

Dynamics Quick Start

Contacts and Accounts

Microsoft Dynamics 365 projects can be complex. They deeply affect the organisation and require people to change their processes. We often see employees resist this change due to loss of control, the uncertainty of the new way, and concerns about their own competence.

How will you mitigate against this risk?



Contacts and Accounts solution

The Dynamics Quick Start solution is designed to help customers get up and running with Dynamics 365, with a single source of truth for all stakeholder engagement.

The benefit of conducting the Quick Start is that it engages business leaders so they make commitments to automation priorities rather than postpone their evaluation, missing out on beneficial new features and performance.

FiveP's Quick Start is a unique implementation methodology coupled with Microsoft's cloud-based software tools, which lays a structured roadmap for getting the work done quickly, and with quality outcomes.

Technology Pack

- ▶ Establish and Configure Dynamics CRM and Office365 tenant
- ▶ Configure Outlook contacts synchronisation settings
- ▶ Configure Contact and Accounts Entity fields
- ▶ Tailor duplicate Contact detection settings
- ▶ Enable Outlook Web Access (OWA) integration
- ▶ Enable Outlook 2016 Add-In integration
- ▶ LinkedIn Integration (if enabled)
- ▶ Establish basic document management with SharePoint OR Microsoft Teams
- ▶ Training Workshop (2 hours)
- ▶ Connect Dynamics CRM to PowerBI (Using standard integration)
- ▶ Security configured (so that users track against contacts and accounts only)

Project Delivery Pack

- ▶ Establish a single source of truth for Contacts and Accounts
- ▶ Establish the base for future solutions
- ▶ Iron out any technology teething issues with a low impact solution



Rapid Deployment

FiveP's Dynamics 365 Quick Start solution is the fastest way to uplift your organisation's stakeholder engagement maturity.

Below is a typical example of a Quick Start project milestones.



Step 1

Establish platform and environment

- ▶ Create Dynamics 365 instance
- ▶ Enable users and security



Step 2

Configure Application

- ▶ Configure account and contact entities
- ▶ Duplicate detection tailoring
- ▶ Activity management



Step 3

Deploy Integration Features

- ▶ Outlook integration setup
- ▶ Document management configuration

Your road to success starts now!

① Activate your Dynamics 365 (learn more here <http://fivep.com.au/what-is-dynamics-365/>)

② Choose a delivery model:

Quick Start Delivery

- ▶ Technology Pack
- ▶ Project Delivery Pack
- ▶ Professional Services

Quick Start + Support

- ▶ Quick Start Delivery
- ▶ Ongoing Innovation & Planning
- ▶ Service Desk & Support

For enquiries about pricing, support or to find out how we can achieve your business goals together call us today on **1800 66 44 56** or submit your message here <http://fivep.com.au/contact-fivep>

If you are a Telstra Business customer, you may be eligible for Telstra All-4-Biz funding options (<http://bit.ly/2rXUwld>). Please ask FiveP how to set this up.

③ Get more out of your investment. Talk to FiveP about enhancing document management configurations, Dynamics Sales Automation, Dynamics Marketing Automation, Field Services, Project Management and PowerBI Reporting Customisation.