



Gold Cloud Platform
Silver Small and Midmarket Cloud Solutions

The SMB Guide to **Leveraging Dynamics 365 for Success**

There's more to Microsoft than Outlook, Word, Excel, and Teams...

And, you don't need to be an enterprise company to utilize it.

Use this eBook as a guide to finding ways your business can utilize Microsoft's Dynamics 365 suite for success.



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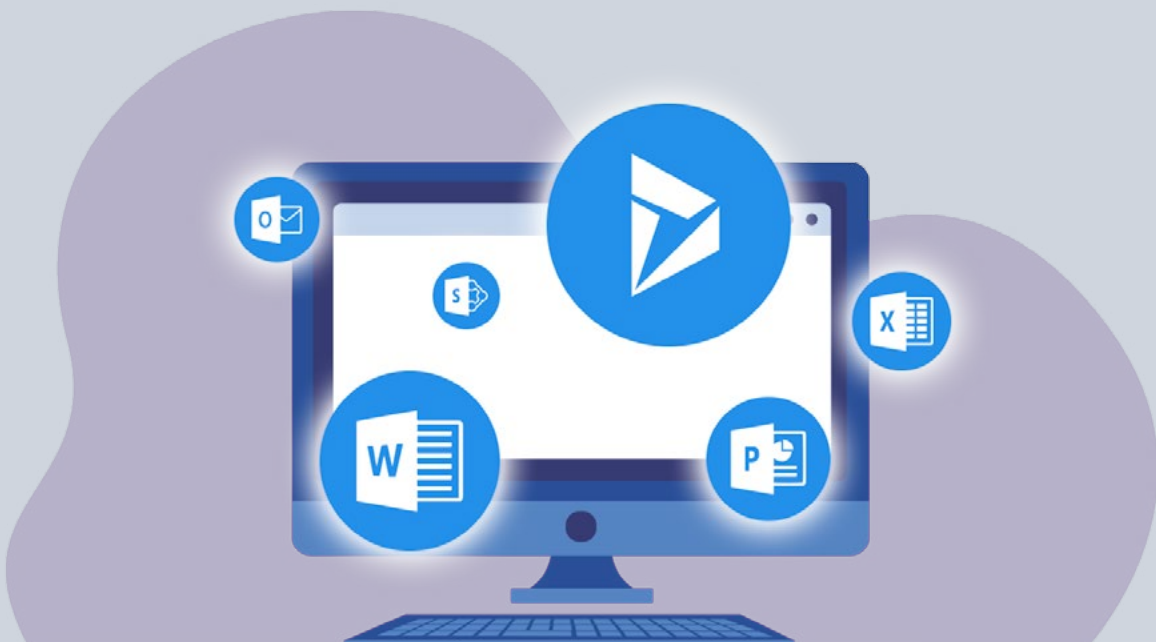
Do more with Microsoft

by leveraging Dynamics 365

We are all well-versed with the Office 365 suite and its offerings. Microsoft is synonymous with Windows and Office. It is the gold-standard for productivity and reporting. However, there is more to Microsoft than just Office 365.

You have likely heard the term “digital transformation” which has been coined by business leaders such as Microsoft’s Satya Nadella. But, for a business like yours what does undergoing a digital transformation really mean? At GOBI, we would peg digital transformation as using technologies and processes to drive your business forward. Using Microsoft products and cloud technologies, you can innovate your processes and create a cohesive and scalable stack of platforms.

In this eBook, we will explore the products that are available to you within Dynamics 365 that can help your small-to-medium-sized business drive digital transformation and edge out competitors.



Digitally Transform Your Sales with Dynamics 365 Sales

What needs and challenges does this platform address?

As an SMB, you understand the importance of customer relationships. You likely also understand the challenge of keeping track of all your customers' activities and interactions with your business. As a company owner, it is critical to have visibility on your current accounts and sales team to monitor performance.

Why use Dynamics 365 Sales?

Go beyond basic sales force automation tools to better understand your customer needs, engage more effectively, and win more deals with a connected platform for sales. Dynamics 365 Sales integrates with Microsoft 365 and leverages the extensive capabilities of the Microsoft Power Platform.

What are some key features of Dynamics 365 Sales?

- Share, find and connect with new companies and people to develop your contacts and generate new leads. Engage customers better through intelligent insights from analyzing all customer data in near-real time.
- Out-of-box seamless integration with productivity and business intelligence applications such as PowerBI, Office 365, DocuSign and more.
- Prospect and build qualified pipeline using predictive intelligence to focus on the right lead based on interaction history and insights.
- Get visibility into sales results with analytic dashboards. Coach sellers toward optimal results.
- Onboard and motivate sellers through sales contests that promote teamwork and accountability.

How could a small-to-medium-sized business leverage Dynamics 365 Sales?

Dynamics 365 for Sales provides complete transparency throughout the sales process. It is an all-in-one sales solution that can be used by everyone in the company. For example,

- If you want to share customer data with the finance department for invoicing, instead of manual emails, the finance manager can log in to the system to view the complete customer communication logs.
- If you want to follow-up on a sales lead, then you can set up automated personalized emails at custom dates to be sent instead of manual ad-hoc emails.

Dynamics 365 Sales in Action

The screenshot displays the Dynamics 365 Sales interface for an opportunity named "3D Printers for GDI". The interface includes a navigation pane on the left with sections like "My Work", "Customers", "Sales", and "Collateral". The main content area shows a summary of the opportunity, including the contact "Regina Murphy", account "Graphic Design Institu...", purchase timeframe "This Quarter", currency "Dollar", budget amount "\$95,000.00", and purchase process "Committee". A timeline section shows recent communications, including emails and phone calls from Regina Murphy and Brenden Thiel. The opportunity score is displayed as "96 Grade A" with a green "Improving" indicator. The interface also features a top navigation bar with various actions like "Save", "New", "Refresh", and "Collaborate".



"The Dynamics 365 Sales platform gives Colliers International tremendous recruiting abilities because it's customized to their workflow and is incredibly appealing to brokers. The system is unlike any other; it keeps track of deals, communications, and knowledge specifically tailored to the real estate industry, putting their brokers ahead of the competition."¹

Get Started with Dynamics 365 Sales

[LEARN MORE](#)

[TRY IT FOR FREE](#)

Our team at GOBI are experts in helping small-to-medium-sized business transform their processes with Dynamics 365 Sales. To see if it is a fit for your business, schedule a complimentary meeting with one of our specialists:

[GET A DYNAMICS 365 SALES CONSULTATION](#)

¹Why & How Colliers Indiana Attracts Top Brokers Thanks to Their CRM
<https://ascendix.com/blog/dynamics-365-case-study-real-estate-colliers/>

Provide Next-Level Shopping Experiences with Dynamics 365 Commerce

What needs and challenges does this platform address?

As a retailer, you want to provide your customer with the best possible shopping experience. However, it is a challenge to know what your customers want and how to best target them. This, coupled with how difficult it can be to keep track of your inventory and back-end operations, means that having the best technology to manage your commerce is crucial.

Why use Dynamics 365 Commerce?

Dynamics 365 Commerce is an end-to-end retail solution by Microsoft to meet both customer personalization and operational challenges. It unifies all the modules of your retail business in one place, so you have complete visibility over your entire operation. Moreover, it allows you to keep track of customer visits and provide them with a customized shopping experience based on their preference.

What are some key features of Dynamics 365 Commerce?

- Omnichannel commerce management
- Creation and management of sales promotions
- AI-based product recommendations
- Product rating and review management

How could a small-to-medium-sized business leverage Dynamics 365 Commerce?

Dynamics 365 Commerce is a one-stop-shop to make sure you run your retail business efficiently and achieve scalable growth. For example,

- If you want to know what your customers are looking for then this solution allows you to collect customer information from various sources (social media, online browsing, in-store purchases, etc.) and roll out promotions and product recommendations.
- If you want to keep track of your back-office data when answering customer queries then you can use this system to have full visibility on your inventory and delivery statuses to provide a seamless retail experience to customers.
- Your customers want a unified shopping experience – whether online or in-store. Using this tool, you can integrate all the touchpoints and have complete visibility of your interactions with the customers to provide a better service.

Dynamics 365 Commerce in Action

The screenshot displays the Dynamics 365 Commerce 'Transaction' screen. The main area shows a list of items for sale:

ITEM	QUANTITY	SALES REPRESENTATIVE	TOTAL (WITHOUT TAX)
Snow Jacket	1	Ivo Hamels	\$240.00
Mountain Jacket	1	Ivo Hamels	\$270.70
Waterproof Lace Shoes	1	Ivo Hamels	\$180.00
Black Bold Framed Sunglasses	1	Ivo Hamels	\$89.00
Helmet and Goggles	1	Ivo Hamels	\$480.00
Grey Skit Boots	1	Ivo Hamels	\$640.00

Below the items list, there are 'Recommended products' including Green Sunglasses, Helmet and Goggles, Hydration Pack, and Ski Boots. A summary table at the bottom shows:

LINE	QUANTITY	SUBTOTAL
LINES	6	\$1,899.70
DISCOUNTS	\$35.00	TAX \$189.97
		PAYMENTS \$0.00

The total amount due is \$2,089.67. On the right side, there is a customer profile for Karen Berg (2001) with a loyalty card (55103) and a balance of \$89.00. Below the profile is a numeric keypad and a grid of payment and action buttons such as 'Set quantity', 'Scan loyalty card', 'Pay with cash', and 'Pay with credit card'.



"With Dynamics 365, we can map great technology to outstanding business processes that will help us continue to expand our markets and adopt new business models. Everyone benefits from that. The company benefits, the customer benefits—it's a win-win for all." - **Matt Keays, COO, Michael Hill**²

Getting Started with Dynamics 365 Commerce

[LEARN MORE](#)

[GET A DEMO](#)

Interested in how Dynamics 365 Commerce could improve your shopping experience and streamline operations? Book a Consultation with one of our Dynamics experts:

[GET A DYNAMICS 365 COMMERCE CONSULTATION](#)

² Global jeweler polishes its business processes and customer service with cloud-first approach <https://customers.microsoft.com/en-us/story/michaelhill-retail-dynamics365-en>

Streamline Your Business Operations with Dynamics 365 Supply Chain Management

What needs and challenges does this platform address?

As a manufacturer or distributor, your biggest challenge is likely keeping track of various assets and business processes like order fulfillment, planning, procurement, production, inventory, warehousing, transportation, and maintenance to maximize efficiency and minimize costs.

Why use Dynamics 365 Supply Chain Management?

Dynamics 365 Supply Chain Management is an all-in-one solution that enables you to view all your supply chain activities by providing insights based on real-time data. With this information in hand, you can focus on improving operational efficiency and optimizing workforce productivity. Thus, you and your workers are equipped with all the information you need to drive efficiency and improve resource use.

What are some key features of Dynamics 365 Supply Chain Management?

- Complete visibility over your supply chain – from warehouse operations to inventory to transportation

- Improve workload efficiency by automating the resource management
- Streamline your manufacturing and procurement processes
- Use predictive maintenance to increase the life of your high-value assets

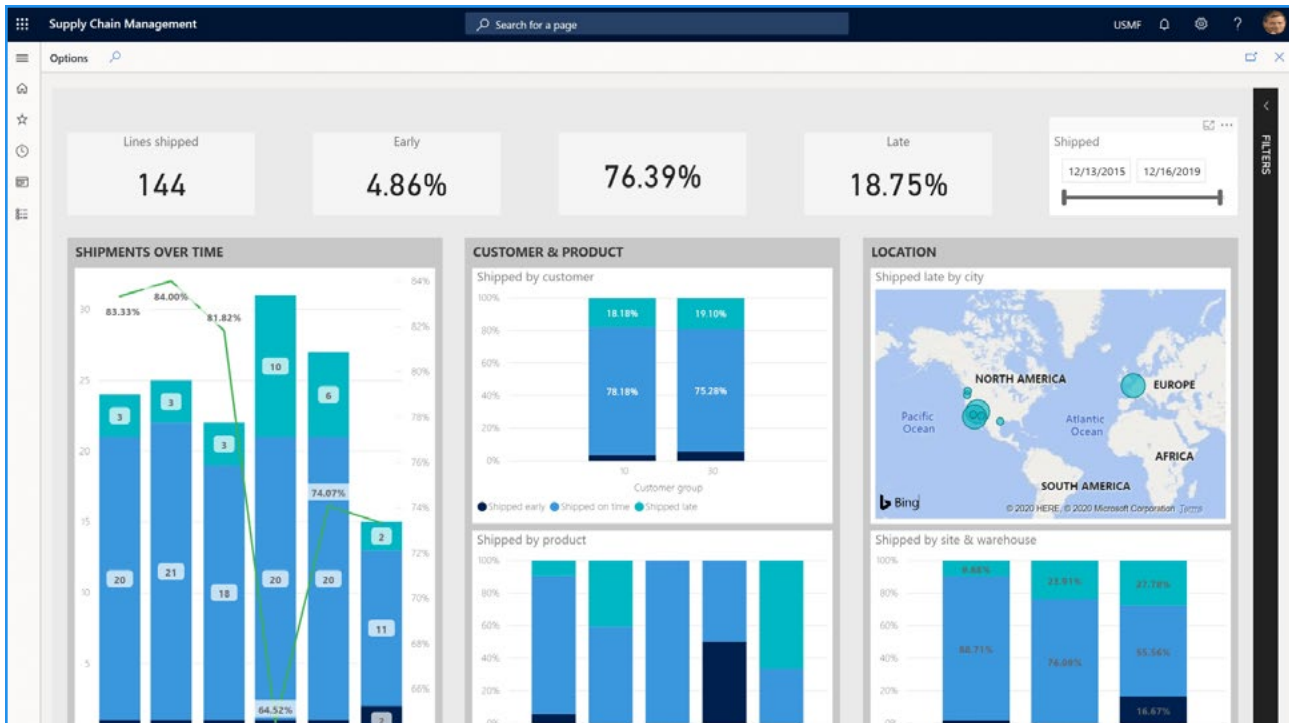
How could a small-to-medium-sized business leverage Dynamics 365 Supply Chain Management?

Dynamics 365 Supply Chain Management is your central source of intelligence to understand your resource management and supply chain in detail. Use cases include,

- If you want to allocate your workforce as per the demand, this solution allows you to clearly see the resource availability, the need, and the time required to process an order.
- If you want to keep better track of your stock, you can perform warehouse management by effectively tracking your inventory, shipping, quality control, capacity, and consumption.

If you want to speed up your production life cycle, utilize capacity planning, production scheduling, sequencing, and capabilities.

Dynamics 365 Supply Chain Management in Action



"With Dynamics 365 in our corner, we are confident that we have the right teams, technology, and insights to accomplish our business goals and fulfill our brand promise to everyone in the Majans family—our business partners, our customers, and our employees. We've set ourselves up for the future, which I think is the true essence of transformation." -

Amit Raniga, Director, Majans³

Getting Started with Dynamics 365 Supply Chain Management

LEARN MORE

GUIDED TOUR

Think that Dynamics 365 Supply Chain Management may be a good fit for your business? Reach out to one of our experts to see how you can get started:

GET A DYNAMICS 365 SUPPLY CHAIN CONSULTATION

³Finding magic in the mix of innovation, technology, and flavor

<https://customers.microsoft.com/en-us/story/746973-majans-manufacturing-dynamics-365>

Manage All Aspects of Your Business with Dynamics 365 Business Central

What needs and challenges does this platform address?

As a growing business, you want an all-in-one system that's scalable to meet your demands, reduce cost, and increase productivity.

Why use Dynamics 365 Business Central?

Dynamics 365 Business Central is the ideal Cloud ERP software for SMBs who want one system to comprehensively manage their business. This robust solution helps your business in sales, accounting, finance, project management, supply chain, reporting, and much more. As a Microsoft product, it easily integrates with all your existing productivity apps like Office 365 as well as a growing extensions store via [Dynamics 365 App Source](#).

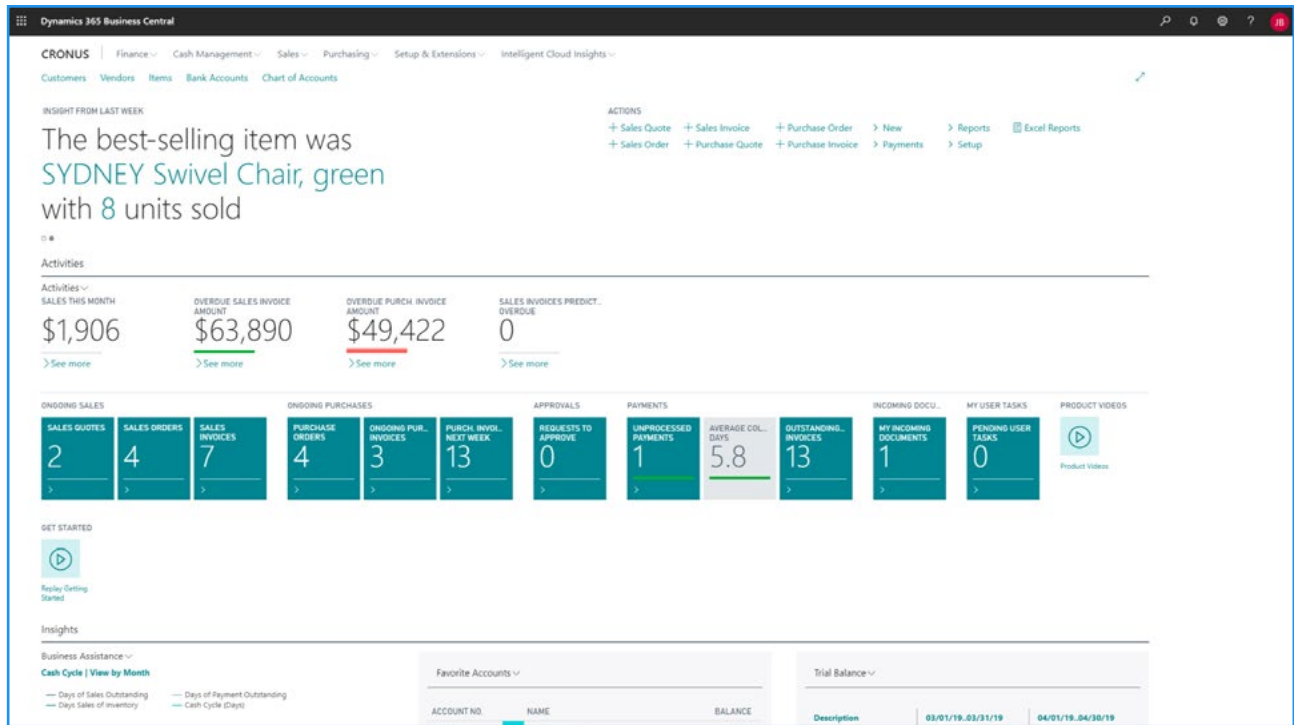
What are some key features of Dynamics 365 Business Central?

- Always available on the cloud
- Tracking financial performance in real-time
- Project management with resource tracking
- Optimize your supply chain
- Boost sales and improve service

How could a small-to-medium-sized business leverage Dynamics 365 Business Central?

- Microsoft Dynamics 365 Business Central is a comprehensive solution that helps SMBs connect their financials, sales, services, and operations to streamline and secure business processes, improve customer interactions, and make better decisions. You can accelerate your sales process and help them act quickly on sales-related inquiries, manage service requests, and process payments—all from within Outlook.
- Your finance team needs a quick rundown of business financials. With Business central you can chart financial performance in real time with built-in Power BI dashboards. Identify patterns and trends and gain new insights with in-depth analysis and unlimited dimensions.
- If you want to satisfy regulations and security requirements, Business Central allows you to create a variety of user roles and types, giving them the control and visibility they require to ensure security and GDPR compliance.

Dynamics 365 Business Central in Action



"To ensure our colleagues are actively collaborating we're going to be using the Dynamics 365 offering more intensely, with Business Central forming the core where all ends come together. It became clear to us that Business Central was the way forward to realize growth for our company!" - Nico Marneth, CFO, Doréma ⁴

Getting Started with Dynamics 365 Business Central

[LEARN MORE](#)

[FREE TRIAL](#)

Business Central is an incredibly powerful platform that can help you consolidate platforms and optimize your business operations. To learn more, book a meeting with one of our dynamics experts:

[GET A DYNAMICS 365 BUSINESS CENTRAL CONSULTATION](#)

³ Doréma expands and grows thanks to ABC E BUSINESS and Dynamics 365 Business Central
<https://customers.microsoft.com/en-CA/story/830215-dorema-abcebusiness-d365>

Activate the Power of Microsoft with **GOBI Technologies'** **Dynamics 365** **Consulting Services**

- End-to-end engagement - Our Dynamics 365 consulting services provide support, planning, and management of your Microsoft cloud and business applications.
- We enable our clients to understand and make optimal use of Microsoft's most powerful tools for business empowerment.
- Simplify your journey - Our Dynamics 365 engagement team provides the resources to help build your business strategy and road-map to a successful Dynamics 365 environment.
- Accelerate your ROI - Our Dynamics 365 consultants and technical team help increase adoption and utilization rate as well as address day-to-day operational challenges.
- Discover your Potential - We offer value through benchmarking and aligning your business processes and operations with your business vision.
- A Powerful Partner - GOBI brings industry experience and a modern digital transformation strategy applied to over 100 clients.

**SEE OUR DYNAMICS 365
CONSULTING SERVICES**



Gold Cloud Platform
Silver Small and Midmarket Cloud Solutions

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