



Bridgeall

Dynamics 365 Sales Service Description



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1. Service Description

Dynamics 365 is Microsoft's suite of business applications. Bridgeall provides services and support around the Dynamics 365 CRM solutions.

1. Automate key tasks and processes
2. Make better decisions with embedded insights and reporting
3. Manage your members, employees, tenants and citizens
4. Deliver portals and services with Dynamics 365

At Bridgeall we provide a full range of tailored Dynamics 365 services. Our Microsoft certified Dynamics 365 consultants provide expertise, guidance and support for every stage of your journey.

Whether you are looking to transform your Sales, Marketing or Customer Service or upgrade your existing suite of business applications Bridgeall can help.

Bridgeall provide a full range of consultancy, migration, implementation and support services for Dynamics 365.

1.1. About Dynamics 365

Dynamics 365 is a range of business applications, based in the cloud, that are designed specifically to support and enable your departments to be more productive, make better decisions and transform the way you work. Each Dynamics 365 solution easily integrates with the other modules available, allowing you to build up a single platform to run your entire business.

All of the applications are fully configurable and come with key workflows and processes to help your teams do more. Dynamics 365 is fully embedded across the Microsoft suite including Microsoft Teams, SharePoint and the Power Platform.

All of the applications are SaaS (Software as a Service) and have a pay monthly per user pricing model.

2. Examples of Dynamics 365 projects

2.1. Scotlands Housing Network – a complete digital transformation

Scotland's Housing Network were using Excel spreadsheets as their primary tool to manage member details, contacts, membership levels and information associated with housing associations. This information was spread across various Excel sheets and was becoming difficult to manage. As well as this, the team required a refresh of their business processes and platforms. Bridgeall worked with the team to combine all sheets to create a single source of truth, refine their business processes and carry out a complete digital transformation project.

To begin, a customised model-driven Power App was implemented which allowed for a single source of truth for member management. Spreadsheets were migrated into the system which allowed for a unified interface for Scotland's Housing Network staff. The solution was then integrated with their newly launched website to provide a simple interface to create and manage events, mailing lists and also manage website logins and enquiries. A CRM system was created using the core functionalities of Dynamics 365 Sales and Marketing allowing for Scotland's Housing Network to use the accounts and contacts to manage members and memberships and also utilising the information stored here to empower their marketing campaigns to more efficiently manage these activities. Customised dynamic marketing lists were set up and campaigns created for these marketing lists guaranteeing that their communities of practice were always kept up to date with minimal manual upkeep.

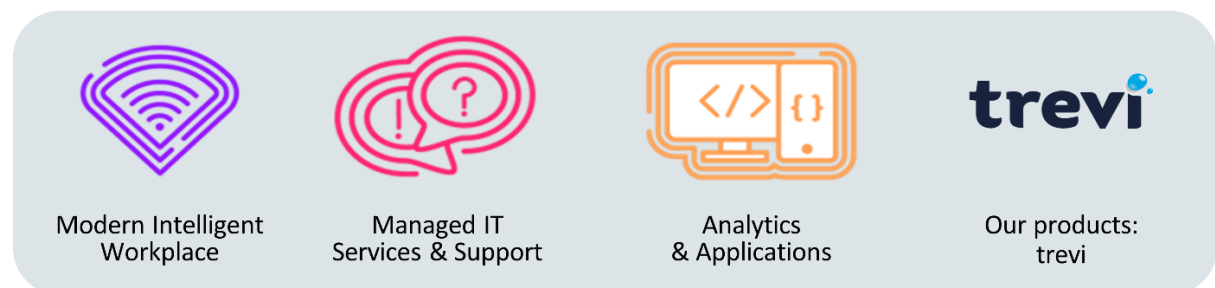
To make sure the system met requirements, the core Dynamics 365 Sales and Marketing functionalities were expanded to include capabilities to manage website logins and sign-ups. A direct integration between Dynamics 365, Azure and the website ensures everything is managed centrally and the process is easy to follow. Utilising some of newest features of the power Platform such as custom pages and modern commanding further tied this all together to provide a tailored experience which has reduced the need for manual input thus saving time and costs with improved efficiency.

To ensure the team were on top of their data, we moved to the business intelligence project which involved implementing Power BI reports and links to analytics to allow members to view and interact with reports, guidance, and training on adoption of new technology. These reports were then integrated into the website to provide a unified seamless experience for the user.

3. About Bridgeall

Since 2002, Bridgeall has successfully delivered hundreds of projects to private and public sector organisations. Our focus is on providing an exceptional service to our customers by delivering class-leading digital solutions. We are ISO 9001, ISO 27001 and Cyber Essentials Plus certified, demonstrating our focus on quality and governance in everything we do.

As well as having our own software solutions for the water market (Trevi), we split our services up into our 3 main business units; Managed IT Services & Support, Modern Intelligent Workplace and Applications & Analytics.



We are a one-stop-shop for all things Microsoft with certified consultants across the full stack and cloud solutions including Azure, Dynamics 365, Data & Analytics, Microsoft 365, SharePoint, Power Apps and Power Platform, working with the likes of:



Microsoft

Bridgeall takes great pride in our achievements in recent years of being a 10 x Microsoft Gold Partner. With Microsoft's new Cloud Partner Program, this changed the accreditation approach to focus on key solution areas. As a result, we have achieved the designations required to qualify as an accredited Microsoft Solutions Partner in the following key areas.



Modern Work

Azure Infrastructure

Azure Data & AI

Azure Digital & App
Innovation

In addition, we are a Tier 1 Cloud Solution Provider (CSP), meaning we have unique access to Microsoft licensing and can offer specialist licensing advice and pricing.

Being a CSP partner, Bridgeall can also offer our clients flexible pricing and billing options, as well as the ability to bundle multiple services together under a single contract.

4. Contact Us

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Document Properties

FIELD	DATA
Version	0.1
Date	[Publish Date]
Author	Author
Owner	
Client	Bridgeall
Document Location	

Revisions

REVISION DATE	RELEASE	CHANGE SUMMARY	CHANGED BY

Approvals

NAME	TITLE	VERSION

Distribution

NAME	TITLE	COMPANY