Advantage: In a world where customer experience is a key differentiator, implementing Digital Contact Center can give operations a significant competitive advantage. By providing exceptional service, organisations can attract and retain customers and stand out from the crowd.

Conclusion

Dynamics 365 Digital Contact Center is a game-changer for companies looking to transform their customer service operations. By unifying communication channels, empowering agents with intelligent insights, and personalising customer experiences, Digital Contact Center enables you to deliver exceptional service, drive business growth, and build lasting customer relationships. If you're looking to elevate your customer experience and stay ahead of the competition, Dynamics 365 Digital Contact Center is the solution you need.



Extending Microsoft Dynamics 365 CRM Application



Microsoft Dynamics 365 CRM applications offer a robust platform for managing customer interactions. A key strength lies in their extensibility, allowing you to tailor the system to your specific business needs.

Understanding the Customisation Landscape

The Dynamics 365 offers a layered approach to customisation, it's crucial to choose the right tool for the job, consider complexity, maintainability, and performance. Generally, it's best to start with a no-code/low-code methodology before resorting to a traditional coding approach.

No-Code/Low-Code Methodology

Business Rules: These define logic that executes client-side (in the browser) based on certain conditions. They're ideal for simple validations, field visibility changes, and setting default values. They're easy to configure and require no coding. A good use case for changing a business rule would be showing or hiding a field based on another field's value. Prior to business rules, JavaScript was used to achieve this, by using the business rules no code approach means you are achieving lower technical debt within your system.

Workflows: Automate business processes without writing code. Workflows can be triggered by CRUD events (Create, Read, Update, Delete) and perform actions like sending emails, creating records, updating records, and starting other workflows. An excellent use case for workflows is automatically sending a welcome email when a new contact is created. Workflows have been ingrained into the platform since its inception in 2011 and still has many powerful uses. Workflows work best for simpler, real-time processing where the scope of the automation stays within the Dynamics 365 CRM environment.

Power Automate (Flows): Power Automate is a cloud-based platform designed for more complex automations, particularly those connecting Dynamics 365 with other applications and services. Extending far beyond the boundaries of Dynamics 365, it integrates with hundreds of platforms, including Microsoft services like Office 365,

SharePoint, and Teams, as well as third-party platforms like Twitter, Dropbox, and Slack. Power Automate handles everything from simple notifications to intricate, multi-step processes involving approvals and data manipulation. Its user-friendly visual designer, combined with pre-built templates and connectors, makes workflow creation and management accessible even to non-developers.

Business Process Flow: Business process flows (BPFs) in model-driven applications streamline user workflows by visually guiding them through a process to completion. They ensure consistent procedures and optimise the user experience for achieving the desired outcomes. Common use cases include:

- Sales Processes, guiding sellers through the steps needed to maximise deal wins
- Case Resolution, helping support agents efficiently manage and resolve customer issues
- Event Planning, ensuring all necessary steps are taken, from venue booking to entertainment details
- Real Estate, assisting agents in preparing a home for open house, covering inspections, staging, and staffing.

Custom Entities (Tables): Create entirely new entities (tables) to store data specific to your business. This allows you to manage information not covered by standard tables and fields. It is important to remember that standard entities can be shaped to different business requirements so sometimes custom tables may not always be the best solution. All tables, system and custom, have the following components available to be customised:

Columns (Fields): Add custom columns fields to existing or custom entities to capture additional data. Define data types (text, number, date, lookup, etc.) and properties (required,

read-only)). The best practise is to repurpose columns and rename the field rather than create new columns.

Relationships: Define how tables relate to each other (one-to-many, many-to-one, many-to-many). This allows you to link related records and access information efficiently. The best example of relationships is between a single account and multiple contacts related to each other, representing a company and the employees that work for them.

Forms: Customise the layout and content of forms used to interact with data. Add or remove columns, sections, tabs, and sub grids. Forms can be reused, and additional forms can be created for additional business functions.

Views: Define different ways to view and filter data. Create public or personal views to display relevant information. Views work in a similar way to Microsoft Excel with searching and filtering on columns.

Charts: Visualise data using charts and graphs. Create charts to provide users with an 'at-a-glance' insight into key metrics, for example, create a sales performance chart, enabling the sales team and managers to see how they are performing.

Icons: Customise entity icons to visually distinguish them. This improves user experience and makes it easier to identify different types of records.

Code-Based Customisation

JavaScript (JScript): Client-side scripting that runs in the user's browser. Used for complex form manipulations, validations, and UI enhancements. An example would be to implement custom calculations on a form. (Note: While still supported, JavaScript development is moving more towards web resources and TypeScript for better maintainability.)

Plugins (C#): Server-side code that executes on the Dynamics 365 server. Plugins are triggered by events and can perform complex logic, integrations, and data manipulations.

Custom Actions: Define reusable server-side logic that can be called from workflows, plugins, or other code. Custom actions provide a way to encapsulate complex operations.

Web Resources (HTML, JavaScript, CSS, XML, XSL): Files that are stored in Dynamics 365 and can be used to extend the user interface. Web resources are commonly used for creating custom user interfaces, embedding external content, and implementing complex JavaScript functionalities.

Solutions

To support customisation deployments across environments Solutions are used. Solutions are packages of customisations that can be deployed between Dynamics 365 environments and help manage and organise customisations. CRM projects solutions are used and deployed using Azure DevOps Pipelines to ensure a level of automation when deploying.

Best Practices

Start Simple: Customise Dynamics 365 without writing code. Use the platform's built-in tools and configurations to achieve the desired changes and solve business requirements, for example:

- **Creating or editing forms:** Changing the layout of fields, adding or removing sections, and adjusting how data is displayed.
- **Creating or editing views:** Defining how data is filtered, sorted, and presented to users.

- **Configuring business rules:** Setting up automated actions based on specific conditions. Ensure that descriptions are added to each business rule actions to support administrators in understanding the requirement the business rule fulfils.
- **Documenting workflows:** Ensure workflows have good naming conventions that describe the steps and what the workflow does.

Plan Carefully: Thoroughly analyse requirements before implementing any customisations.

Test Thoroughly: Test customisations in a sandbox environment before deploying them to production.

Document Everything: Document all customisations for maintainability. Dynamics 365 CRM is self-documenting if leveraged correctly.

Consider Performance: Optimise customisations to minimise their impact on performance. Too much client-side script and forms will take time to load.

Use Source Control: Manage code customisations using a source control system, such as Azure DevOps repositories.

Stay Updated: Keep up with the latest Dynamics 365 updates and best practices.

Choosing the Right Approach:

The table below summarises when to use each customisation method:

Method	Use Case	Complexity
Business Rules	Simple validations, form logic	Low
Workflows	Automated business processes	Low-Medium
Power Automate	Integrations with other systems	Low-Medium
Custom Tables	New data storage requirements	Medium
Columns	Capture additional data	Low
Relationships	Define data relationships	Low
Forms	Customise form layout	Low-Medium
Views	Filter and display data	Low
Dashboards	Visualise data	Low
JavaScript (Client)	Complex form manipulations, UI enhancements	Medium-High
Plugins (Server)	Complex business logic, integrations	High
Custom Actions	Reusable server-side logic	Medium-High
Web Resources	Custom UI, external content, complex JS	Medium-High

By understanding these customisation options and following best practices, you can effectively extend Dynamics 365 CRM apps to meet your unique business requirements. Remember to prioritise declarative methods and only use code-based customisations when necessary.



Dynamics 365 Field Service: Streamlining your Field Operations



Dynamics 365 Field Service is a comprehensive solution for managing field service operations and offering a centralised platform to streamline scheduling, dispatching, work order management, inventory tracking, and customer communication.

This results in improved service delivery, customer satisfaction, and optimised resource utilisation. Integrating with other Dynamics 365 modules like Sales and Field Service empowers companies to efficiently manage their mobile workforce when delivering onsite services. This is achieved by improving first-time fix rates, effectively managing service call volumes, and minimising travel time all with the target of enhancing customer satisfaction with better communication and scheduling.

Field service involves any service performed at a customer's location, rather than a company facility. Typically this involves dispatching technicians to carry out installations, repairs, or routine maintenance jobs. Essentially, it's mobile workforce management, demands specialised tools for scheduling and dispatching, and is applicable across a range of business sectors. By replacing manual, paper-based processes with a digital platform, field service centralises all operational aspects.

“While Dynamics 365 Field Service is often associated with traditional ‘break-fix’ or maintenance scenarios, its powerful scheduling, mobility, and resource management capabilities extend far beyond these limitations.”

While Dynamics 365 Field Service is often associated with traditional ‘break-fix’ or maintenance scenarios, its powerful scheduling, mobility, and resource management capabilities extend far beyond these limitations. This platform offers robust tools for managing diverse frontline operations, including:

Standard Installation, maintenance, and repair: Encompassing the setup and deployment of new equipment, preventative and routine checks for optimal operation, and the diagnosis and restoration of malfunctioning systems, ensuring functionality and minimising downtime.

Care & Social Services: Streamlining home healthcare visits, child protection checks, and mental health outreach with automated scheduling, mobile data capture, and real-time updates.

Delivery & Logistics: Optimising specialised deliveries like medical supplies or groceries for vulnerable populations and managing mobile library services through inventory tracking and route optimisation.

Pick-Up & Waste Management: Facilitating efficient hazardous waste collection, donation pick-ups, and large item removal with compliance tracking, route planning, and detailed documentation.

Other Frontline Roles: Enabling mobile veterinary services, on-site training, and event support by managing schedules, resources, and communication effectively.

Ultimately, Dynamics 365 Field Service empowers organisations with a mobile workforce to enhance efficiency, improve service delivery, and streamline operations across a wide range of both traditional and non-traditional operations.

In today's competitive landscape, on site customer service is paramount to a brand's success. Organisations should consider Dynamics 365 Customer Service for the following reasons:

Increased Efficiency and Productivity: Automating manual processes eliminates paperwork, reduces errors, and improves overall efficiency. Optimised scheduling minimises travel time and maximises technician utilisation. Real-time communication improves coordination. Mobile enablement empowers technicians, saving time and increasing productivity.

Enhanced Customer Satisfaction: Proactive communication keeps customers informed. Access to customer history empowers technicians to provide a faster, more effective service. Real-time tracking provides customers with greater visibility, while optimised scheduling enables faster response times.

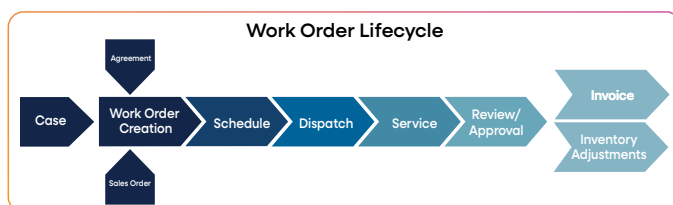
Reduced Costs: Optimising resource utilisation minimises labour costs. Improved inventory management reduces stockouts. Automating processes reduces administration. Improved first-time fix rates reduces repeat visits. All of which helps save money!

Data-Driven Insights: Real-time dashboards and reports provide valuable insights, providing data-driven insights to facilitate informed decisions, while performance tracking measures progress and identifies areas for improvement.

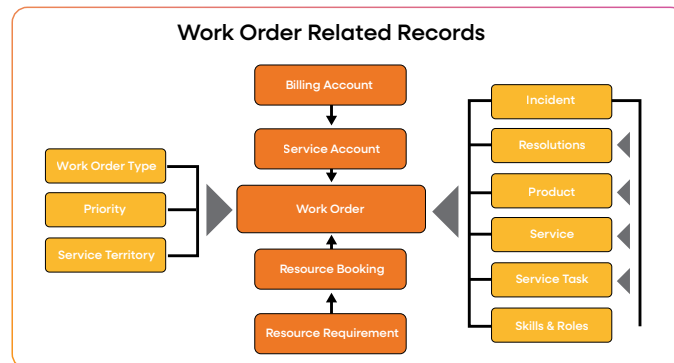
Competitive Advantage: Improved service delivery differentiates companies from their competitors and enhances customer satisfaction which ultimately increases loyalty.

Key Features of Dynamics 365 Field Service

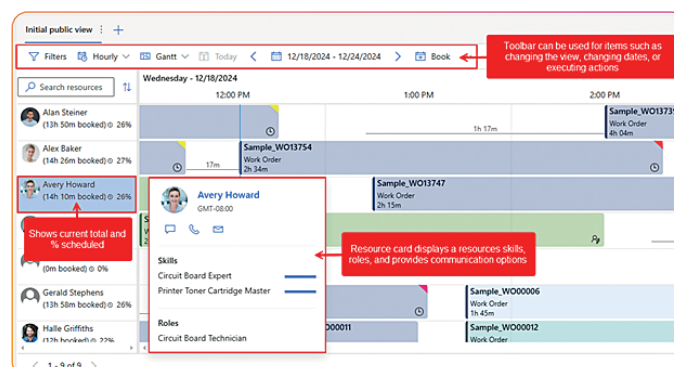
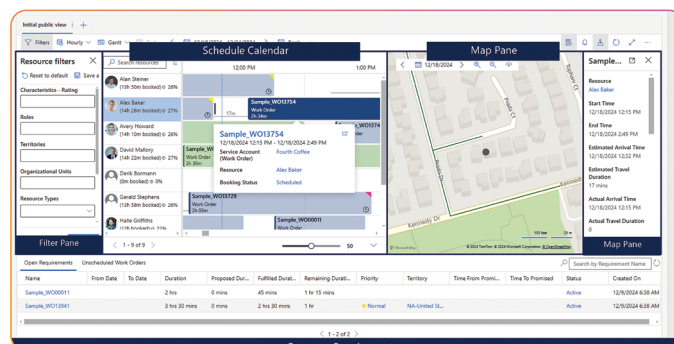
Works Order Management: In Dynamics 365 Field Service, a works order is a central record representing a job to be performed by a field technician. It tracks all aspects of the service, from initial creation and scheduling, through dispatch and service delivery using the mobile app, to review, approve, and finally invoice and of course, dealing with any inventory adjustments. The works order lifecycle progresses through various statuses, reflecting its current stage, and can be initiated manually, through case/opportunity conversion, or automatically via contracts or IoT alerts. Effective management of this lifecycle, including resource allocation, task management, and communication, is crucial for optimising field service operations and ensuring customer satisfaction.



Centralised Works Orders: Works orders do not exist in isolation. Their strength comes from the rich relationships they have with other records in the system. These relationships provide context, drive scheduling, and ensure accurate execution. These relationships are fundamental to how Dynamics 365 Field Service manages and tracks field service activities. They provide a complete picture of the work being done, from the initial request to final billing, and ensure that all relevant information is readily available to the user and the customer.



Schedule Management: Dynamics 365 Field Service offers intelligent scheduling capabilities that optimise technician schedules by considering skills, availability, location, and customer preferences. AI-powered suggestions further streamline resource allocation, while the intuitive drag-and-drop interface simplifies assigning and rescheduling works orders. Real-time visibility of technician location and availability empowers dispatchers to react quickly to changes, and route optimisation minimises travel time and costs. These features combine to create a powerful scheduling engine that maximises efficiency and improves customer satisfaction.



Service Agreement Management: Many businesses offer recurring services through maintenance agreements, like an HVAC company's seasonal checkups or a landscaping company's year-round care. These agreements often involve a flat fee for services provided at various intervals. While some services, like break fix, are on-demand, others, such as maintenance, need to be scheduled regularly. Dynamics 365 Field Service facilitates this with agreements, which provide a framework for automatically generating works orders and invoices at predefined intervals. A single agreement can manage multiple booking and invoice schedules.

Service Agreements, though often associated with maintenance, are fundamentally designed for automating

recurring, scheduled activities and managing contractual billing. This broad functionality extends their application beyond traditional maintenance to encompass diverse services like bin collection, regular deliveries, inspections, subscriptions, security patrols, and cleaning. The emphasis on maintenance arises from Field Service's core focus and the predictable revenue it generates. However, the key is to recognise that agreements are versatile tools for any service with a regular schedule, requiring work orders or invoices, and operating within a contractual framework.

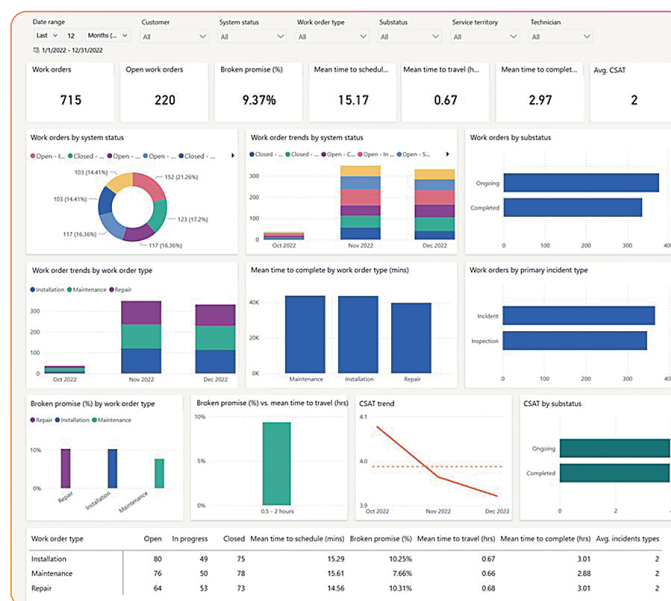
Inventory Management: Effective inventory management is crucial to any business. Understanding on-hand, on-order, and committed inventory levels enables better planning and ensures field technicians have the necessary supplies when they need them. Inventory is managed through warehouses, which represent storage locations, including traditional buildings and mobile units like service trucks. Defining warehouses allows operations to track inventory locations accurately. Inventory adjustments allow manual quantity adjustments for specific warehouses, useful for initial setup or correcting discrepancies. Inventory transfers facilitate moving products between warehouses, such as stocking a technician's truck from a central warehouse. Both adjustments and transfers can involve multiple products and require specifying the relevant warehouses. These tools help maintain accurate inventory levels, optimise field service operations, and prevent delays due to missing parts.

Asset Management: Customer assets represent specific pieces of customer-owned equipment, from large machinery to appliances. Tracking these assets allows an organisation to record detailed information, maintain a service history of related works orders, and even connect them to IoT devices for remote interaction via Connected Field Service. Assets can be added manually or automatically converted from products installed during a works order. Effective customer asset management helps maintain a repository of customer assets, track service history, and, when combined with Connected Field Service, enables proactive maintenance solutions.

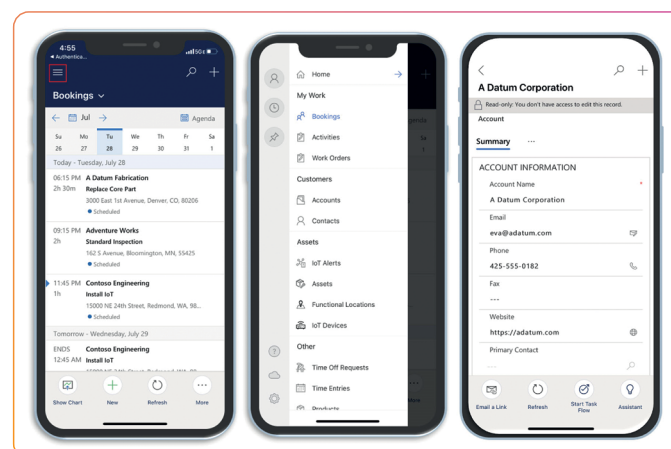
Inspections: Inspections are digital forms used by technicians within work orders to efficiently capture information through a list of questions. These questions can cover various areas, from safety protocols and asset testing to customer interviews and other audits. Technicians using the Field Service mobile app can complete inspections directly within the app, including uploading files and images with comments. Inspections offer offline support, association with customer assets for historical tracking, and version management for easy updates. Created with a drag-and-drop interface, they are simpler than paper forms and store data in the Dataverse, facilitating reporting and integration with automated business processes.

Field Service Insights: Dynamics 365 Field Service utilises Power BI-based reports to provide visual insights into key operational metrics, helping resource and operations managers assess performance and scheduling strategies. These reports address critical business questions regarding resource utilisation, the accuracy of estimated completion times, and the effectiveness of task/resource matching. Answering these questions allows for developing effective, cost-saving, and customer-centric scheduling strategies.

Field Service includes the "Resource and Utilisation" and "Work Order Summary" reports, while the Resource Scheduling Optimisation add-in provides the "Admin" and "Optimisation Summary" reports.



Field Service Mobile Application: Frontline field service workers need immediate access to information and tools to effectively serve customers. This includes job details, location information, guidance on tasks, and easy access to support. Beyond just task overviews, they need resources to achieve first-time resolution, regardless of location. This might include customer location details, the ability to capture images/videos, barcode scanning, parts/services information, customer signature capture, access to subject matter experts, and both online and offline data access. The Dynamics 365 Field Service Mobile app, built on Power Platform, provides these tools, allowing access to assigned work orders, customer assets, accounts, contacts, and a daily schedule view. Bookings and related work orders are conveniently grouped, and offline access ensures service continuity even without internet connectivity, with configurable data availability.



By using these features, companies can significantly improve their field service operations, enhance customer satisfaction, and drive business growth. Dynamics 365 Field Service provides a comprehensive solution for managing every aspect of field service, from scheduling and dispatch to inventory management and customer communication.

Spotlight on - Annie Klongdee



From Cabin Crew to CRM Dr, Annie's journey highlights her willingness to embrace challenges. Starting in Customer Services at a Local Authority, her line manager saw potential and suggested a systems-based role, sparking her passion for CRM and continuous growth. Annie's story exemplifies how new challenges lead to rewarding career path.

What did you do before you came to Node4?

Before I joined Node4, I was a Functional Consultant at a Microsoft partner for a little while. I needed a new challenge, so I joined Node4, and here I am continuing my journey in consultancy.

What drew you to working with us?

When I was looking to change roles, I wanted to evolve and gain more experience across the Microsoft stack. The role at Node4 involved e-commerce integration with ERP, focusing on portals and selling ecommerce attached to ERP. It was perfect for me because I wanted a chance to learn something new.

What was the job of your dreams when you were in primary school?

When I was younger, I wanted to be Air Cabin Crew since I could remember. I went through the training, actually got my wings and received a job offer. However, I had to relocate outside of Exeter, and at 18, I wasn't sure if I could handle it. I wanted to travel the world but I'm slightly vertically challenged which was fine for short haul like Flybe but I wasn't quite tall enough for likes of Virgin or BA!

How long have you been working with our much-loved products?

I've been with Node4 for 2 and a half years, so I'm relatively new to the business but I have been working with CRM for about 9 years. I started my career as a CRM Project Support Officer at a Local Authority where I learned the basics. It's been a great journey as I've met so many amazing people and learned so much, including things I never thought I'd know, like Cisco related stuff and some random infrastructure terminology.

What's your favourite thing about Dynamics NAV and Dynamics 365 Business Central or CRM?

My background is in CRM. After learning about BC and CRM in detail, I realised the capabilities are limitless. You can do so much with these tools. I love the flexibility and freedom they offer, allowing people to access them on the go, easily customisable, and with Power Platform capabilities its really is limitless. When you combine BC with ecommerce front-end portals, it becomes really exciting.

How would you explain your job to a 5-year-old?

Imagine someone needing a hug when they don't know what they're doing. I'm that person who gives the hug and teaches them how to use their systems and tools.

What's your favourite thing about Node4 and the capabilities it offers?

Having everything under one umbrella gives you the chance to develop with a supportive team who re willing to share their knowledge has been amazing. Transitioning from consultancy to sales, I've learned so much and received incredible trust and encouragement.

Do you see scope to progress within the company?

Absolutely! Before moving to Sales, I briefly returned to the CRM support desk to re-enter the CRM world with a familiar team. Shortly after, Rebecca McFarlane suggested the "CRM Dr." role. Despite not knowing the details, I embraced the challenge and loved the opportunity to grow and learn.

What is your proudest achievement in life?

My proudest career moment was transitioning from a local authority customer service role to CRM project support. With no IT background or degree, I learned to configure and customise CRM, driven by curiosity and an amazing line manager's encouragement. I'm proud of my achievements and glad I didn't go to university, proving that curiosity and learning can lead to success.

What do you like to do in your own time?

I enjoy training my bird, JubJub, which means "kiss kiss" in Thai. My partner bought her for me recently, and for Christmas, he got me a pair of lovebirds and they are call Ting & Tong which means silly / wacky. Then my colleague, Joy, asked if I've seen Little Britain...Say no more if you've seen it. They're currently nesting and may lay some eggs soon! Outside of the birds, I love traveling for culture, hiking, and being in my own space up in the mountains or jumping on an aeroplane generally!

Have you recently taken up a new hobby or learnt a new skill?

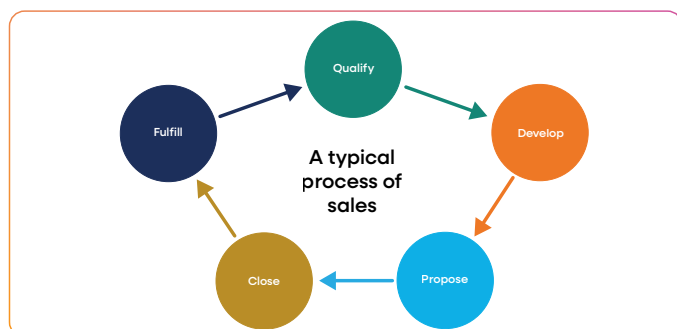
I've learned how to look after parrots and keep them alive, which involves a lot of Googling. Also I'm getting married this year and next year. I'm Thai, and most of my relatives live in Thailand, so we're having a traditional Thai wedding this year. It's all about family and friends giving a water blessing. It's a community feel with no limited space, just one big party. My partner has never been to Thailand, so it will be his first time meeting my family. The plan for next year is a wedding in England at Chester Zoo. I'd love to get married in an elephant enclosure, but my partner said no, so we settled for a Manor House within the zoo, with lots of photos with animals around the zoo.

Dynamics 365 Sales: An Overview



Part of the Microsoft Dynamics 365 Customer Experience (CE) suite of business applications, Microsoft Dynamics 365 Sales known as 'CE Sales' is a comprehensive application aimed at empowering sales team to drive revenue and growth in their organisation.

The solution provides a unified view of your business while managing your sales processes effectively, from initial contact to closed deals, helping foster stronger customer relationships and improving overall sales performance. A typical sales process lifecycle is represented in the following image:



Sales and selling has always been a competitive landscape and the need for effective tools to understand customer needs and manage complex sales cycles is crucial to your business' strategic ambitions. Dynamics 365 Sales addresses these challenges by offering several key benefits:

Improved Sales Productivity: Automates routine tasks, allowing sales teams to focus on building relationships and closing deals.

Enhanced Customer Relationships: Provides a 360-degree view of each customer, including their interaction history, preferences, and purchase patterns.

Streamlined Sales Processes: Standardises and automates the sales processes, ensuring consistency and efficiency across the sales team. This leads to shorter sales cycles and increased win rates.

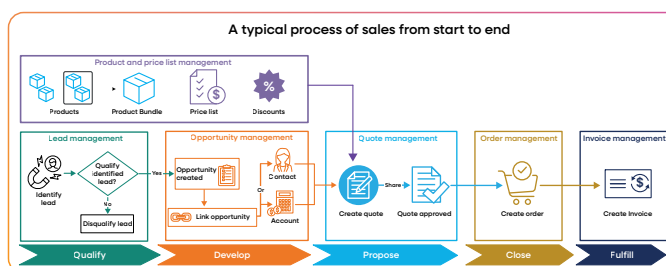
Increased Revenue: By improving sales productivity, enhancing customer relationships, and streamlining sales processes, Dynamics 365 Sales ultimately contributes to increased revenue and profitability.

Better Collaboration: Facilitates collaboration among sales team members, as well as with other departments like marketing and customer service, ensuring everyone is aligned and working towards common goals.

Scalability and Flexibility: Adapts to the evolving needs of businesses of all sizes, offering flexible deployment options and customisation capabilities.

Integration with other Microsoft Products: Seamlessly integrates with other Microsoft products like Office 365, Power BI, and LinkedIn Sales Navigator, creating a unified and productive work environment.

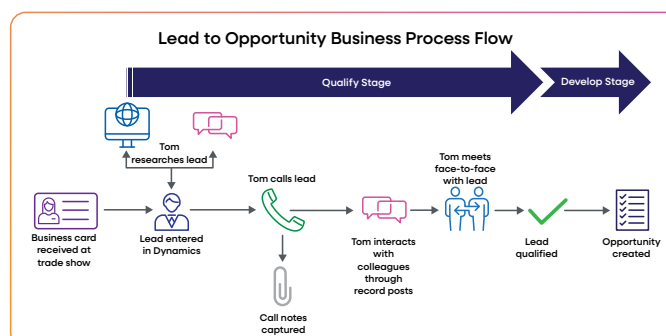
The following image illustrates an example of sales process lifecycle, start to finish. Although every organisation is different these lifecycles are typical frameworks that are available.



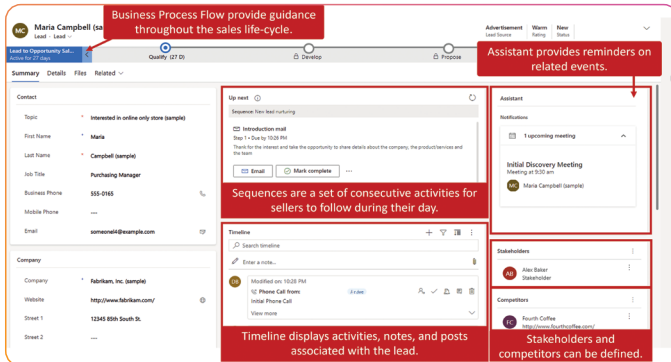
Main Features of Dynamics 365 Sales

Dynamics 365 Sales offers a wide range of features designed to support every stage of the sales process. Key functionality:

Lead Management: Dynamics 365 Sales views a 'Lead' as a potential customer that is interested in products and/or services but at an initial stage of your sales process. Lead Management facilitates the management of these leads and keeps them separate from the current client base who may are hopefully doing business with you on a regular basis.

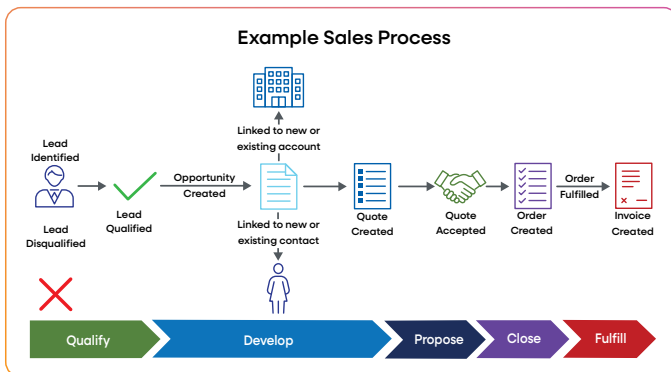


Leads can be captured from various sources, such as website forms, marketing campaigns, and social media. Once captured and recorded, Dynamics 365 Sales can assist in prioritising leads based on value and fit. It then assigns the lead to a suitable sales representative. Lead communication is tracked giving your business a clear view of progress in the sales pipeline and when you win the business the ability to convert them into a customer can be done with a click of a button.



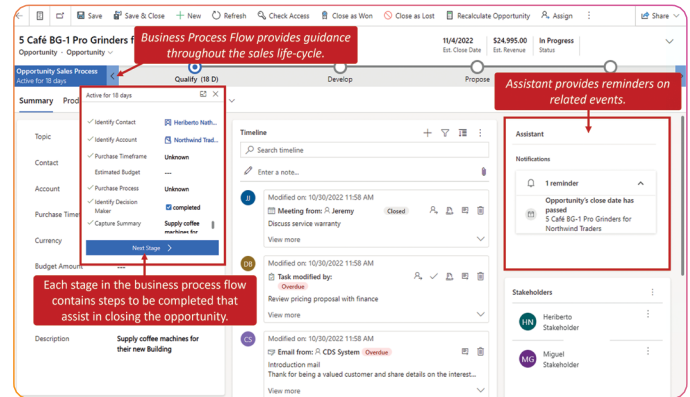
Contact and Account Management: One of the most vital parts of any Customer Relationship Management system are the customers that are serviced by an organisation. Customers can be people or organisations that use your products and services. Dynamics 365 Sales can handle a Business to Business (B2B) or Business to Consumer (B2C) strategy. Centralising this customer data means providing a single source of truth for all customer interactions across the functions of your business.

Opportunity Management: Once prospects or leads have expressed an interest and been qualified with the products and services that meet their requirements, they are now considered opportunities. Opportunities are potential sales, these opportunities are verified against customers and contain more detailed information about the cost and lead time of the product and services you are offering.

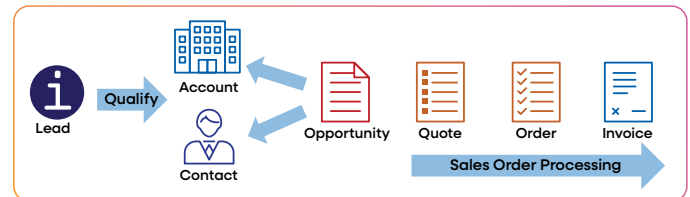


Opportunities can be tracked and managed throughout the full sales cycle from inception to closure. The Opportunity Business Sales Process flow allows organisations to define bespoke stages for their sales process, safeguarding a more reliable and controlled approach and process. The data points in opportunities can be leveraged within opportunity scoring, competitor analysis and sales forecasting.

Sales Order Management: There is a comprehensive suite of tools to manage the entire sales lifecycle, from initial lead generation to final invoice. However, the degree to which organisations leverage Dynamics 365 varies widely.

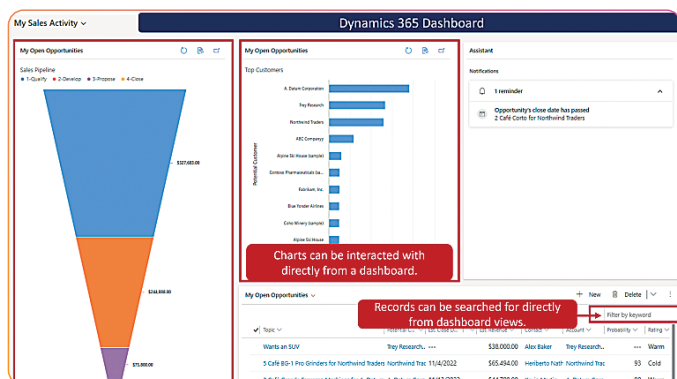


Many businesses already utilise established Enterprise Resource Planning (ERP) systems such as Business Central for core functions like accounting, inventory management, and purchasing. In these cases, it's common practice to integrate Dynamics 365 Sales with these external applications, particularly for sales order processing. This integration often involves managing leads and opportunities within Dynamics 365, while quotes, orders, and invoices are handled by the existing ERP system.



Reporting and Analytics: Dynamics 365 Sales Reporting provides a rich set of tools for sales analytics, empowering organisations to gain a deep insight into their performance and greatly improves drive data-driven decision-making. Beyond basic analysis through lists, views, charts, and dashboards, there is an Advanced Find feature for complex searches and seamless integration with Microsoft Excel for further analysis. For more sophisticated business intelligence, Dynamics 365 integrates with Microsoft Power BI, enabling businesses to connect data from multiple sources and create interactive dashboards with rich visualisations. This integration allows sales teams to easily explore data, identify trends, and answer key questions regarding sales performance, win rates, as well as insights like regional strengths and weaknesses, ultimately facilitating strategic growth and improvement.

“For more sophisticated business intelligence, Dynamics 365 integrates with Microsoft Power BI, enabling businesses to connect data from multiple sources and create interactive dashboards with rich visualisations.”

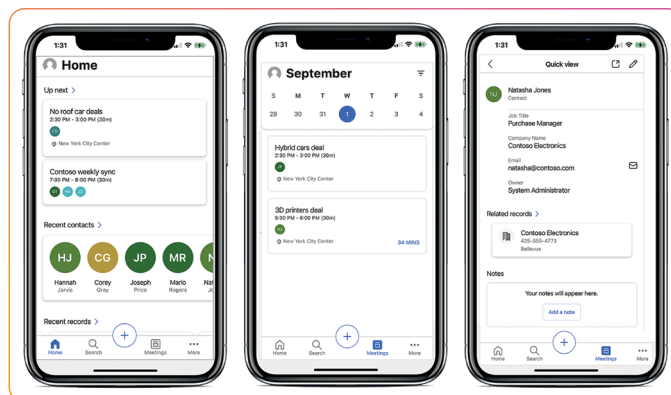


Forecasting: Sales forecasting, the process of predicting future sales based on historical data, market trends, and other factors, is crucial for organisational success. It allows businesses to anticipate demand, optimise resource allocation, and identify both opportunities and potential challenges. Accurate forecasting directly impacts financial decisions, budgeting, and strategic planning, contributing to improved overall performance and growth. Dynamics 365 Sales offers a built-in forecasting feature that empowers sales teams at all levels, from individual sellers tracking their progress against targets to company leaders projecting revenue for investors. While a default monthly forecast is readily available, Dynamics 365 allows for the creation of custom forecasts tailored to specific business needs, configurable by revenue or quantity, and offering granular control over hierarchy, permissions, and displayed details. This flexibility enables you to gain valuable insights into your sales pipeline and make data-driven decisions.

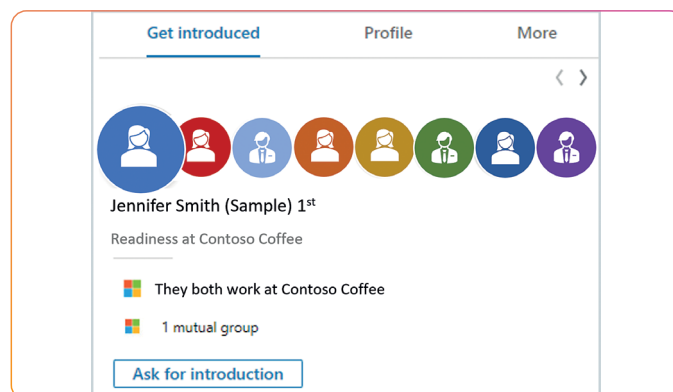
“Dynamics 365 Sales offers a built-in forecasting feature that empowers sales teams at all levels, from individual sellers tracking their progress against targets to company leaders projecting revenue for investors.”

Copilot for Sales: As with all good platforms these days, there is a growing element of AI being used to assist with application use. Dynamics 365 Sales now comes with the Microsoft Alpowered assistant, Copilot, designed to boost productivity and efficiency within sales teams. Copilot provides a range of helpful features through a chat interface, including summarising records, highlighting recent changes, preparing for meetings, and providing news updates on accounts. Sellers can quickly access information on their pipeline, get summaries of leads and opportunities, stay up to date on important emails, and even receive assistance with preparing for upcoming sales appointments. This intelligent assistant helps streamline sales tasks, enabling teams to focus on building relationships and closing deals.

Mobile Access: The mobile app enables sales teams to stay productive and connected, regardless of their location. The mobile app provides access to key customer data, opportunities, and activities, enabling sellers to manage their pipeline, schedule appointments, and log interactions directly from their smartphones or tablets. With offline capabilities, users can continue working even without internet access, ensuring seamless productivity in the field. The app also facilitates real-time collaboration, allowing team members to share updates, access relevant documents, and stay informed about customer interactions, ultimately streamlining communication and improving responsiveness.



Integrations: In today's sales landscape, building strong customer relationships is paramount. There is a suite of tools to facilitate this “relationship selling” approach. Dynamics 365 Sales Insights leverages AI to provide actionable insights, including relationship analytics, predictive scoring for leads and opportunities, notes analysis, conversation starters, and identification of internal connections. The Sales Accelerator further streamlines the process by prioritising customer lists, providing relevant context, and automating recommendations through sales sequences. Finally, integration with LinkedIn Sales Navigator empowers sellers with valuable customer insights, icebreakers, introduction requests, and direct access to InMail, all within the Dynamics 365 interface, maximising network potential and enhancing customer engagement.



The platform offers a wealth of additional features and capabilities that can be tailored to meet the specific needs of different organisations. Exploring these features in more detail can help businesses leverage the full power of Dynamics 365 Sales to drive sales growth and build stronger customer relationships.

Upgrading Dynamics 365 CRM:



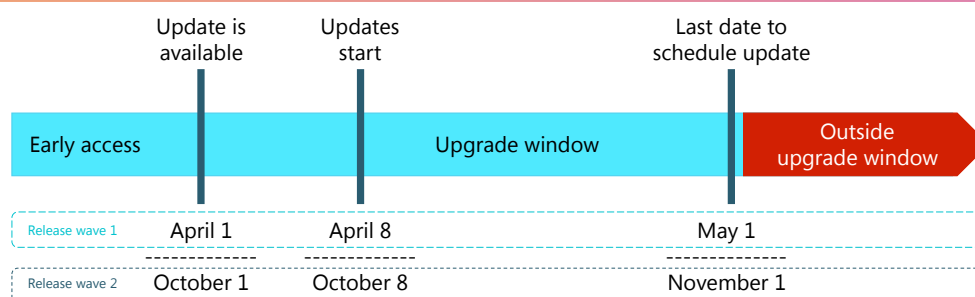
A Comprehensive Guide

Upgrading your Dynamics 365 CRM Applications, such as Dynamics 365 Sales or Dynamics 365 Customer Services, is crucial for accessing the latest features, performance improvements, security updates, and ensuring continued support by Microsoft.

This article outlines the upgrade process for both online (SaaS) and on-premises deployments, details end-of-support dates for older versions and discusses the considerations for migrating from on-premise to SaaS.

Upgrading SaaS Platforms

The SaaS upgrade process is generally smoother and less involved than on-premise upgrades as Microsoft manages the underlying infrastructure. Dynamics 365 CRM release waves bring twice-yearly updates with new features and improvements. To ensure a smooth transition, it's recommended that your testing or sandbox environments be one version behind your production environment. This allows you to thoroughly evaluate the upcoming changes before they impact your live system.



Here's a breakdown of considerations for Microsoft Dynamics 365 CRM SaaS:

- 1. Review Release Notes:** Before any upgrade, thoroughly review the official Microsoft release notes. These documents detail new features, deprecated functionalities, breaking changes, and upgrade instructions for the target version. This is your primary source of truth.
- 2. Check System Requirements:** Ensure your customisations, integrations, and any dependent applications are compatible with the target version. Pay close attention to any changes in supported browsers, operating systems, and other prerequisites.
- 3. Backup Database:** Before proceeding with any upgrade (sandbox or production), it's highly recommended to back up your database. While Microsoft performs backups, having your own backup provides an extra layer of security and allows for quicker restoration if needed. This can usually be done through the Power Platform admin center. Consult Microsoft's documentation for the specific steps and options available for backing up your environment.
- 4. Sandbox Testing:** Crucially, upgrade a sandbox environment first. This allows you to test the upgrade process, validate customisations, integrations, and user workflows without impacting your production instance. Identify and address any compatibility issues in this safe environment.
- 5. Prepare for Downtime:** While SaaS upgrades are designed to minimise downtime, some disruption might be unavoidable. Plan the upgrade during off-peak hours to minimise impact on users and be sure to communicate the planned maintenance window to your users.

6. Schedule the Upgrade: For SaaS environments, you will typically schedule the upgrade through the Power Platform admin center. Microsoft provides tools and guidance for scheduling and managing the upgrade process. Do not forget to action a database backup via power platform admin center.

7. Post-Upgrade Testing: After the upgrade, thoroughly test all functionalities in your sandbox environment again. Pay particular attention to areas where you had customisations or integrations.

8. Production Upgrade: Once you've validated the upgrade in the sandbox, schedule the production upgrade through the Power Platform admin center.

9. Post-Upgrade Validation: After the production upgrade, conduct a final round of testing to ensure everything works as expected. Monitor system performance and address any issues promptly.

Upgrading On-Premise Versions

Upgrading on-premise is a complex undertaking due to the direct management of server infrastructure. This involves a comprehensive assessment of hardware compatibility, potential operating system upgrades, and ensuring the existing SQL Server environment meets the new version's requirements. The upgrade process itself may necessitate a multi-step approach, especially if the current version is significantly older, requiring intermediate upgrades before reaching the target version. Data migration and schema changes need careful execution to minimise downtime and maintain data integrity. Customisations, integrations, and ISV solutions must be evaluated and potentially rewritten for compatibility. Thorough testing is crucial!

1. Review Release Notes and System Requirements: As with SaaS upgrades, this is your first step.

2. Hardware Assessment: Evaluate your server hardware to ensure it meets the requirements of the target version. Consider upgrades to hardware if necessary.

3. Software Prerequisites: Ensure all required software components, such as operating systems, databases (SQL Server), and .NET Framework versions, are compatible with the target version.

4. Backup: Absolutely Essential. Create a full backup of your existing Dynamics 365 environment, including the database, customisations, and configurations. This backup is your safety net in case of any issues during the upgrade.

5. Staging Environment: Set up a staging environment that mirrors your production environment. This is where you'll perform the upgrade first.

6. Upgrade the Staging Environment: Follow the official Microsoft upgrade documentation meticulously. This usually involves stopping services, upgrading the database, applying updates, and configuring the new version.

7. Testing: Thoroughly test the upgraded staging environment, focusing on customisations, integrations, and user workflows.

8. Production Upgrade: Schedule the production upgrade during a maintenance window. Follow the same steps as the staging upgrade.

9. Post-Upgrade Validation and Monitoring: Validate all functionalities and monitor system performance after the production upgrade.

End of Support for Older Versions

Is your Dynamics 365 CRM a relic of the past? Running outdated software is a significant risk. Older versions are vulnerable to security threats, suffer from performance limitations, and lack access to crucial updates and support. Microsoft's lifecycle policies dictate product support timelines, and these policies are the only definitive source for end-of-support dates. It's crucial to consult the official Microsoft documentation, as these dates are subject to change. Generally, any version predating the transition to Dynamics 365 Customer Engagement (around 2016) is almost certainly unsupported.

Determining the exact end-of-support date for your specific Dynamics 365 version requires checking the official Microsoft lifecycle policy documentation. Search for "Dynamics 365 lifecycle policy" or "Dynamics 365 version support" to find the relevant resources. These pages list each version and its corresponding support dates, including the end of mainstream and extended support. While older versions might still function, relying on them is a dangerous gamble. Don't assume your system is safe just because it's still running.

Upgrading to the latest Dynamics 365 version is the best way to protect your business. Modernising your CRM ensures access to the latest security patches, performance enhancements, and new features. It's an investment in your organisation's future, mitigating the risks associated with outdated software. Don't let your CRM become a liability; upgrade to unlock the full potential of Dynamics 365 and safeguard your business.

Migrating from On-Premise to SaaS

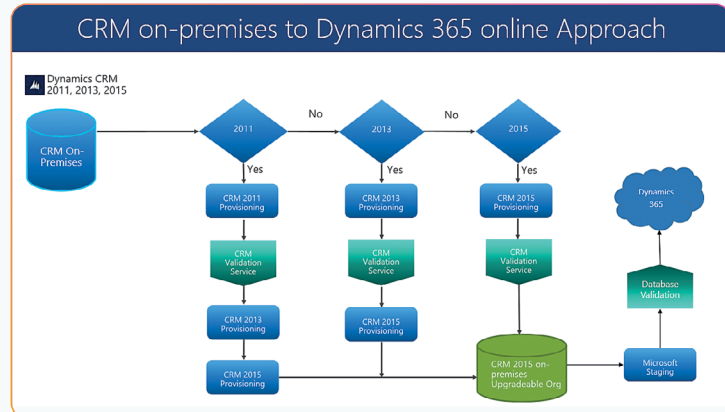
Moving from on-premise systems to the cloud offers benefits like lower infrastructure costs, automatic updates, and better scalability. However, it's a complex process requiring careful planning.

Assessment: Begin by thoroughly analysing your current on-premise setup. Consider existing customisations, integrations, data volume, and user needs.

Migration Strategy: Choosing the right strategy is crucial:

Lift and Shift: This approach moves your existing system with minimal changes. While seemingly simpler, it can be complex for heavily customised systems and may not fully utilise cloud features.

Re-implementation: Rebuilding your solution in the cloud allows for process optimisation and using new functionality. This is often better for older, highly customised systems.



Key Migration Steps

- 1. Data Migration:** Plan your data migration meticulously. Clean and transform data for cloud compatibility. Microsoft offers tools and services to assist in this process.
- 2. Customisation Migration:** Evaluate customisations and determine the best migration approach. Some may require rewriting for cloud compatibility. The Power Platform can be a very helpful route in these cases.
- 3. Integration Migration:** Plan the migration of integrations with other systems. Update connection strings and adapt them to the online environment.
- 4. Testing:** Rigorous testing is essential to ensure all functionalities work correctly after migration.
- 5. Go-Live and Support:** Plan your go-live process and provide post-migration user support.

Critical Considerations

Data Security and Compliance: Ensure your data security and compliance requirements are met in the cloud.

Internet Connectivity: Reliable internet access is mandatory for cloud-based systems.

User Training: Adequate user training on the new online environment is vital.

Cost Analysis: Analyse migration costs and ongoing cloud subscription fees.



Conclusion

Upgrading Dynamics 365 Customer Engagement requires careful planning and execution. Whether you're upgrading SaaS or on-premise, or migrating from on-premise to SaaS, thorough testing and validation are crucial for a successful upgrade. Always consult the official Microsoft documentation and consider engaging with experienced Dynamics 365 consultants for complex upgrades or migrations.

What are my Options – Reporting from CRM



Every organisation you talk to use reports to drive business decisions. Usually, these reports are created using Excel, broken down into silos across the business, and are poorly unified, providing incoherent information.

However, you know you have information available, which may be locked away in different systems, exist purely in people's heads, or is lost under the noise and volume of unorganised data. As a Pre-Sales Lead for Data, you see first-hand how organisations are transforming the way they use data, not only in reporting but by the tools and technologies they choose to deploy. The bottom line is, how can your business drive meaningful and actionable insight?

Thankfully, with the inception of Dynamics 365 tooling, most of these questions are answered out of the box. Modules such as Dynamics 365 Sales, Field Service, and Customer Service all have native in-app reporting options which take the headache out of data analytics from day one. This article will share how native reporting in Dynamics 365 can give you immediate visibility into what is happening in key areas whilst demonstrating how external tools such as Excel and Power BI can further extend your reporting capabilities. Better still, game-changing updates through Microsoft Fabric can help your business become truly data-driven through a modern data platform technology that natively integrates with your Dynamics 365 platform. Let us explore how these tools work together to deliver real-time intelligence for more informed decision-making.

Sales

Your sales team's success hinges on knowing where deals stand, which leads need attention, and whether your pipeline will meet tomorrow's targets. Knowing where this information resides, planning forecasts, and analysing in real-time if goals are going to be achieved, and by whom, is typically a task conducted across CRM. This is usually through associated Excel workbooks. Yet, if these metrics are spread across multiple workbooks and systems, any insight is lost and what you do have starts to lose its impact.

Dynamics 365 Sales offers the capability to track your sales information whilst also providing a series of native reports which help bring metrics together from all areas of the system:

Real-Time Dashboards: Keep tabs on leads, opportunities, and active deals at a glance and with the use of Copilot, get prescriptive recommendations and summarisation of your workload.

Customisable Charts: Identify which products or services are most profitable, spot average deal sizes, and track conversion rates. You can further extend this capability through Copilot to analyse information across all stages of your sales pipeline.

Interactive Views: Drill down into specifics, such as filtering data by region, account manager, product, and any field linked to your records. This tool allows you to prioritise efforts for maximum impact.

With data in one place, your sales team can confidently forecast and turn real-time visibility into fast, targeted decisions. Better still, these features are not just limited to the Sales solution; in fact, these capabilities are present across all Dynamics 365 products thanks to the common data model that the products are built on. Dataverse natively provides the above features to all Dynamics 365 and Power Platform products that are built using it.

Field Service

That being said, there are many more unique analytical capabilities that span other Dynamics 365 products. With Field Service, you are able to manage work orders, scheduling, and resource availability, all of which can be more complex than a typical Sales pipeline. In this instance, it is important that product tools suit the scenario they are looking to resolve.

Work Order Insights: The Work Order Summary Report is available out of the box, enabling resource schedulers to identify current work order demand, schedule times, travel times, completion times, and much more. Open requests can be easily monitored, whilst providing insight on areas where upcoming demand could be needed.

Resource Utilisation: Resource managers can quickly analyse the efficient use of resources, enabling real-time monitoring of key information such as the time spent on bookings, allocated bookings across territories, and how individual resources are allocated.

Inventory Tracking: Identify which service parts are running low so that you can proactively replenish stock in your warehouse and on mobile locations such as engineers' vans.

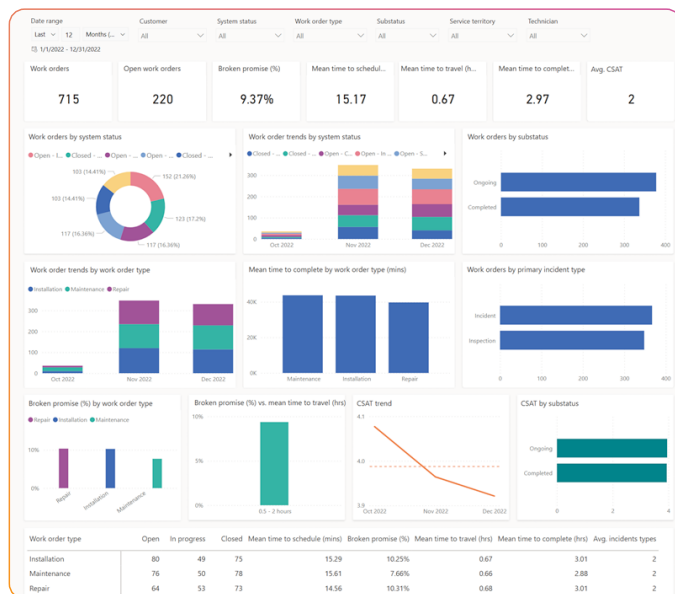


Figure 1: Work Order Summary Report

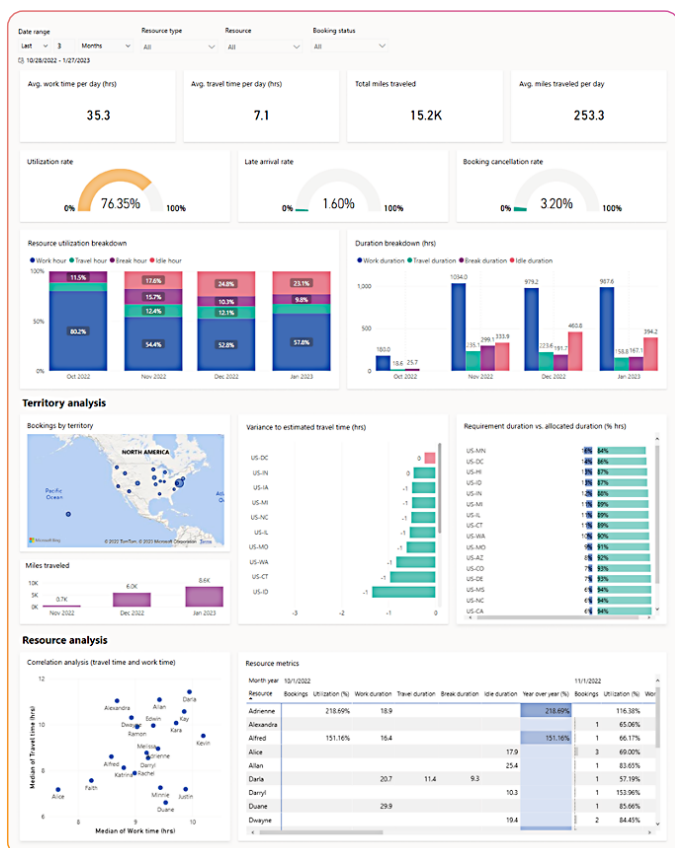


Figure 2: Resource and Utilisation Report

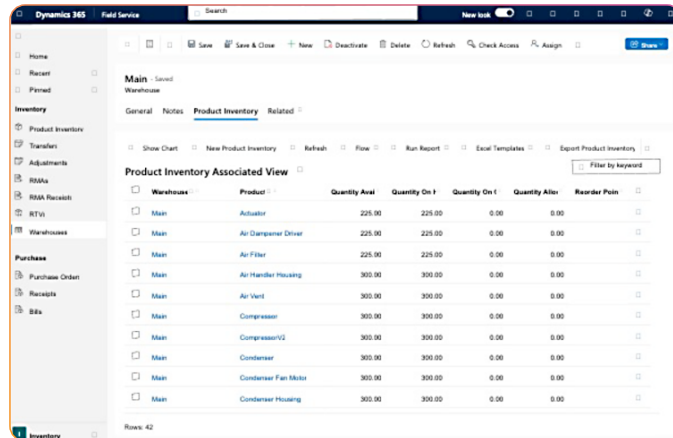


Figure 3: Inventory Tracking & Warehousing

Baked-in dashboards across the product, including some useful in-app screens, help manage day-to-day operations. With the implementation of Connected Field Service, bringing in IoT devices enables the harnessing of predictive maintenance, streamlining operations, reducing costs, and improving the customer experience.

Customer Service

Customer experience is at the heart of all modern businesses, whether that's providing a support mechanism, helping customers with orders and returns or providing a level of care to members of a community. If your customer support teams are not tracking crucial information such as resolution times, case information and satisfaction scores, you may be missing the opportunity to improve. Dynamics 365 Customer Service addresses this by bringing information together into a single location across channels and your customer service team.

Case Management: Case information can be displayed through interactive dashboards showing customer cases, identifying recurring issues and prompting follow-ups for overdue tickets.

Agent Performance: Measure productivity with native KPI's such as first-contact resolution, close by date and using data to track the number of escalations.

Omnichannel Analytics: Reports such as the summary, voice, agent, ongoing conversations, and backlog conversations can be easily accessed through the service to provide a complete 360 of your customer service operation and interactions.

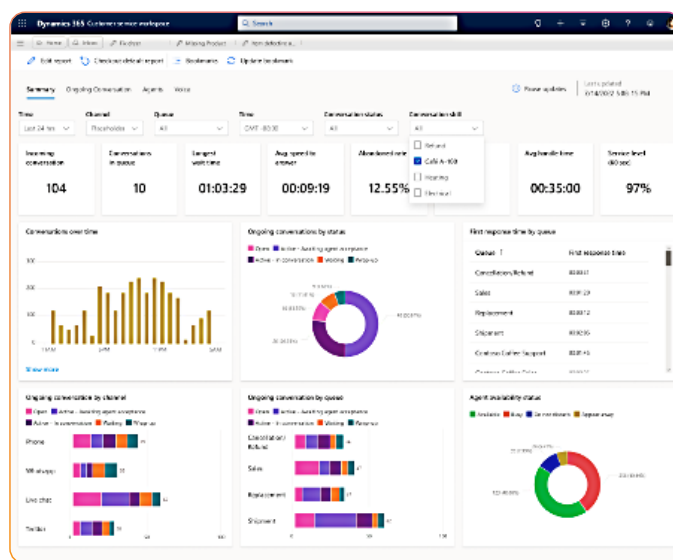


Figure 4: Customer Service Summary Report

Supercharge Analytics

But that is not all, Dynamics 365 provides an excellent set of reporting options using in-app capabilities, and what's great is that this can be further extended. All data is readily available through the Dataverse, the common data model that fuels Dynamics, this means that data can be easily accessed using external tools. Let's face it, Excel is not dead and is still a tool used extensively across businesses, so why not leverage something your teams are familiar with.

As the go-to for ad-hoc analysis for many organisations, Excel can help provide a familiar interface. With easy integration to Dynamics 365 data through pivot tables, users can access real-time data and perform their own analysis. Better still, tools within Dynamics can help setup templates to quickly interrogate data within the toolset.

For many organisations, modern analytics are the way to go. With tools such as Power BI, real-time dashboards, and advanced visualisations, this is the direction of travel. Power BI extends in-app reports, providing the following benefits:

Unified Data Models: Bring multiple tables together, such as opportunities, works orders and cases to provide a single source of the truth and track trends across Dynamics 365 products.

Drill-Down and Data Interrogation: Slice and dice your data by region or salesperson, creating interactive charts to help tell your data's story across your Dynamics estate, whilst also bringing in data from non-Dynamics 365 products.

AI Capabilities: Built-In AI features enable users to build reports faster than ever without needing to be a Power BI expert.

Microsoft Fabric

And if all this wasn't enough, there is still one more option! I will not go into too much detail here, but we're talking about Microsoft Fabric. This is Microsoft's end-to-end analytics and data platform. We have a whole other section talking about this, but to summarise, Dynamics 365 is natively integrated with Microsoft Fabric. So, if you are looking for a Modern Data Platform which not only provides reporting, but also enhances data operations, leverages machine learning, and enables integration of data across multiple systems, then Microsoft Fabric is your answer.

Time to Act

Businesses today face mounting pressure to create smarter, faster, and more personalised experiences, whether that is closing a deal, dispatching a technician, or resolving customer support tickets. Dynamics 365 provides a powerful native reporting foundation by, first, helping to bring your operational processes together, and more importantly, surfacing insights in real-time from your data through a series of in-app capabilities.

If you are ready to take your analytics journey further, start by assessing the data you already have in Dynamics 365. Then, map out how extending these insights with advanced analytics can deliver quick wins, such as more accurate sales forecasting. With the right strategy in place, and by using the right technology, you will gain the actionable, AI driven insight needed to confidently meet, and exceed, your business objectives.



NODE4

Gain a trusted partner on your AI journey with Node4

Made  for more



Thinking AI, but want to do it right? We help businesses harness Microsoft 365 Copilot with secure, scalable strategies that don't just tick boxes but move you forward.



Data stays protected



Teams are empowered



You stay in control

From first steps to full-on AI integration, we deliver tailored solutions that energise your people and fuel future growth.

Node4 × Microsoft Copilot Smart. Secure. Seamless.

Go to www.node4.co.uk/microsoft-copilot to see how we can help you on your AI journey.

Spotlight on - Peter Norman



When he's not chasing his son down the slopes on a snowboard, Peter leads the pre-sales efforts for the CRM team at Node4. With years of experience in implementation and consultancy, Peter is an ideal candidate.

What did you do before you came to Node4?

I spent 24 years at the Daily Mail Group in IT, eventually managing the Advertising Systems team. We designed and implemented our own CRM system before switching to Microsoft Dynamics CRM. I played multiple roles including developer, manager, and project manager. The internet's impact on newspapers led to downsizing, and I took redundancy after 24 years. The next day, I joined ConsultCRM and have since worked with 5 Microsoft partners over 10 years.

What drew you to working with us?

I joined Node4 five years ago, transitioning from the Private to the Public Sector. Previously a functional consultant and Head of Functional Consulting, I moved to pre-sales for a closer relationship with Microsoft and a broader CRM application suite. This shift allowed me to expand my knowledge and experience beyond project-specific technology.

What was your background to the world of ERP/CRM?

Essentially, I learnt and wrote my own CRM system. Then when we engaged with Microsoft, I was part of the design team for how it would support newspapers. When it went live, I became the main SME in the group for CRM – so it just happened over time.

What was the job of your dreams when you were in primary school?

I wanted to be an architect but chose a 2-year HND in electronic engineering instead of a 7-year university course. I don't regret it; I learned computers and software development. I got into computers in school because the computer course had a one-hour slot with one hour free. Small decisions as a child can change your whole future. Now, I appreciate the path I took, as it led me to a fulfilling career in technology.

How long have you been working with our much-loved products?

I've been working with Microsoft CRM for about 15 years, now Microsoft Dynamics 365.

What's your favourite thing about Dynamics NAV and Dynamics 365 Business Central or CRM?

As an ex-project manager, my top choice is Project Operations, with Field Service a close second. I appreciate that CRM includes Dataverse, originally part of CRM but now integrated with systems like Business Central and Finance and Operations. It's great to see our database becoming a central hub across organisations, not just for CRM.

How would you explain your job to a 5-year-old?

Trying to explain CRM or Dynamics 365 is hard to anyone, let alone a child. I see my role as aligning software with the goals of the business. I don't change businesses, more of a business consultant.

What's your favourite thing about Node4?

Historically, we worked as isolated teams and couldn't deliver projects needing skills outside CRM. Now, as part of Node4, we access diverse expertise in telephony, Business Central, SharePoint, PowerBI, Teams, etc. This is crucial as solution boundaries blur. Personally, I value the opportunity to access these skills and gain new knowledge. Plus, the offices are nice!

Do you see there is scope to progress within the company?

I just have! I am now Head of Pre-sales for the CRM team. I'm really looking forward to working with Richard, Ravi and Theo, and making a difference to delivery and sales with CRM.

What is your proudest moment in life?

My son is turning 21 this year, and he is my proudest moment. Last year, he volunteered for three months in Sri Lanka with the Foundation of Goodness, helping underprivileged children by coaching cricket, teaching English and computers, and running swimming lessons. He also shared his insights on a radio show with the founder. His dedication to the community fills me with pride.

What do you like to do in your own time?

I love winter sports, especially skiing and snowboarding, and plan trips every year. In the summer, I will keep track of my son playing cricket. He is currently doing a Cricket Coaching and Management university course and is now in his third year. Other times, I do bits of DIY in the house and the usual things like films and gardening.

Have you recently taken up a new hobby or learnt a new skill?

I started skiing on a school trip and now love winter holidays. My son, who grew up skiing, got me into snowboarding. I still go on annual skiing trips with old CRM colleagues and try to snowboard with my son. My wife and I recently bought a motorhome for more travel in the UK and abroad.

Do you have a book or TV show you'd recommend?

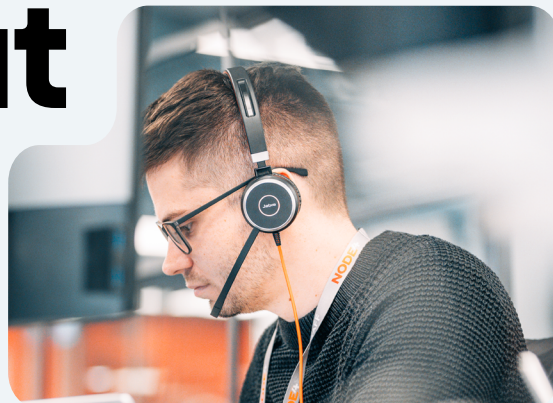
"Reacher" on Netflix, based on the Jack Reacher novels, is fantastic. The series works great with the new cast, unlike the films with Tom Cruise. Also, "Unforgotten" is brilliant; we binged three series and loved it.

Why Choose Us

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Support that Always has Your Back



No matter which Microsoft Dynamics solution you rely on, whether it's Dynamics 365 Business Central, Dynamics NAV, Dynamics 365 CRM, Power Platform or Fabric or any of the older versions of these products – we've got you covered. Why? Because we're not just passionate about the product; we're passionate about making your systems work for you. The hard truth is the most expensive part of any system isn't the software itself, it's poor support.

When systems break (and even the best do), the business impact can be immense. And let's not forget the hidden costs, such as workarounds, slow response times, and ongoing technical issues. These can all pile up, draining your team's productivity and morale. It's a cost that often goes unnoticed but can far outweigh the software's monthly or annual fees. That's why evaluating the quality of your support provider is just as critical as choosing the right solution for your business.

What Does Great Support Look Like?

Great support isn't just about solving problems; it's about empowering your business to thrive. Here's what you can expect from a partner that delivers true value:

- **Responsive Communication:** When you need help, you'll get timely responses from someone who understands your system and your business.
- **Experienced Support Teams:** Your issues are handled by seasoned experts, not passed around junior agents and continually escalated.
- **Proactive Problem Solving:** Good support doesn't wait for problems to arise; it identifies potential challenges and resolves them before they affect your team.
- **Clear Action Plans:** Whether it's a quick fix or a longer-term strategy, you'll always know what's being done, by whom, and when it will be resolved.
- **Super User Enablement:** Your key users are supported and empowered to handle common issues efficiently, helping to reduce disruptions.

Think about this: If your Super Users can't reach the right person when they need help, frustration will build. A delayed response, an inexperienced support agent – it all erodes confidence, slows processes, and holds your team back. Good support eliminates these roadblocks and helps to keep your business moving forward.

One Partner, One Place for All Your Support Needs

Managing multiple support partners for different solutions can be frustrating and inefficient. When you work with us, you have one team that supports all your Microsoft Dynamics solutions, from ERP through CRM to reporting and all the components in between. It's the benefit of having a single point of contact, without ever feeling the need to worry!

With everything under one roof, your team saves time, communication is streamlined, and there's no finger-pointing between providers. You'll always know exactly where to go for help, and that help will come from someone who understands your full Microsoft ecosystem inside and out.

Thinking About Switching Partners?

Love your Microsoft Dynamics solution(s) but frustrated with your current partner? We're here to help you make the move.

Our 6-Step Switch Process



Step 1: Let's Talk

We start with a conversation. You tell us about your system, the challenges you're facing, and what's not working for you. We'll share how we can help and outline a clear plan.



Step 2: Know Your System

You provide details of your software license so we can gather insights from Microsoft, and at the same time, we'll dive deeper into understanding your setup.



Step 3: Diagnose and Plan

We work with you to identify existing system issues, support backlogs, training needs, and any new requirements. We also review customisations and extensions to confirm we can support your system seamlessly. This is where we give you the green light.



Step 4: Official Transition

You complete Microsoft's partner switch form to confirm your move to us. It's a very simple and straightforward process.



Step 5: Welcome to the Team

We finalise our agreements, and you're officially on board. From here, we get straight to work.



Step 6: Quick Wins and Long-Term Success

We address the immediate priorities identified in Step 3. Our goal is to get your systems running smoothly and your team feeling supported as soon as possible. Once you're settled in via our dedicated on-boarding team, we'll introduce you to the full support team that's ready to back you every step of the way.

Why Switch to Us? The Services that Set Us Apart

Our support doesn't stop at fixing issues. As one of our customers, you gain access to a range of value-driven services designed to optimise your Microsoft Dynamics systems and keep them working for you:

- **Dedicated Engagement Manager:** Your single point of contact, always on hand to help.
- **Free Minor Modifications:** Small tweaks? We handle them, free of charge.
- **Free Burst Training:** Short, focused training sessions to help your users get the most from Dynamics 365 Solutions.
- **Free System Health Check:** We assess your system's performance, ensuring it's running optimally and efficiently.
- **Solution Architect Reviews:** We appreciate that everyone needs to plan for the future. Every customer is entitled to a free day with a solution architect to help plan the "what's next" and help align your IT and business strategy.

Book Your Free Health Check Today

We'll review your systems and provide actionable recommendations. Many suggestions like accessing free training won't cost you a penny. For other improvements, such as development or consultancy, we'll outline clear options so you can decide what's best for you.

Choose Support that Works for You

Switching partners doesn't need to be complicated. We're here to make the transition smooth, stress-free, and most importantly, worthwhile. Let us show you what real Microsoft Dynamics support looks like.

For more details on how we support you, turn to [page 112](#).

The Concierge Stage: A Pivotal Prelude to Project Success



In today's ever increasingly integrated and comprehensive technical landscape, the implementation of new systems is often a complex undertaking. Frequently, organisations are driven directly from the sales phase into active projects, which can leave customers feeling disorientated and ill-prepared. However, a more considered and effective approach exists, one that carefully cultivates a solid foundation for success and ensures alignment for everyone involved.

Introducing The Concierge Service

So, what is this "Concierge" Service?

Well, if you ask Copilot, you'll get something along these lines:

"A concierge service is designed to assist individuals with various tasks and services, often providing personalised support. This can include making travel arrangements, booking reservations at restaurants or events, running errands, and even organising personal schedules. Essentially, a concierge service aims to make life easier and more convenient by handling tasks that might otherwise take up your time."

And for those slightly more mature readers opening a Dictionary (look it up, it used to be a thing) you'll find this;

Concierge (kon-si-airzh) - '1) a door keeper or porter of a hotel who makes reservations and arranges activities to enhance your stay. In any great European hotel, the most important figure with whom the clients deal directly is usually the concierge.

So, if we go for the best of both worlds, old and new, we are basically looking at something or someone to make your life easier by giving you access to something or someone very important.

"Concierge manages expectations for both the customer and the project team, fostering a mutual understanding of the project's scope and potential challenges."

Enter the Concierge Stage

A phase or service designed to prepare the customer for a smooth and efficient project journey.

This critical phase, a cornerstone of the now Famous Day in the Life (DITL) methodology, represents a deliberate departure from the norm. Rather than rushing headlong into project execution, the Concierge Stage provides a structured period dedicated to orienting the customer. It ensures they are not only aware of what to anticipate throughout the

project but also understand their individual responsibilities and how to prepare themselves proactively. Moreover, this stage allows the project team a valuable opportunity to connect with you beyond the typical sales dynamic.

The Significance of the Concierge Stage

The Concierge Stage is not merely a formality; It serves to maintain customer engagement during the crucial planning and resource allocation phases, providing an on-going connection with the teams. It also furnishes customers with essential, foundational knowledge, enabling them to navigate the upcoming project with confidence.

A key element of this stage is the introduction to the DITL methodology. This approach is about delivering focused, efficient projects that maximise productivity, doing away with the need for unwieldy, rarely read scoping documents. The DITL method prioritises core business processes and crucial reporting requirements, championing a pragmatic and practical strategic approach.

Concierge manages expectations for both the customer and the project team, fostering a mutual understanding of the project's scope and potential challenges. It also provides a clear explanation of a project teams roles and responsibilities, ensuring that all stakeholders understand their parts within the larger framework. Crucially, the Concierge Stage brings awareness to the time constraints involved with both the day-to-day business operations (BAU) and specific project tasks.

A Glimpse into the Concierge Service

The Concierge Service is comprised of a carefully curated array of complimentary offerings. These services are typically introduced during a preliminary meeting, led by the Project Sponsor. These offerings include:

- A thorough introduction to the DITL methodology, setting the stage for a well-coordinated project.
- Walk through of the top ten Project Gotchas.
- A comprehensive explanation of roles and responsibilities, ensuring that each person is aware of their specific duties.
- A look into the wizardry of a Data Migration strategy and offer supportive training.
- Reintroducing people to the concept of UAT test script writing, ensuring we get the most from the testing phase.
- Basic BC 101 Training Sessions, self-paced learning modules accessible through the website, empowering customers with fundamental knowledge.
- Engaging “Look & Feel” Demonstrations, arranged by the Project Concierge in collaboration with the Pre-Sales Team.
- Illuminating “BC - Art of the Possible” Demonstrations, also orchestrated by the Project Concierge with the Pre-Sales Team.
- An overview of critical project documentation, ensuring that customers are familiar with the key documents guiding the project.

Essential Actions during the Concierge Stage

During this phase, a series of vital actions in the core project can be undertaken and set in motion to establish a solid groundwork. These include:

- The appointment of a Project Sponsor, and the scheduling of an Introductory Meeting with the client, officially marking the beginning of the Concierge Stage.
- The introduction of all available Concierge services, such as training, to the client.
- The assignment of a Project Manager from the delivery team.
- The distribution and explanation of key project documents, such as the PID Template, Steerco and Go-live Steerco Checklists, Sprint Statements, and the Solution Acceptance Document.
- The presentation of a High-Level Project Plan, giving the customer a clear understanding of the project's timeline.
- Engaging conversations about Business Processes and Change, which are important to discuss prior to formal workshops.
- Highlighting the crucial importance of Net Promotor Score (NPS) surveys as a method to gather insights into the project's success.

“The Concierge Stage transcends a mere preliminary step, acting as an active investment in building strong relationships.”

The Transition to Project Initiation

It's important to understand that the project does not have to wait for all Concierge activities to be completed before advancing to the Initiation Stage. Concierge services can be requested at any point in the project as needed by simply contacting the Project Concierge. The Concierge Log serves as a live record, updated as each task is completed. Once the customer transitions to the Initiation Stage, the details are then transferred and stored in the completed tab.

By emphasising this essential preliminary phase, organisations are ensuring that their projects are not just started but are set up for success. The Concierge Stage transcends a mere preliminary step, acting as an active investment in building strong relationships. This is achieved through mutual understanding, collaboration, and ensuring that all customers are well-informed, engaged, and completely prepared for the project that lies ahead. The Day in the Life (DITL) methodology, with the Concierge Stage as a key component, is designed to deliver projects efficiently by focusing on core business processes and communication.



Our Project Methodology



Waterfall is the traditional project methodology that most Microsoft partners will use to discuss and document your requirements, build a solution, test and fix it, and then have you go live. Our problem with this process is the 'discuss and document' phase. It takes too long to do properly and delays the point at which your users start working with the software.

Our approach

Our 'Day in the Life' (DITL) approach is anchored in the agile project methodology. We want to show standard software as early as possible in the process and secure user feedback. This feedback is the key to the success of any project.

- Our approach is born out of our experience of implementing countless business systems over many years.
- Reflects our passion for delivering great software and providing excellent service.
- Utilises the strengths of the solution it's designed to be quickly configured to meet different customers' needs.
- Supports our commitment to being honest, pragmatic and fair. It helps set very clear expectations.
- Is one of the things that distinguishes us from other companies that deliver these kinds of projects.

Laying foundations

We start every project with a 'Foundation' stage. The objective of the Foundation stage is to build a prototype that uses real software and your data as the basis for discussion. Life is too short for extensive and expensive scoping documents that nobody finds time to read with the appropriate degree of care. Seeing is believing.

This Foundation stage significantly reduces project risk by providing users with a working model of what the end result will be, before we ask you to commit to the full project.

During the Foundation stage, you can expect:

- To get to know us better (and vice versa).
- To see us work with role owners within your business to understand what they need to do each day and how the system can support them in being more effective.
- To see discussions guided gently towards the standard/best practice processes available.
- To have us identify the outliers, exceptions, and critical success factors.
- To help us explore ways in which your project can be phased to suit your resourcing, timing, and business priorities.
- Us doing what we need to do to more accurately assess how long it will take to deliver the full project.

Building on foundations

Once the Foundation process is complete, and you make the decision to proceed, we get into the following:

Build prep - Together we'll take some time to prepare for the build. This is really all about agreeing the sprint delivery cadence. Instinctively, Node4 is inclined to go fast not slow. We always want to build and maintain momentum, but are used to navigating seasonality and team capacity constraints. We work to create a solid plan that everyone can buy into.

Build sprints - Each system build is broken down into smaller iterations called 'sprints'. We start each sprint by validating the list of things that are required to deliver the minimum viable solution (the backlog), and then prioritising these, slotting those that are most important into the available capacity for the next sprint. Within each sprint, time is allocated for you to test what we deliver. If issues are reported, they are resolved within subsequent sprints. The process is repeated until all the tasks in the backlog have been completed.

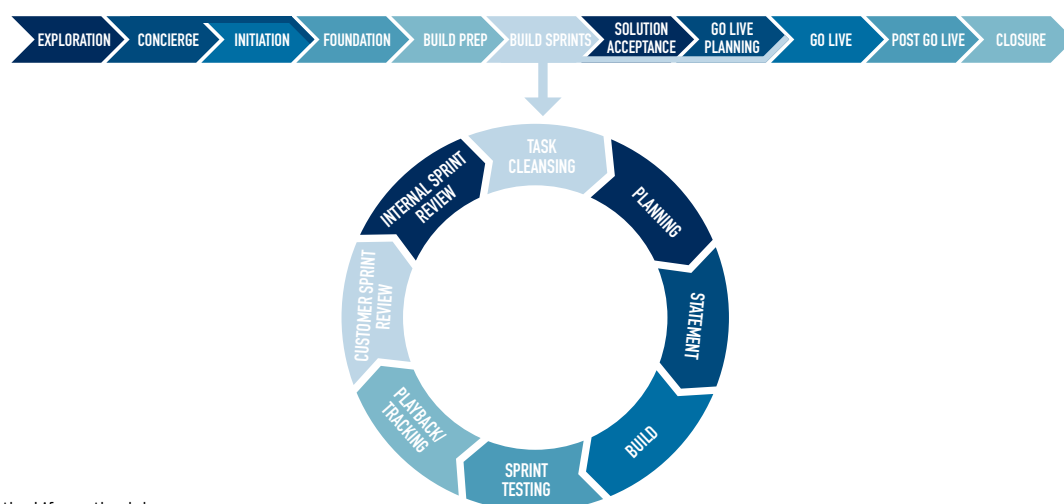
Solution acceptance - Once all the build tasks have been completed and all the sprint testing has been performed, we move into 'Solution Acceptance'. This is where we ask your team to use the solution to play back their key business process in front of the project team. This helps assess whether the system, as well as the users, are ready to go live.

Go live planning - The planning of the go live actually starts much earlier in the project lifecycle. We'll agree a set of cutover tasks that we'll test out through one or more dress rehearsals.

Go live - If, at this point, you are happy that all your processes can be worked through without a hitch, then we pop the cork! You go live and we stay on hand for a while to provide support to your users as they embark on a new life in their brand new system.

Post go live - We'll be close by for a while to support your staff. Then we'll be back to do reviews after six weeks and three months post go live to identify any issues that have emerged. In the meantime, we will have done a comprehensive handover to our fabulous Support Team!

Closure - All good things must come to an end. We take this opportunity to look back on the project and assess whether it's been a success. We perform a 'lessons learned' process which helps us refine our own delivery processes, as well as helping our customers learn about how their own teams work together to deliver large change initiatives.



Node4 - Day in the Life methodology

Why Node4 is different

Our people love building and delivering software that meets your business needs. Our DITL model is designed to help them do so in a way that:

- Drives engagement between our two organisations. It takes a team effort – you and us.
- Is efficient. We don't waste time (and your money) on endless documentation to which nobody will subsequently refer.
- Minimises risk by asking you to prioritise your requirements all the way through the project, such that we deliver the most important requirements first.

How We Support You!

We're here to help you get the best from your Dynamics NAV, Business Central, CRM and Finance and Operations Systems. Here are just some of the ways that we go about it!

Our Support Team

We have a dedicated team of over 90 specialist support consultants and developers with over 750 years of combined experience. Whether it's Dynamics NAV, Business Central, CRM, or Finance and Operations, there's always someone available to support you every step of the way! Our teams also have a wealth of experience in supporting integrated third-party applications, ensuring you get the most out of your systems.

All our team are experienced consultants who come to work each day with one purpose: to deliver high-quality, value-for-money service. Always at the end of the phone, they are more than happy to assist in any way they can, whether it's a system issue, functional question, process advice, or some ad-hoc training.

You can log a call in three ways:

You can reach our support team in three ways: email us at digitalsupport@node4.co.uk, call us on +44 (0)208 328 9818, or use our Customer Portal.

The process to transition to our support team is easy and well planned. Our Onboarding team will help you understand our processes, escalation points, and everything important, and assist our core teams in understanding your system. This is where the relationship with Support starts. We ensure we have the correct access details, project documentation, and configuration for seamless support. Once settled, you will be transferred to our Core Support team, giving you access to consultants and developers who know every nook and cranny of Business Central, CRM and Finance and Operations systems, as well as Continia, Spindle, PowerBI, Power Platform, Jet Reports, and more.

Making changes to your system

If you would like to make a change to your system, all you need to do is email digitalsupport@node4.co.uk or your Engagement Manager.

If you want to, for example, add a field to a table and expose it on a page/form or add a filter to a report – and it can be done in around an hour – we'll do this for free, as quickly as we can. We call the service Minor Mods.

Change done by a developer that is under 1 hour including scoping, delivery to UAT, testing and release.

Free of charge

Anything that is outside of Minor Mod scope will be passed to your Engagement Manager and Short Order team.

Support will review and qualify quickly and let you know if the request is Minor Mod – delivery is about 4-6 weeks.

If your requirement is more complex, we'll work with you to better understand the changes required. If it can be completed in 5 days or less, we'll come back to you with a fixed price quote.

If the change will require more than 5 days' work, our Engagement Managers will engage to provide you with a high-level ballpark estimate.

Enhancing your knowledge

We see training as a logical extension of our support policy. The better users are able to take advantage of their system and its full range of options, the more likely we are to have happy and satisfied customers! There are multiple options available to you:

Burst training

- Quick demo or overview of standard or add on functionality
- 30 – 60-minute call
- A particular topic - something specific such as Year-end process
- Support will review and qualify and set up a call with you (lead times about 2-4 weeks)

We've also put together an array of short and simple how-to video tutorials explaining and demonstrating standard functionality in Dynamics NAV and Dynamics 365 Business Central.

Areas covered are:

- Finance
- Sales & Marketing
- Inventory Management
- Purchasing & Expenses
- Reporting & BI

We also have recorded webinars delivered by topic specialists, designed to take you through some of the trickier processes. These videos are normally about 30-40 minutes long and range from areas such as Upgrading, Expense Management, Jet Reports, and many more!

Find our videos here:

info.the365people.com/videos-and-guides

If that isn't enough, we have developed a series of FREE training courses called Knowledge Days, covering Dynamics NAV, Dynamics 365 Business Central, Jet Reports, and Power BI.

Visit our website to learn more about our free training: www.the365people.com/knowledgedays

We are committed to continually enhancing our services and finding innovative ways to support you, ensuring you get the most out of your solution. If you have any suggestions for new ways we can improve, we'd love to hear from you. Please get in touch with our Customer Services Director, Rebecca McFarlane at r.mcfarlane@node4.co.uk.

If you're ready to get started? Reach out today and experience the difference: moreinfo@thenavpeople.com.



NODE4

The User Day

The event offers an insightful journey into technology, covering the latest developments from Microsoft, the Business Central product, and the exciting innovations in the Power Platform and beyond. You will have the opportunity to explore the most suitable upgrade options and gain practical ideas on how to maximise your ERP investment.

“From start to finish the content was absolutely in line with what I was looking for. Informative and constructive with a great quality of presenters and presentations.

The afternoon session held my attention and again provided great content.”

SCAN ME



For more information on our User Day and other events held throughout the year, scan the QR code and head over to our events page.

Made  for more

NODE4