CLOUDFRONTS™
Dynamics 365 & Power Platform

SERVICES AUTOMATION

WITH MICROSOFT DYNAMICS 365 APPS

FOR MANAGED SERVICES PROVIDER

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Executive Summary

Summary

If you are a Professional Services organization like a Managed IT Service Provider, and you are working your way to establishing business applications within your organization that handles everything from Sales to Billing, this eBook should help you channel the implementation and give ideas on how you can innovate on the process.

Purpose

This eBook highlights Microsoft Cloud's capabilities for business applications like Dynamics 365 Apps, Power Platform, and Microsoft Azure with Outlook & Teams.

Who this is for

Dynamics 365 Consultants, Developers, and Customers looking to get onboarded or enhance their Microsoft Cloud implementation to kick-start their journey for their business processes using Microsoft Cloud.

Estimated reading time: 12 minutes

Introduction

Over the years, we've had the opportunity to work with some of the best Professional Services organizations in the United States, implementing Microsoft Dynamics 365 Customer Engagement Apps like Project Operations, Sales, and Customer Service with seamlessly integrated applications for business processes.

These implementations enabled organizations to optimize their business processes and deliver significant ROI over the years for our customers.

Here are some case studies that we'll further discuss in this eBook.

Case Study
Invoke

CloudFronts enabled Texas based Invoke to remodify and enhance its customer management capabilities with Dynamics 365 Project Operations.

LEARN MORE ⊙

Case Study
LiveWire Technologies

LiveWire Technologies replaced its CRM platform Autotask with Dynamics 365 Customer Service for better customer information management.

LEARN MORE ⊙

Why is Services Automation for Professional Services Organizations Important?

Services Automation for Dynamics 365 Customer Engagement applications like Project Operations is vital to elevate the capabilities of the Dynamics 365 platform and continue to build on top of the rich features the platform has to offer.

With an end-to-end automated Sales cycle in place, your team can effortlessly bridge the gaps in the sales process and work on higher-level tasks that have the most impact & add value to your organization.

Purpose of Automating Business Processes

Automated business processes enable organizations to mitigate the time and effort required to look for the information that should have been classified to surface at the right time.

Moreover, chances are that when the information is found, it might or might not be accurate or actionable.

Therefore, the priority should be to establish data integrity that enables team members to find the data at the right time and focus on tasks that drive Sales – thus, retaining ROI over the years.

This also eliminates dependency on other team members who might have critical sales information in their Inbox. This information is lost as it wasn't tracked in the system.

Services Automation saves manual efforts and enables organizations to create a single source of truth with Dynamics 365. This ensures that no critical information is lost and generates potential revenue opportunities.

Technologies Involved

Since we are 100% focused on Microsoft Cloud products like Dynamics 365, we have a distinction between a Pro Code vs. No Code Approach to solution implementation.

Dynamics 365
(Sales, Project Operations, Customer Service, Field Service)

Power Automate
(Microsoft Flow)

Canvas Apps
(Power Apps)

Power BI

Azure

Third-Party Integration
(Third-Party Integration with core systems using REST API)

Pro-Code vs. No-Code

Pro-Code	No-Code / Low-Code
• Integration using Azure Functions and C# Plugins within Dynamics 365 to handle complex business scenarios. • Number / monetary-intensive use cases where the application needs to be secure and deployed away from pro-code or low-code applications. • A critical implementation that needs high availability and higher usage limits.	• Notification configuration using Power Automate. • Canvas Apps for siloed departments who don't need access to the whole environment or want to skip the application's learning curve. Like, simple form entries and data view. • Reporting and Dashboards using Power BI and then embedding Power BI into Dynamics 365 or Microsoft Teams. • Adaptive Cards to capture valuable information from Teams/Outlook.

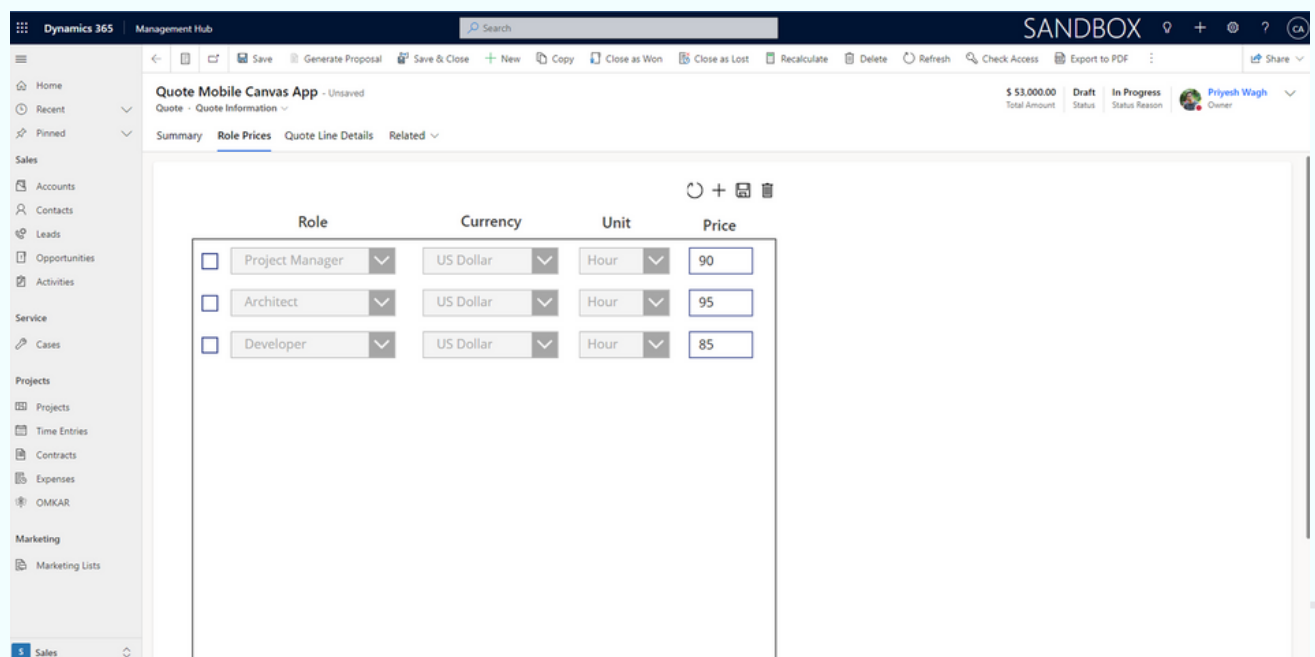# Sales Automation in Project Operations

The sales cycle is critical and the genesis of the business. Unfortunately, most of the revenue loss happens when the ball gets dropped in the Sales Cycle due to the following reasons:

- Critical communication/notes are missing from conversations with the clients.
- The absence or departure of Salespeople results in the disappearance of crucial information.
- Lack of system adoption because the system is too complex to implement, or the Sales Team finds it challenging to utilize the system to the full potential of the platform.

Using Canvas App to encapsulate complexity

By implementing Canvas App, you can hide the complexity of the platform and capture the most vital information needed in the Sales Process by removing ambiguity and complexity.

Let's look at this scenario: To enter Quote Lines and Quote Line Details in Project Operations, you must navigate back and forth with multiple clicks. We can ease this process by having a simple Canvas App that only captures the Roles, and you can specify the rates. So, below is an embedded Canvas App on how you can define the Roles & Rates in the Quote.

Once your Roles are Rates are provided, you can then define the Quote Line Details, which you would have to go two levels deep in the hierarchy to define.


So, the takeaway is to identify and innovate on the Sales processes and implement Canvas Apps for such areas, which will take care of calculations, hide away the platform's complexities, and reduce clicks.

## Automating DocuSign processes with SharePoint

Proposals to clients are a critical part of the Sales cycle, and often, these important signed documents are left in team members' mailboxes.

To ensure such vital documents are correctly stored in SharePoint, which is integrated with Opportunities, here's an example of how you can store signed DocuSign documents automatically to SharePoint once signing is completed on the customer's/prospect's end using Power Automate.

Once Quotes and Quote Lines are created using the Canvas App in the above section, you can then Generate a Proposal as shown below, and automatically, a proposal document will be generated from the Quote Line specifications and stored in the SharePoint location tied to the parent Opportunity in Dynamics 365.
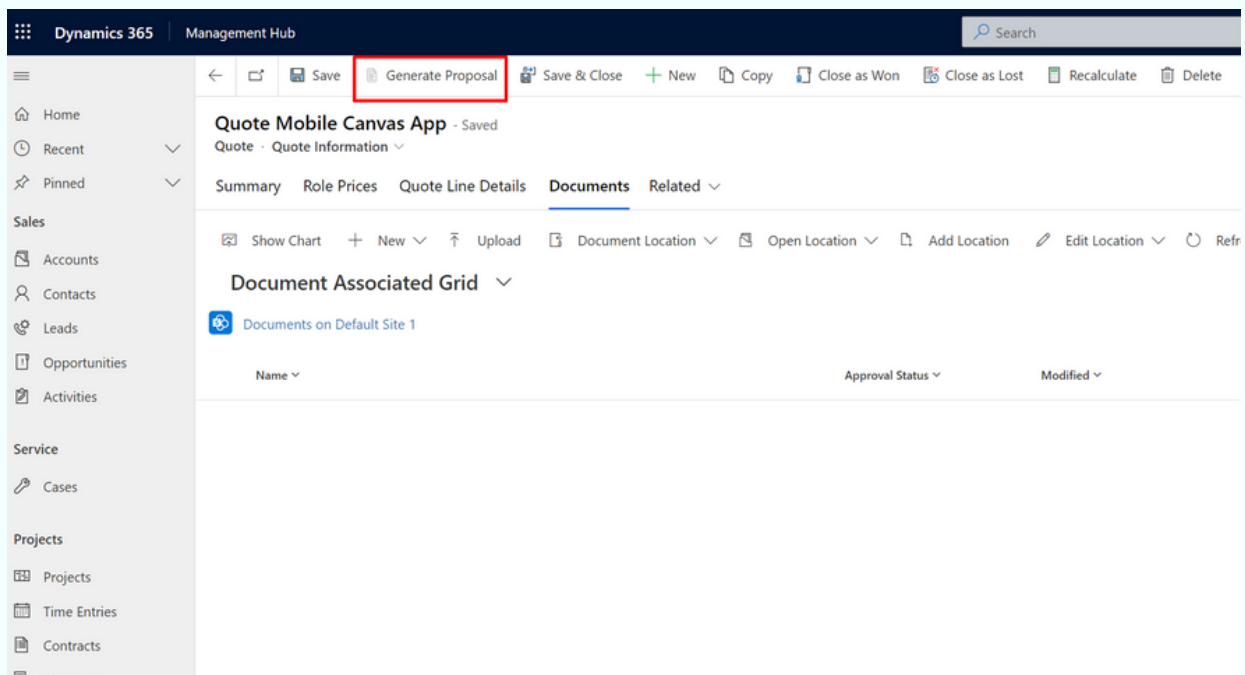
And on the Opportunity, the proposal to be sent is stored. So when the signed document is returned, it will also be automatically stored on the Opportunity without team members having to remember to upload them to SharePoint manually.
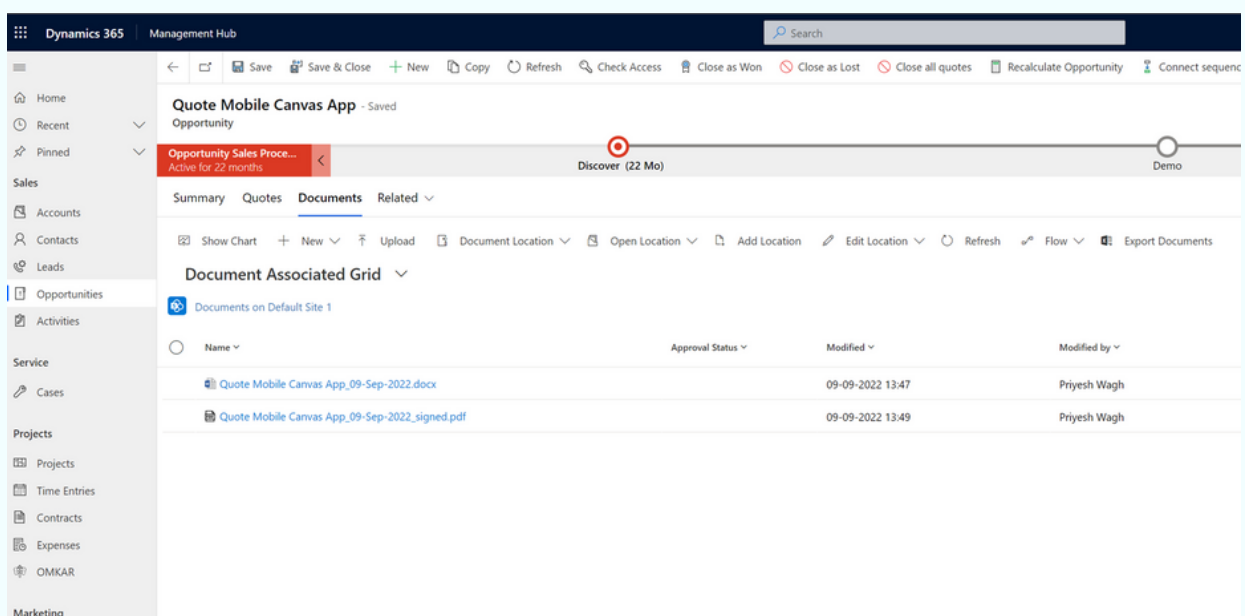

Furthermore, you can take the automation further by closing the Opportunity as Won and notifying the Sales Team about the win by posting an announcement on Teams using Power Automate!

Project Management and Resource Allocation

Project Management is essential for billing on time and getting paid on time.

And to ensure that you are billing on time, the Resource Allocation aspect of Project Management is critical so that you don't miss revenue and ensure the team is utilized well across the organization.

Embedding Power BI Reports in Teams – Resource Allocation.
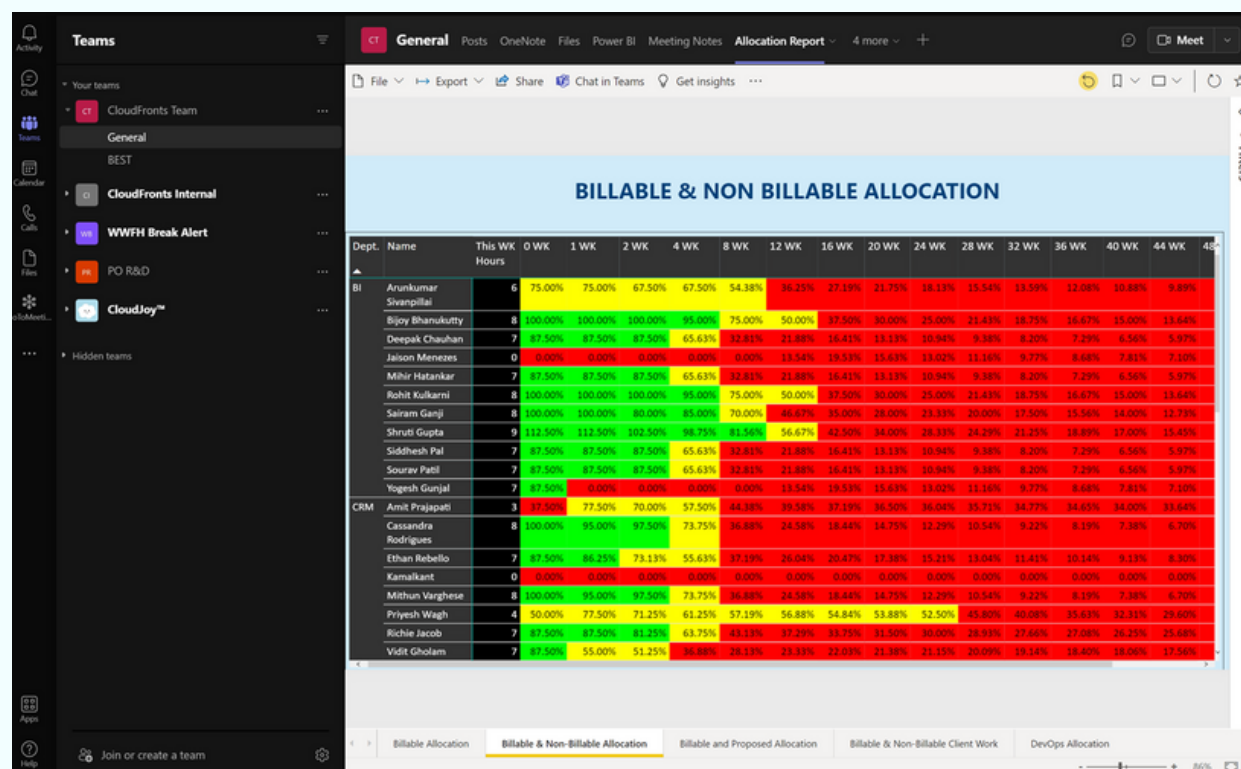
Even something as simple as creating a Leave Report to understand who is on leave, so they are not allocated on projects on their PTO days.

This also saves the hassle of asking around or being surprised when you receive their out-of-office notification.

And for ease, you can also embed this Power BI Report in Microsoft Teams.

Also, to ensure we get billed correctly, we must ensure that revenue is not missed by creating a mismatch report comparing team members' time entries versus where they were allocated.

This way, you ensure all the efforts are being billed correctly, which will result in getting paid correctly.

Billing

To ensure getting paid on time, we must also ensure we are billing on time. To bill on time, we must have the billing schedule at a glance to identify when the Invoices should go out to customers. The accounting team can then follow up on the Invoices based on the payment terms.

Below is a Power BI Report, which shows when the Invoices are supposed to go out to customers based on the schedule.
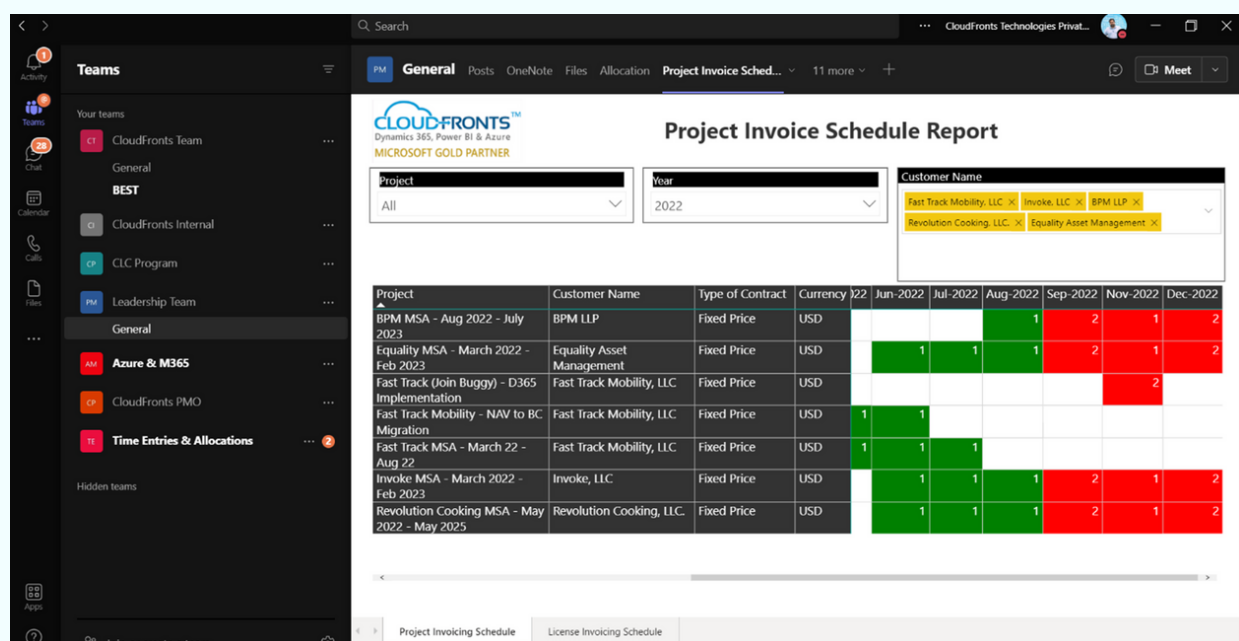
Dynamics 365 Project Operations can create Pro-forma Invoices that don't have Tax information. They are not customer-facing.

Hence, you either already have a third-party application like QuickBooks Online or are utilizing Business Central as the Accounting platform. In both these scenarios, you can implement a solid integration of Invoices that can be sent from Dynamics 365 Project Operations into one of these accounting systems. The completed tax information can be sent back as updates once the revenue has been realized.

Third-Party Integrations

Dynamics 365 Implementations alone cannot remain as siloed systems. For them to become source-of-truth for business operations, they must co-exist with other applications in your setup of business applications sending and receiving business-critical data.

An example of such a setup is using Dynamics 365 Customer Engagement applications, i.e., reflecting Customer data to other systems like Business Central. Another example is using a system like QuickBooks Online to send Pro-forma Invoices to QuickBooks and receive the completed Invoice with tax details into Dynamics 365. For such scenarios, the implementation choice is using REST API Azure Functions.

What are the benefits of using Azure Functions with REST API?

- REST APIs are widely accepted standards for integrating cloud solutions.

- Azure Functions incur minimal costs when hosted on Pay-As-You-Go Plans with no charges of up to a million monthly transactions. In addition, they can be monitored and scaled well.

- No third-party dependencies, like learning a new integration tool and license costs overhead.

An example of integrating Account and Contact data from Dynamics 365 CRM to Business Central can be implemented using Azure Functions.

Below is the high-level architecture of how this robust integration with monitoring.
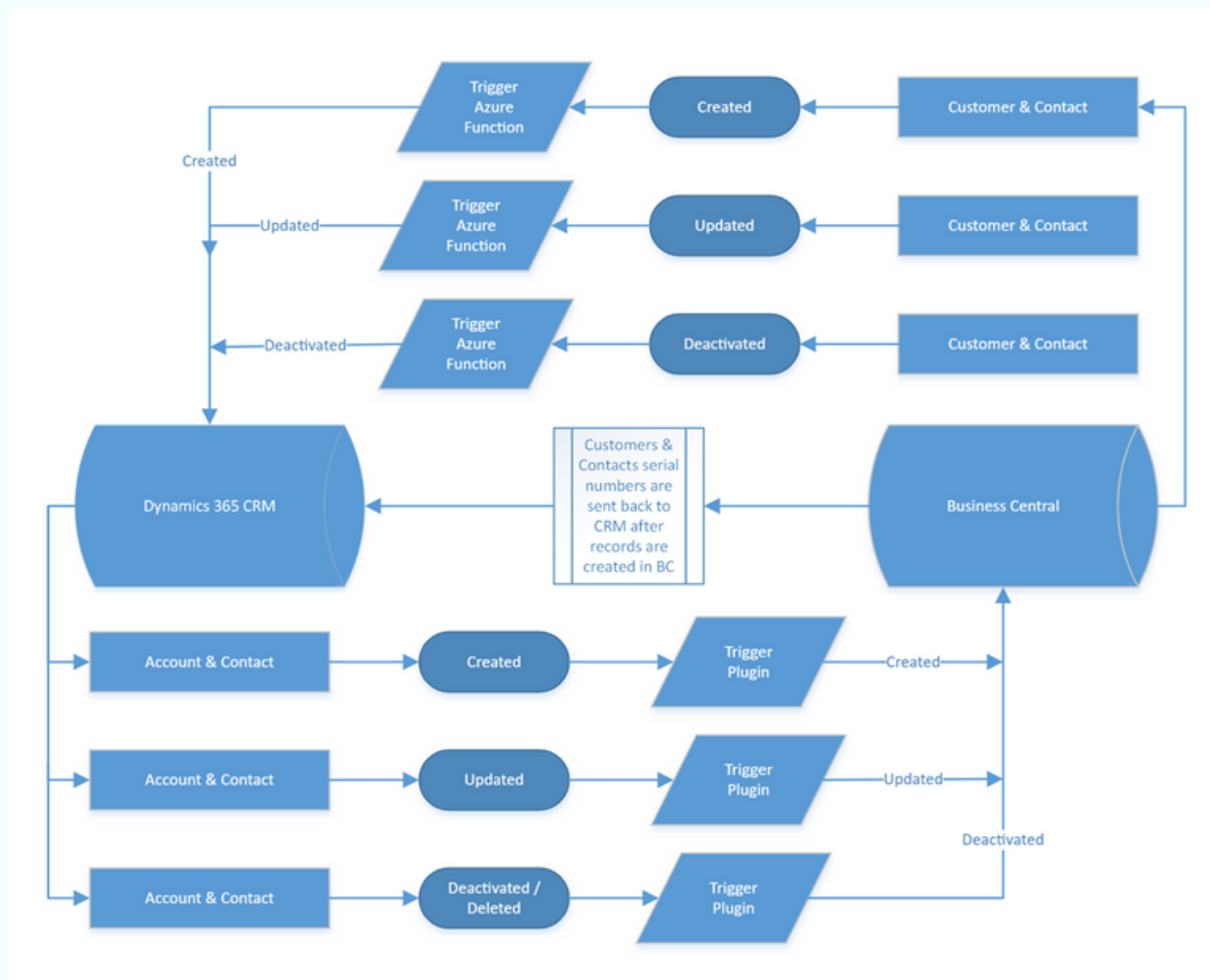
Conclusion

All the products I talked about in this eBook leverage Microsoft Cloud well for Services Automation implementations for professional services firms in the US.

When business applications are implemented as scalable solutions that ensure business data integrity, reliability, and accuracy, the result is ROI in the form of increased revenue year-on-year.

Without such an implementation, business applications remain out of sync, missing critical information required and adding to the burden of team members looking for data, reaching out to colleagues, and asking for information that might not be readily available.

In addition, valuable productive time is spent searching for information that isn't reported confidently – the objective is to streamline the process so that the system works for you and not the other way around.

You then win back your valuable time to channel into the right area of your business!

Let us help you elevate the capabilities of Microsoft Cloud so you can get back to focusing on growth, stability, and driving home business opportunities.

About CloudFronts

Headquartered in Mumbai, CloudFronts is a 100% Dynamics 365 focused Microsoft Gold Partner empowering Teams & Organizations around the world to Solve their Complex Business Challenges with Microsoft Cloud.

CLOUDFRONTS™
Dynamics 365 & Power Platform

Microsoft Gold Partner

Microsoft Gold Partner

100% focused on Microsoft Dynamics 365

10+ years, 100+ Successful Implementations

We are a Gold Cloud Platform, Gold Data Analytics, Gold Application Development, and Gold Cloud CRM Microsoft Partner, which showcases our deep capabilities on Dynamics 365, Power BI, and the Azure platform.

We also collaborate with Partners around the globe to help them focus on strategic aspects of their growing Dynamics businesses while we assist with everything from Pre-Sales to Delivery and Post Go-Live support.

Our goal is to successfully implement our clients' and partners' requirements through well-executed projects supported by strong technical and functional expertise across all our teams.