

Dynamics 365 Customer Service as a CRM Solution



Starter Package

Ideal for small to medium-sized businesses, our "Starter" package of Dynamics 365 Customer Service as a CRM Solution provides the essential tools you need to manage and grow your customer relationships. With features designed for 1-5 users, this package is designed to empower your small team with the essential tools to efficiently manage customer interactions, streamline your sales processes, and create lasting customer relationships.

Features included:

- **Account & Contact Management:** Centralize your customer information, making it easy to maintain relationships and track interactions.
- **Activity Management:** Stay organized by managing all your customer-related activities in one place.
- **Email Management:** Seamlessly integrate email communication within your CRM to keep conversations in one location.
- **Document Management:** Effortlessly store and manage important customer-related documents.
- **Lead Management:** Capture, track, and nurture potential leads to drive sales growth.
- **Opportunity Management:** Manage sales opportunities with a clear view of your sales pipeline.
- **Product Management:** Easily manage your product catalog for streamlined sales processes.
- **Campaign Management:** Plan and execute marketing campaigns to attract and engage customers.
- **Invoice Management:** Create and manage invoices to streamline your financial processes.
- **Dashboards & Reports:** Access insightful dashboards and reports to make data-driven decisions and track your business performance.





Services included:

- Setting up D365 Environment: We'll help you get started by setting up your Dynamics 365 environment.
- Configuration + Customization: Tailor your CRM to your business needs with configuration and basic customization.
- Document Settings: Optimize document settings for efficient document management.
- Basic Sales App Configuration: Configure the sales application to suit your specific requirements.
- Set up Branding & Theming: Personalize your CRM with your branding and theming.
- Basic Security Configuration: Ensure your data is secure with basic security configuration.
- Basic Customization: Customize the CRM to match your unique business processes.
- Basic Dashboard & Reports: Get started with basic dashboards and reports to track your business performance.
- Discovery Sessions: Collaborate with our team to identify how to best use your CRM to meet your business goals.
- Admin Training: Equip your team with the knowledge and skills to manage the CRM effectively.
- Functional/User Training: Provide training sessions to ensure your team can utilize the CRM to its full potential.

This package seamlessly integrates with SharePoint for document management and collaborative workflows. The implementation is completed in a time frame of 2.5 weeks at a cost of \$19,500, with licenses required for D365 Sales Professional at \$88.20 CAD per user/month.

Business Package

Our "Business" package of Dynamics 365 Customer Service is designed for growing businesses, accommodating 5-10 users, and offers an expanded set of features for more robust customer relationship management. With an array of added capabilities, this package empowers you to take your sales processes to the next level.

Additional services included:

- Standard Security Configuration: Safeguard your data with standard security configuration.
- Standard Customization: Customize the CRM to adapt to your evolving needs.
- Standard Dashboard & Reports: Gain access to essential business insights through standard dashboard and report setup.

This package seamlessly integrates with SharePoint and Microsoft Teams (only internal) for document management and collaborative workflows. The implementation is completed in a time frame of 4.5 weeks at a cost of \$35,100, with licenses required for D365 Sales Enterprise at \$128.90 CAD per user/month.



Premium Package

Our "Premium" package of Dynamics 365 Customer Service is the ultimate solution for businesses that demand excellence in customer relationship management. Designed for teams of 10-20 users, this package provides an extensive set of features, services, and integrations to supercharge your sales efforts and transform the way you interact with your customers.

Additional services included:

- Shared Mailbox Setup: Implement shared mailboxes for improved email management and collaboration.
- Advanced Security Configuration: Enhance data security with advanced security configuration.
- Advanced Customization: Customize the CRM to adapt to evolving business processes and needs.
- Advanced Dashboard & Reports: Gain access to advanced dashboards and in-depth reports for critical business insights.
- Technical Training: Technical training is provided to handle advanced CRM functions.
- Migration (up to 3500 records): Migrate your data seamlessly with assistance in transferring up to 3,500 records.
- Data Assessment: Assess your data for quality and accuracy.
- Data Mapping: Ensure smooth data transfer and mapping.

This package seamlessly integrates with Outlook, SharePoint, Teams (internal only), and Data Migration for document management and collaborative workflows. The implementation is completed in a time frame of 10 weeks at a cost of \$78,000, with licenses required for D365 Sales Enterprise at \$128.90 CAD per user/month.

