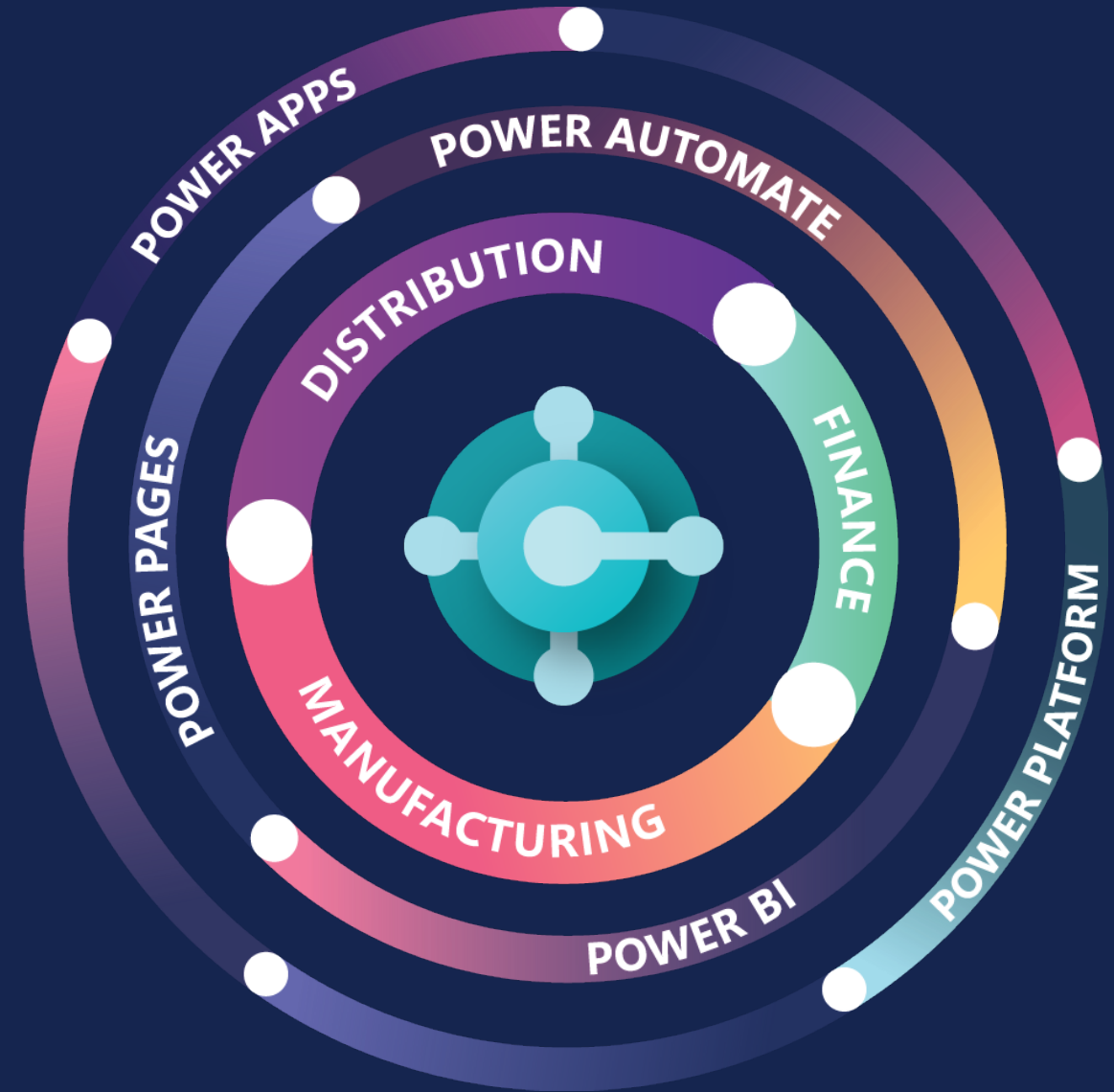


BUSINESS CENTRAL connect

Finding Your Fit: Microsoft CRM
Tools Compared



18th & 19th NOVEMBER 2025

What we'll cover

1. Do You Need a CRM Tool?
2. Business Central: Basic CRM Capabilities
3. Business Central: Demo
4. Dynamics 365 Sales: Advanced CRM Capabilities
5. Dynamics 365 Sales: Demo
6. Conclusions and Questions





Do You Need a CRM Tool?

When to Consider a CRM Tool

- Sales team growth
- Lack of visibility
- Manual processes
- Customer experience gaps
- Disconnected systems
- Data-driven decisions
- Compliance and security



Business Central: Basic Capabilities

Business Central: Basic CRM Capabilities

Features:

- Basic contact and account tracking
- Interaction and document logging
- Campaigns and segments
- Opportunity tracking
- Reporting and Copilot features

Limitations:

- No lead scoring or routing
- Limited automation and user customisation
- Basic reporting and dashboards
- Not designed for complex sales processes
- Requires BC user licence



Demo: Business Central



Dynamics 365 Sales: Advanced Capabilities

Dynamics 365 Sales: Advanced CRM Capabilities

Features:

- Full contact and account lifecycle management
- Advanced lead qualification and scoring
- Guided sales process and workflows
- Opportunity scoring and tracking
- Customisable dashboards and forecasting
- Integration with LinkedIn Sales Navigator
- Copilot AI assistance
- Deep integration with Teams, Outlook and SharePoint
- Native integration with Business Central

Advantages:

- Highly customisable and scalable
- Rich analytics and reporting
- Designed for sales teams and customer engagement
- Supports complex sales journeys and collaboration

Optimised, Structured Sales Process Tailored to Your Business Needs

- Business Process Flows for a standardised process to guide and prompt salespeople at each pipeline stage.
- Out of the box Lead>Opportunity>Quote>Order process but can be built upon to capture other areas in the sales process.

Gift Supplies Winter 2025 - Saved
Opportunity · Opportunity ▾

Sainsburys Account 6/4/2025 Est. close date £49,464.00 Est. revenue EN Ellie Nickson Owner ▾

Sales Process Active for 9 days Qualify **Develop (< 1 Min)** Propose Close >

Summary Products Quotes Field Service Files Related ▾

Opportunity information

Opportunity ID * OPP-1017

Topic * Gift Supplies Winter 2025

Opportunity Type --- ▾

Industry Hospitality ×

Summary

Up next ⓘ

Manage your account See upcoming opportunities + Create

Active for less than one minute

Customer need ---

Proposed solution ---

Identify stakeholders mark complete ▾

Identify competitors mark complete ▾

< Next Stage

Form assist

Interests

Categories of Interest ---

Purchase Timeframe Unknown ▾

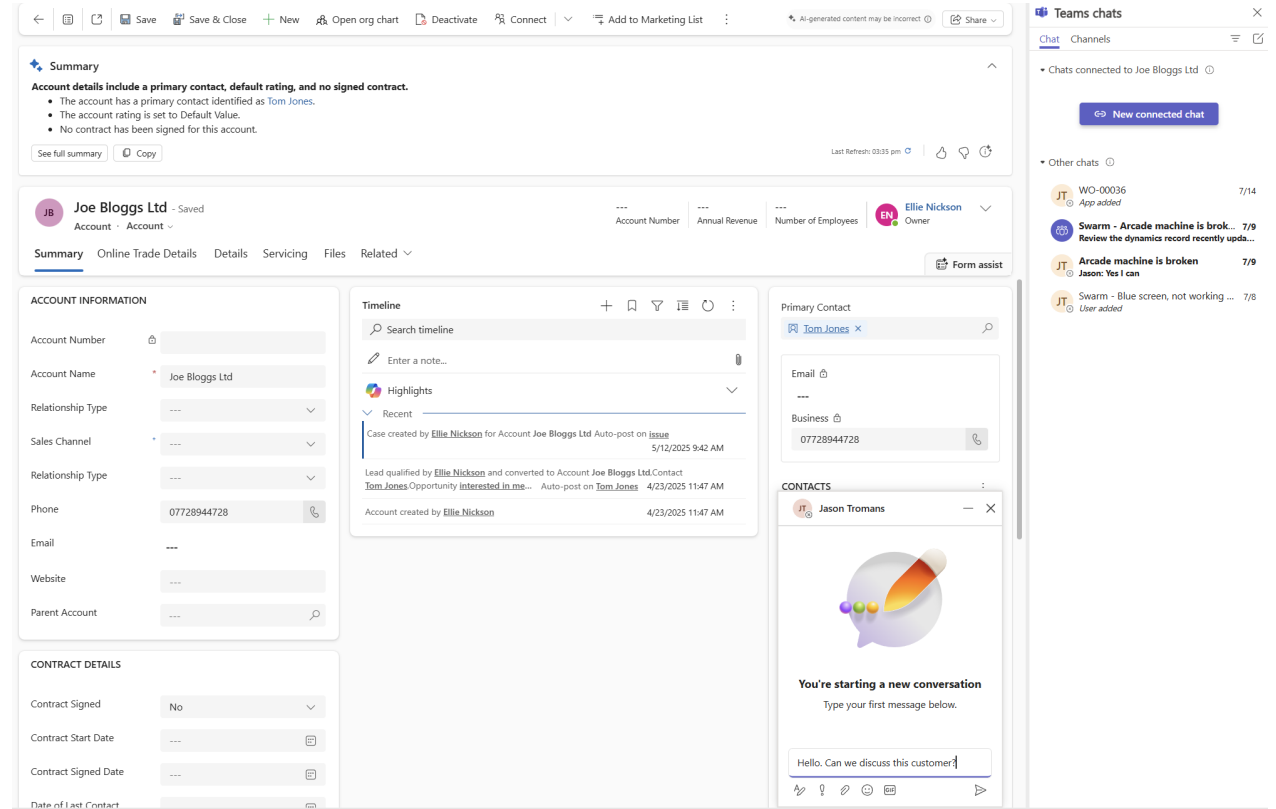
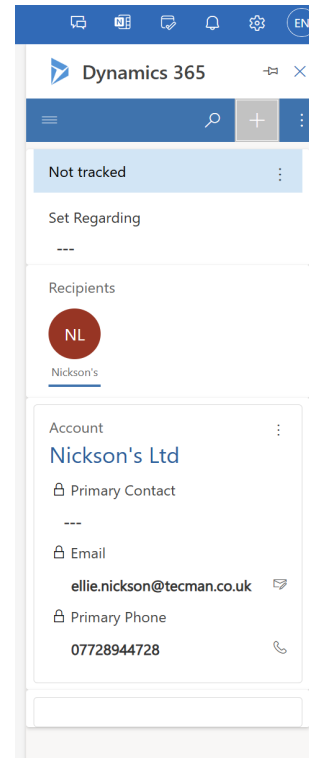
Stakeholders ⋮

Built-In AI Tools & Insights

- Built in Copilot which connects to your data
- AI summaries keeping you up to date with your customers / pipelines
- Autonomous specialist agents – additional licence considerations
- Smart Paste

Advanced Integration with Other MS & Third-Party Tools

- Outlook – Emails, Appointments & Tasks
- MS Teams
- SharePoint
- LinkedIn Sales Navigator



Native Integration with Business Central

The screenshot displays the Business Central user interface for an account named 'Abbies Antique Games'. The interface is organized into several panels:

- Summary Panel:** Shows the account name, credit limit (£25,000.00), and a 'See full summary' link.
- ACCOUNT INFORMATION Panel:** Contains fields for Account Name, Relationship Type (Customer), GTM Strategy, Industry (Beta), Phone, Email (a.lathwood@aagtest.co.uk), Website, and Parent Account.
- CONTRACT DETAILS Panel:** Includes fields for Contract Signed (No), Contract Start Date, Contract Signed Date, and Date of Last Contact.
- ADDRESS Panel:** Contains fields for Street 1 (Thomas Street), Street 2, City, County, Post Code (M320QY), Country, and BC Country Code.
- Timeline Panel:** Displays a search bar, a note entry field, and a list of recent highlights, including auto-posts on Case Cases and Account creation.
- Assistant Panel:** Shows a 'No notifications or suggestions' message.
- Primary Contact Panel:** Displays contact information for Dynamics 365 Business Central, including Customer No. 4031, Balance (£11,057.67), Modified On (10/1/2025 10:17 AM), and various sales and service metrics.

A map at the bottom left shows the location of Thomas Street M320QY.

Power Platform Tools for Customisation & Advanced Automation

- Little to no need for a software developer to customise the system
- Low code / drag & drop tools available
- Powerful automation options with Power Automate
 - Automatic creation of leads from web forms
 - Notify salespeople when opportunities are overdue
 - Extend standard integrations
 - Hundreds of standard connectors available



Demo: Dynamics 365 Sales

Microsoft Dynamics 365 Sales

PRIMED! *& ready to go!*

FIXED COST.

FIXED TIMESCALE.

FLEXIBLE SOLUTION.

Get up and running with:

- ✓ Centralised Accounts & Contacts
- ✓ Activity & Pipeline Management
- ✓ Outlook, Teams & SharePoint Integration
- ✓ Mobile & Copilot Productivity
- ✓ Business Central Integration
- ✓ Just enough configuration to fit how you do things

Extra Packs available for:

- + Competitor Tracking
- + KPIs & Reporting
- + Products, Price Lists & Quotes

Deployed in
3 months
for just
£20k



Conclusions

Thank you.

BUSINESS CENTRAL
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18th & 19th NOVEMBER 2025

