



## Working as one

Work smarter. Unify your business  
with Microsoft Dynamics 365 Business Central  
& Office 365





# Discover more. Achieve more.

To get an edge, your business needs to make every minute count. Every time you contact a customer you need to build trust and loyalty.

It's a tough ask if the tools you're using every day aren't pulling in the same direction. Dipping in and out of different applications slows you down, while hard-to-find information makes it tougher for teams to share data or see the bigger picture. This, in turn, makes it difficult when making decisions and more time-consuming.

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What if you had a unified set of business management tools and applications to bring you insights from finance, sales or operations, when you need it?

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It would allow you to spend less time looking for information and more time managing your business and helping customers.

The good news is, this is possible!

Today's Microsoft cloud-based solutions like Microsoft Dynamics 365 Business Central and Office 365 talk to each other. What's key is that you see the need for your personal productivity (Office 365) applications and your business management solution (Dynamics 365) to work as one, to get the best out of both.

If you're responsible for making sure your business performs as well as it can, you may ask yourself: how do I make sure our processes, people and data are as joined up as possible? What do everyday tasks start to look like when I consider our solutions together? And what benefits can I expect to see?

We'll dive into these questions throughout this eBook.



# Greater efficiency. Better experiences.

The cloud puts synchronised business solutions firmly within your reach.

A common platform lets you unify relationships, processes and data throughout the applications which you can use daily. This means your teams can drive efficiency and serve customers effectively.

Suddenly, making information available is the default, not another overhead. Update a document, report, or project in one location, and it will sync and update in another. With the power of cloud computing, it's also easier to adopt new features or technology, such as business analytics or artificial intelligence. These solutions turn your data into meaningful insights to make better, more informed, faster decisions.

We will look at the three main advantages that you get from making your productivity and business applications work as one:

- 1 Productivity through better collaboration
- 2 Data insights that drive better decision-making
- 3 Improved security and reduced IT complexity







No switching from one application to another. No comparing and consolidating feedback. The team saves time and effort because everyone is using unified business and productivity applications and solutions to work as one.

Information workers save 4 hours per week from improved collaboration & data sharing.”

~ The Total Economic Impact of Microsoft Teams by Forrester



## 1 | Productivity through better collaboration

# Work together. Work faster.

One of the key contributions Dynamics 365 Business Central & Office 365 can make to your business is to help you work even better together. When your business applications feed into your everyday productivity applications, and vice versa, it brings people together and helps you to be more productive. This makes your routine tasks happen that much more smoothly.

### Scenario #1

Let's say that you have a new sales opportunity. People from across your business need to work together to build a presentation to make the most of that opportunity. So, whether they are doing this as a presentation in a PowerPoint deck or supplying a proposal created in Word, they can co-author simultaneously in real-time.

They don't need to be in the same place or even the same time zone. They will have the ability to see what changes have been either suggested or have been made. Even better yet, this can all be done on any device (from mobiles to tablets) and in any browser even if they don't already have the applications downloaded. This ensures that everyone is looking at the most up-to-date version and draws on insights from your business data. The result? The team put together a personalised presentation that resonates with the customer.

Repeat this efficiency again and again, and you can see how much time it frees up to drive additional sales or add value for your existing customers.



## Scenario #2

Your company receives an email from an important customer who needs you to fulfil an order at short notice. Your sales team even though they may not be regular users can check availability for the product in Dynamics 365 Business Central without even realising they are in the application, directly from within their Outlook their inbox.

This is only possible through the tight integration between the two products – as it enables Outlook to immediately identify the item in Dynamics 365 Business Central from the information in the

customer's email and present the stock availability while still in Outlook.

In this example, the salesperson discovers you don't have enough stock. Still within Outlook, they create and send a purchase order to your supplier to make up the shortfall. Then, in the same interface, they can create and send a quote to the customer.

This example is about a specific process becoming more efficient. Behind this, though, are the principles of automating routine tasks and giving people data automatically – in the applications

they're used to. This familiarity means they are able to use Dynamics 365 Business Central & Office 365 without needing hours of training, so they can focus on their day-to-day tasks, through compatible and intuitive applications, an urgent job is dealt with quickly and accurately.

However good your existing business and productivity applications are, if your teams work in silos, it falls on your employees to connect the data and insights to make decisions. This is inefficient by its very nature, and it invites human error. It can also hold you back from providing great customer experiences. If your productivity applications (Office 365) and business applications (Dynamics 365) work as one, then your technology helps you to be far more efficient and to serve your customers better.



# Accurate data. Smarter decisions.

Insights come from having the right data, in the right place, at the right time. To unlock the potential of your data, you need it to be up-to-date and accessible – across all your applications. Again, solutions need to work together to make this happen.

## Scenario

A sales representative receives an email from a customer who would like a quote on some items. Dynamics 365 Business Central and Office 365 reads the body of the email and recognises the sender. This means the representative has access to the customer's existing quotes and can easily pull up the customer record in her email. From this view, she reviews the account. She can see the customer's current quotes, ongoing orders and sales history. As she creates the quote, it auto-

populates with the customers and product details and line items suggested by the services built into Dynamics 365 Business Central and Office 365. This all means the representative can get the job done faster.

The representative avoids duplication and improves her approach. She also enhances her productivity by drawing on accurate, up-to-date data.

In the case above, the sales team are able to communicate better and faster with their customers. Of course, accurate data, refreshed across programs, can lead to better decisions in every aspect of your business. Whether it's a personalised offer to a customer or a shift in how you and your employees work.



# Turn to the cloud. For security & simplicity.

Let's skip straight to an example in practice to understand how a connected, cloud solution makes a difference.

## Scenario

Your finance manager logs into Office 365 to check his email and then tries to login into your ERP/main finance and business application, but with lots of different logins for different applications they have completely forgotten which one they need to use for this particular application. What follows is the frustration and annoyance of time lost to the process of resetting their password, when really all they wanted to do was get on with the task they had planned.

However, with Dynamics 365 Business Central and Office 365 it's one single sign-on. No more logging in separately. Mixed up passwords are a thing of the past! Even when there are the occasional problems with logins everything is built under one hood which means it's so much easier to manage.

Using both Office365 and Dynamics 365 Business Central also means you can switch on the in-built multi-factor authentication (MFA) for increased security and compliance to help prevent some of the most common and successful types of cyberattacks.

## Scenario

For example, let's say that the user is logging in from a laptop, which has been compromised by a phishing email. But with MFA set up, to complete the log in the user must use a phone app or a code texted to their phone. Since the hacker doesn't have access to the user's phone, the breach is prevented.



## Phishing attacks. How they work.

An attacker uses a list of email addresses and delivers a message with a compelling call to action. (For example, the user may be told that he or she needs to log in and verify transactions.) Usually, it sends users to a fake website where the users provide their username and password.



**phishing**  
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the fraudulent practice of sending emails purporting to be from reputable companies in order to induce individuals to reveal personal information, such as passwords and credit card numbers.

# Move forward. As one.

If you are running your business today using multiple applications and productivity tools, you may be keeping data and people apart. By treating your solutions as one, you can optimise how your business performs — allowing you to draw on their joint capabilities as well as their individual strengths.

Leveraging the capabilities together allows you to align your operations, financials, sales, and service. This both supports collaboration internally and with customers and generates insights. Once this happens, you'll see your processes, customer interactions and decisions all improve. So, you can unlock what's next for your business.

One way to make your business applications and productivity tools work together is to use both Microsoft Office 365 and Dynamics 365.

They unite your people and processes, which helps you to drive up performance and deliver great customer experience.



Having delivered over 7,000 successful projects, we've plenty of experience implementing business systems, Microsoft Dynamics solutions and the technical infrastructure to support them.

We are a Microsoft Gold Certified Partner. We can deliver Microsoft Dynamics solutions on your own IT infrastructure or in the Microsoft Cloud. Based in the Midlands and North East, we support clients across the UK and further afield.

If you would like to learn more about how we can support your company, please do not hesitate to get in contact with us today and take your first steps towards enhancing your business processes:

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