



# Microsoft Dynamics 365

Capabilities Guide



## DYNAMICS 365 FOR SALES

### ACTIONABLE INSIGHTS

**Prospects and Lead Prioritisation**—Find new prospects, identify the most important leads to focus on and ensure accurate and complete data for multi-channel campaigns.

**Relationship Health**—Reveal relationship health, risk and next best actions to allow sales teams to sell smarter and make better, faster decisions.

**Pre-built Dashboards**—Integration with Power BI provides live, pre-built dashboards and reports with drill-through, interactive and visual capabilities.

**Social Media Tracking**—Build authority in social channels by sharing relevant content. Use social media to identify competitive threats, keep a pulse on the market and find high-quality leads.

**Customer Intelligence**—Get everyone on the same page with a single, easy-to-reference dashboard, helping sales teams engage with customers in more personalised and effective ways.

### RELATIONSHIP MANAGEMENT

**LinkedIn Sales Navigator Integration**—Tap into the power of LinkedIn's network of more than 500 million professional members.

**Relationship Assistant**—Get a clear picture of each customer relationship and see the strength and trend of each relationship to proactively focus on the relationships that need extra attention.

**Email Intelligence**—Gain insight from email interactions with customers.

**Content Personalisation**—Personalise content with familiar Office 365 tools that enable simultaneous collaboration and editing.

### SALES PRODUCTIVITY

**Sales Process**—Optimise sales efforts and know the next best step with sales process automation and a guided process based on best practices.

**Opportunity Management**—Manage customers and deals where and how you work, whether its web apps or Outlook across smartphone, tablet, PC and Mac.

**Sales Mobility**—Work on the go with rich, modern mobile apps that work anytime, anywhere, even offline.

**Partner Management**—Use the partner dashboard to give a quick view of their interactions across opportunities, cases and other relevant information.

### SALES PERFORMANCE

**Seller Onboarding**—Use business process management to ease onboarding and align sales behaviour with best practices.

**Sales Effectiveness**—Hit your numbers by setting goals, monitoring results and providing feedback and coaching in real-time. Conduct what-if analysis with immersive Excel and pre-built templates, all without leaving the Sales application.

**Reports and Dashboards**—Integration with Power BI shows reports and dashboard to gain quick insights about sales performance.

**Gamification**—Boost performance, productivity and business application adoption through fun, engaging team-based competitions.



## DYNAMICS 365 FOR MARKETING

### MULTI-CHANNEL CAMPAIGNS

**Email Marketing**—Easily create professional emails with personalised messages and deliver campaigns at the perfect time to engage with your leads.

**Landing Pages**—Create and publish professional-looking landing pages to attract and capture website visitors as either contacts or leads.

**LinkedIn Integration**—Use LinkedIn's social platform to target the right audience and generate high-quality leads that build new, profitable relationships.

### LEAD MANAGEMENT

**Lead Nurturing**—Get a 360° view of every lead and monitor every touchpoint with contacts in real-time.

**Lead Scoring**—Identify your best leads and enable teams to focus on high-value prospects with a flexible lead scoring model based on campaign behaviour.

**Segmentation**—Segment audience lists by demographic, vertical, geography, interests or behaviours and match your content to your customers' interests to drive conversions.

**Notifications and Alerts**—Track customer behaviour in real time and automatically get notifications the moment leads or customers respond to your marketing campaigns.

**Align Marketing and Sales**—Securely connect and align your customer-facing teams using shared processes and a single source of customer information.

### EVENT MANAGEMENT

**Integration with Webinar Providers**—Get your event up and running quickly with ON24, a Dynamics 365 webinar partner. Use preconfigured dashboards to have a broad overview of your event-planning activities

and the overall results.

**Event Portal**—Create a consistent and streamlined registration process to improve attendance and overall event experience.

**Attendance Tracking**—Gain insight into event sessions with real-time visibility into attendees' behaviour at events and webinars.

### TOOLS AND TEMPLATES

**Email Templates**—Choose from the selection of sample templates plus tools to help you create emails that get clicks.

**Landing Page Templates**—Launch engaging and effective landing pages quickly with page templates and ready-to-use forms.

**Campaign Designer**—Improve organisation and team alignment by centralising all campaign information and tasks into a single location for fast decision-making. Get a 360° view of how your campaigns are delivering against engagement and conversion goals.

**Surveys**—Easily create surveys to gather actionable feedback from customers to understand individual needs and expectations in more depth.

### MARKETING INSIGHTS

**Dashboards and Reports**—Maximise marketing ROI with configurable dashboards and reports to track campaign performance and identify the lead sources and marketing channels delivering superior results.

**Marketing Analysis**—Power BI integration with several pre-built content packs, providing insights and analytics across the sales and marketing process.





## DYNAMICS 365 FOR CUSTOMER SERVICE

### OMNI-CHANNEL ENGAGEMENT

**360° View of the Customer**—Get a complete view of all your customers, including a full history of interactions, user preferences and relevant customer information from third-party applications.

**Shared Experiences**—Complete customer information shared across channels and interactions to ensure a consistent experience.

**Real-Time Insights**—Agents are presented with real-time insights, SLA timers and entitlements so that every interaction is personalised and contextual.

**Case Routing**—Machine learning detects social post sentiment and intent to automatically create and route as cases

**Survey Designer**—Use a drag-and-drop interface, theme editor and rich design logic to easily create personalised surveys with multiple delivery mechanisms.

### SELF-SERVICE AND COMMUNITIES

**Encourage Self-Service**—Intuitive navigation with case deflection capabilities, community discussion forums and a blog platform.

**Relevant Results**—Optional federated search returns results from any combination of relevant knowledge articles, social posts and blogs.

**Mobility**—Responsive design optimised for mobile devices.

**Optimised Customer Access**—Seamless transition between self and assisted support.

**Customer Entities**—Admins can create custom entities with easy to use tools and a rich set of SDKs enable developers to easily build apps.

**Security**—Portals leverage CRM authentication, security, user roles and rights and either local authentication or federated authentication through a variety of providers.

### AGENT ENABLEMENT

**Know the Next Best Step**—A dynamic interface optimised to drive the next best action and contextually serve up tools, guidance and data to agents throughout the interaction, including information and assets from third-party applications.

**Solve Cases Faster**—Topical analysis and machine learning scenarios surface relevant knowledge articles and related cases to help agents solve cases faster and improve first-time resolution rates.

**Improve Efficiency**—Boost productivity with business processes and workflow, integrated knowledge, SLAs, agent scripting, entitlements and recommendations.

**Avoid Escalation**—Speed resolution and avoid escalations by using collaboration tools to connect agents with peers and subject matter experts across internal and external teams.

**Guidance**—Provide context-sensitive guidance to help new users navigate the application and perform tasks specific to their role.

**Gamification**—Reward optimal behaviours with gamification to improve performance and increase productivity.

**Case Management**—Take the service directly to the customer any time it cannot be managed through other channels. A single platform for customer and field service covers everything from case management through to work order completion.





## DYNAMICS 365 FOR CUSTOMER SERVICE

### UNIFIED KNOWLEDGE

**Quick Create**—With Quick Create functionality, SMEs and agents can create content on the fly to be routed into the approval window.

**Knowledge Base**—Build your knowledge base with community-sourced knowledge enrichment scenarios.

**Quality Content**—Mobile optimised knowledge articles can use rich media, such as images and videos, to improve first-time resolution rates.

**Up-To-Date Content**—Articles can be scheduled for periodic review or expiration to ensure content is always current. End users can also provide feedback by rating content.

**Discoverability**—Improve search and discoverability by associating knowledge articles with products, customer entitlements and other customer or account data.

**Improvements**—Knowledge analytics drive article efficiency and identify potential areas for adjustments and augmentation.

### SERVICE INTELLIGENCE

**Data Visualisation**—Role-tailored dashboards present real-time and historical data through a visual user interface.

**Deep Insights**—Drill down into data with interactive charts, including data from third-party applications for deeper insights, analysis and exploration.

**Q&A**—Use natural language capabilities to instantly render new reports and visualisations.

**Identify Opportunities**—Use service intelligence to identify cross-sell and up-sell opportunities, explore what-if scenarios,

improve service metrics and identify best practices.

**Personalisation**—Report on custom KPIs and metrics tuned specifically to your business.





## DYNAMICS 365 FOR FIELD SERVICE

### SERVICE AGREEMENTS

**Accurate Billing**—Apply different billing rates for different types of work and materials. Ensure that services and billing conform to warranty stipulations.

**Asset Management**—Classify assets with barcodes or serial numbers and track asset location, repair history and maintenance needs.

**Service Forecasting**—Track warranties against assets and provide field staff with visibility into terms and expiration dates.

**SLA Management**—Manage terms and conditions and automate the renewal of contracts and Service Level Agreements.

### SCHEDULE & DISPATCH OPTIMISATION

**Optimised Workload**—Identify and organise available resources by category to intelligently balance workloads and resources.

**Send the Best Technician**—Match the skill sets of technicians to the requirements of work orders.

**Intelligent Scheduling**—Understand geography, availability, truck inventory, regulatory requirements, customer preferences and service level agreements.

**Resource Reallocation**—Easily reallocate resources and optimise schedules in response to emergency situations or changes throughout the day.

**Scheduling Options**—Multiple scheduling options from a drag-and-drop schedule board to fully automated and optimised scheduling.

### INVENTORY MANAGEMENT

**Part Allocation**—Improve first-time fix rates with accurate allocation of parts.

**Remote Access**—Provide mobile access to inventory and parts information.

**Part Management**—Manage inventory information for part transaction such as return material authorisations (RMAs), stock adjustments or stock transfers.

**Reduce Write-offs**—Track service stock accurately at mobile and fixed locations to reduce write-offs.

**Automatic Updates**—Adjust inventory records automatically based on field use or en route purchasing

**Inventory Forecasting**—Effectively forecast material requirements.

**Part Replenishment**—Take advantage of bulk and just-in-time ordering.

### MOBILE

**Case Information**—Easily update work orders and access all relevant case and customer information as well as recommended steps for repair.

**Work Order Instructions**—Maintain consistency of work performed with step-by-step checklists.

**Applications**—Native mobile applications for any device provide real-time and offline data.

**Customer Feedback**—Launch and complete customer satisfaction surveys.

**Reduce Travel Time**—Direct technicians on the best route with turn-by-turn directions.

**Up-to-date Information**—Technicians can update their status to travelling, working, or on a break, ensuring full visibility.

**Work Order Completion**—Take and store photographs of work and capture client signatures, generate invoices and collect payment.





## DYNAMICS 365 FOR FIELD SERVICE

### CONNECTED FIELD SERVICE

**Connected Field Service**—A simple to configure experience means newly installed and existing customer assets can be easily connected from within Field Service.

**IoT Anomaly Detection**—Identify and fix problems before customers are aware of them, using IoT sensors to report anomalies and send alerts.

**Maintenance**—Machine learning capabilities allow Field Service to predict when a device needs attention and solve issues before failure with automatically initiated, multi-layered troubleshooting.

**Predictive Maintenance**—Perform “just-in-time” preventative maintenance by understanding actual consumption instead of a time-based preventative schedule.

### CUSTOMER CENTRIC EXPERIENCE

**Customer Portal**—Customers can track upcoming service appointments and view completed and open cases through the web portal.

**Real-Time Visibility**—Integration with Glympse keeps customers informed of the technician's arrival time and provides the technician's photo and vehicle information.

**Stay Informed**—Customers automatically receive text messages and phone calls to keep them informed at every stage of service.

### BUSINESS INTELLIGENCE

**Performance Management**—Track performance with interactive graphical scorecards and dashboards.

**Self-service Reporting**—Out-of-the-box reports provide businesses with user-friendly tools for custom reporting.

**Drill-down Analysis**—See detailed transaction level data to assess specific issues.

**Predictive Analysis**—Sophisticated predictive analysis, segmentation and recommendation algorithms.

**Visualisation**—Stunning graphic representations of real-time business insights that can be modified in a few clicks.





## DYNAMICS 365 FOR RETAIL

### UNIFIED COMMERCE

**Omni-Channel Experience**—Give customers the convenience and flexibility to buy in-store, pick up in other locations, or get home delivery through optimised ordering and fulfilment tools.

**Modern POS**—Fully functional and customisable modern point of sale (POS) usable on any device, even offline, with no disruption.

**Ecommerce**—An ecommerce platform supporting third-party storefronts, including features such as a rich consumer API, payment integration and a tailored retail experience app for iOS and Android devices.

**Order Management**—Create customer orders both synchronously and asynchronously.

**Payment Processing**—Accept credit, debit, cheque, cash, loyalty cards and other payment methods including Tap to Pay such as Apple Pay.

**Call Centres**—Take customer orders directly over the phone using a responsive UI, accessible via any browser.

**Social Integration**—Connect with customers, implement promotions and publish content to your social media channels.

### MODERN STORE EXPERIENCE

**Daily Operations**—Perform daily tasks quicker using automated and streamlined workflows.

**Employee Productivity**—Create and use schedules, time clock in/out and utilise manager dashboards to improve efficiency.

**Inventory Management**—Define automated replenishment rules for creating purchase orders.

**Consumer Convenience**—Accept orders

using a range of ordering and fulfilment modalities and allow your customers to sell or return outside of the assortment for that store, with or without a receipt.

### INTELLIGENT OPERATIONS

**Workspaces**—Leverage personalised workspaces and view role-based KPIs and reports with interactive data visualisations using Microsoft Power BI.

**Reports**—View business reports directly within the POS, covering sales metrics, cash management, employee productivity and summarised X and Z reports.

**Recommendations**—Provide personalised product recommendations backed by advanced machine learning technology to enhance up-sell and cross-sell opportunities.

### MANAGE MERCHANDISING

**Product Management**—Create product catalogues and categorisation schemes that can be targeted to or shared between channels to enrich products with descriptions, images, videos and rich text content.

**Categorisation**—Centrally manage products using n level deep product category hierarchies for bulk categorisation of products.

**Product Attributes**—State product attributes and define groups which can be categorised and used across products.

**Define Pricing**—Define product, category, catalogue, customer or channel-specific pricing rules and discounts.

**Orders**—Pick and receive transfer orders and purchase orders.

**Manage Data**—Easily bulk edit data using native integration with Office 365 and Microsoft Excel.





## DYNAMICS 365 FOR RETAIL

### CUSTOMER ENGAGEMENT

**Customer Profile**—Let customers use social identities (Facebook, Google or Microsoft accounts) to engage with your business.

**Loyalty Capabilities**—Configure and manage loyalty programs, promotions, discounts and gift cards seamlessly across channels.

**Targeted Promotions**—Use customer segmentation to provide targeted promotions.

**Email Receipts**—Send email receipts to your customers.

**Promotions**—Define pricing and promotion activation and deactivation times and dates.

### ADAPTABLE AND SECURE PLATFORM

**Integration**—Integrate with existing systems using the Data Import/Export Framework.

**Training**—Implement your own interactive task guides for back-office business processes to easily train new employees.

**Security**—A comprehensive compliance framework meeting industry standards including PA DSS 3.2, SOC 1 & 2, ISO 27018 and many others, to help you comply with your specific business requirements.

**Privacy**—Safeguard data using the highest levels of encryption so you know where your data is stored, who can access it and under what conditions.





## DYNAMICS 365 FOR TALENT

### HIRE THE RIGHT PEOPLE

**Streamlined Process**—Use automated interview scheduling and reduce administrative tasks with a self-service candidate portal providing guidance and transparency every step of the way.

**Candidate Profiles**—Create accurate profiles by integrating disparate data, including candidate self-assessments.

**LinkedIn Integration**—Use LinkedIn's professional network of over 500 million people to find and source top candidates.

### SET UP FOR SUCCESS

**Document Sharing**—A centralised location for sharing key resources and relevant documents.

**Track Success**—Monitor candidate performance and progress through analytics dashboards to provide ongoing feedback.

**Onboarding Guide**—A customisable pre-boarding and onboarding guide tailored to new hires.

**Make Connections**—Identify LinkedIn connections to quickly build relationships across the company.

### ANALYSE AND IMPROVE

**Performance Dashboard**—Get full transparency about employees with real-time performance dashboards tracking accomplishments and allowing for feedback to be taken immediately.

**Centralised View**—Create a 360° view of employees' past and present experiences and keep track of accomplishments and certifications.

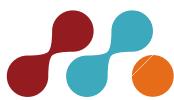
**Continued Development**—Recommend professional development resources and additional training required for advancement.

### HR ADMINISTRATION

**Minimise Risk**—Avoid fines by simplifying HR compliance to global regulations and health and safety requirements.

**Automation**—Automate routine HR tasks such as benefits, compensation, leave and absence.





## DYNAMICS 365 FOR PROJECT SERVICE AUTOMATION

### OPPORTUNITY MANAGEMENT

**Solution Selling**—Forecast profitability and prioritise deals using the integrated sales management dashboard with both product and project-based opportunities.

**Customer-centric**—Use customer portals to engage and collaborate with customers in real time on quotes, project scope and resource requirements.

**Streamline Contracts**—Streamline the sales management experience and quickly create project contracts, track labour rates and generate SOWs using an enhanced and integrated sales automation experience.

### PROJECT PLANNING

**Collaborative Execution**—Make it easy for Sales Managers to visualise cost, effort and sales value in collaboration with project managers to estimate and define the work using standard project templates.

**Predictable Results**—Visual project planning and estimation includes predecessors, automatic task scheduling and visualises cost, effort and sales information for credible "estimate to completion" planning and financial integrity.

**Enhanced and Robust**—Use the robust project scheduling and management capabilities of Microsoft Project to complement the sales planning process.

### RESOURCE MANAGEMENT

**Intelligent**—Optimise resource alignment through a consolidated scheduling engine across all modes of service. View and filter resources based on skill and availability to ensure you have the right people on the right projects at the right time.

**Utilisation-focused**—Pivot the business on resources to enable business development

and portfolio investments to align with skills and talent management.

**Consultant-centric**—Empower Consultants and Sub-contractors to apply directly for relevant project roles. Resource information includes skills and proficiencies that can be updated through mobile devices.

### TEAM COLLABORATION

**Productivity**—Provide powerful, easy-to-use, mobile-ready Office 365 productivity tools for project teams, customers and partners to communicate and collaborate on project deliverables and tasks.

**SMAC**—Incorporate Social, Mobile, Analytics and Cloud (SMAC) experiences and technologies to enable timely and relevant communication and collaboration.

**Greater Agility**—Empower Project Managers by providing real-time status and performance indicators, allowing them to respond quickly to scope changes, mitigate risk and manage critical KPIs while ensuring consistent and profitable service delivery.

### TIME AND EXPENSE MANAGEMENT

**Intuitive and familiar**—Simplify the management, tracking and submission of estimated and billed project time by integrating the tasks and deliverables across project and work calendars.

**Accountability**—Provide real-time financial insights to customers and empower them to collaborate on timely corrective actions.

**Efficiency**—Track all project and non-project schedules and streamline the submission, approval, processing and reconciliation of expenses through web and mobile apps. Managers can easily approve new entries while understanding the financial implications of newly-approved items.





## DYNAMICS 365 FOR PROJECT SERVICE AUTOMATION

### CUSTOMER BILLING

**Timely and Effective**—Provide Project Managers with a one-stop-shop to review, override and track overruns and approve all costs and time impacting their projects.

**Accuracy**—Ensure the project invoices reflect the terms of the contract and approved work and expenses to projected vs actual budgets.

**Automation**—Automate the generation, approval and distribution of reconciled invoices in email and on the web with back-office financial integration

**Financial Impact**—The financial impact of project work, including costs, unbilled revenue and invoices, is recorded for use in analytics and integration into financial systems.

### SERVICE ANALYTICS

**A Unified Platform**—Leverage Dynamics 365 business applications and the Power BI platform to form a strong basis for reporting, integration and analytics.

**360° Project View**—Understand project performance, team and resource feedback and the voice of the customer to ensure an on-time and on-budget delivery model.

**Trends and forecasting**—Identify trends, explore what-if scenarios, forecast outcomes to prioritise service offerings and skills development and adopt best practices.



## MICROSOFT DYNAMICS 365

To accelerate your digital transformation, you need a new type of business application. One that breaks down the silos between CRM and ERP, that's powered by data and intelligence and helps capture new business opportunities. That's Microsoft Dynamics 365.

With expertise across Manufacturing, Wholesale & Distribution, Retail and Service, we are ideally placed to understand the unique challenges that you face and work closely with you to help overcome your business challenges efficiently and cost-effectively.

### DYNAMICS 365 ADVANTAGES

**Start with what you need**—Choose from modular applications that are designed for specific processes, roles, and industries—so you can solve a business problem and easily expand to run your entire business in the cloud.

**Optimise productivity**—Enable greater productivity by seamlessly connecting your business process data with Office 365 and LinkedIn data—surfacing it within familiar tools like Outlook, Excel, and Power BI.

**Infuse intelligence**—Deliver actionable insights powered by artificial intelligence and the Microsoft cloud that proactively guide employees to optimal outcomes and drive business results.

**Adapt to change**—Easily tailor, extend, connect, and build applications with a modern platform and little to no code development so you can meet your specific business needs.

### Overall Key To Success

By leveraging the power of a cloud-based, all-in-one business management solution, our customers have been able to upgrade from their multiple disparate business systems to one single, comprehensive solution to manage finances, operations, sales and customer service.

Gold  
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