

E-book

# Reinvent business productivity with Microsoft Dynamics 365 and Microsoft 365

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# Executive summary

To stand out from the competition, businesses need to make every minute count and every customer engagement shine.

Microsoft Dynamics 365 is a comprehensive business management solution that helps businesses manage financials, sales, service and operations easier and faster from day one.

This e-book explores how Dynamics 365 integrates with Microsoft 365 to connect business processes and personal productivity like never before, bringing insight and efficiency to your daily tasks.

We will also cover three day-in-the-life scenarios that illustrate how Microsoft's unique capabilities make business owners, sales representatives and accountants more productive — ultimately improving customer experiences.



## Disconnected systems hold businesses back

If you're a business owner, your workday often begins at home, triaging emails early in the morning. Having grown the business from the ground up, you know your customers and vendors, and you're still involved in day-to-day operations. But the bigger your company gets, the more complex your business processes become.

Each email adds something to your to-do list, which typically requires transitioning to a different application. You use accounting software to prepare an invoice, a CRM system to manage your contacts and sales pipeline, and perhaps yet another manufacturing solution to track production or inventory.

Switching back and forth between fragmented, stand-alone solutions takes time and often requires duplicate data entry. This diminished productivity stifles your ability to scale and cuts into time you could spend developing new business.

To keep up the pace of your growth, you're likely considering the move to a more comprehensive business management solution.

Microsoft Dynamics 365 helps you get through administrative tasks quickly and easily, so you can focus on the big picture, and your team can spend more time taking care of customers.

# Connect people, processes and systems

## Reimagine productivity with Dynamics 365 and Microsoft 365

Microsoft brings the worlds of business processes and personal productivity together, connecting your people, processes and systems like never before.

Right now, your employees might be the only common link between your business systems and the email, spreadsheet and word processing tools you use every day. This means they waste a lot of time flipping between apps or cutting and pasting, which can lead to data entry errors. Connected business solutions from Microsoft help to pull everything together, so your people don't have to.

Together, Microsoft Dynamics 365 and Microsoft 365 help you:

- Drive productivity by reducing time spent switching between stand-alone apps
- Foster collaboration and communication across Outlook and Teams to break down internal silos and broadening visibility across the organization
- Accelerate user adoption and lower training time with a seamless user experience

Let's take a look at some scenarios where Dynamics 365 and Microsoft 365 work together to make your people more productive and your business more efficient.

## Scenario 1: Work where business takes you

As a business owner, imagine you receive an email from a high-priority customer who urgently needs an order delivered in a short timeframe. With Dynamics 365, you can find the information you need and act on it without searching disparate systems or coordinating with other departments. Without leaving your inbox, you check inventory and discover that you don't have enough stock on hand to fulfill the order. In the same interface, you create and send both a purchase order to the vendor and a quote to your customer, moving on to your next task within minutes.

Dynamics 365 also helps you secure processes and work on the go. Suppose you are out of the office and an email alerts you that a sales quote has exceeded your established 10% maximum discount. Right from your mobile inbox, you quickly review the quote and check the customer's order history, account status and credit limit. You make an informed decision to approve the discount, which automatically updates the quote and notifies the sales rep that it's ready to be sent to the customer.

With Dynamics 365 and Microsoft 365 working together, you can take quick action right from your email—allowing you to spend more time managing your business and connecting with customers.



## Scenario 2: Improve customer interactions

You know how critical it is to keep your sales team connected in the office and on the go. Dynamics 365 and Microsoft 365 simplifies and automates daily tasks to keep your sales team focused on managing sales.

Your sales rep receives an email from a customer requesting a quote on some items. The system recognizes the sender, enabling him to easily pull up the customer card within Outlook. From this dashboard, he reviews the account — including the customer's existing quotes, ongoing orders and sales history. As he's creating the quote, customer and product information auto-populate, helping him get it done faster.

While he was sending the sales quote, a note hit his inbox from a potential customer he met at a recent event. The system recognizes that their email address is not in the customer database and prompts him to add it. Without leaving Outlook, he creates their profile in the Dynamics 365 app.

This kind of automation reduces time spent on administrative tasks, allowing your sales team to quickly respond to inquiries and ultimately improve customer interactions.

# Scenario 3: Simplify reporting and make better decisions

Your accountants run a crucial piece of the business. Dynamics 365 makes an accountant's day easier by simplifying reporting, streamlining month-end close and reducing data entry errors.

Her day starts in the Dynamics 365 app, where she is preparing the monthly P&L statement. She needs to edit multiple invoices at once, so she opens the invoice list in Microsoft Excel. In a matter of minutes, she adds a new batch of invoices and updates the status of several others. With just one click, she publishes the data back to the Dynamics 365 app, where it's automatically refreshed.

Wanting a deeper analysis of the month's revenue, she switches to Microsoft Power BI. There she has multiple ways to analyze Dynamics 365 data, including the revenue information she just updated. Through rich visuals and custom dashboards, she gains insights she couldn't get from standard reports.

With Dynamics 365, you get an end-to-end view of your business and built-in intelligence that helps you make more informed decisions.

# Why Rackspace for Microsoft 365 and Dynamics 365?

Let Rackspace serve as your single point of contact for Microsoft SaaS offerings, so you can focus on your business. Plus, we can help integrate your Dynamics 365 applications into your existing systems, such as Microsoft 365, to increase efficiency and provide your customers with the right data, in the right place, at the right time.

## Single Provider for All Microsoft SaaS

Let us manage all your licensing needs for Microsoft 365 and Microsoft Dynamics 365, so you can focus on maximizing these powerful applications.

## Flexible Licensing

With multiple plans to choose from, our experts can help you pick the right plan for your business.

## Microsoft Expertise

We're an industry leader in supporting Microsoft solutions and are here 24x7x365 to help you get the most out of your Dynamics 365 and Microsoft 365 investment.



# About Rackspace Technology

Rackspace Technology is the multicloud solutions expert. We combine our expertise with the world’s leading technologies — across applications, data and security — to deliver end-to-end solutions. We have a proven record of advising customers based on their business challenges, designing solutions that scale, building and managing those solutions, and optimizing returns into the future.

As a global, multicloud technology services pioneer, we deliver innovative capabilities of the cloud to help customers build new revenue streams, increase efficiency and create incredible experiences. Named a best place to work, year after year according to Fortune, Forbes, and Glassdoor, we attract and develop world-class talent to deliver the best expertise to our customers. Everything we do is wrapped in our obsession with our customers’ success — our Fanatical Experience™ — so they can work faster, smarter and stay ahead of what’s next.

Learn more at [www.rackspace.com](http://www.rackspace.com) or call 1-800-961-2888.

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